SpeechMiner User Manual

Recording and Quality Management

Speech and Text Analytics 8.5.5

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Introduction to SpeechMiner

Designed to provide valuable information, the Genesys Interaction Recording (GIR) solution uncovers the cause and effect relationships that influence business issues and contact center performance. Valuable insights about workforce performance and the customer experience your organization delivers are hidden within the agent-customer interactions your organization records.

With the optional Quality Management (QM) add-on product, specific agent training requirements, compliance breaches or customer satisfaction issues are detected automatically. If your system does not include QM, the Quality menu will not appear in your SpeechMiner interface.

By recording and analyzing large quantities of interactions, GIR enables your organization to improve workforce performance and the customer experience by providing insight into why and when customers are contacting your company, who they are talking to, why multiple contacts are needed to resolve issues, what processes cause customer frustration and whether your agents are providing an appropriate level of service.

New in this Release

The following is a list of the new SpeechMiner features:

8.5.510 Release

- **Interaction Search, Export and Add Improvements:**
  - **Sort by Agent:** Within the Interactions grid it is now possible to sort by the **Agent** column. Interactions with multiple agents will appear after (descending order) or before (ascending order) the alphabetized list of interactions with one agent. Subsequently, Interactions with multiple agents are sorted by the number of agents and then relevance.
  - **Search by List of Interaction IDs:** It is now possible to search for a specific set of Interactions based on a semicolon delimited list of Interaction IDs. A list of up to 50 Interaction IDs is supported. This can be useful when working with a specific set of interactions.
  - **Export All Interaction Meta Data:** You can now easily export all the metadata associated with Interactions from an interaction search, up to the maximum number of listed interactions, without having to scroll through all interactions in the search results.
  - **Add All Interactions to a List:** You can now easily add all Interactions from an interaction search to an Interaction List without having to scroll through all interactions in the search results.

- **Quality Management Improvements:**
  - **In-Line Rubric / Standards Definition: Forms** and **Questions** within Forms now have an expanded **Description** field that can be used to store the standard definition or rubric used by your Quality Managers to ensure consistency when performing evaluations of Agents.
  - **Form and Evaluation Manager Improvement:** The **Forms Manager** grid and the **Evaluations Manager** grid now includes a **Description** column; if a description is long, the full content is shown in a tooltip. In addition, when you hover over a Form or Evaluation name, a tooltip with the description of the specific Form/Evaluation is shown.

- **SMART Improvements:**
  - **Option to Re-categorize Interactions:** SMART users can now decide to re-categorize all existing interactions in the system or not when updating Category definitions.
  - **SMART Statistics Date:** You can now configure the default **Show Calls Since** date value in SMART to determine in advance the date range for the information that will be shown.

- **Reporting Improvements:**
  - **Agent Comparison by Segment report:** It is now possible to report on agents performance based on the Segments within an Interaction instead of just at the Interaction level only. Interactions can have

multiple Segments, each involving a different Agent. Reporting by Segment provides more precise Agent Comparison information for multi-segment interactions.
  - **Agent Trend by Segment report:** It is now possible to report on agent performance trends based on the Segments within an Interaction instead of just at the Interaction level only. Reporting by Segment provides more precise Agent Trend information for multi-segment interactions.
  - **Team Comparison by Segment report:** It is now possible to report on teams performance based on the Segments within an Interaction instead of just at the Interaction level only. Interactions can have multiple Segments, each involving a different Agent from different Teams. Reporting by Segment provides more precise Team Comparison information for multi-segment interactions as only Segments where that Team was involved are included in the comparison report.

- **Language Enablement:** Recognition of Canadian French (fr-CA) and Canadian French UI support was enabled. Speech Analytics and Text Analytics now operate on voice interactions and text interactions in Canadian French**.**

8.5.509 Release

- **Genesys Logo:** The Genesys logo has been updated throughout the product based on new Genesys branding.

- **Access Control:** SpeechMiner now supports Configuration Server based Access Control for items within SpeechMiner for Genesys based user accounts. This functionality determines the agents and users that are visible to a logged in user based on their granted Read permissions. Additionally, access to items within SpeechMiner (For example, Forms, Evaluations, and so on.) is also limited based on read access to the creator of those items. Access Control is enabled in the following areas of the user interface:
  - All Agent Hierarchy filters, including those in Search, Evaluation Manager, Evaluation Sessions and Trending.
  - All Users filters, including those in Search, Evaluation Manager, Action Items, Saved Reports - Sharing, Saved Searches – Sharing, Interactions List - Sharing.
  - Forms, Evaluations and Evaluation Sessions.
  - Alerts.

