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Introduction

This document describes how to use the Cisco Unified Workforce Optimization Quality Management applications in Workforce Optimization.

Overview

Workforce Optimization allows managers, supervisors, agents, knowledge workers, archive users, evaluators, and the administrator to use the same user interface to access the Cisco Workforce Optimization Quality Management applications from a web browser. Users can monitor and evaluate the performance of groups, teams, agents, and knowledge workers in a contact center environment. The administrator controls what appears on a user’s Dashboard.

Your assigned role gives you access to varying levels of information. Evaluators, managers, and supervisors can evaluate a contact, view evaluation results, and enter comments on an evaluation; agents and knowledge workers can view and comment on their own evaluation results.

Intended Audience

This document is written for the following users of Quality Management:

- Agents
- Knowledge workers
- Supervisors
- Managers
- Evaluators
- Archive users
- Administrator

Documentation

The following documents contain additional information about Quality Management:

- Cisco Unified Workforce Optimization Quality Management Application User Guide
• Cisco Unified Workforce Optimization Quality Management Administrator Guide
• Cisco Unified Workforce Optimization Quality Management CAD Integration Guide
• Cisco Unified Workforce Optimization Quality Management Error Code Dictionary
• Cisco Unified Workforce Optimization Quality Management Installation Guide
• Cisco Unified Workforce Optimization Quality Management Troubleshooting Guide
• Release Notes for Cisco Unified Workforce Optimization Quality Management
Getting Started

Workforce Optimization is the Quality Management interface for the following applications.

- Dashboard
- Recordings
- Live Monitoring
- Reporting
- Alerts

The information provided in this section is common to each of these applications.

User Interface Requirements

The user interface supports the following web browsers.

- Internet Explorer 9, 32-bit
- Internet Explorer 8
- Internet Explorer 7
- Mozilla Firefox 3.5

The user interface supports these web browsers on the following operating systems:

- Microsoft Windows XP Professional, Service Pack 3 or later
- Windows Vista Business, Enterprise, or Ultimate Editions
- Windows 7 Professional and Ultimate

The user interface supports the following screen resolutions:

- 1280 × 800
- 1280 × 1024
- 1440 × 900
- 1920 × 1080

The following items must be installed and enabled:

- SSL Certificate—the SSL certificate is installed on the Base server by your administrator
• Java 1.6.31
• Java Plug-in
• Java Runtime Environment (JRE) 1.60 update 13—the JRE is required for to playback voice and screen recordings from the Recording application. Download from http://<Base server>/TUP/QM/jre-6u13-windows-i586-p.exe, where <Base server> is the IP address or hostname for the user interface.
• ActiveX (for Microsoft Internet Explorer only)
• Calabrio® Screen Player Plug-in—the Calabrio Screen Player Plug-in is required to play back screen recordings

**NOTE:** If the Calabrio Screen Player Plug-in is not installed and you try to play a contact recording with a screen recording, an error message will appear.

• Cookies

**NOTE:** Cookies must be enabled. The Base server uses the browser cookies to return state information to the Base server. The state information is used for authentication, user session identification, and user preferences (for example, language preference).

• Adobe Reader 6.0 or later—the Adobe Reader is required to open PDF-based reports and user documentation. A free Acrobat Reader download available at www.adobe.com.

The pop-up blocker must be disabled.

The Java settings require configuration. To configure the Java settings:

• Choose Start > Control Panel, switch to Classic View if necessary, double-click Java. From the General tab, click Settings under Temporary Internet Files, and then select the Keep Temporary Files on My Computer. Click OK to dismiss the Temporary File Settings dialog box, and then click OK again to dismiss the Java Control Panel window.

### Configuring Microsoft Internet Explorer

**PREREQUISITE**

You need administrative or elevated privileges on your desktop to perform this task.

**TASK**

1. Choose Tools > Internet Options.

**STEP RESULT:** The Internet Options dialog box appears.
2. Click the Security tab, click Custom Level, and then perform the following steps:
   a. Scroll down to Run ActiveX Controls and Plug-ins and select the Enabled option.
   b. Scroll down to Downloads and select the Enabled option for Automatic Prompting for File Downloads.
      ADDITIONAL INFORMATION: This is required when you try to open a report in the Reporting application.
   c. Scroll down to Scripting and select the Enabled option for Active Scripting.
      ADDITIONAL INFORMATION: JavaScript depends on this setting being enabled.
   d. Click OK.
3. Click the Privacy tab, click Advanced, and then perform the following steps:
   a. Select the Override Automatic Cookie Handling check box.
   b. Select the Always allow Session Cookies check box.
   c. Choose Accept under Third-party Cookies, and then click OK.
4. Click OK to dismiss the Internet Options dialog box.
5. To enable pop-ups for a specific site, perform the following steps:
   a. Choose Tools > Pop-up Blocker > Pop-up Blocker Settings.
   b. Type the IP address for Workforce Optimization in the Address of Website to Allow field, and then click Add.
   c. Click Close.

Configuring Mozilla Firefox

**PREREQUISITE**
You need administrative or elevated privileges on your desktop to perform this task.

**TASK**
1. Choose Tool > Options.

    **STEP RESULT:** The Options dialog box appears.

2. To enable pop-ups and JavaScript, click Content and perform the following steps.
   a. Click Exceptions next to Block Pop-up Windows, type the IP address for Workforce Optimization, click Allow, and then click Close.
b. Select the Enable JavaScript check box.

3. To accept cookies, click Privacy and perform the following steps:
   a. Select Use Custom Settings for History from the Mozilla Firefox Will drop-down list.
   b. Select the Accept Cookies from Sites check box.
   c. Select the Accept Third-party Cookies check box.
   d. Choose They Expire from the Keep Until drop-down list.

4. Click OK.

Usernames and Passwords

Quality Management requires the following login information:

- If you are an administrator, use the same username and password used for Quality Management administrator ID to log in to Workforce Optimization.
- If your company uses Windows Active Directory with Workforce Optimization, your username, password, and domain is your network login username, password (the password is case-sensitive), and domain. If there is only one domain available, the domain name appears by default in the Domain field.

   NOTE: The Domain field in the Workforce Optimization Login window appears only when your contact center uses Windows Active Directory.

- If your company does not use Windows Active Directory, ask your Quality Management administrator for your Workforce Optimization username and password.

About Single-User Login Authentication

Your contact center purchased one or more of the following Cisco products.

- Cisco Unified Workforce Optimization Quality Management.
- Cisco Unified Workforce Optimization Workforce Management (WFM).

These products use the Workforce Optimization interface. Workforce Optimization is a web-based interface that supports single-user login.
You can access Workforce Optimization, by entering the URL in a web browser. Ask your Quality Management administrator for the correct URL. The format for the URL is as follows:

https://<Base IP address> or http://<Base IP address>

where <Base IP address> is the IP address for Workforce Optimization.

The appearance of the Workforce Optimization Login window depends on how Workforce Optimization is configured.

- If Workforce Optimization is configured for a standalone Cisco product, the Login window (Figure 1) displays only the login fields for that product.

  ![Login window for a single product](image1)

- If Workforce Optimization is configured to share common login fields for multiple Cisco products, the Login window (Figure 2) displays one common set of login fields for all products and the Separate Product Logins check box.

  ![Login window for shared products](image2)
• If you are not configured for multiple Cisco products or you want to log into both of the Cisco products with different login credentials, select the Separate Product Logins check box. The Login window (Figure 3) will display login fields for each product. The Separate Product Logins, Quality Management, and Workforce Management check boxes are selected by default. To log into only one product, clear the check box next to the product name you do not want to access, and then enter your user name, password, and domain, if required, for the selected product.

Figure 3. Login window for multiple products

Once you log into these products through Workforce Optimization, you have access to the applications associated with each product, and the applications appear enabled in the Container bar at the top of the screen. Your access to all applications for each product persists as long as you have access to at least one application.

If you are using Active Directory, the Domain drop-down list displays the domains that are common to both products. This is true for both shared and unshared logins. For example, if Quality Management has domain p1, and WFM has p2, the Domain drop-down list displays p1 and p2. Choose the correct domain for your username and password.

If one of the products is unavailable when you log in, the applications for that product will not be available.

Points to Remember

When logging into Workforce Optimization, remember the following points:

• Each product has a set of unique login requirements. You cannot log in to Quality Management if:
  – Your license has expired.
  – You are a deactivated manager or you are a manager without a group.
Displaying Multiple Browser Tabs

You can display multiple Quality Management applications in different browser tabs during the same session.

Multiple Browser Tabs Guidelines

If you want to log in to Workforce Optimization using multiple browser tabs, follow these guidelines:

• You must log in to Workforce Optimization as a user from one browser tab on your PC. Each additional browser tab that you open will be associated with the username you used to log in to the first tab.

• Logging in or out of one browser tab effects all concurrent browser tabs.

• Only use multiple concurrent browser tabs to view screens. Do not initiate actions (for example, approving an agent's request, editing schedules, or adding events evaluating contacts, applying widget settings, or creating a contact).

NOTE: Initiating actions as one user using multiple browser tabs is not supported and might cause synchronization issues.

• If you need to initiate an action, close all but one of your browser tabs before initiating the action.

Displaying Applications in Multiple Browser Tabs

**Task**

1. Log in to Workforce Optimization.

2. Copy the Uniform Resource Locator (URL) from the browser’s Address field.
3. Open a new browser tab, paste the URL in the browser’s Address field, and press Enter.

4. Click the application button you want to appear in the new browser tab.

   **STEP RESULT:** The new browser tab displays the selected application.

5. Repeat step 3 through step 4 for each additional browser tab.

---

**Validating Your PC**

Before you log in to Workforce Optimization for the first time, validate your PC. This task ensures your PC is compatible with Workforce Optimization.

**TASK**

1. Enter the following URL in your web browser, where `<Base IP address>` is either the name or IP address of the Workforce Optimization server.

   https://<Base IP address>

   **STEP RESULT:** The Workforce Optimization Login window appears.

2. Click Validate my PC Configuration.

   - If the Results column displays Good for each feature you can log into the Workforce Optimization.
   - If you get a Bad result, click Bad for additional information. A dialog box appears with instructions and, if applicable, hyperlinks to the required software. Correct the problem, and then click Validate my PC Configuration again.

   Contact your system administrator if any value other than Good appears in the Results column and you are not able to resolve the problem.
**STEP RESULT:** The Diagnostics window appears (Figure 4). The Diagnostics window displays the results for each product’s features. If only one product is installed, the window only displays the features for that product. Some of the values that appear in the Diagnostics window are browser dependent. See “User Interface Requirements” on page 11 for more information on browser dependencies.

![Diagnostics window](image)

**NOTE:** The Java Plug-in is automatically installed when you install the required JRE. Depending on how the web browser you are using is configured, you might need to enable the Java Plug-in. Screen Playback is enabled when the Java Plug-in is enabled.

### Clearing Your Cache

If Workforce Optimization does not display screens properly (for example, you see a blank screen), log out, clear your cache, and then log in again.

To clear the cache for your web browser, choose one of the following options:

**TASK**

- In Microsoft Internet Explorer, choose Tools > Internet Options, select the Delete Browsing History on Exit on the General tab, click Delete, and then click OK.
- In Mozilla Firefox, choose Tools > Options > Advanced. Click the Network tab, click Clear Now, and then click OK.
Logging In

**PREREQUISITE** You must have a username and password for Workforce Optimization in order to log in.

This task shows you how to log in to one or more Workforce Optimization products.

**TASK**

1. Enter the following URL in your web browser, where `<Base IP address>` is either the name or IP address of the Workforce Optimization server.

   https://<Base IP address>

   **STEP RESULT:** The Workforce Optimization Login window appears.

2. Complete the fields in the Login window, and then click Login.

   **ADDITIONAL INFORMATION:** Pressing the Enter key only works when your cursor is in the Password field. If your cursor is in the Domain field, pressing the Enter key will not log you in to Workforce Optimization.

   **STEP RESULT:** If the information you entered is correct, the Workforce Optimization window appears. If you successfully log in to each product, the applications for each product appear in the Container bar at the top of the window.

   If you are logging in to multiple products and the login for both products fail, the Login window appears. Reenter your username and password, and try again.

   If you are logging in to multiple products and the login fails for only one of the products, a Login Failure dialog box appears for that product. Reenter your username and password, and try again.

Logging Out

This task shows you how to log out of Workforce Optimization.

**TASK**

- To log out of Workforce Optimization, move your cursor over `<user name>` in the upper right corner, where `<user name>` is your name, in the Signed In field, and then click Log Out.

  **STEP RESULT:** You have explicitly logged out of Workforce Optimization.

- To exit Workforce Optimization, close the web browser.
ADDITIONAL INFORMATION:  You have implicitly logged out of Workforce Optimization.
You can log back in to Workforce Optimization at any time.

Logging Out Due to Inactivity

The Quality Management administrator can configure Workforce Optimization so that after a specified amount of idle time, it automatically times out your session. You are logged out and the web browser remains open. By default, this feature is not enabled.

If Workforce Optimization logs you off due to inactivity, the Login window displays the following message:

You have been logged out as a result of being inactive for <number> minutes.

Where <number> specifies the number of minutes of inactivity.

NOTE:  If you are in the process of exporting a recording when Workforce Optimization times out, the export will continue.

Mixed Mode Licensing

The license type determines what Quality Management records. For example, if Agents X and Y have an Advanced Quality Management (AQM) license, the application can record their screens.

SolutionsPlus

SolutionsPlus is a set of licenses that support the MediaSense capture method for recordings.

SolutionsPlus does not require the Recording CTI service and the Monitor service. If a user licensed for SolutionsPlus is configured for a different recording capture method, the recording server will ignore the configuration and the user will not be recorded.

Compliance Recording Application License

The Compliance Recording Application (CRA) license allows only audio recording and archive search and playback. Status and archive reports are available to supervisors and managers only.
Quality Management Application License

The Quality Management Application (QMA) license supports audio contact recordings only for archival and quality management purposes.

Advanced Quality Management Application License

The Advanced Quality Management Application (AQMA) license supports both audio and screen recordings, as follows:

- Audio-only recording for archival purposes.
- Screen and audio recordings for quality management purposes.

Upgrading Your SolutionsPlus Licenses

If you need more recording capture methods, you can purchase Calabrio licenses. A Calabrio license includes the following recording capture methods:

- Desktop Recording
- Server Recording
- Network Recording
- MediaSense Recording

To add more recording capture methods, you need to:

- Purchase a Calabrio (CR, QM, or AQM) license.
- Add more servers, as required, to meet capacity and configuration requirements.
- Install the Recording CTI service and the Monitor service, if they were not previously installed.
- Switch users to the Calabrio license.

Calabrio Licenses

Calabrio provides a set of licenses that use the Calabrio capture method for recordings.

Compliance Recording License

The Compliance Recording (CR) license allows only audio recording and archive search and playback. Status and archive reports are available to supervisors and managers only.

Quality Management License

The Quality Management (QM) license supports audio contact recordings only for archival and quality management purposes.
Advanced Quality Management License

The Advanced Quality Management (AQM) license supports both audio and screen recordings, as follows:

- Audio-only recording for archival purposes.
- Screen and audio recordings for quality management purposes.

License and Features for Cisco Unified CCX

Table 1 shows the Quality Management features available by license for Cisco Unified CCX.

<table>
<thead>
<tr>
<th>Feature</th>
<th>Calabrio Licenses</th>
<th>SolutionsPlus Licenses</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>CR</td>
<td>QM</td>
</tr>
<tr>
<td>100% voice recording and archiving</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Voice monitoring</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Desktop Recording, Server Recording, and Network Recording</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>MediaSense Recording</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Search utility</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>On-demand recording</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Recording with or without a PC</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Monitoring and Notification (MANA) administration</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Quality evaluations</td>
<td>-</td>
<td>x</td>
</tr>
<tr>
<td>Screen recording</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Screen monitoring&lt;sup&gt;a&lt;/sup&gt;</td>
<td>-</td>
<td>-</td>
</tr>
</tbody>
</table>

<sup>a</sup> Requires the installation of Calabrio Screen Master on the supervisor's desktop.
## Access Based on Role

Table 2 shows the Quality Management features available by role and license.

**Table 2.** Access based on license and role

<table>
<thead>
<tr>
<th>Role</th>
<th>Dashboard</th>
<th>Recording</th>
<th></th>
<th></th>
<th>Reporting</th>
<th>License</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Evaluate</td>
<td>Search</td>
<td>Live Monitoring&lt;sup&gt;a&lt;/sup&gt;</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>and Review</td>
<td>and Play</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Archive User</td>
<td>--</td>
<td>--</td>
<td>x</td>
<td>--</td>
<td>x</td>
<td>CR, CRA</td>
</tr>
<tr>
<td>Manager</td>
<td>--</td>
<td>--</td>
<td>--</td>
<td>x</td>
<td>x</td>
<td>CR, CRA</td>
</tr>
<tr>
<td>Supervisor</td>
<td>--</td>
<td>--</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>CR, CRA</td>
</tr>
<tr>
<td>Agent</td>
<td>--</td>
<td>--</td>
<td>x</td>
<td>--</td>
<td>--</td>
<td>CR, CRA</td>
</tr>
<tr>
<td>Knowledge Worker</td>
<td>--</td>
<td>--</td>
<td>x</td>
<td>--</td>
<td>--</td>
<td>CR, CRA</td>
</tr>
<tr>
<td>Archive User</td>
<td>x</td>
<td>--</td>
<td>x</td>
<td>--</td>
<td>x</td>
<td>QM, QMA, AQM, AQMA</td>
</tr>
<tr>
<td>Evaluator</td>
<td>x</td>
<td>x</td>
<td>--</td>
<td>--</td>
<td>--</td>
<td>QM, QMA, AQM, AQMA</td>
</tr>
<tr>
<td>Manager</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>QM, QMA, AQM, AQMA</td>
</tr>
<tr>
<td>Supervisor</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>QM, QMA, AQM, AQMA</td>
</tr>
<tr>
<td>Agent</td>
<td>x</td>
<td>x</td>
<td>x&lt;sup&gt;b&lt;/sup&gt;</td>
<td>--</td>
<td>x</td>
<td>QM, QMA, AQM, AQMA</td>
</tr>
<tr>
<td>Knowledge Worker</td>
<td>x</td>
<td>x</td>
<td>x&lt;sup&gt;b&lt;/sup&gt;</td>
<td>--</td>
<td>x</td>
<td>QM, QMA, AQM, AQMA</td>
</tr>
</tbody>
</table>

<sup>a</sup> If you want to enable Live Monitoring for an evaluator or archive user, assign the manager role to the users.
b. Only if enabled by the Quality Management administrator. Agents who are not assigned to a team can still log into Workforce Optimization and access their contact recordings.

Quality Management Applications by Role and License

Table 3 shows the Quality Management applications available by role and license.

**NOTE:** Permissions are configured per evaluation form.

Table 3. Access based on role and license

<table>
<thead>
<tr>
<th>Applications</th>
<th>Roles</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Agent or Knowledge Worker</td>
</tr>
<tr>
<td>Record Voice</td>
<td>any&lt;sup&gt;a&lt;/sup&gt;</td>
</tr>
<tr>
<td>Screen</td>
<td>A&lt;sup&gt;b&lt;/sup&gt;Q&lt;sup&gt;c&lt;/sup&gt;</td>
</tr>
<tr>
<td>Dashboard</td>
<td>any</td>
</tr>
<tr>
<td>Recording</td>
<td>Play</td>
</tr>
<tr>
<td>View Evaluation</td>
<td>AQ</td>
</tr>
<tr>
<td>Evaluate</td>
<td>--</td>
</tr>
<tr>
<td>Live Monitoring&lt;sup&gt;d&lt;/sup&gt;</td>
<td>--</td>
</tr>
<tr>
<td>Reporting</td>
<td>any</td>
</tr>
</tbody>
</table>

a. Any license.
b. A = AQM or AQMA license.
c. Q = QM or QMA license.
d. If you want to enable Live Monitoring for an evaluator or archive user, assign the manager role to these users.
e. When an evaluator logs in to Workforce Optimization that is configured for multiple products, the QM button in the Reporting application displays a blank page.

Scoping Rules

Your role not only controls what information is available to you, but also the scope of that information. In this case, “scope” refers to the contacts you can view and/or evaluate.
Scoping Rules and HR/Training Recordings

The scoping rules described in this section do not apply to contacts marked as Training recordings, which can be reviewed by all roles. The scoping rules do apply to all other recordings, including those marked as HR recordings.

Administrator ID

The administrator ID can configure contents of the Dashboard view by role. The administrator can also lock down a dashboard.

Agents and Knowledge Workers

Agents and knowledge workers can view only training recordings and their own evaluated contacts. Agents can also see their own archive recordings if enabled by the Quality Management administrator.

Supervisors

Supervisors can view contacts made only by their currently active teams. For example, if a supervisor had been assigned to Team A last week, but is now assigned to Team B, that supervisor can view only contacts recorded by currently active agents on Team B. This includes contacts recorded by the Team B agents before the supervisor was assigned to Team B.

Managers

Managers can view contacts made only by their currently active groups. For example, if a manager had been assigned to Group A last week, but is now assigned to Group B, that manager can view only contacts recorded by currently active agents on currently active teams in Group B. This includes contacts recorded by the Group B agents before the manager was assigned to Group B. Managers can also view training and HR contacts.

Evaluators

Evaluators can view contacts for all currently active groups, teams, and agents. Evaluators cannot see any contacts made by deactivated groups, teams, and agents.

Archive Users

Archive users can view all archive contacts made by all active and inactive groups, teams, and agents.

Active Role Access

Active groups and teams are currently in use. Inactive groups and teams are no longer used, but still have history that needs to be taken into account for such things as historical reporting.

With the exception of archive user, Quality Management is only concerned with active groups, teams, and agents.
Dual Monitor Configuration

When configuring display properties on a machine running Workforce Optimization with dual monitors, additional host monitors must be located below or to the right of the primary display monitor in the Display Properties window. Any monitor located above and/or to the left of the primary display monitor will not be visible (this is a Windows restriction).

Figure 5 shows the Display Properties window.

Using a Dual Monitor Configuration

**TASK**

- To view a popup window on another monitor, click and drag the popup window to the other monitor.

**STEP RESULT:** You can now view the Workforce Optimization on one monitor and the popup window on the other monitor.
Workforce Optimization (Figure 6) is divided into the following sections.

- **Workforce Optimization toolbar**—the toolbar at the top of the window that displays navigation buttons you can use to perform the following tasks.
  - Access Workforce Optimization’s common applications.
  - View the name of the user who is currently signed in to Workforce Optimization. To log out, move your cursor over <user name> in the Signed In field, and then click Log Out.
  - View the number of new alerts and display a list of alerts. The Alerts button also displays number of new messages available. When you click one of the alerts in the list, an Alert Notification dialog box displays more information.
    For Quality Management, alerts occur when a significant event happens.
    For more information, see “Alerts” on page 30.
  - Access the available help by application for the Workforce Optimization.

- **Application pane**—the center region displays the application.

- **Widget**—a self-contained application that can be configured for a specific purpose.

**Figure 6. Workforce Optimization**
Table 4 describes the buttons that appear in the Workforce Optimization toolbar at the top of the screen.

Table 4. Workforce Optimization toolbar

<table>
<thead>
<tr>
<th>Button</th>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
</table>
| Dashboard       | 🎞️  | Provides information based on the products installed with Workforce Optimization. The products are as follows:  
|                 |      | • Quality Management—provides a summary and detail display of the contact center’s performance statistics for the last twelve months by agent, team, and group. The summary displays are in the form of bar charts and graphs.  
|                 |      | • Workforce Management—displays your productivity for the selected interval. The summary displays are in the form of bar charts or graphs.  
|                 |      | Administrators can log in to Workforce Optimization and lock down the Dashboard by role.                                                   |
| Recordings      | 🎧  | Allows you to do the following:  
|                 |      | • Search the stored archives for specific contact recordings.  
|                 |      | • Review a list of contacts and from this list access the associated recordings and evaluations.                                           |
| Live Monitoring | 🎧  | Allows supervisors and managers in a Network Recording environment to monitor active calls for users in their scope.                             |
| Reporting       | 📋  | Allows you to generate evaluation reports and system reports for Quality Management                                                        |
| Signed In       | NA   | Displays the name of the current user. To log out, move your cursor over `<user name>` in the Signed In field, and then click Log Out.       |
| Alerts          | 🚨  | Displays a list of alerts.  
|                 |      | For more information, see “Alerts” on page 30.                                                                                         |
| Help            | 🎨  | Displays the available help by application.                                                                                             |

Alerts

Workforce Optimization generates alerts when a significant event happens, and sends them to agents, evaluators, supervisors, and managers.
Workforce Optimization uses the following methods to provide additional information about alerts.

- New alerts briefly appear as a popup by the Alerts button.
- The Alerts button displays the number of new messages available.
- Unacknowledged alerts appear in highlighted text. You can click the alert to view the message details in the Alert Notification dialog box (Figure 7). You can only view the details of one message at a time.

**Figure 7. Alert Notification dialog box**

![Alert Notification dialog box](image)

- Alerts remain in the list for seven days. After seven days, Workforce Optimization automatically deletes the alerts regardless of whether you have read them or not.

After the seventh day, alerts might still appear in the list of alerts. You must log out of Workforce Optimization and then log back into Workforce Optimization before the alerts are removed from the Alerts application.

**NOTE:** If you are logged into multiple sessions of Workforce Optimization, you must log out of all sessions before alerts are removed from the Alerts application.

Table 5 describes the fields in the Alert Notification dialog box.

**Table 5. Alert Notification dialog box fields**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sent</td>
<td>The date the alert was sent.</td>
</tr>
<tr>
<td>Source</td>
<td>The component that generated the alert.</td>
</tr>
<tr>
<td>Message</td>
<td>A brief description of the alert.</td>
</tr>
<tr>
<td>More Info</td>
<td>Additional information regarding the alert.</td>
</tr>
</tbody>
</table>
When Alerts Appear

Alerts appear when a significant event happens, for example:

- A contact moves from Unscored, In Progress, or Scored state to the Needs Approval state. Quality Management issues this alert to all evaluators, supervisors, and managers who have access to the contact based on existing scoping rules, and are required to approve the evaluation.

- A contact moves from the Unscored, In Progress or Needs Approval state to the Scored state. Quality Management issues this alert to the agent associated with the contact, and the supervisors and managers who have access to the contact based on existing scoping rules.

- A requested contact recording has been exported and is available for download.

- A scored contact, completed for an agent, requires approval when there are no approvers configured to approve the contact recording. An alert must be sent to an approver when a contact completes. For example, a supervisor can approve but the agent is no longer on the supervisor’s team or a manager can approve but the agent’s team is not in the manager’s group.

- Users who are not logged in when an alert is generated will get the alert when they log into Workforce Optimization.

You should also note the following:

- The user who triggers the alert does not receive the alert.
- An alert is not triggered when a new comment is added to an evaluation form.

Managing Alerts

**TASK**

- To view an alert, click Alerts in the Workforce Optimization toolbar and then click an alert in the list to display more information. When finished, click Close to dismiss the Alert Notification dialog box.

- To delete an alert, click Delete .

- To close the list of alerts, click Alerts .

Application Pane

The application pane displays a Quality Management application. The application appears when you choose an application from the Workforce Optimization toolbar. See “Toolbar” on page 30 for more information.
Workforce Optimization displays different applications depending on your role and license.

Applications

All applications available in Workforce Optimization have the same basic layout.

Table 6 lists the application buttons.

Table 6. Application buttons

<table>
<thead>
<tr>
<th>Icon</th>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>NA</td>
<td>Apply</td>
<td>Saves your changes.</td>
</tr>
<tr>
<td>NA</td>
<td>Cancel</td>
<td>Exit without saving changes.</td>
</tr>
<tr>
<td>🛠 Settings</td>
<td></td>
<td>Displays the configurable settings for this application. Click the icon again to hide the settings.</td>
</tr>
</tbody>
</table>

An Error 🔄 appears next to a field when you enter the wrong information.

Tables

Workforce Optimization often displays information in tables. These tables can be modified to your preferences.

Sorting Tables

Data that is presented in tabular form can be sorted based on the contents of a single column in the table. The sort can be ascending or descending.

A small triangle at the right of the primary sort column heading displays the direction of the sort, ascending or descending.

Consider the following limitations when sorting tables:

- You cannot sort encrypted metadata in the Recordings application.
- You cannot sort data in the Live Monitoring application.
Managing Tables

**TASK**

- To sort a table by one column, click the column heading. Click again to reverse the sort order.
- To move a column, click and drag the column to the location you want it to appear.
- To change the size of a column, drag the column edge to the required width.
- If the table is long, use the scroll bar at the right of the table to move up and down the table.
- If the table is wide, use the scroll bar at the bottom of the table to move left and right.

*ADDITIONAL INFORMATION:* There is no Save button.

Moving Items between Lists

The following applications allow you to move items between lists:

- Dashboard
- Reporting

**TASK**

- Use these mouse actions to move items between lists:
  - To move an item from one list to another list, click the item in one list and drag it to the other list.
  - To move multiple contiguous items, click the first item in the list, shift-click on the last item in the list, and then drag the items to the other list.
  - To move multiple noncontiguous items, press the Ctrl key while selecting each item in the list, and then drag the items to the other list.
  - To move an item from one location in a list to another location in the same list, click and then drag the item to the location you want it to appear in the list.
  - To move multiple contiguous items in a list to another location in the same list, click the first item in the list, shift-click on the last item in the list, and then drag the items to the location you want it to appear in the list.
  - To move multiple noncontiguous items in a list to another location in the same list, press the Ctrl key while selecting each item in the list, and then drag the items to the location you want it to appear in the list.
Time Zone Considerations

Workforce Optimization displays time for Quality Management in two different ways, depending on where it appears.

Time in the Desktop Interface

In the Workforce Optimization interface, the time associated with a contact is the time the contact occurred at the agent’s location, expressed in a format appropriate to the locale. For example, if the agent is located in Chicago, IL, USA, the time associated with any contacts made by that agent is Central Standard Time (CST).

The contact also displays the abbreviation for the local time zone. If the time zone associated with the contact is unknown to Workforce Optimization, then the time is displayed in Greenwich Mean Time (GMT).

Time in Reports

In all reports except system status and user recording status, the time associated with a contact is the time the contact occurred at the agent’s location in a format appropriate to the locale, with a designated time zone.

In system status and user recording status reports, the time associated with a contact is in a format appropriate to the locale plus the GMT offset. For example, the time for a contact made by a Chicago agent at 3:42 PM CST appears as 9:42 PM GMT -06:00.
Dashboard

The Dashboard application (Figure 8) is a common (multi-product) application that contains a set of widgets. These widgets are product-specific. Initially, the Dashboard displays widgets for all products that you logged into. The default set of widgets is defined by the role and Dashboard view assigned to you. If one of the products is down, the widgets associated with that product do not appear in the Dashboard.

Figure 8. Dashboard application

The Dashboard automatically launches when you log into Workforce Optimization and displays the widgets assigned to your role.

The Dashboard displays all widgets in a continuous sequence. Blank spaces between widgets are not allowed.

If enabled by your administrator, you can customize the layout and contents of the Dashboard by selecting widgets to display, renaming widgets, adjusting the widget settings for each widget, and moving the widgets around within the Dashboard. Changes to the Dashboard are saved automatically and your changes appear the next time you return to the Dashboard.

Changes made to the Dashboard or widget settings persist until they are changed by either you or the administrator.
Table 7 lists the fields that appear in the Dashboard toolbar.

Table 7. Dashboard toolbar fields

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dashboard</td>
<td>Allows you to create and modify a Dashboard view by role. A view defines what widgets and widget settings are available to a role. The possible Quality Management roles are:</td>
</tr>
<tr>
<td>View by Role</td>
<td>• Agent</td>
</tr>
<tr>
<td></td>
<td>• Supervisor</td>
</tr>
<tr>
<td></td>
<td>• Manager</td>
</tr>
<tr>
<td></td>
<td>• Evaluator</td>
</tr>
<tr>
<td></td>
<td>• Archive User</td>
</tr>
<tr>
<td></td>
<td>• Knowledge Worker</td>
</tr>
<tr>
<td><strong>NOTE:</strong></td>
<td>Only the administrator can access this feature.</td>
</tr>
</tbody>
</table>

Table 8 lists the buttons that appear in the Dashboard toolbar.

Table 8. Dashboard toolbar buttons

<table>
<thead>
<tr>
<th>Icon</th>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>🔧</td>
<td>Settings</td>
<td>Displays the configurable settings for this application. Click the icon again to hide the settings.</td>
</tr>
<tr>
<td></td>
<td><strong>NOTE:</strong></td>
<td>The Settings buttons only appears when the Lock Down state is disabled by the administrator.</td>
</tr>
</tbody>
</table>

Table 9 lists the icons that appear in the Dashboard.

Table 9. Dashboard icons

<table>
<thead>
<tr>
<th>Icon</th>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>🔄</td>
<td>Down Arrow</td>
<td>This icon appears when you move a widget in the Dashboard and the Configure Dashboard widget. The Down Arrow appears when you drag the widget to a legitimate position.</td>
</tr>
<tr>
<td></td>
<td><strong>NOTE:</strong></td>
<td>You can only move a widget when the Lock Down state is disabled by the administrator.</td>
</tr>
</tbody>
</table>
Default Widget Order by Role

Table 10 shows the default widget order by role for the default Dashboard view for multiple products. If your administrator assigned a specific Dashboard view to you, this information does not apply to your Dashboard view.

Table 10. Default widget order by role

<table>
<thead>
<tr>
<th>Agent or Knowledge Worker</th>
<th>Supervisor</th>
<th>Manager</th>
<th>Evaluator</th>
<th>Archive User</th>
</tr>
</thead>
<tbody>
<tr>
<td>My Schedule\textsuperscript{a}</td>
<td>My Schedule\textsuperscript{a}</td>
<td>Evaluation Averages</td>
<td>Evaluation Averages</td>
<td>Contact Totals</td>
</tr>
<tr>
<td>Agent Percentages</td>
<td>Agent Percentages</td>
<td>Recent Evaluations</td>
<td>Recent Evaluations</td>
<td>--</td>
</tr>
<tr>
<td>Agent Time Distributions</td>
<td>Agent Time Distributions</td>
<td>Contact Totals</td>
<td>Contact Totals</td>
<td>--</td>
</tr>
<tr>
<td>Evaluation Averages</td>
<td>Evaluation Averages</td>
<td>Evaluation Ranges</td>
<td>Recent Evaluations Performed</td>
<td>--</td>
</tr>
<tr>
<td>Recent Evaluations</td>
<td>Recent Evaluations</td>
<td>Recent Evaluations Performed</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>Agent Time Totals</td>
<td>Agent Time Totals</td>
<td>--</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>Contact Totals</td>
<td>Contact Totals</td>
<td>--</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>Agent Calls Per Hour</td>
<td>Evaluation Averages</td>
<td>--</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>Agent Call Volumes</td>
<td>Recent Evaluations</td>
<td>--</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>Evaluation Ranges</td>
<td>Contact Totals</td>
<td>--</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>--</td>
<td>Evaluation Ranges</td>
<td>--</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>--</td>
<td>Recent Evaluations Performed</td>
<td>--</td>
<td>--</td>
<td>--</td>
</tr>
</tbody>
</table>
Dashboard Roles and Scope

The scope of the Dashboard application is based on your highest role. If you are a supervisor and an agent, your access to the Dashboard application is based on the supervisor role.

**NOTE:** The Dashboard application does not display relevant data if the user is not assigned to a team.

Table 11 displays the available widgets by role.

**Table 11. Available widgets by role**

<table>
<thead>
<tr>
<th>Widget</th>
<th>Agent or Knowledge Worker</th>
<th>Supervisor</th>
<th>Manager</th>
<th>Evaluator</th>
<th>Archive User</th>
</tr>
</thead>
<tbody>
<tr>
<td>Evaluation Averages</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>Evaluation Ranges</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>Contact Totals</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Recent Evaluations</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>--</td>
</tr>
<tr>
<td>Recent Evals Performed</td>
<td>--</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>--</td>
</tr>
<tr>
<td>Evaluation Averages</td>
<td>--</td>
<td>x</td>
<td>--</td>
<td>x</td>
<td>--</td>
</tr>
<tr>
<td>Evaluation Ranges</td>
<td>--</td>
<td>x</td>
<td>--</td>
<td>--</td>
<td>--</td>
</tr>
</tbody>
</table>

a. My Schedule is available to WFM agents and supervisors only.
Table 12 shows the filter choices available to you in the Dashboard application based on role. This table does not apply to Evaluators and Archive Users, since they do not have access to Dashboard.

Table 12. Filtering roles and scope for Dashboard application

<table>
<thead>
<tr>
<th>Role</th>
<th>Group</th>
<th>Team</th>
<th>Agent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manager</td>
<td>Enabled(^a)</td>
<td>Enabled(^a)</td>
<td>Enabled(^a)</td>
</tr>
<tr>
<td>Supervisor</td>
<td>Disabled(^b)</td>
<td>Enabled(^a)</td>
<td>Enabled(^a)</td>
</tr>
<tr>
<td>Agent</td>
<td>Disabled(^b)</td>
<td>Disabled(^c)</td>
<td>Disabled(^d)</td>
</tr>
<tr>
<td>Knowledge Worker</td>
<td>Disabled(^b)</td>
<td>Disabled(^c)</td>
<td>Disabled(^d)</td>
</tr>
</tbody>
</table>

a. Quality Management populates the drop-down based on user’s scope.
b. Quality Management populates the drop-down based on the user’s group.
c. Quality Management populates the drop-down list based on the user’s team.
d. Quality Management displays only the user’s name in the drop-down list.

This allows you to change the view (group, team, and agent) and the scope (specific group, specific team, and specific agent) in the Dashboard application. The scope of the report is based on the lowest selection you chose in the Settings pane.

Table 13 displays the scope for the report list.

Table 13. Report list scope

<table>
<thead>
<tr>
<th>Report List Scope</th>
<th>Selected Group Filter</th>
<th>Selected Team Filter</th>
<th>Selected Agent Filter</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agent Scope</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Team Scope</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Group Scope</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
</tr>
</tbody>
</table>
Default Widget Settings by Role

The default settings for Group, Team, and Agent are based on your highest role. Table 14 shows the default widget settings by role.

Table 14. Default widget settings by role

<table>
<thead>
<tr>
<th>Settings</th>
<th>Agent or Knowledge Worker</th>
<th>Supervisor</th>
<th>Manager</th>
<th>Evaluator</th>
<th>Archive User</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group</td>
<td>Your Group</td>
<td>Your Group</td>
<td>Your Group</td>
<td>First Group(^a)</td>
<td>First Group(^a)</td>
</tr>
<tr>
<td>Team</td>
<td>Your Team</td>
<td>Your Team</td>
<td>All</td>
<td>All</td>
<td>All</td>
</tr>
<tr>
<td>Agent</td>
<td>Yourself</td>
<td>All</td>
<td>All</td>
<td>All</td>
<td>All</td>
</tr>
</tbody>
</table>

\(^a\) The first group that appears in the list. You can choose any group that appears in the list.

Widget Toolbar

The following table describes the buttons that might appear in the widget toolbar.

<table>
<thead>
<tr>
<th>Button</th>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action Link</td>
<td>![Link Icon]</td>
<td>Closes the current application and displays information related to the widget.</td>
</tr>
<tr>
<td>Settings</td>
<td>![Settings Icon]</td>
<td>Displays the configurable settings for this widget. When you apply changes to the settings, the configured settings persist each time you log in. Click the icon again to hide the settings. This button is not available if the widget does not have configurable settings.</td>
</tr>
</tbody>
</table>
Widget Settings

The Widget Settings window allows you to customize the settings for the selected widget.

Table 15 defines the fields that can appear in the Widget Settings window. Only fields that apply to a specific widget appear in the widget settings window.

**NOTE:** Some widgets might not display one or more of these settings because the data is either unavailable or not applicable.

Table 15. Widget Settings fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
</table>
| Range     | The date range for the historical information. The possible values are as follows:  
            • 4, 8, 12, or 24 Hours.  
            • 8, 15, 30, 90, or 180 Days.  
            • 1 - 12 Months (Default = 6 Months). |
| Chart     | The type of chart you want to appear in this widget. The possible values are:  
            • Line Graph—Displays metrics as a line. The default setting.  
            • Stacked Bar—Displays metrics stacked on top of each other.  
            • Vertical Bar—Displays metrics next to each other (for example, Below, Meets, and Exceeds). |
| Eval Form | The name of the evaluation form. The default setting is All.                                                                                     |
| Group     | The name of the group. The default setting is determined by your role. See “Widget Settings” on page 43 for more information about the default setting. |
| Team      | The name of the team. The default setting is determined by your role. See “Widget Settings” on page 43 for more information about the default setting. |
| Agent     | The name of the agent. The default setting is determined by your role. See “Widget Settings” on page 43 for more information about the default setting. |
| Goal      | When selected, displays the goal for the selected service queue. When cleared, the goal is not displayed. See the Workforce Management Administrator User Guide for specific instructions on modifying this value. |
Dashboard Features

The Dashboard application provides a summary and detail display of the contact center’s performance statistics for the last twelve months by agent, team, and group. The summary displays are in the form of bar charts and graphs.

There is a standard set of statistics displayed in the Dashboard application, but the level at which the statistics are presented depends on your role as agent, knowledge worker, supervisor, or manager. The Dashboard application also enables you to filter the contact center’s performance statistics based on filtered search results.

See “Dashboard Roles and Scope” on page 40 for more information on the filter fields.

Scoping Differences between Dashboard and Reports

There are no differences between the Dashboard application and the following graphical reports in the Reporting application.

- Quality Averages Graph
- Evaluations Totals Graph
- Contact Totals Graph

Table 16 summarizes how the values reported are different, based on where the information appears.

Table 16. Scoping differences between Dashboard and Reporting

<table>
<thead>
<tr>
<th>Information Type</th>
<th>Dashboard</th>
<th>Reporting</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date ranges</td>
<td>Displays only completed months. For example, the Past Month is the last completed month. The current month is from the first day of the month to the current day.</td>
<td>Uses explicit date ranges selected by the user.</td>
</tr>
<tr>
<td>Roles</td>
<td>Displays data based on the current role.</td>
<td>For managers and supervisors, the current role determines the reports available. The groups, teams, and agents that are available for selection are based on the groups or teams that are currently managed or supervised, and which agents are currently on those teams.</td>
</tr>
</tbody>
</table>
Points to Remember

Remember the following points when working with the Dashboard application.

- The Dashboard application defaults to your highest role. For example, if you are assigned the agent and supervisor roles the Dashboard application automatically displays the performance statistics associated with the supervisor role.
- Groups and teams are listed alphabetically in drop-down lists. The first group in the list appears in the Dashboard application by default. If a group contains multiple teams, All appears in the Dashboard application by default.
- The Dashboard application displays the past 3 months by default in the Contact Totals, Evaluation Averages, and Evaluation Ranges widgets.
- If an agent’s average is the same as the team or group, the Agent average is overlayed by the Team Average or Group Average.
- All displayed scores are rounded up for the purposes of determining which category (Exceed, Meet, or Below) the score falls in.
**Evaluation Averages**

The Evaluation Averages widget displays the current evaluation averages for the selected group, team, or agents.

The Evaluation Averages widget displays one or more of the following data elements.

- Team
- Group
- Agent

The Action Link displays the Quality Averages Graph (Reporting > QM > Quality Averages Graph) using the filter values specified in Widget Settings. See “Quality Averages Graph” on page 134 for more information on this report.

**Contact Totals**

The Contact Totals widget displays the current contact totals for the selected group, team, or agents.

The Contact Totals widget displays these data elements by default.

- Scored
- Unscored
- Quality

See “Widget Dictionary” on page 48 for a description of the data elements.

The Action Link displays the Contact Totals Graph (Reporting > QM > Contact Totals Graph) using the filter values specified in Widget Settings. See “Contact Totals Graph” on page 135 for more information on this report.