- **Improved Tooltips:** Tooltips in SpeechMiner in various locations now provide more detail; for cases where even more space is required, clicking on the element loads a modal window with all the information. Affected areas include: **Topics** and **Categories** in the **Interactions Grid, Current Filter** at the top of the **Interactions Grid,** and **Action Items** details.

- **Quality Management Improvements:**
  - **Evaluation Sessions Grid:** You can now filter the Evaluation Sessions grid according to the date on which the session was created as well as when the session was completed.
  - **Evaluation Session Completion:** The workflow to close an Evaluation Session has been optimized to reduce the number of clicks required.

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- **Audio Wave Graph:** When working with Chrome, the SpeechMiner Media Player, in a Recording and QM deployment (when Speech Analytics is not deployed), now contains an Audio Wave Graph that enables the user to see where there are silences in the audio. From the Audio Wave Graph (when dual-channel audio is available), the user can also distinguish between when one speaker is talking vs. the other.

- **Screen Recording Grid:** The SpeechMiner Screen Recording grid now includes two new columns (Agent First Name and Agent Last Name).

- **Search for Users:** When using the **Users** filter option in the **Search Filter** in Search or Evaluation Sessions, or when selecting **Evaluators** in Evaluation Manager, the names are listed alphabetically according to the user's full name, also the filter now filters based on username and full name.

- **Usage Tracking Report:** The **Usage Tracking** report now logs separate entries for playing a voice interaction vs. selecting an interaction from the search results grid.

- SpeechMiner no longer supports Internet Explorer 10.

8.5.507 Release

- **Auto Fail Report:** A drill down report that focuses on auto fail Quality Management questions and agents.

- **Auto Fail Permission:** A new Auto Fail permission has been added to enable the user to create, edit and/or view the Auto Fail report.

- **Distributed Evaluations Targeted to Specific Agents:** Provides supervisors with the ability to evaluate specific agents repeatedly over time.

- **Quality Management - Agent Notification:** Enables agent collaboration to provide agent feedback against evaluations and related scores.

- **Show Evaluation Session Score Permission:** Enables a user to turn on/off the evaluation session Show Score option.

- **Replace Interaction:** Enables a user (based on existing search criteria) to select an alternative interaction due to the interaction's quality.

- **Replace an Evaluation Session Interaction Permission:** Enables a user to replace the evaluation session interaction.

- **Interaction Tags:** Enables you to use user defined tags for a variety of uses (for example, compliance or training).

- **Define Tags:** Enables you to define tags for a variety of uses (for example, compliance or training).
- **Define Tags Page Permission:** Enables a user to define and edit an interaction tag.
- **Tag Interactions Permission:** Enables a user to tag an interaction.
- **Protect from Deletion:** Enables you to prevent an interaction from being deleted.
- **Protect Interactions from Deletion -** A new permission has been added to enable you to protect interactions from deletion.
- **Tag Interactions as Evaluated:** Automatically adds an Evaluated tag when an evaluation session is completed.
- **Ad-Hoc Evaluation:** Enables you to launch an evaluation from the player against a specific media asset.
- **Create Ad-Hoc Evaluation Permission:** This permission will enable the user to evaluate interactions from the Explore page.
- **Trending Bubble – Drag and Drop:** Enables you to move a Trending bubble to a different location on the screen. This ability is useful in moving apart bubbles that are close together as the system has found that they are closely related. Once the Trending chart is re-run , the bubble returns to its original place.
- **Recognition Improvements:** Recognition enhancements have been made for improved accuracy and detection results.

8.5.506 Release

- **Alpha Numeric Operation IDs:** Operation IDs can now contain both letters and numbers.
- **Export to PDF:** Enables users to export a completed evaluation session as a PDF file.
- **Export Completed QM Sessions:** Users can now export completed evaluation sessions according to a specific date range.
- **Installation/Upgrade Prerequisite:** Before installing/upgrading SpeechMiner .NET 4.6.2 must be installed.

8.5.505 Release

- **Configuration Data:**

  - User lists now include only users associated with the context in which they are shown (for example, a list of evaluators will only include users with QM permissions).
  - Changes to the configuration database have an immediate effect on the system (for example, when a user is given QM permissions, his/her name will appear in the evaluators list the next time you view the list).
  - Preset views are now supported for users with Genesys authentication.