**Recent Evaluations**

The Recent Evaluations widget displays the results for the most recent evaluations performed by all evaluators for the selected group, team, or agents.

The Recent Evaluations widget displays the following data elements.

- Last (%)
- Last 5 (%)

See “Widget Dictionary” on page 48 for a description of the data elements.
The Recent Evaluations widget also displays the results for the last five scored evaluations for the selected group, team, or agents.

The Action Link displays the Recordings application.

**Recent Evals Performed**

The Recent Evals Performed widget displays the results for the most recent evaluations performed by you for the selected group, team, or agents.

The Recent Evals Performed widget displays the following data elements.

- Last (%)
- Last 10 (%)

See “Widget Dictionary” on page 48 for a description of the data elements.

The Action Link displays the Recordings application.

**Evaluation Ranges**

The Evaluation Ranges widget displays the current evaluation ranges for the selected group, team, or agents.

The Evaluation Ranges widget displays the following data elements.

- Below
- Exceeds
- Exceeds

The Action Link displays the Evaluation Totals Graph (Reporting > QM > Evaluation Totals Graph) using the filter values specified in Widget Settings. See “Evaluation Totals Graph” on page 135 for more information on this report.
## Widget Dictionary

Table 17 describes the fields in the widgets.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agent</td>
<td>A data element on a chart that represents an agent.</td>
</tr>
<tr>
<td>Agent Average</td>
<td>The average score the agent has earned for the selected date range.</td>
</tr>
<tr>
<td>Below</td>
<td>The total number of evaluated contacts whose scores fall below expectations. The default score range is 0–74%. The Quality Management Administrator can modify this range.</td>
</tr>
<tr>
<td>Call Duration</td>
<td>The duration of the contact (length of time between call answered and call dropped) in HH:MM:SS.</td>
</tr>
<tr>
<td>Date</td>
<td>The contact date.</td>
</tr>
<tr>
<td>Evaluations</td>
<td>The number of evaluations</td>
</tr>
<tr>
<td>Exceeds</td>
<td>The total number of evaluated contacts whose scores exceed expectations. The default score range is 90–100%. The Quality Management Administrator can modify this range.</td>
</tr>
<tr>
<td>First Name</td>
<td>The agent’s first name.</td>
</tr>
<tr>
<td>Forecast</td>
<td>When selected, the Service Queue Performance widget displays the real time performance and the forecasted performance for the service queue. When cleared, the widget displays real time performance. This check box is enabled when you choose Interval from the Group By check box in the Widget Settings window for Service Queue Performance.</td>
</tr>
<tr>
<td>Group</td>
<td>A data element on a chart that represents a group.</td>
</tr>
<tr>
<td>Group Average</td>
<td>The average score the group has earned for the selected date range.</td>
</tr>
<tr>
<td>Last 5 (%)</td>
<td>The average percentages score for the last five evaluations as determined by evaluation date and time.</td>
</tr>
<tr>
<td>Last 10 (%)</td>
<td>The average percentages score for the last ten evaluations performed by you as determined by evaluation date and time.</td>
</tr>
<tr>
<td>Last Name</td>
<td>The agent’s last name</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>---------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| Last (%)      | The widget in which this field appears determines the definition.  
  • Recent Evaluations—the percentage score for the last evaluation as determined by evaluation date and time.  
  • Recent Evaluations Performed—the percentage score for the last evaluation performed by you as determined by evaluation date and time. |
| Meets         | The total number of evaluated contacts whose scores meet expectations. The default score range is 75–89%. The Quality Management Administrator can modify this range. |
| Name          | The name of the group, team, or agent.                                                                                                           |
| Quality       | The number of quality calls.                                                                                                                    |
| Score         | The evaluation score given to the contact.                                                                                                      |
| Scored        | The number of scored contacts.                                                                                                                   |
| Score Std Dev | The standard deviation of the group’s score or team’s score. A low standard deviation (closer to 0) indicates that scores are grouped closely to the mean score.  
  A higher standard deviation (further from 0) indicates that scores are far from the mean. A lower standard deviation is an indicator of consistent performance; a higher standard deviation is an indicator of variable performance. |
| StdDev        | The standard deviation of the agent’s score. A low standard deviation (closer to 0) indicates that scores are grouped closely to the mean score.  
  A higher standard deviation (further from 0) indicates that scores are far from the mean. A lower standard deviation is an indicator of consistent performance; a higher standard deviation is an indicator of variable performance. |
| Team          | A data element on a chart that represents a team.                                                                                               |
| Team Average  | The average score the team has earned for the selected date range.                                                                                  |
| Team Name     | The name of the team.                                                                                                                           |
| Total Evaluations | The total number of evaluations.                                                                                                           |
| Unscored      | The number of unscored contacts.                                                                                                               |
Administrator

The administrator controls the Dashboard by configuring the following Dashboard features:

1. **The appearance of the default dashboard by role**, including:
   - The widgets that appear on the Dashboard for each role.
   - The order in which the widgets appear.
   - The names of the widgets.
   - The content of the widgets.

   If you do not assign a default dashboard to a role, the user will see the default dashboard assigned by Quality Management to their role.

2. **The Lock Down state for each role**. If you lock down a dashboard, the dashboard user notices the following:
   - The Settings button does not exist on the Dashboard toolbar. The user cannot change the settings on their Dashboard.
   - The user cannot rename widgets.
   - The user cannot customize the layout of widgets on the dashboard.
   - If the user changed the dashboard before you applied the Lock Down state, all previous changes are lost and the user only sees the dashboard assigned to their role.

Configuring the Dashboard by Role

**PREREQUISITE**

This task requires a user logs in using the username and password for the administrator ID.

**TASK**

1. Select a role from the Role drop-down list in the Dashboard toolbar and then click settings.

2. To modify the widgets that appear on the dashboard, click Settings in the Dashboard toolbar, and choose one or more of the following options.
   - To add widgets to the dashboard, drag the widgets to the Selected Widgets list, and then click Apply.

   See "Moving Items between Lists on page 34" for more information.
- To move a widget in Selected Widgets, click the widget, and then drag the widget to the desired location. A Down Arrow appears when you drag the widget to a legitimate position.

When you drag a widget to the left half or right half of another widget, this icon appears to the left or the right of the widget.

**NOTE:** You cannot drag a widget to an empty space. To drag a widget to the last position, drag the widget to the right half of the last widget in Configure Dashboard Widgets.

- To rename a widget, double-click the widget you want to rename in the Selected Widgets list, type the new name in the Rename Widget dialog box, click Apply, and then click Apply.

- To delete widgets from the dashboard, select the widgets you want to delete from the Selected Widgets list, click Delete Selected Widgets, and then click Apply.

- To lock a dashboard so users cannot change it, select the Lock Down check box, and then click Apply.

- To close the Configure Dashboard Widgets dialog box without saving your changes, click Cancel.

3. Repeat step 1 and step 2 for each role.

**Agents, Knowledge Workers, Supervisors, Managers, Evaluators, and Archive Users**

The contents of your Dashboard depend on how the administrator configured the Dashboard based on your highest role. If the administrator locks down your Dashboard, the content of your Dashboard is limited to what the administrator allowed for your role.

**Managing Your Dashboard (Lock Down Disabled)**

You can perform the following task on the Dashboard when the Lock Down state is disabled in addition to the tasks available when the Dashboard Lock Down state is enabled.

**TASK**

- To move a widget in the Dashboard, click the widget toolbar (the cursor changes to Move ), and then drag the widget to the desired location. A Down Arrow appears when you drag the widget to a legitimate position.
**ADDITIONAL INFORMATION:** When you drag a widget to the left half or right half of another widget, this icon appears to the left or the right of the widget. When you drop a widget in a new location, the remaining widgets fill in the gap where the widget was originally located.

**NOTE:** You cannot drag a widget to an empty space. To drag a widget to the last position, drag the widget to the right half of the last widget in the Dashboard.

- To modify the widgets that appear on your dashboard, click Settings ✉ in the Dashboard toolbar, and choose one or more of the following options.

  - To add widgets to the dashboard, drag the widgets to the Selected Widgets list, and then click Apply.
    
  See “Moving Items between Lists” on page 34 for more information.

  - To move a widget in Selected Widgets, click the widget, and then drag the widget to the desired location. A Down Arrow ▼ appears when you drag the widget to a legitimate position.

    When you drag a widget to the left half or right half of another widget, this icon appears to the left or the right of the widget.

**NOTE:** You cannot drag a widget to an empty space. To drag a widget to the last position, drag the widget to the right half of the last widget in Configure Dashboard Widgets.

  - To rename a widget, double-click the widget you want to rename in the Selected Widgets list, type the new name in the Rename Widget dialog box, click Apply, and then click Apply.

  - To delete widgets from the dashboard, select the widgets you want to delete from the Selected Widgets list, click Delete Selected Widgets, and then click Apply.

  - To close the Configure Dashboard Widgets dialog box without saving your changes, click Cancel.

**Managing Your Dashboard (Lock Down Enabled)**

You can perform the following tasks on the Dashboard when the Lock Down state is enabled.

**Task**

- To filter the information that appears in a widget, click Settings ✉ in the widget toolbar, choose the options you want to appear in the widget, and then click Apply.

**ADDITIONAL INFORMATION:** All widgets are refreshed after you change the settings.
• To close the Widget Settings dialog box without saving your changes, click Cancel.

• To display related information, click Action Link in the widget toolbar.

• To see view the value for a data element in a Stacked Bar chart, place your cursor over the color in the stacked bar that represents the information you want to see.

  **STEP RESULT:** The Stacked Bar chart displays the value for the selected data element in the stacked bar.

• To see a value for a cluster in a Vertical Bar chart, place your cursor over the cluster that represents the information you want to see.

• To see a value for a point in a Lines Graph chart, place your cursor over the point that represents the information you want to see.

  **STEP RESULT:** The Lines Graph chart displays the value for the selected point.

• To view the average by month in an averages graph, place your cursor over the circle that represents the quality average for the month you want to see.

  **STEP RESULT:** The averages graph displays the value for the selected point.
Dashboard
Agents, Knowledge Workers, Supervisors, Managers, Evaluators, and Archive Users
Recordings

The Recordings application allows you to perform the following tasks depending on your role and scope.

- Search for specific contacts.
- Configure the columns in the Contacts table.
- Export contact metadata from a call or non-call contact to Comma-Separated Values (CSV).
- Create a non-call contact.
- Review a list of contacts and from this list access the associated recordings, if applicable, and evaluations.
- Mark an archive recording for quality.
- Mark a contact (call or non-call for calibration).
- Evaluate quality management contacts or non-call contacts.
- Export contact recordings.
- Tag a contact for Training or Human Resources (HR).

Information about recordings (metadata), if configured, is available immediately after a call is recorded, even though the recording itself has not yet been uploaded. If you need to review such a recording immediately, you can download the recording on-demand as long as the client desktop is on and available.

**NOTE:** The Media Player is very large. The first time you access the Recordings application it will take several minutes to initialize the Media player. Once the Media Player is cached subsequent loads are much faster.

Roles and Scope

The roles and scope that apply to the Recordings application depend on the type of available contacts and the roles assigned to the user.

The availability of contacts in the Contacts table depends on your role:

- Supervisors have access to archived contacts made by currently active agents on their currently active assigned teams.
- Managers have access to contacts made by currently active agents of their currently active assigned groups.
• Managers and supervisors can play all recordings within their scope.

If a manager or supervisor opens an Unscored contact within their scope, but does not have the ability to evaluate the Unscored contact, they can still play the contact. In this scenario, the following message appears instead of the evaluation form.

You are not allowed to evaluate this contact.

If a manager or supervisor chooses All Evaluations and In Progress, the Contacts table displays all In Progress evaluations in their scope.

If a manager or supervisor chooses My Evaluations and In Progress, the Contacts table displays all In Progress evaluations in their scope that they evaluated.

• Managers, supervisors, and evaluators can create a contact for evaluation.
• Archive users have access to all contacts.
• Evaluators see all active agents’ contacts (scored, unscored, in progress, needs approval).
• Agents and knowledge workers see only their own scored contacts and contacts designated as Training.
• Knowledge workers can see all of their own contacts.
• Agents can see recordings tagged only for Archive, if enabled by the Quality Management administrator.
• The highest role assigned to a user controls the ability to export contact recordings from the Recordings application. If the user is assigned to any role that can export a contact recording, the user can export any contact recording that appears in their Contacts table.
**Your Role and Scope**

Your highest role determines your scope in the Recordings application. Table 18 shows how your highest role determines your scope.

**Table 18. Your role and scope**

<table>
<thead>
<tr>
<th>Role (Ranked Highest to Lowest)</th>
<th>Scope</th>
</tr>
</thead>
<tbody>
<tr>
<td>Archive User</td>
<td>All contacts of all active and inactive users</td>
</tr>
<tr>
<td>Evaluator</td>
<td>All contacts of all active users</td>
</tr>
<tr>
<td>Manager</td>
<td>All contacts of active users in the manager’s group</td>
</tr>
<tr>
<td>Supervisor</td>
<td>All contacts of active users on the supervisor’s team</td>
</tr>
<tr>
<td>Knowledge Worker</td>
<td>All contacts of self</td>
</tr>
<tr>
<td>Agent</td>
<td>Evaluated contacts of self plus archived recordings of self, if enabled</td>
</tr>
</tbody>
</table>

**Recording Retention**

The administrator determines the amount of time contacts are retained for quality management workflows and archive workflows.

**Quality Management Workflow Retention**

Quality Management allows quality management contacts to be retained according to the limits shown in Table 19.

**Table 19. Recording retention periods for quality management workflows**

<table>
<thead>
<tr>
<th>Recording Type</th>
<th>Retention Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scored</td>
<td>1 day—unlimited (default = 30 days)</td>
</tr>
<tr>
<td>Unscored</td>
<td>1 day—unlimited (default = 30 days)</td>
</tr>
<tr>
<td>HR</td>
<td>1 month—unlimited (default = 6 months)</td>
</tr>
<tr>
<td>Training</td>
<td>1 month—unlimited (default = 6 months)</td>
</tr>
<tr>
<td>Tagged</td>
<td>1 month—unlimited (default = 120 months)</td>
</tr>
</tbody>
</table>
Archive Workflow Retention

Quality Management allows archive workflow contacts to be retained according to the limits shown in Table 20.

Table 20. Contact retention periods for archive workflows

<table>
<thead>
<tr>
<th>Recording Type</th>
<th>Retention Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>Archive</td>
<td>1 month—Unlimited (default = 84 months)</td>
</tr>
<tr>
<td>Tagged</td>
<td>1 month—Unlimited (default = 120 months)</td>
</tr>
<tr>
<td>Contact Information</td>
<td>13 months minimum in both the Dashboard and Reporting applications</td>
</tr>
</tbody>
</table>

a. Audio recordings only.

Recording Security Features

All recordings have the following security features.

- Encryption—audio and screen recordings are encrypted for security purposes.
  - Audio and screen recordings are compressed and encrypted during network transport.
  - Encrypted recordings are uploaded via Hypertext Transfer Protocol (HTTP).
  - Stored audio recordings are encrypted with 128 bit Advanced Encryption Standard (AES).
  - Stored screen recordings are unencrypted, but they are re-encrypted when streamed to a client for playback via sockets.

- Role-based permissions—only authorized users can play back or export recordings.

- Audit trail—tracks who accessed the recording system, what they accessed, and when they accessed the recording system.
• Payment Card Industry (PCI) compliant—a set of comprehensive requirements for enhancing payment account data security. For a complete description of this feature, see the PCI Overview document available on the portal.calabrio.com website.

Recordings Toolbar

Table 21 describes the fields that appear in the Recordings toolbar. These fields display the current statistics for your contact center.

Table 21. Recordings toolbar fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>AQP</td>
<td>Average Quality Percentage for the recordings. The average qualities score for recordings returned by the search.</td>
</tr>
<tr>
<td>ATT</td>
<td>Average Talk Time, in seconds, it takes an agent to handle calls. Talk time is elapsed time from when an agent answers a call until the agent disconnects or transfers the call. This includes the time when the agent is actively talking to the caller and the time when the agent places the caller on hold. The average time that agent was in the Talk In, Talking Out, and Talking other states during an interval.</td>
</tr>
<tr>
<td>Total</td>
<td>The number of records that match the search.</td>
</tr>
</tbody>
</table>

NOTE: The table does lazy loading, so it is possible not all the records will initially appear. Also, records are added to the table when you scroll down.

Table 22 describes the buttons that apply to the entire Contacts table.

Table 22. Recordings toolbar buttons that applies to the entire Contacts table

<table>
<thead>
<tr>
<th>Button</th>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>New or Refine Search</td>
<td>NA</td>
<td>Displays the Search Recordings window. See &quot;Search Recordings&quot; on page 62 for more information.</td>
</tr>
<tr>
<td>Save</td>
<td></td>
<td>Saves your search settings. Your options are:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Save this Search—Saves the current search.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Saved Searches—Lists the available saved searches.</td>
</tr>
<tr>
<td>Settings</td>
<td></td>
<td>Displays the configurable settings for this application. See &quot;Configure Fields&quot; on page 68 for more information.</td>
</tr>
</tbody>
</table>
Table 23 describes buttons that requires you to select a contact in the Contacts table before the buttons are enabled.

Table 23. Recordings toolbar buttons that applies to a selected contact

<table>
<thead>
<tr>
<th>Button</th>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>CSV Export</td>
<td>![CSV Icon]</td>
<td>Exports the metadata for all contacts in CSV format. See “CSV Export” on page 73 for more information.</td>
</tr>
<tr>
<td>Create Contact</td>
<td>![Plus Icon]</td>
<td>Adds a non-call contact. See “Create Contact” on page 74 for more information.</td>
</tr>
<tr>
<td>Export</td>
<td>![Download Icon]</td>
<td>Exports the selected contact recording. See “Export” on page 76 for more information.</td>
</tr>
<tr>
<td>Mark for Quality</td>
<td>![Quality Icon]</td>
<td>Marks the selected contact recording for quality management. This button is enabled when the selected recording has a Reason value of Archive and the recording has been uploaded. See “Mark for Quality” on page 78 for more information.</td>
</tr>
<tr>
<td>Mark for Calibration</td>
<td>![Calibration Icon]</td>
<td>Marks a contact for calibration. When a contact is marked for calibration it allows the contact to be evaluated by multiple users with evaluation privileges. See “Mark for Calibration” on page 79 for more information.</td>
</tr>
<tr>
<td>Tag Call</td>
<td>![Tag Icon]</td>
<td>Applies the Tagged retention time to the selected contact. See “Tag Call” on page 80 for more information.</td>
</tr>
</tbody>
</table>
The Contacts table sometimes contains more contacts than can be viewed in the Recordings window. When a large number of contacts are available, the navigation bar (Figure 9) allows you to quickly navigate through the Contacts table.

Use the following mouse actions to view contacts in a large table:

- To specify the number of contacts per page, click the Number of Contacts drop-down list and choose a number from the list, or type a number in the field, and then click enter.
- To go to the end of the list, click End of List.
- To go to the beginning of the list, click Beginning of List.
- To go to the next page, click Next.
- To go to the previous page, click Previous.
- To go to a specific page, click Go To, type a number within the displayed range, and then press Enter.

**NOTE:** Workforce Optimization supports up to 999 pages. If your list of contacts is greater than 999 pages, “1 of ...” appears in the Go to field.
Search Recordings

The Search Recordings window (Figure 10 and Figure 11) allows you to search for contacts using filters.

When you search for recordings you must specify a date range, specific date or time, or a contact ID. You cannot run a search without specifying at least one of these options.

Quality Management saves the selected fields when you click Search. The field settings persist until you add or delete more fields.

Figure 10. Search Recordings window

Figure 11. Search Recordings window after you click Expand Search

Table 24 describes the fields you can use to filter your search.

Table 24. Search Recordings fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organization</td>
<td>Search contacts by organization. You can choose from the following options:</td>
</tr>
<tr>
<td></td>
<td>• Group—The name of the group. If you choose All, Search Recordings searches</td>
</tr>
<tr>
<td></td>
<td>all group.</td>
</tr>
<tr>
<td></td>
<td>• Team—The name of the team. If you choose All, Search Recordings searches</td>
</tr>
<tr>
<td></td>
<td>all teams.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>---------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| Name          | Search contacts by name. You can choose from the following options:  
                  • First Name—the user’s first name.  
                  • Last Name—the user’s last name.  

If you are using Active Directory, the Quality Management uses first and last name created in Active Directory. If you are using QM Authentication, Quality Management uses the first and last name created in Quality Management Administrator. |
| Phone Number  | Search contacts by phone number. You can enter:  
                  • Specific numbers (for example, 6125551212).  
                  • Number ranges using wildcards (for example, 612*, where the * wildcard stands for any number of digits, or 612555????, where the ? wildcard stands for 1 digit).  
                  • The * wildcard to record all calls.  

The numbers you enter cannot contain dashes or parentheses. |
| Date Range    | Search contacts by date range. You can choose from the following options:  
                  • Today—the current day.  
                  • Yesterday—the previous day.  
                  • In the Past Week—the last seven days.  
                  • In the Past Month—the last 30 days.  
                  • In the Past Year—the last 365 days. |
| Specific Date | Search contacts by calendar date range. The default date when you switch from Date Range to Specific Date is today’s date. |
| Time          | Search contacts by range of time. If the start time is greater than the end time, Quality Management searches contacts over midnight. |
| Search Scope  | Search contacts by scope. You can choose from the following options:  
                  • All Evaluations—returns all contacts based on the scope of your combined roles.  
                  • My Evaluations—returns contacts that you can act upon.  
                  • My Calibrations—returns contacts marked for calibration. |
Recordings Toolbar

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State

Search contacts by evaluation state.

**NOTE:** Only users who can evaluate a contact will see this field.

You can choose one or more of the following options:

- **Scored**—adds scored evaluations within your scope to your search results.
- **Unscored**—adds unscored evaluations within your scope to your search results.
- **In-Progress**—adds in progress evaluations within your scope to your search results.
- **Needs Approval**—adds evaluations within your scope that need approval to your search results.

The basic search allows you to choose from one of these evaluation states. To choose multiple evaluation states, click Expand Search and then choose one or more evaluation state check boxes.

Select Criteria

Search contacts by adding more search values. You can choose from the following options:

- Organization
- Name
- Phone Number
- Date Range
- Specific Date
- Time
- Search Scope
- State
- Contact ID
- Recording Flags
- Score
- Speech Energy
- Custom Data
- Contact Type
- Recording Type

Contact ID

Search recordings by Contact ID.

**NOTE:** If you choose to search recordings by Contact ID, the search ignores the values for all other filters (for example, Specific Date and Score), and only displays recordings associated with the specified Contact ID.

This field appears under Expand Search.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>State</td>
<td>Search contacts by evaluation state. <strong>NOTE:</strong> Only users who can evaluate a contact will see this field. You can choose one or more of the following options: • Scored—adds scored evaluations within your scope to your search results. • Unscored—adds unscored evaluations within your scope to your search results. • In-Progress—adds in progress evaluations within your scope to your search results. • Needs Approval—adds evaluations within your scope that need approval to your search results. The basic search allows you to choose from one of these evaluation states. To choose multiple evaluation states, click Expand Search and then choose one or more evaluation state check boxes.</td>
</tr>
<tr>
<td>Select Criteria</td>
<td>Search contacts by adding more search values. You can choose from the following options: • Organization • Name • Phone Number • Date Range • Specific Date • Time • Search Scope • State • Contact ID • Recording Flags • Score • Speech Energy • Custom Data • Contact Type • Recording Type</td>
</tr>
<tr>
<td>Contact ID</td>
<td>Search recordings by Contact ID. <strong>NOTE:</strong> If you choose to search recordings by Contact ID, the search ignores the values for all other filters (for example, Specific Date and Score), and only displays recordings associated with the specified Contact ID. This field appears under Expand Search.</td>
</tr>
</tbody>
</table>
**Recordings**  
**Recordings Toolbar**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recording Flags</td>
<td>Search contacts by flags. You can choose from the following options:</td>
</tr>
<tr>
<td></td>
<td>• Tagged—Search for recordings tagged for quality management.</td>
</tr>
<tr>
<td></td>
<td>• HR—Search for recordings tagged for HR.</td>
</tr>
<tr>
<td></td>
<td>• Training—Search recordings that are marked for training.</td>
</tr>
<tr>
<td></td>
<td>This field appears under Expand Search.</td>
</tr>
<tr>
<td>Score</td>
<td>Search contacts by Form Percentage score from the evaluation form.</td>
</tr>
<tr>
<td></td>
<td>Enter a desired score value in the Score field.</td>
</tr>
<tr>
<td></td>
<td>See “Understanding How Evaluations are Scored” on page 108 to see how this value is calculated.</td>
</tr>
<tr>
<td></td>
<td>This field appears under Expand Search.</td>
</tr>
<tr>
<td>Select Operator</td>
<td>Search contacts by an operator value. Choose one of the following options</td>
</tr>
<tr>
<td></td>
<td>from the Select Operator field:</td>
</tr>
<tr>
<td></td>
<td>• Lesser Than—Search for score values that are less than your specified value.</td>
</tr>
<tr>
<td></td>
<td>• Equals—Search for score values that match your specified value.</td>
</tr>
<tr>
<td></td>
<td>• Greater Than—Search for score values that are greater than you specified value.</td>
</tr>
<tr>
<td></td>
<td>This field appears when you select Score, Speech Energy, or Custom Data under Expand Search.</td>
</tr>
</tbody>
</table>
### Field Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
</table>
| **Speech Energy** | Search recordings by speech energy. Enter the number of seconds in the Seconds field, and then choose a Select Criteria option and a Select Operator option.  
The options for Select Criteria are as follows:  
- Silence Events—filters recordings based on the number of events where neither the agent nor the caller are talking using the Silence Duration threshold.  
- Talk Over Events—filters contact recordings based on the number of events where the agent and the caller are talking at the same time using the Talk Over Duration threshold.  
- Silence Duration—the minimum number seconds for the silence event. Quality Management displays all silence events that meets or exceeds this threshold.  
- Talk Over Duration—the minimum number seconds for the talk over event. Quality Management displays all talk over events that meets or exceeds this threshold.  
Quality Management does not return contact recordings if the silence or talk over event is related to a pause/resume event or hold/retrieve event.  
This field appears under Expand Search. See "Detecting Silence and Talk Over Events" on page 83 for more information on speech energy. |
| **Custom Data**   | Search contacts by metadata. Enter a value in the Value field, and then choose a Select Criteria option and a Select Operator options.  
The options for Select Criteria are determined by the Monitoring and Recording administrator.  
This field appears under Expand Search. |
| **Contact Type**  | Search contacts by contact type. Choose one of the following contact types:  
- Call—a contact with a call recording.  
- Non-Call—a contact without call recording. |
Table 25. Search Recordings buttons

<table>
<thead>
<tr>
<th>Field</th>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recording Type</td>
<td></td>
<td>Search contacts by recording type. Choose one of the following possible recording types:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- End Point—a Desktop Recording (Endpoint).</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Network—a Network Recording.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Server—a Server Recording (SPAN).</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- MediaSense—a Cisco MediaSense recording.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Multiple Registration—an Avaya Recording using the Multiple Registration method.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Unknown—the contact was either recorded prior to 8.7, a Non-Call contact type, or the recording type could not be determined</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Field</th>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search</td>
<td>NA</td>
<td>Search recordings.</td>
</tr>
</tbody>
</table>
| Reset | NA | Restore default settings.  
|       |      | This button appears under Expand Search. |
| Cancel | NA | Exit without saving changes. |
| Basic Search | NA | Displays basic search options.  
|       |      | This button appears under Expand Search. |
| Expand Search | NA | Displays advanced search options.  
|       |      | This button appears under Basic Search. |
| Add | NA | Add a new field.  
|     |      | This button appears under Expand Search. |
| Delete | | Remove the field.  
|       | | This button appears under Expand Search. |
Search Guidelines

When locating a contact, consider the following information.

- An agent who is currently not on a team can search archived contacts (including all training recordings) and play back their own recordings. The cell in the Team Name column associated with the selected contact recording appears blank.

**NOTE:** An agent must be associated with a team so Quality Management can record the agents contacts.

- You can filter the number of contacts returned by specifying the contact type (Call or Non-call).

Searching Recordings

**TASK**

- To search recordings, choose one of the following tasks:
  - To perform a simple search, click New or Refine Search from the Recordings toolbar, complete the fields in the Search Recordings window, and then click Search.
  - To perform an advanced search, click Expand Search in the Search Recordings window, complete the fields, and then click Search.
  - To search for specific speech energy (for example, silence or talk over), click Expand Search in the Search Recordings window, choose Speech Energy from the Select Criteria drop-down list, complete the fields, and then click Search.
  - To save the current search, click Save, choose Save this Search, type the name of the search in the Type a Name field, and then click Save.
  - To rename an existing search, click Save, choose Save this Search, select the search from the Select A Search drop-down list, type the new name for the search in the Type a Name field, and then click Save.
  - To use a saved search, click Save, choose Saved Searches, and then select the name of the search you want to use from the menu.

Configure Fields

By default, Quality Management displays the columns in the Contacts table in the same order as listed in the Configure Fields window with the exception of the metadata fields, HR field, and Training field.

Quality Management Administrator controls the fields that appear in Workforce Optimization for agents, knowledge workers, and supervisors. Evaluators, archive
users, and managers can configure any field (regardless of the Desktop Configuration Administration settings).

The Configure Fields dialog box lists the available field names for the Contacts table. You can use this window to choose the fields that you want to appear in the Contacts table. By default, all fields are selected.

The fields are described in “Field Dictionary” on page 69.

NOTE: This list does not include any metadata fields added by the Quality Management administrator.

Column Width

You can change the width of a column in Contacts table that contains the search results. The column size remains the same between sessions. When you remove a column, Quality Management does not remember the column size when you add it to the table again.

When you change a column width, remember the following guidelines:

- If you switch PCs or change browsers on the same PC, the column width settings are not maintained. New settings are generated on the new PC and/or browser.
- If a different user logs in to the same PC or browser, that user will have their own set of column widths.
- If you clear the cookies in your browser, the column width settings disappear.

NOTE: The cookies expire after a year of inactivity.

Field Dictionary

This section is an alphabetical listing of all fields that appear in the Contacts Information dialog box and the Contacts table in the Recordings application.

These columns appear when configured by the Quality Management administrator.

<table>
<thead>
<tr>
<th>Field</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>% Score</td>
<td>The evaluation score or calibration score given to the contact.</td>
</tr>
<tr>
<td>% Silence</td>
<td>The percentage of the call spent in the Silence state.</td>
</tr>
<tr>
<td>% Talk Over</td>
<td>The percentage of the call spent in the Talk Over state.</td>
</tr>
<tr>
<td>Field</td>
<td>Definition</td>
</tr>
<tr>
<td>----------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| <Metadata Fields> | One or more columns may appear in the table for custom metadata field names and values. The cells in these columns are editable. The maximum character length for metadata fields are as follows:   
  • Text=2056.  
  • Number=205.6  
  • Date—maximum length is based on the standard date format. |
| AVG Silence    | The average duration of the silence event in HH:MM:SS.                                                                                   |
| AVG Talk Over  | The average talkover time in HH:MM:SS.                                                                                                  |
| Agent ID       | The agent’s ID.                                                                                                                         |
| Approved By    | The name of the manager or supervisor who approved the evaluation.                                                                    |
| Calibrated     | The contact has been marked for calibration. The valid values in this field are:                                                         
  • Yes.                                                                                               
  • No.                                                                                                  
  This field only appears in the Contacts table.                                                        |
| Call Duration  | The duration of the contact (length of time between call answered and call dropped) in HH:MM:SS.                                         
  The call duration shown in the Contacts table and the Media Player might not be the same due to the difference in “event duration” (the time between events) and “recording duration” (the duration within the actual recorded file). The events are used to start or stop recording. However, there are two different sources of information that lends itself to differences even in a normal scenario. In these scenarios the call duration is supposed to be different. Scenarios where the duration would be different are as follows:  
  • Recording API can be used to Pause/Resume/Restart recording. In this case, the recording could be much less than the actual call duration. If a recording is restarted a minute into the call, the call duration would be more than the recording duration  
  • An archive or cleaned quality call (no screen) with a long ring time will show call duration as the full ring to hang up duration whereas the media player would show only the audio length.  
  This field applies only to calls.                                                                    |
| Called Number  | The number of the phone that received the call. Displays “unknown” if the called number is unlisted or blocked.                        
  This field applies only to calls.                                                                    |
### Field Definition

<table>
<thead>
<tr>
<th>Field</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Calling Number</td>
<td>The number of the phone that made the call. Displays “unknown” if the calling number is unlisted or blocked. This field applies only to calls.</td>
</tr>
<tr>
<td>Contact ID</td>
<td>The contact’s ID.</td>
</tr>
<tr>
<td>Contact Type</td>
<td>The contact type. The valid values for this field are:</td>
</tr>
<tr>
<td></td>
<td>• Call—a contact with a call recording.</td>
</tr>
<tr>
<td></td>
<td>• Non-Call—a contact without a call recording.</td>
</tr>
<tr>
<td>Date</td>
<td>The contact date.</td>
</tr>
<tr>
<td>Date Evaluated</td>
<td>The date when the contact recording was evaluated or calibrated.</td>
</tr>
<tr>
<td>Evaluation Form</td>
<td>The name of the evaluation form or calibration form used to score the contact recording.</td>
</tr>
<tr>
<td>Evaluator Name</td>
<td>The name of the evaluator or calibrator.</td>
</tr>
<tr>
<td>First Name</td>
<td>The agent’s first name.</td>
</tr>
<tr>
<td>Group Name</td>
<td>The name of the group.</td>
</tr>
<tr>
<td>HR</td>
<td>The contact has been marked as an HR contact. The valid values in this field are:</td>
</tr>
<tr>
<td></td>
<td>• Yes.</td>
</tr>
<tr>
<td></td>
<td>• No.</td>
</tr>
<tr>
<td>Last Name</td>
<td>The agent’s last name.</td>
</tr>
<tr>
<td>Line</td>
<td>The extension the agent used to answer the call. This field applies only to calls.</td>
</tr>
<tr>
<td>MAX Silence</td>
<td>The duration of the longest silence event in HH:MM:SS.</td>
</tr>
<tr>
<td>MAX Talk Over</td>
<td>The duration of the longest talkover event in HH:MM:SS.</td>
</tr>
<tr>
<td>MIN Silence</td>
<td>The duration of the shortest silence event in HH:MM:SS.</td>
</tr>
<tr>
<td>MIN Talk Over</td>
<td>The duration of the shortest talkover time in HH:MM:SS.</td>
</tr>
</tbody>
</table>
### Field Definition

<table>
<thead>
<tr>
<th>Field</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recording Type</td>
<td>The recording type associated with this device. The valid values for the <strong>Recording Type</strong> field are:</td>
</tr>
<tr>
<td></td>
<td>• Server Recording—contact was recorded using Server Recording (SPAN).</td>
</tr>
<tr>
<td></td>
<td>• Network Recording—contact was recorded using Network Recording.</td>
</tr>
<tr>
<td></td>
<td>• Multiple Registration—contact was recorded using Multiple Registration method. This method allows you to programatically add participants to an existing call.</td>
</tr>
<tr>
<td></td>
<td>• Single Step Conference—contact was recorded using Single Step Conferencing method. This method allows you to choose register up to three devices at a single, softphone-enabled extension.</td>
</tr>
<tr>
<td></td>
<td>• Unknown—the contact was either recorded prior to 8.7, a Non-Call contact type, or the recording type could not be determined.</td>
</tr>
<tr>
<td></td>
<td>• Endpoint—contact was recorded using Desktop Recording (Endpoint).</td>
</tr>
<tr>
<td></td>
<td>• MediaSense Recording—contact was recorded using MediaSense Recording.</td>
</tr>
<tr>
<td>Reason</td>
<td>The reason the contact was recorded as set in the recording rule (Archive, First, Last, Longest, Shortest, Random, Logging, Tagged, Performance, and New Employee).</td>
</tr>
<tr>
<td>Silence Events</td>
<td>The number of detected silence events.</td>
</tr>
<tr>
<td></td>
<td>In the <code>&lt;user name&gt;</code> - ID tab under Analysis, Silence Events displays the number of detected silence events and a timestamp indicating when the silent event occurred during the call (ordered by earliest to latest).</td>
</tr>
<tr>
<td>State</td>
<td>The current evaluation state of the contact. The valid values in the <strong>State</strong> field are:</td>
</tr>
<tr>
<td></td>
<td>• Scored—contacts that are claimed by an evaluator, fully scored, and, if approval is required, are approved.</td>
</tr>
<tr>
<td></td>
<td>• Unscored—contacts that are as yet unclaimed by an evaluator and unscored.</td>
</tr>
<tr>
<td></td>
<td>• In Progress—contacts that are claimed by an evaluator but which are not yet completely scored</td>
</tr>
<tr>
<td></td>
<td>• Needs Approval—contacts that are claimed by an evaluator, are fully scored, and are awaiting approval.</td>
</tr>
<tr>
<td>TOT DUR Silence</td>
<td>The total duration of silence time in HH:MM:SS.</td>
</tr>
<tr>
<td>TOT DUR Talk Over</td>
<td>The total duration of talkover time in HH:MM:SS.</td>
</tr>
</tbody>
</table>
### Configuring Fields

**TASK**
- To choose the fields that appear in the Contacts table, click Settings, click a tab, select the check box next to each field name you want to appear in the table, repeat for each tab, and then click Apply.

**STEP RESULT:** The Contacts table displays the fields that you selected.

- To change the size of a column, drag the column edge to the required width.
- To move a column to another location, click the column header, click the column body, and then drag the column to a new location.

### CSV Export

The CSV Export feature allows you to export contact metadata for all contacts in the Contacts table (call and non-call contacts) to CSV.

#### Exporting Metadata to CSV

**TASK**
- To export metadata from a contact from the Contact table, click CSV Export, complete the fields in Opening CSV dialog box, and then click OK.

**STEP RESULT:** The metadata is saved to CSV format.
Create Contact

The Create Contact dialog box (Figure 12) allows you to create a contact for evaluating non-call activities. The non-call activities can be evaluated in real time or after the fact. For example:

- Live monitor of voice or screen
- Counter work
- Customer service counter
- Chat
- Email
- Social media

You can only create a non-call contact for an agent who belongs to a team that is associated with a quality management workflow.

**NOTE:** Only managers, supervisors, and evaluators can use this feature.

**Figure 12.** Create Contact dialog box

![Create Contact dialog box](image)

Any role with evaluation privileges can evaluate this non-call contact. An evaluator can assign an evaluation form, evaluate the contact, and insert contact metadata.

If you plan to evaluate the contact, Cisco recommends that you also use an evaluation form that is specifically created for non-call activities. This allows Quality Management to accurately report non-call activities in the Dashboard and Reporting applications.
Table 26 describes the fields that appear in the Create Contact dialog box.

Table 26. Create Contact dialog box fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date</td>
<td>The date the contact occurred. The current date appears by default.</td>
</tr>
<tr>
<td>Time</td>
<td>The time the contact occurred. The current time appears by default.</td>
</tr>
<tr>
<td></td>
<td>You cannot create two contacts at the exact same time for the same person.</td>
</tr>
<tr>
<td></td>
<td>If you intend to create several contacts at the same time (within the same</td>
</tr>
<tr>
<td></td>
<td>minute) for the same person, ensure you enter a unique time for each contact</td>
</tr>
<tr>
<td>Group</td>
<td>The name of the group.</td>
</tr>
<tr>
<td>Team</td>
<td>The name of the team.</td>
</tr>
<tr>
<td>Agent</td>
<td>The name of the agent.</td>
</tr>
<tr>
<td>Evaluation Form</td>
<td>The name of the evaluation form associated with this contact.</td>
</tr>
<tr>
<td></td>
<td><strong>NOTE:</strong> You cannot change the evaluation form after you created the contact.</td>
</tr>
</tbody>
</table>

Table 27 describes the buttons appear in the Create Contact dialog box.

Table 27. Create Contact dialog box buttons

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create</td>
<td>Adds a non-call contact.</td>
</tr>
<tr>
<td>Cancel</td>
<td>Exit without saving changes.</td>
</tr>
</tbody>
</table>

Managing Non-call Contacts

**TASK**

- To add a non-call contact, click Create Contact, complete the fields, and then click save.

  **STEP RESULT:** The non-call contact appears in the Contacts table.

- To view the metadata for a non-call contact, double-click the non-call contact in the Contacts table to display the Media Player. From the Media Player, click `<user name>` - ID tab, where `<user name>` is the name of the agent.

  **STEP RESULT:** The `<user name>` - ID tab displays the metadata.
• To change metadata from the <user name> - ID tab, type your changes into the metadata fields, and then click Apply.
• To evaluate a non-call contact, double-click a contact in the Contacts table with a Contact Type of Non-Call and complete the evaluation form.

Export

The Quality Management administrator can enable the export feature to allow you to export contact recordings from the Quality Management server. Exported contact recordings can be saved in the following formats.

• Windows Media Audio (WMA)—Compressed audio files.
• Waveform Audio File Format (WAV)—Uncompressed audio files.
• Windows Media Video (WMV)—Compressed audio/video files. This option is only available if the contact recording has a screen recording associated with it.

Recordings can be exported from Contacts table and the Media Player in the Recordings application. When you select a recording for export, all available data connected with the recording—audio, video, and metadata—are included in the exported file (except WAV files, which cannot include metadata).

You can play exported recordings using Microsoft Windows Media Player 9 or later.

The time needed to export a recording depends on the length of the recording and whether it includes video. If a recording is in the process of being exported and Workforce Optimization times out due to inactivity, the export process will continue to completion.

Exporting Recordings

TASK

• To export recordings from the Contacts table, choose one of the following tasks:
  – To export a recording, click a recording in the Contacts table, and then click Export . Choose the option you want for the exported recording from the Export dialog box, and then click Export.
  – To download an exported recording, click Alerts , double-click the Export of Contact <ID> is Ready for Download message, click Here in the
Alert Notification dialog box to download the file and then follow the prompts to download the recording.
If you are using Firefox, the contacts are saved to ..\Documents and Settings\<user name>\My Documents\Downloads folder.
If you are using Internet Explorer, click Save and choose a location from the Save as dialog box.

**ADDITIONAL INFORMATION:** If you are using the Internet Explorer web browser and the Windows Media Player opens when you click Export, you need to configure Windows Media Player before you export contact recordings. See “Configuring Windows Media Player” on page 77 for more information. Firefox is configured correctly by default.

**Configuring Windows Media Player**

Use this task to configure Windows Media Player to allow you to play exported recordings.

**TASK**

1. In Windows Media Play, choose Tools > Options.

**ADDITIONAL INFORMATION:** If you do not automatically see Tools in your Windows Media Player toolbar, right-click on the tool bar and choose Tools > Options.

**STEP RESULT:** The Options dialog box appears.

2. Select the File Types tab and clear the following check boxes.

   - Windows Media Audio file (wma)
   - Windows Media Video file (wmv)
   - Windows audio file (wav)

3. Click OK to save your changes and dismiss the dialog box.

**Viewing Exported Metadata in an Exported Recording**

This task describes how use Windows Media Player to view metadata in an exported recording.

**TASK**

1. Launch Windows Media Player.

2. Locate and select the desired exported recording file.

3. Click Now Playing.
**STEP RESULT:** Window displays the name of the exported contact recording.

4. Right-click the name of the exported recording file and choose Properties, and then click the Content tab in the Properties window.

**STEP RESULT:** Windows Media Player displays the metadata in the Description field under the Content tab (Figure 13).

![Figure 13. Quality Management metadata displayed in Windows Media Player](image)

Mark for Quality

When you mark a contact for quality, Archive changes to Marked for Quality in the Reason column and the contact can be evaluated. A contact that is marked for quality has the same retention time as specified for a quality management workflow. See “Quality Management Workflow Retention” on page 57 for more information.

**Marking a Contact for Quality**

**TASK**

- To mark a contact for quality, select a recording with a Reason value of Archive from the Contacts table, and then click Mark for Quality.

**STEP RESULT:** The Reason value changes to Marked for Quality. The Open Evaluation button is enabled in the Media Player and the Evaluation window appears, and the evaluation form is enabled.
Mark for Calibration

When you mark a contact for calibration you allow the contact to be evaluated by multiple users with evaluation privileges. For more information on calibration, see “Calibration” on page 112.

Figure 14. Choose Evaluation Form dialog box appears when you mark contact for calibration

Table 28 describes the fields that appear in the Choose Evaluation Form dialog box.

Table 28. Choose Evaluation Form dialog box fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Evaluation Form</td>
<td>The name of the evaluation form associated with this contact.</td>
</tr>
<tr>
<td></td>
<td><strong>NOTE:</strong> You cannot change the evaluation form after you mark the contact for calibration.</td>
</tr>
</tbody>
</table>

Table 29 describes the buttons appear in the Choose Evaluation Form dialog box.

Table 29. Choose Evaluation Form dialog box buttons

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create</td>
<td>Adds a calibrated contact.</td>
</tr>
<tr>
<td>Cancel</td>
<td>Exit without saving changes.</td>
</tr>
</tbody>
</table>

Marking a Contact for Calibration

**TASK**

- To mark a contact for calibration, select a contact in the Contacts table, click Mark for Calibration, choose an evaluation form from the Evaluation form drop-down list, and then click Create.
Tag Call

You can change contact with a Reason code of Archive to Tagged. When you do this Quality Management applies the Tagged retention time to the contact. See “Quality Management Workflow Retention” on page 57 and “Archive Workflow Retention” on page 58 for more information on the Tagged retention time.

Changing a Contacts Retention Time

**TASK**

- To change the retention time for a contact, select a contact from the Contacts table, and then click Tag Call.

**STEP RESULT:** Quality Management updates the retention time for the contact.

Media Player

The Media Player (Figure 15) appears at the bottom of the Recording window when you double-click a contact recording in the Contacts table. If the recording is located on another machine, Media Player starts downloading the recording (Download on Demand), plays the recording when there are enough bytes downloaded for audio playback to begin, and enables the playback control buttons.

The Media Player pane allows you to play a contact recording while you are scoring the contact recording in the Evaluation Form window. Use the Playback Controls in Media Play to play back, pause, and stop a recorded contact. The Media Player also includes a recording progress bar (slider), which can be used to quickly skip forwards or backwards in the recording.

**Figure 15. Media Player**
### Playback Controls

The Media Player provides playback controls for audio and screen recordings. This topic explains how to use the playback controls in the Media Player.

*Table 30* describes the active playback controls.

#### Table 30. Playback controls

<table>
<thead>
<tr>
<th>Icon</th>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>NA</td>
<td>Associated Contacts</td>
<td>Display a table of all contacts associated with the recording. See “Associated Contacts” on page 86 for more information on associated contacts.</td>
</tr>
<tr>
<td>🎧</td>
<td>Previous</td>
<td>Return to the previous segment in the recording. If there is only one segment associated with the recording, and you click this button, The Media Player starts playing at the beginning of the segment. If there is more than one segment and you click this button when you finish the last segment, the Media Player starts playing the first segment of the recording.</td>
</tr>
<tr>
<td>🎧</td>
<td>Next</td>
<td>Go to the next segment in the recording. If there is only one segment associated with the recording, and you click this button, The Media Player starts playing at the beginning of the segment. If there is more than one segment and you click this button when you finish the first segment, the Media Player starts playing the last segment of the recording.</td>
</tr>
</tbody>
</table>
| 🎧   | Play               | Start the recording playback (alternates with Pause). When you click Play, the video portion of the recording starts streaming from the Screen Services server.  
**NOTE:** Video is available only with the AQM license. |
| 🎧   | Pause              | Pause the recording playback (alternates with Play).                                                                                          |
| NA   | Position           | Identifies the current playback position of this recording in HH:MM:SS format.                                                                  |
| NA   | Progress Bar       | Displays the completion percentage for the recording. Drag the slider on the progress bar to move forward or backward in the recording.          |
### Recordings Media Player

<table>
<thead>
<tr>
<th>Icon</th>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Zoom In" /></td>
<td>Zoom In</td>
<td>When clicked, increases the size of the energy bar in the Media Player.</td>
</tr>
<tr>
<td><img src="image" alt="Zoom Out" /></td>
<td>Zoom Out</td>
<td>When clicked, decreases the size of the energy bar in the Media Player.</td>
</tr>
<tr>
<td><img src="image" alt="Resize" /></td>
<td>Resize</td>
<td>Restores the energy bar to its original size.</td>
</tr>
</tbody>
</table>
| ![Export Recording](image) | Export Recording  | Export a contact recording. Choose the format you want to export the contact recording to, and then click OK. You can choose from the following:  
  - WAV  
  - WMA  
  - WMV  
You can also mark contact recordings designated as Archive in the Reason column of the Recordings application for quality scoring. |
| ![Layout Screen and Evaluation Frames](image) | Layout Screen and Evaluation Frames | Displays the Screen window and Evaluation window in their original size and position. |
| ![Mark for Quality](image) | Mark for Quality   | Marks the selected recording for quality evaluation and displays the Evaluation Form window. This button is enabled when the selected recording has a Reason value of Archive and the recording has been uploaded. |
| ![NA Screen 1 to 1](image) | Screen 1 to 1      | When selected, the Screen window resizes the recording to its actual size. When cleared, the entire screen is visible within the Screen window. |
| ![Close](image)     | Close              | Exit the Media Player                                                       |
Table 31 describes the playback markers that might appear on the Media Player.

Table 31. Playback markers

<table>
<thead>
<tr>
<th>Icon</th>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="Image" alt="Comment" /> <img src="Image" alt="1" /></td>
<td>Comments</td>
<td>Identifies the number of comments associated with the contact recording at the 0 minutes and 0 seconds position. When clicked, the Evaluation Comments dialog box display all comments associated with the contact recording. This icon only appears when a comment exists at the beginning of the contact recording. See “Evaluation Comments” on page 111 for more information on evaluation comments.</td>
</tr>
<tr>
<td><img src="Image" alt="Comment" /> <img src="Image" alt="1" /></td>
<td>Comments</td>
<td>Identifies a comment in the energy bar that is associated with the contact recording at the specified position in minutes and seconds. When clicked, the Evaluation Comments dialog box display all comments associated with the contact recording. This icon only appears when a comment exists at a specified location in the contact recording. See “Evaluation Comments” on page 111 for more information on evaluation comments.</td>
</tr>
<tr>
<td><img src="Image" alt="Silence" /></td>
<td>Silence</td>
<td>Identifies a Silence event that is associated with the contact recording.</td>
</tr>
<tr>
<td><img src="Image" alt="Talkover" /></td>
<td>Talkover</td>
<td>Identifies a Talkover event that is associated with the contact recording. The Talkover icon appears at the beginning of a Talkover event.</td>
</tr>
</tbody>
</table>

Detecting Silence and Talk Over Events

Quality Management can analyze recorded calls for silence and talk over events. When found, information about the event is stored with the call recording as metadata and a marker is placed in the energy bar when you play back the recording. You can use this metadata to search call recordings for silence or talk over events.

A recorded call contains two streams of audio that represent the two sides of a call. The Media Player displays the inbound stream in blue and the outbound stream in red in the Energy bar (Figure 16).

Figure 16. Energy bar
In a normal conversation, you will see the energy alternate between the outbound call and the inbound call. A talk over event occurs when the inbound call and the outbound call spike simultaneously. The Media Player displays a Talkover icon in the Energy bar where a Talkover event occurs. When the both parties are silent (silence event), the line in the energy bar is flat. The Media Player displays a Silence icon in the Energy bar where a Silence event occurs.

**NOTE:** Pausing recording or placing a caller on hold might generate a silence event.

Normally, each stream contains the voice of a single party; either the agent or the customer. Occasionally, a stream includes multiple voices. For example, a conference call contains the agent stream where you hear the agent’s voice, and a second stream where you hear the voices of all other parties in the conference call.

Call streams can include non-speech noises (for example, wind, typing, background conversions, or barking dogs). Quality Management processes these noises in addition to speech when searching for silence and talk over events in a call.

Quality Management uses a Voice Activity Detection (VAD) module to determine whether the analyzed audio is classified as silence or speech. VAD analyzes discrete blocks of audio data and derives an average amplitude or volume for that block. The blocks are called frames. A frame size is measured in milliseconds of audio. VAD uses the same frame size when processing all audio in a file.

VAD reads a frame and determines if the frame indicates silence or speech based on the VAD decision threshold. If the average value for the frame falls below the VAD decision threshold, the frame is marked as mutual silence. VAD processes each frame of each stream and then compares the frames from stream 1 and stream 2. VAD assigns an audio type to each pair of frames. The audio types are as follows.

- Mutual Silence (MS)—Both frames are silent.
- Normal (N)—One frame contains speech while the other frame is silent. This indicates normal conversation.
- Talk Over (TO)—Both frames contain speech.

VAD uses a heuristic algorithm. The algorithm is adaptive and can dynamically change based on the quality of the audio data. In a noisy environment, the VAD decision threshold will rise in order to indicate only the loudest noises as speech. Otherwise, the entire phone conversation would be marked as constant speech, even if the noise is caused by a car engine or other non-speech background noise.

In a quiet environment where the person is not speaking loudly, the VAD decision threshold will fall so it can correctly identify speech at a low volume. This allows the entire call to be marked as normal speech instead of silence.
This adaptability allows VAD to be more accurate when determining speech or silence in recorded call, but it is not always 100% accurate. During the few seconds required for VAD to adapt to changes in background noise levels, audio might be marked as normal speech when no one was speaking or marked as mutual silence when someone was speaking. Because speech and silence are determined by average sound amplitude, there will always be instances where normal speech or mutual silence is incorrectly assigned to a frame of audio. Essentially, VAD does not know the difference between human speech and the sound of a car engine. VAD is designed to analyze phone calls where you expect to hear two or more people talking to each other.

You can configure the threshold values for talk over and silence events from the Call Events Administration window in Monitoring and Recording Administrator. Quality Management saves information about events where the minimum duration is equal to or greater than the threshold value. Information about the event includes the type (silence or talk over), the duration of the event (in milliseconds), and the start of the event as an offset from the beginning of the audio.

It is possible that Quality Management might not identify a talk over or silence event. For example, Quality Management might miss a talk over event even when two people are clearly talking to each other on a call at the same time. If one of the speakers during the talk over event paused to think or take a breath for at least a quarter of a second, VAD could mark the frame as an instance of silence. From the speaker’s perspective, they were constantly talking so VAD should correctly indicate a talk over event. From VAD’s perspective, there was a period of silence during the conversation so it cannot be considered a talk over event.

During mutual silence, a sudden noise like typing on the keyboard or a cough might be loud enough to cause a frame to be identified as talking even though no one is speaking. These momentary transitions in state will result in instances where expected VAD events are not indicated and stored with the call recording. This is not an error with the software.

**User Name - ID**

The <user name> - ID tab displays the contact information (metadata) for the recording and allows you to edit the metadata associated with the recording. If the metadata is encrypted the metadata field is disabled.

The <username> - ID tab displays all fields (both selected and cleared) listed in the Configure Fields window.
See “Field Dictionary” on page 69 for a description of the fields in the <user name> - ID tab.

**About Metadata**

Call metadata is inserted into WMV and WMA files. Call metadata is not available in WAV files, since the WAV file format does not support tags.

The supported tags are displayed in the Windows Media Player Properties window, in the Description field on the Content tab. Windows Media Player only displays system metadata and metadata that is enabled for export in Quality Management Administrator. System metadata includes Identification (ID), Automatic Number Identification (ANI), Dialed Number Identification Service (DNIS), ACD Call ID (acdCallId), Last Name (lastName), First Name (firstName), Agent ID (agentId), username, and Start Time (startTime).

**Custom Metadata**

Custom metadata enables better and faster search capabilities. Custom metadata allows you to:

- Pass any data collected from the caller (for example, the account number or call type) to the call recording metadata
- Saves management time searching call archives
- Evaluate calls that are important to the business

**Modifying Contact Information**

Use this task to modify contact information (metadata) for a contact recording.

**Task**

- From the Media Player, click <user name> - ID tab, click Custom Metadata, type your changes into the metadata fields, and then click Apply.

  **Step Result:** Workforce Optimization saves your changes and displays them in the custom metadata fields.

**Associated Contacts**

The Associated Contacts tab (Figure 18) displays a table of all contacts associated with the recording. You can only play segments of a call that are within your scope. When
you click a call segment that is within your scope, Associated Contacts highlights that call segment.

**Figure 18. Associated Contacts tab**

<table>
<thead>
<tr>
<th>First Name</th>
<th>Last Name</th>
<th>Agent ID</th>
<th>Date</th>
<th>Time</th>
<th>Time Zone</th>
<th>Calling Number</th>
<th>Called Number</th>
<th>Call Duration</th>
<th>ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mark</td>
<td>Banks</td>
<td>12345</td>
<td>08/23/1999</td>
<td>1:00</td>
<td>PM</td>
<td>123-456-7890</td>
<td>234-567-8901</td>
<td>30</td>
<td>0001</td>
</tr>
</tbody>
</table>

See “Field Dictionary” on page 69 for a description of the fields in the Associated Contacts tab.

**Associated Contacts and Cisco MediaSense Recording**

If your site is using MediaSense Recording, note that MediaSense Recording behaves different from other recording types. When a call is placed on hold, MediaSense Recording stops and the raw files are closed. When the call is retrieved from hold, a new set of raw files is created. This means a single call from your perspective can result in multiple call sessions or segments. Associated Contacts displays each session as a distinct call. Multiple sessions that are logically related (contain the same session ID) will be linked as Associated Calls. When you play back a MediaSense-recorded call, you must play each of the associated calls to hear the entire call from your perspective.

**Normal Call**

A normal call is where a customer speaks to an agent (Figure 19).

**Figure 19. Normal Call**

A normal call is never placed on hold, transferred, or conferenced and the session ID remains the same. This applies to all recording types, including Cisco MediaSense.

**Call with Hold Time**

A call with hold time (Figure 20) is where an agent places customer on hold during a call then later resumes the call with the customer.

**Figure 20. Call with hold time**
Cisco MediaSense treats each part of this call as a separate from the hold time and creates two separate sessions. In this scenario, two contacts and 2 SPX files are created. This is different from other recording types where the Quality Management Call Recording and Quality Management capture methods result in a single contact and single SPX file that represents the hold time as silence in the middle of the recording. Cisco MediaSense Recordings do not include the silence that represents hold time.

**Bracketed Call**

A bracketed call (Figure 21) is where an agent places a customer on hold during a call to consult with another agent. After finishing the consultation call, the agent resumes talking with the customer.

Figure 21. Bracketed call

In this scenario, Cisco MediaSense creates three contact files and three SPX files (one session ID). Again, this is different from other recording types where the Quality Management Call Recording and Quality Management capture methods result in a single contact and single SPX file that contain the audio from the consultation (or bracketed) call in between the audio from the customer and agent. Cisco MediaSense Recordings do not include the silence that represents hold time.

Notice that for each MediaSense call flow there is a session ID that corresponds with a single contact and SPX file. Also notice that the “xRecCi” remains constant across holds. This is important when determining associated contacts. See “Associated Contacts and Cisco MediaSense Recording” on page 87

See “Cisco MediaSense Call Flow Examples” on page 90 for more call flow examples.
Screen Recording

Quality Management supports screen recording with MediaSense Recording. Screen recording behaves similar to audio recording such that a single call may have multiple screen recording files that correspond to a session ID. If the Quality Management administrator enabled Extended Screen Recording (for quality management workflows), the screen recording for each session will be longer than the audio recording (Figure 22).

**Figure 22.** Call with hold/resume with 10 seconds of extended screen recording

<table>
<thead>
<tr>
<th>sessionid = 1a</th>
<th>HOLD</th>
<th>sessionid = 1b</th>
</tr>
</thead>
<tbody>
<tr>
<td>xRefID = 1</td>
<td></td>
<td>xRefID = 1</td>
</tr>
</tbody>
</table>

Audio recording file #1

Screen recording file #1 with 10 seconds of extended screen recording

Audio recording file #2

Screen recording file #2 with 10 seconds of extended screen recording

**NOTE:** If the MediaSense Subscription service fails, screen recording stops and the screen recording is deleted. The audio portion of the call continues recording.
**Cisco MediaSense Call Flow Examples**

Figure 23 displays call flow examples for Cisco MediaSense.

**Figure 23. Call flow examples**

Associated Contacts and Network Recording, Server Recording, and Desktop Recording

**Bracketed and Interleaved Call Recordings**

When an agent or knowledge worker handles two calls simultaneously by putting one on hold and switching between them, the result can be either one or two recordings, depending on if the calls are bracketed or interleaved.
In Figure 24, Recording 1 is created for Call 1. It also contains the entire audio from Call 2. Call 2 is bracketed within Call 1.

**Figure 24. Bracketed call**

In Figure 25, Recording 1 is created for Call 1. It will also contain the portion of audio from Call 2 during the time when both calls are active. Recording 2 is created for Call 2 when Call 1 ends. Recording 2 only contains the portion of audio from Call 2 from the time Call 1 ends. Call 1 is interleaved with Call 2. The duration reported for Call 2 is from the time when Call 2 starts until the time that Call 2 ends. However, the actual duration of Recording 2 will be from the time Call 1 ends until the time Call 2 ends.

**Figure 25. Interleaved calls**

You can play all segments of a call, from when it enters the contact center to when it terminates, using the Associated Contacts tab on the Media Player pane. Clicking Associated Contacts enables you to see every call segment associated with a call. See “Playing All Segments of a Call” on page 91 for more information on associated contacts.

**Playing All Segments of a Call**

You can display all segments of a call from when it enters the contact center to when it is terminated, using the Associated Contacts feature.

When you open the Media Player and click the Associated Contacts tab, you can see every call segment associated with that contact recording.

The following example describes a segmented call.

1. Customer dials in and is routed to Agent A.
2. Agent A transfers customer to Agent B.
3. Agent B conferences call with Supervisor A.

The list of associated contacts is presented in chronological order in the Associated Contacts tab. You might not be able to play back some of the contacts listed in the Associated Contacts tab. This is due to various reasons: they are for agents not on your
team; they were deleted; they did not meet workflow criteria; or they were under the minimum length. These segments are listed in red. You cannot listen to or export those segments of the call, but you can view them so that you can follow how the call moved through the contact center. When you use the call control buttons to move through the list of contacts, it automatically skips over contacts you cannot listen to (those displayed in red).

By default, Associated Contacts highlights the call segment you chose from the Contacts table. When you choose another segment, that segment is highlighted.

Figure 26 shows an example of the Associated Contacts dialog box.

Figure 26. Associated Contacts tab

You can also choose to export a segment of a call.

You cannot export a call segment when:

- The call segment is not in your scope. In this case, Quality Management highlights the row in red.
- The call segment is 0 Kb or an invalid file. In this case, Quality Management disables the row and displays the following message:

  This contact has an invalid audio file and cannot be played or exported.
- The call segment is not uploaded yet. In this case, Quality Management disables the row and displays the following message:

  This contact has not uploaded and cannot be exported.

  Wait for the call segment to download before exporting the call segment.

If Quality Management determines the call segment cannot be exported, it will disable the Export Recording feature.
**Screen**

The Media Player can play both voice and screen recordings. If this is a quality management recording, and a screen recording is associated with the audio recording, the screen appears in a separate window (Figure 27). You can resize the Screen window to your requirements. If your machine is configured for dual monitor display you can display the Screen window on one monitor and Workforce Optimization on another monitor.

*Figure 27. Screen window*

If a recording is audio only, the Screen window does not appear.

**Screen Recording Playback**

You can control the size of the screen recording when you view it. By default, the screen recording automatically fits in the Screen window and maintains the aspect ratio (4:3 or 16:9) used when it was recorded. If you adjust the size of the Screen window, the recording resizes accordingly.

To view the screen recording using the same resolution used when recorded, select the Screen 1 to 1 check box in the lower right corner of the Media Player. The Screen 1 to 1 check box resizes the screen recording to its actual size. Use the scroll bars to view the entire screen recording. Clearing the check box returns the screen recording to its default size so that the entire screen recording is visible within the Screen window.
You can also use the Maximize button on the Screen window to view the screen recording at its actual size. If you clear the Screen 1 to 1 check box, you must also click the Minimize button to return the Screen window to the default size.

**Single- and Multiple-Monitor Recordings**

The Screen window can display recordings of both single- and multiple-monitor setups.

When configuring display properties on a machine for recordings, additional host monitors must be located below or to the right of the primary display monitor in the Display Properties window. Any monitor located above and/or to the left of the primary display monitor will be cut off (this is a Windows restriction). The Screen window will display the screens in the recording according to how you arranged them in the Display Properties window.

Figure 28 displays the Display Properties window.

**Figure 28. Display Properties window**
Figure 29 shows the Screen window playing a recording of a multiple-monitor setup.

**Figure 29.** Screen window displaying multiple monitors

![Screen window displaying multiple monitors](image)

**NOTE:** Multiple-monitor recordings are twice the size of recordings for single monitors.

**Download on Demand**

The Download on Demand features allows you to download the recording for play back by double-clicking a contact with a Contact Type of Call in the Contacts table. A Message (Figure 30) dialog box appears when the recording is being downloaded. When the download completed the Message dialog box goes away.

**Figure 30.** Message dialog box

![Message dialog box](image)

If a recording is already in the process of downloading when you try to play it, you will see the following error message:

```
Download on Demand for contact <contact ID>. Try again.
```

Try playing the recording after it is uploaded or after the End of Day.
Playing Recordings

**TASK**

- To play a recording, choose one of the following tasks:
  - To play a recording, double-click a contact with the Contact Type of Call in the Contacts table.

  The Media Player appears and plays the recording when there are enough bytes downloaded for audio and screen playback to begin.

**NOTE:** The recording is downloaded on demand. See “Download on Demand” on page 95 for more information.

  - To start a recording, click Play in the Media Player.
  - To view a screen recording in its original size, select the Screen 1 to 1 check box.
  - To view a screen recording in its default size, clear the Screen 1 to 1 check box.
  - To skip forwards or backwards in a recording, move the Position progress bar to the desired location.
  - To return to the previous segment in the recording, click Previous.
  - To go to the next segment in the recording, click Next.
  - To pause a recording, click Pause.
  - To view evaluation comments associated with the beginning of a recording, click Comments.
  - To view an evaluation comment associated with a specified location in the recording, click Evaluation Comments.
  - To edit metadata associated with a recording, click the <user name> - ID tab, type the information in the metadata fields, and then click Save.
  - To listen to an associated contact, click Associated Contacts, and then double-click the associated contact you want to listen to.

**NOTE:** You can only play associated contacts that are within your scope. The cursor changes to a Hand (Hand) and the contact segment row is highlighted when the associated contact is within your scope.

  - To increase the size of the energy bar, click Zoom In.
  - To decrease the size of the energy bar, click Zoom Out.
  - To view the energy bar at its original size, choose Resize.
  - To restore the original size and position of the Screen window and Evaluation window, click Layout Screen and Evaluation Frames.
  - To mark a selected recording for quality evaluation and display the Evaluation Form window, click Mark for Quality.
- To evaluate a recording, click Play to start the recording, and then complete the fields in the Evaluation window. If the Evaluation window does not appear, click Mark for Quality.
- To export a recording from the Media Player, click Export, choose the option you want for the exported recording from the Export dialog box, and then click Export.
- To exit the Media Player, click Close.
About Evaluations

Contact recordings can be evaluated and scored by playing back contact audio and screen recordings made during a call. The performance statistics available in the Dashboard application and Reporting application are based on these evaluation scores.

Your role and scope determines your ability to play and evaluate a contact recording in the Recordings application.

Evaluation Form

The Evaluation Form window (Figure 31) allows you to evaluate a contact recording. Only users configured to evaluate a contact recording can complete the form; all other roles can only review it.

If you are not allowed to evaluate a contact, the following message appears in the Evaluation window:

You are not allowed to evaluate this contact.

Figure 31. Evaluation Form window
The Evaluation Form window is divided into the following sections.

- **Evaluation toolbar**—Enables you to tag the evaluation as an HR or Training contact, add or read a form or section comment, mark the evaluation as complete or as approved, and to save any changes made to the evaluation. It also enables you to choose an evaluation form to go with the contact recording, if enabled by the Quality Management Administrator.

- **Evaluation form**—Displays the form used to evaluate the contact. Only users configured to evaluate users can complete the form; all other roles can only review it.

**NOTE:** Supervisors and/or managers can also complete evaluations if enabled by the Quality Management Administrator.

Table 32 describes the fields in the Evaluation Form window.

**Table 32.** Evaluation Form fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Evaluation toolbar</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Evaluation Form

Choose the evaluation form you want to use when evaluating the contact. The list of evaluation forms that appear in this drop-down list is determined by your Quality Management Administrator.

If only one evaluation form is available for this contact recording, only the name of the assigned evaluation form appears in the Evaluation Form field.

If more than one evaluation form is available, you can switch to a different form at any time, even if the contact recording was partially scored (In Progress). If the contact is partially scored and you switch evaluation forms, the following happens:

- The score is reset to zero (0).
- Any form or section comments are deleted.

**NOTE:** After saving and evaluation, only an evaluator who originally evaluated the contact can change the evaluation form.

- The HR and Training check boxes are cleared.
- When a user changes an evaluation form and clicks Save, the evaluation belongs to the user who changed the form, and the evaluation form remains in the In Progress state.

**NOTE:** You cannot change an evaluation form when the evaluation is in the Needs Approval or Scored state. To change the evaluation form when the evaluation is in the Needs Approval or Scored state, the approver must reject the evaluation. When the evaluation is rejected it returns to the In Progress state, and you can change the evaluation form and re-do the evaluation.

<table>
<thead>
<tr>
<th>Field</th>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Evaluation Form</td>
<td>NA</td>
<td>Choose the evaluation form you want to use when evaluating the contact. The list of evaluation forms that appear in this drop-down list is determined by your Quality Management Administrator. If only one evaluation form is available for this contact recording, only the name of the assigned evaluation form appears in the Evaluation Form field. If more than one evaluation form is available, you can switch to a different form at any time, even if the contact recording was partially scored (In Progress). If the contact is partially scored and you switch evaluation forms, the following happens: The score is reset to zero (0). Any form or section comments are deleted. <strong>NOTE:</strong> After saving and evaluation, only an evaluator who originally evaluated the contact can change the evaluation form. The HR and Training check boxes are cleared. When a user changes an evaluation form and clicks Save, the evaluation belongs to the user who changed the form, and the evaluation form remains in the In Progress state. <strong>NOTE:</strong> You cannot change an evaluation form when the evaluation is in the Needs Approval or Scored state. To change the evaluation form when the evaluation is in the Needs Approval or Scored state, the approver must reject the evaluation. When the evaluation is rejected it returns to the In Progress state, and you can change the evaluation form and re-do the evaluation.</td>
</tr>
</tbody>
</table>
Recordings
About Evaluations

Evaluation Displays the evaluation as a quality evaluation. Evaluation and Calibration are toggle buttons. When these buttons appear, you can decide to save the evaluation as calibration only or quality evaluation. The following rules govern the toggle settings and when the toggle is enabled:

• If you have not started a quality evaluation (and it is not in an in progress or approval state), and you have not started a calibrated evaluation, the toggle is enabled and the default is Calibration.

• If you have not started a quality evaluation and you start a calibrated evaluation, the toggle is set to Calibration.

• If another evaluator started scoring the quality evaluation, the toggle is set to Calibration and Evaluation is disabled. You can view your calibrations. If no calibration exists, you can create a calibrated evaluation.

• If you created a quality evaluation, the toggle is set to Evaluation. You can then edit your existing evaluation.

Calibration Displays the evaluation as a calibrated evaluation.

Add Comments Add a comment about the contact recording.

Read Comments Displays a window containing all comments entered for the contact recording. This button is only enabled if there are form comments.
Choose one of the following actions:

- **Mark for HR**—Marks a contact for HR and claims the evaluation for you.
- **Mark for Training**—Marks a contact for training and claims the evaluation for you.

**NOTE:** Mark for HR and Mark for Training do not appear in the list when a contact is marked for calibration.

- **Reject**—Reject an evaluation in the Needs Approval state. When selected, the value in the State field changes to In Progress.

The following actions appear if you are an evaluator. Or you are a manager or supervisor who has been designated by the Quality Management administrator to evaluate a specific evaluation form.

- **Save**—Save the evaluation.
- **Complete**—Mark the evaluation as scored. This option appears when you complete all questions in the evaluation form. When selected, the State field changes to Needs Approval and an alert is sent to the manager or supervisor responsible for approving the evaluation. If no approval is required, the State field changes to Scored.

The following actions only appear if you are an evaluator, supervisor, or manager configured to approve this evaluation and the contact recording is in the Needs Approval state.

- **Approve**—Approve an evaluation in the Needs Approval state. When selected, the value in the State field changes to Scored.
- **Print**—Prints the evaluation form. This option only appears when an evaluation is in the Scored state. When you choose this option, the report appears in PDF format in a new tab or a web browser depending on your web browser preferences.

### Evaluation form

<table>
<thead>
<tr>
<th>Field</th>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Choose Action</strong></td>
<td>NA</td>
<td><strong>Total NA</strong> Total number of points received for the form and by section.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Possible NA</strong> Total possible number of points for the form and by section.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Percent NA</strong> The percentage score for the form and by section.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Information</strong> Displays a tooltip that provides information related to the evaluation question.</td>
</tr>
</tbody>
</table>
Understanding Evaluation Scoring

As the evaluator scores a section on an evaluation form, a rolling total and percent is displayed on that section. For this example, assume the completed form has two sections called Greet and Assess.

The Greet section has a possible total of 15 points. As the evaluator scores each question in the section, the total section score earned is displayed. The agent has earned 8 out of the possible 15 points, or 60%.

Likewise, the Assess section has a possible total of 10 points and the agent earned 8 points, or 80%.

The score (72%) for entire evaluation form appears at the top of the form. Quality Management calculates these numbers as you complete each section.
Figure 32 shows a completed form with two sections.

Understanding How Sections are Weighted

For this example, assume the completed form has two sections called Greet and Assess. The Quality Management administrator who set up the evaluation form determined that the score of the Greet section would contribute 40% towards the overall score and the score of the Assess section would contribute 60%. A section weight is indicated on each section tab. The sum of all of the section weights must be 100.
These weights are applied after all sections are scored to arrive at the overall score (as a percentage) for the evaluation.

The overall score is calculated as follows:

- Section score (as a percentage) × section weight = weighted section score
- Sum of all weighted section scores = total score (as a percentage)

In this example:

- Greeting section = 60% x 0.4 = 24%
- Assess section = 80% x 0.6 = 48%
- 24% + 48% = 72% overall score

Understanding How Questions are Weighted

The maximum score for a section is 100%, no matter how many questions it contains.

For example, in a section with 3 questions:

- Question 1 has a weight of 50%
- Questions 2 and 3 each have a weight of 25%

This means question 1 is worth a maximum of 50 points and questions 2 and 3 are each worth a maximum of 25 points.

If a 0–5 question has a weight of 50%, then points are given for each possible score as follows:

- 1=10 points
- 2=20 points
- 3=30 points
- 4=40 points
- 5=50 points

If a 0–5 question has a weight of 25%, then points are given for each possible score as follows:

- 1=5 points
- 2=10 points
- 3=15 points
- 4=20 points
- 5=25 points
If a Yes/No question has a weight of 50%, then points are given for each possible score as follows:

- No = 0
- Yes = 50

If a Yes/No question has a weight of 25%, then points are given for each possible score as follows:

- No = 0
- Yes = 25

Table 33 through Table 35 show the results for several sections in a sample evaluation form.

**Table 33.** Scored example for a 3 question section

<table>
<thead>
<tr>
<th>Question</th>
<th>Weight</th>
<th>Type</th>
<th>Score</th>
<th>Weighted Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>50</td>
<td>0–5</td>
<td>4</td>
<td>40</td>
</tr>
<tr>
<td>2</td>
<td>25</td>
<td>0–5</td>
<td>3</td>
<td>15</td>
</tr>
<tr>
<td>3</td>
<td>25</td>
<td>Yes/No</td>
<td>Yes</td>
<td>25</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Section Score 80%</td>
</tr>
</tbody>
</table>

**Table 34.** Scored example for a 4 question section

<table>
<thead>
<tr>
<th>Question</th>
<th>Weight</th>
<th>Type</th>
<th>Score</th>
<th>Weighted Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>60</td>
<td>0–5</td>
<td>3</td>
<td>36</td>
</tr>
<tr>
<td>2</td>
<td>15</td>
<td>0–5</td>
<td>4</td>
<td>12</td>
</tr>
<tr>
<td>3</td>
<td>20</td>
<td>Yes/No</td>
<td>No</td>
<td>0</td>
</tr>
<tr>
<td>4</td>
<td>5</td>
<td>Yes/No</td>
<td>Yes</td>
<td>5</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Section Score 53%</td>
</tr>
</tbody>
</table>
Table 35. Scored example with Not Applicable (NA) as an answer to one of the questions

<table>
<thead>
<tr>
<th>Question</th>
<th>Weight</th>
<th>Type</th>
<th>Score</th>
<th>Weighted Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>60</td>
<td>0–5</td>
<td>NA</td>
<td>-</td>
</tr>
<tr>
<td>2</td>
<td>15</td>
<td>0–5</td>
<td>4</td>
<td>12</td>
</tr>
<tr>
<td>3</td>
<td>20</td>
<td>Yes/No</td>
<td>No</td>
<td>0</td>
</tr>
<tr>
<td>4</td>
<td>5</td>
<td>Yes/No</td>
<td>Yes</td>
<td>5</td>
</tr>
</tbody>
</table>

Section Score 42.5%

**NOTE:** An answer of NA removes that question from the total possible. So for this example, Quality Management bases the score of 43% on a score of 17 out of a total of 40.

The formula used for weighting questions considers the underlying scoring system used today. The following example shows this scoring system.

<table>
<thead>
<tr>
<th>Label</th>
<th>No</th>
<th>Yes</th>
<th>NA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Score</td>
<td>0</td>
<td>1</td>
<td>-</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Label</th>
<th>0</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>NA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Score</td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>-</td>
</tr>
</tbody>
</table>

In the current scoring system, the maximum score per question for a Yes/No question is 1 point. For a 0–5 question the maximum score per question is 5. NA is ignored.

So the formula used to calculate the weighted score for a single question is:

(Actual score / Maximum score) * Weight = Weighted score
Here are some example calculations for weighted question scores:

<table>
<thead>
<tr>
<th>Question type</th>
<th>Maximum score</th>
<th>Actual score</th>
<th>Weight</th>
<th>Formula</th>
<th>Weighted score</th>
</tr>
</thead>
<tbody>
<tr>
<td>0–5</td>
<td>5</td>
<td>3</td>
<td>40%</td>
<td>(3/5) * 0.40</td>
<td>24%</td>
</tr>
<tr>
<td>0–5</td>
<td>5</td>
<td>2</td>
<td>17%</td>
<td>(2/5) * 0.17</td>
<td>6.8%</td>
</tr>
<tr>
<td>Yes/No</td>
<td>1</td>
<td>No</td>
<td>30%</td>
<td>(0/1) * 0.30</td>
<td>0%</td>
</tr>
<tr>
<td>Yes/No</td>
<td>1</td>
<td>Yes</td>
<td>45%</td>
<td>(1/1) * 0.45</td>
<td>45%</td>
</tr>
</tbody>
</table>

Understanding How Evaluations are Scored

When you save complete an evaluation form, Quality Management calculates the Total points, Possible points, and the Percentage (or score). These formulas are based on the number of sections in an evaluation form.

The total number of points for a scored evaluation form is the calculated using the following formula.

\[
\text{Form Total Points} = \sum \left( \frac{\text{Section } n \text{ weight}}{100} \times \text{Section } n \text{ Total Points} \right)
\]

The following example shows how the total number of points for a scored evaluation form with four sections is calculated.

\[
\text{Form Total Points} = (25 \times 75) + (25 \times 33.33) + (25 \times 56) + (25 \times 75) = 18.75 + 8.3325 + 14 + 18.75 = 59.83
\]

The total possible number of points for a scored evaluation form is the sum of each section possible points times the total number of points.

\[
\text{Form Possible Points} = \sum \left( \frac{\text{Section } n \text{ weight}}{100} \times \text{Section } n \text{ Possible Points} \right)
\]
The following example shows how the total possible number of points for a scored evaluation form with four sections is calculated.

\[
\begin{align*}
+ \left( \frac{25}{100} \right) \times 100 & = 25 \\
+ \left( \frac{25}{100} \right) \times 66.66 & = 16.6649 \\
+ \left( \frac{25}{100} \right) \times 80 & = 20 \\
+ \left( \frac{25}{100} \right) \times 100 & = 25 \\
\text{Form Possible Points} & = 86.6649
\end{align*}
\]

The percentage for a scored evaluation form is calculated using the following formula:

\[
\text{Form Percentage} = \left( \frac{\text{Form Total Points}}{\text{Form Possible Points}} \right) \times 100
\]

The following example shows how the percentage for a scored evaluation form with four sections is calculated.

\[
\left( \frac{59.83}{86.6649} \right) \times 100 = 69.04\%
\]

**Points to Remember**

When completing the evaluation form, remember the following points.

- You can only select one score per question.
- If you leave the evaluation form before you complete the evaluation, choose Save from the Choose Action drop-down list to mark the evaluation form as In Progress.
- When the evaluation is saved but not completed, only the original evaluator can change the evaluation form. If for some reason Evaluator A is no longer available and Evaluator B must take over Evaluator A’s evaluations, Evaluator B must log in as Evaluator A.
- Once the evaluation is saved and completed, only the original evaluator can modify the evaluation scoring. If for some reason Evaluator A is no longer available and Evaluator B must take over Evaluator A’s evaluations, Evaluator B must log in as Evaluator A.
- Only a Monitoring and Recording administrator can create a form. A form can use either a Yes/No or scale of 0–5 method of scoring. There can be up to 10 sections in an evaluation form, and each evaluation form can include up to 100 questions.
- If you choose NA for each score in a section, the section score appears as follows:
  
  Total: 0   Possible: 0   Percentage: 0%

- If you choose NA for each score in the entire evaluation form, the evaluation score appears as follows:
  
  Total: 0   Possible: 0   Percentage: 0%
• When a section includes a KPI question and you answer the KPI question with zero (0) or No, and then click Complete, the entire evaluation fails.

The section score containing a KPI failure appears as follows:

Total: 0   Possible: <variable 1>   Percentage: 0%

Where <variable 1> changes based on how you answer the questions in the section.

The evaluation score containing a KPI failure appears as follows:

Total: 0   Possible: <variable 2>   Percentage: 0%

Where <variable 2> changes based on how you answer the questions in the entire evaluation form.

See “Key Performance Indicator Questions” on page 110 for more information on KPI questions.

• When you leave a KPI question in a section unanswered, choose NA for the remaining questions, and then click Complete, Quality Management marks the KPI question as NA. There is no KPI failure in this instance.

See “Key Performance Indicator Questions” on page 110 for more information on KPI questions.

• When you mark a question as NA, the weight for that question is not used in the section scores and the evaluation score calculations.

Key Performance Indicator Questions

The Quality Management administrator who creates the evaluation form might designate some questions as “key performance indicator” (KPI) questions. All questions designated as a KPI questions are labeled. A poor score on a KPI question (“no” on a Yes/No question or “zero” on a 0–5 question) results in a zero score for the entire evaluation, no matter how the agent scores on other questions.

You must continue to score the entire evaluation when a KPI question triggers a final zero score. The scores you assign to all questions and sections are retained and are available for review.
Evaluation Guidelines

When locating and playing back a contact recording for evaluation, consider the following information.

- An agent who is currently not on a team can search and play back their own scored recordings (and all training recordings). The cell in the Team column associated with the selected contact recording appears blank.

  NOTE: An agent must be associated with a team so Quality Management can record the agent's contacts.

- An evaluator can search, play back, and score contacts for an agent who is not currently in a team or group. If the agent does not belong to a team or group, the cell in the Team or Group column associated with the selected contact recording appears blank.

- A supervisor can search, play back, and score contact recordings (if configured to do so) for an agent who belongs to a team supervised by the supervisor when the team does not belong to a group.

  NOTE: A team must be associated with a group for quality management purposes.

Evaluating Agent-Tagged Recordings

When an agent tags a contact for retention, Quality Management records the contact and Tagged appears in the Reason column of the Contacts table. Tagged recordings are not associated with an evaluation form until the first person who evaluates the recording assigns an evaluation form.

Evaluation Comments

The Comments button ( or ) displays the Evaluation Comments dialog box. The Evaluation Comments dialog box display all comments associated with the contact recording and highlights the selected comment. You can select the text of a comment and use standard Windows commands to copy and paste it into another application.

The evaluation comments are also available for viewing and printing in the Agent Scored Evaluation report. See “Agent Scored Evaluation” on page 137 for more information.

Comments

Evaluators, managers, and supervisors can add comments to an evaluation form either while they are scoring it, or after they have completed scoring the evaluation form.
Agents and knowledge workers can add comments to a recording only after the evaluation has been scored.

The Read button in the Evaluation Form window displays a list of comments saved with the contact recording.

The Add Comments button displays the Comments dialog box where you can add a comment to the contact recording. By default, the Comments dialog box automatically populates the current time in the recording in the minute and seconds fields. When you click save, your comment will appear in the energy at the specified time.

**NOTE:** If you enter a time that is greater than the call duration, the comment appears at the last second of the call duration in the energy bar.

The Comments window displays the name of the person who entered the comment and the date and time it was entered.

**NOTE:** Each comment can contain up to 1300 characters, and the total number of characters for all comments in an evaluation form is 65,000 characters.

### Training and HR Tags

The evaluator, supervisor, or manager mark a contact for training by choosing Mark for Training from the Choose Action drop-down list in the Evaluation Form when they decide the scored contact recording can serve as a training example. By default, any contact recording with a Training tag is kept for 6 months, unless otherwise specified by the Quality Management administrator, and can be viewed by any role. The evaluator, supervisor, or manager can remove a Training tag from a contact recording.

An evaluator, supervisor, or manager can mark a contact for Human resources (HR) by choosing Mark for HR from the Choose Action drop-down list in the Evaluation Form when they decide the recording should be reviewed by Human Resources for some reason. By default, any recording with an HR tag is kept for 6 months. The retention time is configured by the Quality Management administrator. Only an evaluator, supervisor, or manager can remove an HR tag from a contact recording.

When you mark an unscored evaluation for HR or Training, Quality Management saves the evaluation and claims that evaluation for you.

### Calibration

Calibration helps your contact center achieve the highest measurement quality and productivity.
If you have permission to evaluate contacts (evaluator, supervisor, or manager within scope), you can mark a contact for calibration by choosing Mark for Calibration from the Recordings toolbar. This allows users to search for a contact marked for calibration and evaluate that contact.

A contact marked for calibration can be evaluated by multiple users with evaluation privileges. The calibration feature allows one calibration per user with evaluator privileges. A calibrated evaluation allows you to evaluate the evaluators and ensure the evaluators are using the same standards to evaluate contacts.

An evaluator can separately evaluate and calibrate a contact. To locate located unscored calibrations, in search feature select My Calibration and Unscored filters.

You can then meet with the other evaluators and discuss how to score calls of this type in the future.

If a contact is marked for calibration evaluation, the calibration score does not appear in the team and agent results in dashboards or reports. The calibration score only appears in the Evaluation Calibration report.

Managing Evaluations

**TASK**

- To evaluate a contact, double-click a contact in the Contacts table. Score the contact, add comments, and add tags as needed in the Evaluation Form window. The Evaluation Form window allows you to perform the following tasks:
  - Choose the type of evaluation you want to view or evaluation by clicking Evaluation to access the quality evaluation or Calibration to access the calibration evaluation.

**NOTE:** These options only appear when both the quality evaluation and calibration evaluation are available.

  - To save an evaluation, choose Save from the Choose Action drop-down list.
    When you save an unfinished evaluation, the State field displays In Progress. You can continue the evaluation at a later time.

**NOTE:** An evaluation form cannot be changed after you save an evaluation.

  - To complete an evaluation, choose Complete from the Choose Action drop-down list.
    If the evaluation must be approved when you complete the evaluation, the State field changes to Needs Approval and an alert is sent to the Manager or Supervisor responsible for approving the evaluation. If no approval is required, the State field changes to Scored.
**NOTE:** If the contact is scored for quality management purposes, it will appear as scored when search for All Evaluations or My Evaluations. If you scored a contact for calibration purposes, it will appear as scored when you search for My Calibrations.

- To add a comment to an evaluation form, click Add Comments, type your comment, type the time in minutes and seconds where you want the comment to appear, and then click Save.

**NOTE:** The evaluation form must be saved before you can add a comment.

Quality Management saves the comment, and the Comments (或) button appears on the Media Player. If the contact is unscored, it also claims that evaluation for you.

- To read comments in an evaluation form, click Read Comments, and when finished click OK.

- To mark a contact recording for HR, choose Mark for HR from the Choose Action drop-down list.

Quality Management tags the recording as Training or HR. If the contact is unscored, it also claims that evaluation for you.

- To mark a recording for training, choose Mark for Training from the Choose Action drop-down list.

- To approve an evaluation in the Needs Approval state, choose Approve from the Choose Action drop-down list.

- To reject an evaluation in the Needs Approval state, choose Reject from the Choose Action drop-down list.

If you choose Approve, the State field for the contact recording changes to Scored. If you choose Reject, the State field for the contact recording changes to In Progress.

**NOTE:** A manager can only approve or reject an evaluation that is in the Needs Approval state.

- To print an evaluation form in the Scored state, choose Print from the Choose Action drop-down list.
Live Monitoring

The Live Monitoring application (Figure 33) allows supervisors and managers to monitor active calls for users in their scope.

**NOTE:** Cisco does not support Live Monitoring with Cisco MediaSense Recording.

![Live Monitoring application](image)

The Live Monitoring application provides controls that allow a supervisor or manager to choose an agent and start a monitoring session.

The Live Monitoring application for Unified CCX displays agents for every configured Unified CM cluster. You can only monitor agents who are assigned to the same Unified CM cluster as the extension you provide in the Live Monitoring Settings popup dialog. See “Live Monitoring Settings” on page 117 for more information on the Live Monitoring Settings popup dialog.

**Roles and Scope**

The Live Monitoring application is only available for supervisors and managers. Agents, knowledge workers, evaluators, and archive users cannot access Live Monitoring.

A supervisor or manager can monitor any active user whose phone is configured for Live Monitoring regardless of scope. The supervisor or manager can continue monitoring the agent who has logged out of Workforce Optimization but are still logged into their PC.
Quality Management for Unified CCX only supports Live Monitoring within a single Unified CM cluster. For example, if a supervisor in cluster A tries to monitor an agent in cluster A, Live Monitoring is supported. If a supervisor in cluster A tries to monitor an agent in cluster B, Live Monitoring is not supported.

When an agent uses the Pause command during a live monitoring session, the audio stops for the duration of the pause. When the agent resumes recording, the audio starts.

If your system is configured for Unified CCX, Unified CM’s Silent Call Monitoring feature does not allow multiple supervisors or managers to monitor a single call. As a result, multiple supervisors or managers cannot monitor a single call using the Live Monitoring application in Workforce Optimization.

**Points to Remember**

Remember the following points when working with the Live Monitor application.

- If you, as a supervisor or manager, are configured to be recorded using any recording method (for example, Desktop Recording, Server Recording, or Network Recording), any live monitoring sessions you conduct might be recorded. The calls will only be uploaded and displayed as calls in the Monitoring and Recording Services system if they match either an archive workflow or a quality management workflow. To avoid this behavior, the Monitoring and Recording administrator can configure a second extension in Monitoring and Recording Administrator, and possibly Unified CM that is not configured to be recorded. Therefore, all calls on the first extension will be recorded, but live monitor sessions conducted on the second extension will not be recorded.

- You can only initiate monitor sessions on calls that are in the Talk state. You cannot monitor a line before a call appears, or initiate a monitoring session for a call that is in the Hold state. Calls that are in the Hold state after you initiated a monitoring session will continue to be monitored.

- If Monitoring and Recording Services returns a failure message when you start monitoring an agent, it could be for one of the following reasons.
  - Unified CM could not place a call to the provided extension.
  - The agent is already being monitored by another user.
  - The agent’s phone does not support Network Recording.
  - The Built In Bridge is not enabled on the agent’s phone.

- Live monitoring is call-by-call based, not device or line-based. That is to say you initiate the monitor on a particular call, once the call is over your monitor session is over. You cannot continually monitor a user or a line.
• Live Monitor calls are “fire and forget.” Once the live monitoring session is established, Live Monitor does not track monitor session or provide call control for the monitor session.

• Your extension automatically answers monitored calls. If your phone is on the hook, the call will automatically go to your speaker phone. If you are not using a headset, you might want to lift the handset before initiating live monitoring.

• Once you establish a monitoring session on your phone, you can transfer it anywhere just like a normal call. For example, you could transfer it to your cell phone.

• If you try to monitor a call that is already being monitored by another supervisor or manager, you will hear a busy signal on your extension and the phone displays the extension of the agent you are trying to monitor. However, monitored users can still be recorded through Network Recording.

• To end a monitoring session, just end the call on your phone or wait for the monitored call to end.

**Live Monitoring Settings**

The Live Monitoring Settings popup dialog (Figure 34) allows you to search for specific active users in a Network Recording environment. When you first access the Live Monitoring application, the User table shows all users in your scope.

*Figure 34. Live Monitoring Settings popup dialog*
All search criteria fields except Group and Team accept any defined unicode character, plus wildcards (“?” and “*”). A defined unicode character is any character that can be typed on your keyboard. The asterisk (*) matches one or more characters. The question mark (?) in a string can be replaced by any character, but the length of the string must be exactly as represented.

Table 36 defines the fields in the Live Monitoring Settings popup dialog.

Table 36. Live Monitor Settings fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name</td>
<td>Filters active agents based on the agent’s first name. You can either enter an exact match of the name or use wildcards. An asterisk (*) matches zero or more characters, and the question mark (?) matches a single character.</td>
</tr>
<tr>
<td>Last Name</td>
<td>Filters active agents based on the agent’s last name. You can either enter an exact match of the name or use wildcards. An asterisk (*) matches zero or more characters, and the question mark (?) matches a single character.</td>
</tr>
</tbody>
</table>
| Group      | Filters active agents based on the assigned group. The Group drop-down list displays all groups within your scope. You can select one, more, or All Assigned groups. If you choose All Assigned, Live Monitoring filters the search based on all groups within your scope. To select multiple groups, choose one of the following options.  
• Use Shift + Click to select contiguous rows in the list of teams.  
• Use Ctrl + Click to select non-contiguous rows in the list of teams.  
NOTE: The Group drop-down list is only available to managers. |
| Team       | Filters active agents based on the selected team. The Team list displays all teams within your scope. You can select one or more teams. To select multiple teams choose one of the following options.  
• Use Shift + Click to select contiguous rows in the list of teams.  
• Use Ctrl + Click to select non-contiguous rows in the list of teams.  
• Select the check box to select all teams.  
If you do not select any teams, it assumed you want them all (that is, you want the selected group). |
| Select All | When selected, selects all teams in the list. This check box is clear by default. |
Table 37 defines the buttons in the Live Monitoring Settings popup dialog.

### Table 37. Live Monitor Settings buttons

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Find Users</td>
<td>When clicked, locates the active users that match the filter parameters.</td>
</tr>
</tbody>
</table>
| Remember my extension| When clicked, saves the extension number entered in My Extension after you initiate a successful live monitoring session and then logout or close the web browser.  

**NOTE:** The extension will not be saved if you exit the browser without initiating a live monitoring session, and then logout or close the web browser.  
When clicked, the extension is deleted.  
If your browser does not support cookies, this check box is disabled.  
The extension is saved on a user-by-user basis, so multiple users using the same client machine can have different extensions. For example, one user may choose to remember their extension and another user might choose not to remember their extension. |
| Close                | Exit the Live Monitor Settings popup dialog.                                                                                                 |

### Configure Fields

The Configure Fields window allows you to choose the fields that you want to appear in the Live Monitoring table. By default, all fields are selected.
Table 38 lists all fields that appear in the Configure Fields window.

Table 38. Live Monitoring table fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organization</td>
<td></td>
</tr>
<tr>
<td>First Name</td>
<td>The agent’s first name.</td>
</tr>
<tr>
<td>Last Name</td>
<td>The agent’s last name.</td>
</tr>
<tr>
<td>Team Name</td>
<td>The name of the team.</td>
</tr>
<tr>
<td>State</td>
<td>The current activity state for the call or line. The possible states are as follows:</td>
</tr>
<tr>
<td></td>
<td>• None—There are no calls on the user’s monitorable extensions. This includes calls that are ringing but have not been answered. You cannot monitor this user.</td>
</tr>
<tr>
<td></td>
<td>• Talk—The user answered a call and is talking. The Talk state takes precedence over any other. (That is, if any call is active then the state is Talk.) A user can only have one call in the Talk state at a time (this is a Unified CM constraint). You can monitor this user.</td>
</tr>
<tr>
<td></td>
<td>• Hold—The user answered a call and is on hold. You cannot monitor this user.</td>
</tr>
<tr>
<td></td>
<td>If a call is in a Talk state, the following fields are populated: Line, Called Number, Calling Number, Direction, and Duration.</td>
</tr>
<tr>
<td>Line</td>
<td>The line’s extension.</td>
</tr>
<tr>
<td></td>
<td><strong>NOTE:</strong> This field is populated only if a call is in the Talk state.</td>
</tr>
<tr>
<td>Called Number</td>
<td>The DID or DNIS number that was used to dial this extension.</td>
</tr>
<tr>
<td></td>
<td><strong>NOTE:</strong> This field is populated only if a call is in the Talk state.</td>
</tr>
<tr>
<td>Calling Number</td>
<td>The caller ID or ANI of the calling party. Displays “unknown” if the calling number is unlisted or blocked.</td>
</tr>
<tr>
<td></td>
<td><strong>NOTE:</strong> This field is populated only if a call is in the Talk state.</td>
</tr>
<tr>
<td>Direction</td>
<td>The direction of the call. The possible values are:</td>
</tr>
<tr>
<td></td>
<td>• In—Indicates an incoming call.</td>
</tr>
<tr>
<td></td>
<td>• Out—Indicates an outbound call initiated by the agent.</td>
</tr>
<tr>
<td></td>
<td><strong>NOTE:</strong> This field is populated only if a call is in the Talk state.</td>
</tr>
</tbody>
</table>
### Managing Live Monitoring

**TASK**

- To configure fields in the Live Monitoring table, click Settings in the Live Monitoring table toolbar, click a tab, select the check box next to each field name you want to appear in the table, repeat for each tab, and then click **Apply**.

  **STEP RESULT:** The Live Monitoring table displays the fields that you selected.

- To move a column to another location, click the column header, click the column body, and then drag the column to a new location.

- To search for active users, click Settings in the Live Monitoring toolbar, complete the fields in the Live Monitoring Settings window, and then click **Submit**.

  **STEP RESULT:** The Live Monitoring table displays the users that match your search.

- To configure your extension, click Settings in the Live Monitoring toolbar, type your extension in the **My Extension** field, and then click **save**.

- To delete your extension, clear the **My extension** field.

- To start a Live Monitoring session, double-click a user in the Live Monitor Settings table.

  **ADDITIONAL INFORMATION:** You can only monitor calls in the Talk state.

Your extension automatically answers monitored calls. If your phone is on the hook, the call will automatically go to your speaker phone. If you are not using a headset, you might want to lift the handset before initiating live monitoring.

  **STEP RESULT:** Quality Management starts monitoring the call for the selected user from the line you identified when you configured My Extension. You can now listen to the call.

  **NOTE:** If your phone has multiple extensions, and you want to monitor more than one user at a time, repeat this step for each extension on your phone. Or use the same extension to monitor another call. If you use the same extension to monitor a second user simultaneously, the first call is placed on hold.

<table>
<thead>
<tr>
<th>Field</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Call Duration</td>
<td>The amount of time in HH:MM:SS format that has elapsed since the call was answered.</td>
</tr>
<tr>
<td></td>
<td><strong>NOTE:</strong> This field is populated only if a call is in the Talk state.</td>
</tr>
</tbody>
</table>
• To end a Live Monitoring session, click End Call on your phone.

**ADDITIONAL INFORMATION:** If you are monitoring multiple calls, repeat this step for each extension on your phone.

**STEP RESULT:** The Live Monitoring session ends.
The Reporting application is a common (multi-product) application that contains a set of reports. These reports are product specific. Initially, Reporting displays reports for all products that you logged into. The default set of reports are defined by the role assigned to you.

### Reporting Roles and Scope

The scope of the Reporting application is based on your highest role. If you are a supervisor and an agent, your access to the Reporting application is based on the supervisor role.

The Reporting application allows you to choose a report and the scope of the report (specific group, specific team, or specific agent). The scope of the report is based on the lowest selection you choose in the Reporting application.

*Table 39* shows the filter choices available to you in the Reporting application based on role.

<table>
<thead>
<tr>
<th>Reports</th>
<th>Agent or KW</th>
<th>Supervisor +Agent</th>
<th>Supervisor +KW</th>
<th>Manager</th>
<th>Evaluator</th>
<th>Archive User</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scores All Data</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>Evaluation Totals Graph</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>Evaluation Scores</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>Contact Totals Graph</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>Section Scores</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>Agent Trend Graph</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>Question Scores</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>Agent Scored Evaluation</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>Quality Averages Graph</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>--</td>
<td>--</td>
</tr>
</tbody>
</table>
Best Practices for Running a Report

When requesting multiple large reports, you might run out of memory. The best practice is to request only what you want to see. When your run a report with fewer records, less memory is required, and the report runs quicker. Use the following guidelines when generating a report:

- Before you run a report, know what data you need to access and how best to filter that data. If you can limit the results to a few hundred evaluations/contacts/events, the queries used to generate the data, with few exceptions, will be quick and the memory usage will be minimal.
- Use the smallest date range possible—if you have a very large number of evaluations in your Quality Management database, running reports on a smaller timeframe will use less memory. You should consider how much data a report might return before choosing to run it for a full year.
- For the Agent Scored Evaluation report, try not to request a time period that would include more than 50 evaluations for the agent.
- Use many targeted searches rather than one large search.
- Use group, team, and agent filters to get a small amount of data instead of running a report for all groups or teams in your system.
- For reports that run over multiple teams and groups, select the specific groups or teams than you need to see in the report. The reports will generate much faster, and with less chance of failing if you run a report per team instead of one report for all teams.

<table>
<thead>
<tr>
<th>Reports</th>
<th>Agent or KW</th>
<th>Supervisor +Agent</th>
<th>Supervisor +KW</th>
<th>Manager</th>
<th>Evaluator</th>
<th>Archive User</th>
</tr>
</thead>
<tbody>
<tr>
<td>Evaluator Performance</td>
<td>--</td>
<td>--</td>
<td>--</td>
<td>x</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>Contact Detail</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>Evaluation Calibration</td>
<td>--</td>
<td>--</td>
<td>--</td>
<td>x</td>
<td>x</td>
<td>--</td>
</tr>
<tr>
<td>User Recording Status</td>
<td>--</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>Recording Access User</td>
<td>--</td>
<td>--</td>
<td>--</td>
<td>x</td>
<td>--</td>
<td>x</td>
</tr>
<tr>
<td>Recording Access by Contact</td>
<td>--</td>
<td>--</td>
<td>--</td>
<td>x</td>
<td>--</td>
<td>x</td>
</tr>
<tr>
<td>System Status</td>
<td>--</td>
<td>--</td>
<td>--</td>
<td>x</td>
<td>--</td>
<td>--</td>
</tr>
</tbody>
</table>
• Verify a report has finished running before requesting another report. Less memory is used when fewer reports are running at the same time.

Running a Report

TASK

• Choose one of the following options to run a report.
  – If Workforce Optimization uses a shared login, click QM, select a report from the list, complete the fields, and then click Run Report.
  – If Workforce Optimization does not use a shared login, select a report from the list, complete the fields, and then click Run Report.

STEP RESULT: A new tab or browser window opens and displays the report. You can print the report. If this is a QM report, you can also save it to a file using the File > Save As option in your web browser.

• To customize the fields in a configurable report, drag the fields you want to appear in the report from the Available list to the Selected list.

• To customize the order in which the fields appear in the report, click the fields you want to move in the Selected list and drag them to the location you want them to appear in the Selected list.

ADDITIONAL INFORMATION: See “Moving Items between Lists” on page 34 for more information.

STEP RESULT: The fields appear in the report in the order they appear in the Selected list.

• To return to the list of reports, click Return or click Close.
Report Filters

Table 40 describes the filters for available reports. These fields appear when you select a report to run. The fields are grouped according to where they appear. For example, if a field appears in both the evaluation report filter and the system report filter, the fields are listed under Common Report Filters.

Quality Management saves the values in the fields when you click Search.

Table 40. Report filters

<table>
<thead>
<tr>
<th>Report Filters</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Common Report Filters</td>
<td></td>
</tr>
<tr>
<td>Start Date</td>
<td>The start date for this report period.</td>
</tr>
<tr>
<td>End Date</td>
<td>The end date for this report period.</td>
</tr>
<tr>
<td>Contact ID</td>
<td>The contact’s unique ID. The contact ID appears in the ID column in the Contacts table in the Recordings application.</td>
</tr>
<tr>
<td>Group</td>
<td>All available groups within the user’s scope. (Whether you can select only one or multiple groups depends on the report type.) For some reports, Group is used for filtering only and does not appear in the report.</td>
</tr>
<tr>
<td>Team</td>
<td>All available teams within the user’s scope. (Whether you can select only one or multiple teams depends on the report type.) For some reports, Team is used for filtering only and does not appear in the report.</td>
</tr>
<tr>
<td>Agent</td>
<td>All available agents within the user’s scope. (Whether you can select only one or multiple agents depends on the report type.)</td>
</tr>
<tr>
<td>Select All</td>
<td>When selected, selects all agents or teams in the list. This check box is clear by default. (The ability to select all depends on the report type and your role.)</td>
</tr>
<tr>
<td>Evaluation Form</td>
<td>All available evaluation forms. (Whether you can select only one or multiple reports depends on the report type.)</td>
</tr>
<tr>
<td></td>
<td>If there is only one evaluation form available, the name of the evaluation form appears in the Evaluation Form drop-down list as the default evaluation form. If there is more than one evaluation form available, All is the default option.</td>
</tr>
</tbody>
</table>
### Report Filters

<table>
<thead>
<tr>
<th>Format</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>HTML</td>
<td>reports in HTML format can be viewed and printed from your web browser. When you select this option and click Generate Report, the report appears in the browser. HTML is the default option.</td>
</tr>
<tr>
<td>PDF</td>
<td>reports in PDF format can be viewed and printed from Adobe Acrobat version 6.0 or higher. The free Adobe Acrobat Reader is available for downloading from <a href="http://www.adobe.com">www.adobe.com</a>. When you select this option and click Generate Report, the File Download dialog box appears. You can choose to open or save the PDF file.</td>
</tr>
<tr>
<td>CSV</td>
<td>reports in CSV (comma separated values) format can be viewed and printed from spreadsheet or word processing program for further manipulation. Note that there may be minor differences between the CSV reports and the HTML/PDF reports due to limitations of the file format. When you select this option and click Generate Report, the File Download dialog box appears. You can choose to open or save the CSV file.</td>
</tr>
</tbody>
</table>

The default file name for a PDF or CSV report is `<report name>_<current date>.<extension type>`, for example `report_scores_all_data_20113.18.pdf`.

**NOTE:** If the report does not open in PDF or CSV format, make sure your web browser settings are correct. In Microsoft Internet Explorer, you must select the Enable option for Automatic Prompting for File Downloads. See "Configuring Microsoft Internet Explorer" on page 12 for instructions.

### Field Preferences

Choose columns that appear in the report and the order in which those columns appear. When you click Run Report, the columns that appear in the Selected list become the default columns for the report.

### System Report Filters

<table>
<thead>
<tr>
<th>User</th>
<th>All users who have accessed calls in the Recording archives. (You can select more than one user.) This filter only appears in the Archive Access By User report.</th>
</tr>
</thead>
</table>
Quality Management Reports

This topic describes the quality management reports available to for Quality Management.

Report Types

The types of reports that are available in Quality Management are:

- “Evaluation Reports” on page 129
- “System Reports” on page 140

**NOTE:** Quality Management rounds up scores for individual sections in evaluation forms. However, in reports that show section averages for agents, teams, and groups, the section scores are first added and averaged before being rounded up. As a result, the average displayed in reports will vary slightly from the number calculated by adding up section scores as displayed in Quality Management and then averaging them.

Guidelines for Reports

When generating reports, follow these guidelines:

- Group, Team, and Agent fields are preselected if there is only one option available.

<table>
<thead>
<tr>
<th>Report Filters</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Level</td>
<td>The level of the event. Choose one or more of the following options.</td>
</tr>
<tr>
<td></td>
<td>• ALL—displays all even level messages.</td>
</tr>
<tr>
<td></td>
<td>• INFO—displays only informational messages. Not an error, this is related information that may be useful for troubleshooting.</td>
</tr>
<tr>
<td></td>
<td>• WARN—displays only warning messages. There is a malfunction that is a nuisance but that does not interfere with the program’s operation.</td>
</tr>
<tr>
<td></td>
<td>• ERROR—displays only error messages. The program cannot continue.</td>
</tr>
<tr>
<td></td>
<td>This filter only appears in the User Recording Status report and the System Status report.</td>
</tr>
</tbody>
</table>
• The default value prefixing each report title that can be run for group, team, or agent is a variable. It changes according to the options you select when generating a report and the report becomes a summary for a group, team, or agent.
  – If you are logged in as a manager, the default value prefixing each report title is Group.
  – If you are a supervisor, the default value prefixing each report title is Team.
  – If you are an agent, the default value prefixing each report title is Agent.

For example, if you are a manager and you generate a report for Evaluation Scores using the default settings, the title of the report is “Group Evaluation Scores.” If you choose a team from the Team list, the title of the report is “Team Evaluation Scores.” If you choose an agent from the Agent list, the title of the report is “Agent Evaluation Scores.” By default, an agent only sees “Agent Evaluation Scores.”

• Configurable reports include a Customize Output pane, where you can choose the fields that appear in the report and the order in which those fields appear. When you click Submit, the selected fields become the default fields for the report.

Evaluation Reports

This topic describes the report templates in the Evaluation Reports category.

Scores All Data

The Scores All Data report displays collective evaluation scores. The fields that appear in the report are listed in their default order from left to right as they appear in the report, and are hyperlinked to their definitions in the “Field Dictionary for Reporting” on page 143.

The Scores All Data template allows you to generate the following reports.

• Group Scores All Data—To view this report, choose a group.
• Team Scores All Data—To view this report, choose a group and a team.
• Agent Scores All Data—To view this report, choose a group, team, and agent.

The following fields appear in this report.

• Start
• End
• Group
• Team
• Last Name
• First Name
• Agent ID
• Form (Optional)
• Recordings
• Evaluations (Optional)
• Exceeds
• Meet
• Below
• Average Score(%)
• Section Weight
• Section
• Question
• Question Weight
• [Agent]
• [Team]
• [Group]
• [Form]
• Page
• Run Date

Evaluation Scores

The Evaluations Scores report displays the scores for each evaluation. The fields that appear in the report are listed in the order they appear, and are hyperlinked to their definitions in the “Field Dictionary for Reporting” on page 143.

The Evaluation Scores template allows you to generate the following reports.

• Group Evaluation Scores—To view this report, choose a group.
• Team Evaluation Scores—To view this report, choose a group and a team.
• Agent Evaluation Scores—To view this report, choose a group, team, and agent.

The following fields can appear in this report:

• Start
• End
• Agent ID (Optional)
• Below (Optional)
• Evaluations (Optional)
• Exceeds (Optional)
• First Name (Optional)
• Form (Optional)
• [Form]
• Group (Optional)
• [Group]
• Last Name (Optional)
• Meet (Optional)
• Page
• Question (Optional)
• Question Weight (Optional)
• Recordings (Optional)
• Run Date
• Section (Optional)
• Section Weight (Optional)
• Team (Optional)
• [Team]

Section Scores

The Section Scores report displays the average score for each section of an evaluation form over a specified period. The averages can be of scores from multiple evaluations using the same form. The fields that appear in the report are listed in the order they appear, and are hyperlinked to their definitions in the "Field Dictionary for Reporting" on page 143.

The Sections Scores template allows you to generate the following reports.

• Group Section Scores—To view this report, choose a group.
• Team Section Scores—To view this report, choose a group and a team.
• Agent Section Scores—To view this report, choose a group, team, and agent.

The following fields can appear in this report.

• Start
• End
QuestionScores

The Question Scores report displays the scores for each question. The fields that appear in the report are listed in the order they appear, and are hyperlinked to their definitions in the “Field Dictionary for Reporting” on page 143.

The Question Scores template allows you to generate the following reports.

- Group Question Scores—To view this report, choose a group.
- Team Question Scores—To view this report, choose a group and a team.
- Agent Question Scores—To view this report, choose a group, team, and agent.
The following fields can appear in this report.

- [Agent]
- Agent ID (optional)
- Average Score(%) 
- Below (optional)
- End
- Evaluations (optional)
- Exceeds (optional)
- First Name (optional)
- [Form]
- Form (optional)
- [Group]
- Group (optional)
- Last Name (optional)
- Meet (optional)
- Page
- Recordings (optional)
- Run Date
- Section (optional)
- Section Weight (optional)
- Start
- Team (optional)
- Question (optional)
- Question Weight (optional)

**Evaluator Performance**

The Evaluator Performance report provides a summary of all evaluators’ productivity by displaying the number of evaluations they have performed over a specified time period, and the average score they have awarded to those evaluations. The fields that appear in the report are listed in the order they appear, and are hyperlinked to their definitions in the “Field Dictionary for Reporting” on page 143.

The following fields appear in the report.

- Start
- End
• Last Name
• First Name
• User ID
• Eval Form
• Total Evaluations
• Average Score(%)
• [Form]
• Page
• Run Date

**Quality Averages Graph**

The Quality Averages Graph report displays the quality averages. The fields that appear in the report are listed in the order they appear, and are hyperlinked to their definitions in the “Field Dictionary for Reporting” on page 143.

The Quality Averages Graph template allows you to generate the following reports.

• Group Quality Averages Graph—To view this report, choose a group.
• Team Quality Averages Graph—To view this report, choose a group and a team.
• Agent Quality Averages Graph—To view this report, choose a group, team, and agent.

The following fields can appear in this report.

• Start
• End
• Group Average
• Team Average
• Agent Average
• [Agent]
• [Team]
• [Group]
• [Form]
• Page
• Run Date
Evaluation Totals Graph

The Evaluation Totals Graph report displays the evaluation totals by month. The fields that appear in the report are listed in alphabetical order, and are hyperlinked to their definitions in the “Field Dictionary for Reporting” on page 143.

The Evaluation Totals Graph template allows you to generate the following reports.

• Group Evaluation Totals Graph—To view this report, choose a group.
• Team Evaluation Totals Graph—To view this report, choose a group and a team.
• Agent Evaluation Totals Graph—To view this report, choose a group, team, and agent.

The following fields can appear in this report.

• Start
• End
• Total Exceed
• Total Meet
• Total Below
• [Agent]
• [Team]
• [Group]
• [Form]
• Page
• Run Date

Contact Totals Graph

The Contact Totals Graph report displays the total number of quality management recordings and evaluations per month for a specified group. The fields that appear in the report are listed in their default order from left to right as they appear in the report, and are hyperlinked to their definitions in the “Field Dictionary for Reporting” on page 143.

The Contact Totals Graph template allows you to generate the following reports.

• Group Contact Totals Graph—To view this report, choose a group.
• Team Contact Totals Graph—To view this report, choose a group and a team.
• Agent Contact Totals Graph—To view this report, choose a group, team, and agent.

The following fields can appear in this report.
Agent Trend Graph

The Agent Trend Graph report displays a specific agent’s or knowledge worker’s average score for each evaluation made over a specified time period, along with an indicator if that score meets, exceeds, or is below expectations for that form. The fields that appear in the report are listed in the order they appear, and are hyperlinked to their definitions in the “Field Dictionary for Reporting” on page 143.

The following fields appear in the report.

- Start
- End
- Score
- Trend
- ID
- Contact ID
- Form
- Contact Date
- Contact Time
- Contact Time Zone
- Call Duration
- Score(%)
- [Agent]
- [Form]
- Page
- Run Date
Agent Scored Evaluation

The Agent Scored Evaluation report displays the details of all evaluations scored for a specific agent or knowledge worker during a specified time period, including the scores given on each evaluation question, the score for each section, the overall score, and any added comments. The fields that appear in the report are listed in the order they appear, and are hyperlinked to their definitions in the “Field Dictionary for Reporting” on page 143.

The following fields appear in the report.

- Start
- End
- Eval Form
- Contact ID
- Called Number
- Calling Number
- Call Duration
- Contact Date
- Contact Time
- Contact Time Zone
- Eval Date
- Eval Time
- Eval Time Zone
- Eval Last Name
- Eval First Name
- Score(%)
- Section
- Weight(%)
- Question Type
- Score
- Possible Score
- Possible
- KPI
- Question
- Section Total
The Contact Details report displays the average evaluation scores, ranges, and contact total data for a specific agent. The fields that appear in the report are listed in the order they appear, and are hyperlinked to their definitions in the “Field Dictionary for Reporting” on page 143.

The Contact Details template allows you to generate the Agent Contact Detail report. To view this report, choose a group, team, and agent.

**NOTE:** Statistics for scored contacts do not include evaluations in progress or evaluations waiting for approval.

The following fields appear in the report.

- Start
- End
- Date
- Score(%)
- Exceeds
- Meet
- Below
- Call Duration
- [Agent]
- [Form]
- Page
The Evaluation report displays calibrated evaluation score results. It only reports scored evaluations marked for calibration. It does not display standard evaluation scores. Use this report to evaluate your evaluators.

The fields that appear in the report are listed in their default order from left to right as they appear in the report, and are hyperlinked to their definitions in the “Field Dictionary for Reporting” on page 143.

**NOTE:** This report might take several minutes to generate.

The Evaluation Calibration template allows you to generate the Evaluation Calibration report.

The following fields appear in the report:

- **Eval Form**
- **Contact ID**
- **Called Number**
- **Calling Number**
- **Call Duration**
- **Contact Date**
- **Contact Time**
- **Evaluator Name**
- **Section**
- **Section Score (%)**
- **Question**
- **Weight(%)**
- **KPI**
- **Question Type**
- **Possible Score**
- **Score(%)**
- **Form Comments**
- **[Contact]**
- **Page**
- **Run Date**
System Reports

This topic describes the report templates in the System Reports category.

Recording Access by User

The Recording Access by User report displays the users who accessed the recordings over a specified period. The fields that appear in the report are listed in the order they appear, and are hyperlinked to their definitions in the “Field Dictionary for Reporting” on page 143.

The following fields appear in the report.

- Start
- End
- User Last Name
- User First Name
- User ID
- Accessed Date
- Accessed Time
- Accessed Time Zone
- Agent Last Name
- Agent First Name
- Agent ID
- Contact ID
- Contact Date
- Calling Number
- Called Number
- [User]
- Page
- Run Date

Recording Access by Contact

The Recording Access by Contact report displays a list of archived recordings for a specific agent that were accessed over a specified period. It enables you to determine if a significant number of recordings concerning a particular contact, called number, or calling number were reviewed. The fields that appear in the report are listed in the order they appear, and are hyperlinked to their definitions in the “Field Dictionary for Reporting” on page 143.
The following fields appear in the report.

- Start
- End
- Agent Last Name
- Agent First Name
- Agent ID
- Accessed Date
- Accessed Time
- Accessed Time Zone
- User Last Name
- User First Name
- User ID
- Contact ID
- Contact Date
- Calling Number
- Called Number
- [Agent]
- Page
- Run Date

**User Recording Status**

The User Recording Status report displays user and recording events associated with the agents configured for recording. You can choose to view messages generated by the service at the INFO, WARN, or ERROR level, or at all levels. Information is available for the past 7 days, including the current day. The fields that appear in the report are listed in the order they appear, and are hyperlinked to their definitions in the “Field Dictionary for Reporting” on page 143.

The following fields appear in the report.

- Start
- End
- Team
- Last Name
- First Name
- User ID
The System Recording Status report displays system and administrative events associated with agents configured for recording. You can choose to view messages generated by the service at the INFO, WARN, or ERROR level, or at all levels. Information is available for the past 7 days, including the current day. The fields that appear in the report are listed in the order they appear, and are hyperlinked to their definitions in the “Field Dictionary for Reporting” on page 143.

The File Transfer Servlet writes events that warn when free space is low on the voice and screen services server or when uploads stop because free space is too low.

The following fields appear in the report.

- Start
- End
- Date
- Time
- Machine
- IP Address
- Level
- Category
- Message
- Page
- Run Date
Field Dictionary for Reporting

This section is an alphabetical listing of all fields that appear in Quality Management reports and their definitions.

<table>
<thead>
<tr>
<th>Field</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accessed Date</td>
<td>The date when the contact was accessed.</td>
</tr>
<tr>
<td>Accessed Time</td>
<td>The time when the contact was accessed.</td>
</tr>
<tr>
<td>Accessed Time Zone</td>
<td>The time zone where the contact was accessed.</td>
</tr>
<tr>
<td>[Agent]</td>
<td>The agents’ first and last names based on selection filter criteria for this report.</td>
</tr>
<tr>
<td>Agent</td>
<td>The agent’s first and last name.</td>
</tr>
<tr>
<td>Agent Average</td>
<td>The average evaluation score of all the agent’s evaluations.</td>
</tr>
<tr>
<td>Agent First Name</td>
<td>The agent’s first name.</td>
</tr>
<tr>
<td>Agent ID</td>
<td>The agent’s ID.</td>
</tr>
<tr>
<td>Agent Last Name</td>
<td>The agent’s last name.</td>
</tr>
<tr>
<td>Agent Name</td>
<td>The agent’s first and last name.</td>
</tr>
<tr>
<td>Average Score(%)</td>
<td>The average score for one of the follow items:</td>
</tr>
<tr>
<td></td>
<td>• Form</td>
</tr>
<tr>
<td></td>
<td>• Section</td>
</tr>
<tr>
<td></td>
<td>• Question</td>
</tr>
<tr>
<td>Below</td>
<td>The number of evaluated contact recordings that are below expectations.</td>
</tr>
<tr>
<td>Category</td>
<td>The application associated with the event.</td>
</tr>
<tr>
<td>Call Duration</td>
<td>The contact’s talk time (length of time between call answered and call dropped).</td>
</tr>
<tr>
<td>Called Number</td>
<td>The number of the phone that received the call.</td>
</tr>
<tr>
<td>Calling Number</td>
<td>The number of the phone that made the call. Displays “unknown” if the calling number is unlisted or blocked.</td>
</tr>
<tr>
<td>Field</td>
<td>Definition</td>
</tr>
<tr>
<td>----------------------</td>
<td>---------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Comment</td>
<td>The comments related to a specific form or section. Anyone who can view the evaluation can add a comment.</td>
</tr>
<tr>
<td>Comment Date</td>
<td>The date when the comment was entered.</td>
</tr>
<tr>
<td>Comment Time</td>
<td>The time when the comment was entered.</td>
</tr>
<tr>
<td>Comment Time Zone</td>
<td>The time zone where the comment was entered.</td>
</tr>
<tr>
<td>Comments</td>
<td>The comments for an evaluation. Anyone who can view the evaluation can add a comment.</td>
</tr>
<tr>
<td>[Contact]</td>
<td>The contact’s unique ID.</td>
</tr>
<tr>
<td>Contact Date</td>
<td>The date the contact occurred.</td>
</tr>
<tr>
<td>Contact ID</td>
<td>The contact’s unique ID.</td>
</tr>
<tr>
<td>Contact Time</td>
<td>The time when the contact occurred.</td>
</tr>
<tr>
<td>Contact Time Zone</td>
<td>The time zone where the contact occurred.</td>
</tr>
<tr>
<td>Date</td>
<td>The contact date.</td>
</tr>
<tr>
<td>End</td>
<td>The end date for this report period.</td>
</tr>
<tr>
<td>Eval Date</td>
<td>The date the contact was evaluated.</td>
</tr>
<tr>
<td>Eval First Name</td>
<td>The first name of the evaluator.</td>
</tr>
<tr>
<td>Eval Form</td>
<td>The evaluation form used to score the contact.</td>
</tr>
<tr>
<td>Eval Last Name</td>
<td>The last name of the evaluator.</td>
</tr>
<tr>
<td>Evaluator Name</td>
<td>The first and last name of the evaluator</td>
</tr>
<tr>
<td>Eval Time</td>
<td>The time when the evaluator evaluated the contact.</td>
</tr>
<tr>
<td>Eval Time Zone</td>
<td>The time zone where the contact was evaluated.</td>
</tr>
<tr>
<td>Evaluations</td>
<td>The total number of evaluations.</td>
</tr>
<tr>
<td>Exceeds</td>
<td>The number of evaluated contact that exceed expectations.</td>
</tr>
<tr>
<td>First Name</td>
<td>The agent’s or evaluator’s first name.</td>
</tr>
<tr>
<td>Form</td>
<td>The name of the evaluation form.</td>
</tr>
<tr>
<td>Field</td>
<td>Definition</td>
</tr>
<tr>
<td>---------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>[Form]</td>
<td>The names of the evaluation forms based on selection filter criteria for this report.</td>
</tr>
<tr>
<td>Form Comments</td>
<td>The comments for a form. Anyone who can view the evaluation can add a comment.</td>
</tr>
<tr>
<td>Group</td>
<td>The name of the group.</td>
</tr>
<tr>
<td>[Group]</td>
<td>The names of the groups based on selection filter criteria for this report.</td>
</tr>
<tr>
<td>Group Average</td>
<td>The average score of all contacts evaluated for agents in the group.</td>
</tr>
<tr>
<td>ID</td>
<td>The ID of the contact.</td>
</tr>
<tr>
<td>IP Address</td>
<td>The IP address of the computer on which the event occurred.</td>
</tr>
<tr>
<td>KPI</td>
<td>Key Performance Indicator.</td>
</tr>
<tr>
<td>Last Name</td>
<td>The agent's or evaluator's last name.</td>
</tr>
<tr>
<td>Level</td>
<td>The level of the event. The possible options are:</td>
</tr>
<tr>
<td></td>
<td>• ALL—Displays all even level messages.</td>
</tr>
<tr>
<td></td>
<td>• INFO—Displays only informational messages. Not an error, this is related information that may be useful for troubleshooting.</td>
</tr>
<tr>
<td></td>
<td>• WARN—Displays only warning messages. There is a malfunction that is a nuisance but that does not interfere with the program’s operation.</td>
</tr>
<tr>
<td></td>
<td>• ERROR—Displays only error messages. The program cannot continue.</td>
</tr>
<tr>
<td>[Level]</td>
<td>The names of the levels based on selection filter criteria for this report.</td>
</tr>
<tr>
<td>Machine</td>
<td>The name of the computer on which the event occurred.</td>
</tr>
<tr>
<td>Meet</td>
<td>The number of evaluated contact that meet expectations.</td>
</tr>
<tr>
<td>Message</td>
<td>The event message.</td>
</tr>
<tr>
<td>Page</td>
<td>The current page of this report and the total number of pages for this report.</td>
</tr>
<tr>
<td>Possible</td>
<td>The total possible score.</td>
</tr>
<tr>
<td>Possible Score</td>
<td>The total possible score.</td>
</tr>
<tr>
<td>Field</td>
<td>Definition</td>
</tr>
<tr>
<td>-----------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Question</td>
<td>The actual question that appears in the evaluation form.</td>
</tr>
<tr>
<td>Question Weight</td>
<td>A percentage applied to a question in an evaluation form. The sum of question weights in a section of an evaluation form is 100%.</td>
</tr>
<tr>
<td>Question Type</td>
<td>The type of question. The possible question types are Yes-No and 0-5.</td>
</tr>
<tr>
<td>Recordings</td>
<td>The number of recordings.</td>
</tr>
<tr>
<td>Run Date</td>
<td>The date this report was generated.</td>
</tr>
<tr>
<td>Score</td>
<td>The evaluation score given to the contact.</td>
</tr>
<tr>
<td>Score(%)</td>
<td>The evaluation’s score given to the contact.</td>
</tr>
<tr>
<td>Score Std Dev</td>
<td>The standard deviation of the group’s score or team’s score. A low standard deviation (closer to 0) indicates that scores are grouped closely to the mean score. A higher standard deviation (further from 0) indicates that scores are far from the mean. A lower standard deviation is an indicator of consistent performance; a higher standard deviation is an indicator of variable performance.</td>
</tr>
<tr>
<td>Section</td>
<td>The name of the section in the evaluation form.</td>
</tr>
<tr>
<td>Section Score (%)</td>
<td>The section score given to the contact.</td>
</tr>
<tr>
<td>Section Comments</td>
<td>The comments for a section. Anyone who can view the evaluation can add a comment.</td>
</tr>
<tr>
<td>Section Total</td>
<td>The total score for the section.</td>
</tr>
<tr>
<td>Section Weight</td>
<td>A percentage applied to a section in an evaluation form. The sum of section weights in an evaluation form is 100%.</td>
</tr>
<tr>
<td>Start</td>
<td>The start date for this report period.</td>
</tr>
<tr>
<td>Team</td>
<td>The name of the team.</td>
</tr>
<tr>
<td>[Team]</td>
<td>The name of the teams based on selection filter criteria for this report.</td>
</tr>
<tr>
<td>Team Average</td>
<td>The average evaluation score of all the team’s evaluations.</td>
</tr>
<tr>
<td>Team ID</td>
<td>The team’s unique contact ID.</td>
</tr>
<tr>
<td>Team Name</td>
<td>The name of the team.</td>
</tr>
<tr>
<td>Time</td>
<td>The time of the contact.</td>
</tr>
<tr>
<td>Field</td>
<td>Definition</td>
</tr>
<tr>
<td>----------------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Total Below</td>
<td>The total number of evaluated contacts whose scores fall below expectations. The default score range is 0–74%. This range can be modified by the Quality Management administrator.</td>
</tr>
<tr>
<td>Total Evaluations</td>
<td>The total number of evaluations during the specified time period using the specified evaluation form.</td>
</tr>
<tr>
<td>Total Exceed</td>
<td>The total number of evaluated contacts whose scores exceed expectations. The default score range is 90–100%. This range can be modified by the Quality Management administrator.</td>
</tr>
<tr>
<td>Total Meet</td>
<td>The total number of evaluated contacts whose scores meet expectations. The default score range is 75–89%. This range can be modified by the Quality Management administrator.</td>
</tr>
<tr>
<td>Total QM Recordings</td>
<td>The total number of quality management recordings.</td>
</tr>
<tr>
<td>Trend</td>
<td>The average evaluation score over time.</td>
</tr>
<tr>
<td>[User]</td>
<td>The names of the users based on selection filter criteria for this report.</td>
</tr>
<tr>
<td>User ID</td>
<td>The Windows login (and domain, if an Active Directory system) of the person who accessed the archives.</td>
</tr>
<tr>
<td>User First Name</td>
<td>The user’s first name.</td>
</tr>
<tr>
<td>User Last Name</td>
<td>The user’s last name.</td>
</tr>
<tr>
<td>Weight(%)</td>
<td>A percentage applied to a section or question in an evaluation form. The sum of question weights in an section of an evaluation form is 100%.</td>
</tr>
</tbody>
</table>
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