- **Call List Order:** Interaction lists are now sorted in descending order. The newest interaction is listed first.

8.5.504 Release

- **Encrypt exported interactions:** Enables you to encrypt exported interactions, so that a password is required to access the interactions.

8.5.503 Release

- **Edit Interaction Comments Permission:** A new permission has been added to control which Users can edit an interaction comment; this permission is system wide for a given User.

- **Customer Sensitive Data Permission:** A new permission has been added to enable the user to display customer sensitive meta data (for example, attached data from CIM) in the SpeechMiner GUI. When this permission is enabled, the data is visible.

- **Agent Sensitive Data Permission:** A newpermission has been added to enable the user to display agent sensitive meta data (for example, agent name) in the SpeechMiner GUI. When this permission is enabled, the data is visible.

- **Interaction Evaluation Summary Report:** A report that shows the evaluation score for the last evaluation session, associated with a specific evaluator and interaction.

- **Interaction Evaluation Summary Permission:** A new permission has been added to enable or disable the Interaction Evaluation Summary report.

- **Timestamps in Comments:** Interaction display improvements have been made to include a timestamp in comments. Users will now see the date and time at which the comment was made/last edited.

- **Segment Filter:** Users can now filter the Search Results grid according to a specific number of segments. In addition, the search results can be restricted further using the greater than and/or less than options.

- **Support for MSSQL 2014:** SpeechMiner now supports MSSQL 2014.

8.5.502 Release

- **Shared Evaluations:** Creates evaluation sessions about an agent's performance during customer interactions without assigning the sessions to a specific evaluator(s). Instead, each evaluator associated with the session can select and assign himself/herself a specific session from the available pool of sessions.

- **Edit a Completed Evaluation:** Users with the correct permission can open, save, export and close a completed evaluation session.

- **Filter Panel:** Users can now quickly and easily create retrieve evaluation session information by narrowing down the evaluation session list.

- **Export Incomplete Evaluation Session:** Users can now export an evaluation session that was saved but not completed.

- **Archive Completed Evaluation Sessions:** Users can now archive completed evaluation sessions automatically at a specific period of time or manually.

- **Interactions Report:** A new report that provides a list of all the interactions in the system.

- **Localization for Turkish:** User Interface localization was added for Turkish.

8.5.501 Release

- **Enhanced Segment Data and Metadata:** The Attributes page now contains data for interaction segments.

- **Localization for Arabic:** User Interface localization was added for Arabic.

- **QM Evaluation Session Score Visualization:** An evaluation session score is visible throughout the evaluation session.

- **Screen Column Customization:** It is now possible to change the column order in the Interactions, Events and QM grids per user.

8.5.5 Release

- **Quality Management - Question Library:** When creating a Quality Management form you can now select an existing group of questions and you can create a new group for future use.

- **SMUpgrade:** The new upgrade process executes faster and no longer requires two databases. This one-step upgrade procedure can be performed from any version to any version. on the customer's database (that is, a new database is not required).

Note: The new upgrade procedure is not out of the box. If you are interested in this new upgrade procedure, contact Customer Care and allow for one week to receive the scripts required to perform the procedure along with instructions about how to use them. For additional details, refer to the *SpeechMiner Upgrade Guide*.

Log into SpeechMiner

To work with SMART, log into the system with a username and password defined for you by your SpeechMiner System Administrator.

When you log into the system, SpeechMiner automatically verifies the roles and groups assigned to your account.

The roles assigned to your account signify what SpeechMiner features you are allowed to access.

Only the features you have permissions to view are displayed in the interface when you log into the system.

Before you log into SpeechMiner consider the following:

- The SpeechMiner address will be given to you by your system administrator.
  Alternatively, when your account was created you may have received an automated e-mail notification with the same information.
- You can log into SpeechMiner from any of the currently supported browsers.
  A list of supported browsers can be found in the latest SpeechMiner Release Notes.

To log into SpeechMiner:

1. In a browser of your choice navigate to the SpeechMiner application.
2. Select one of the following:

   SpeechMiner: When your username and password are managed by SpeechMiner.

   Windows: When you log into SpeechMiner using the same username and password you use to log into Windows.

   Genesys: When you log into SpeechMiner using the same username and password you use to log into additional Genesys products.
3. Enter a username and password in the fields provided.

   If you selected **Windows** in step #2, enter your Windows domain in the **Domain** field.
4. Click log into log into the system.

Note: If you are having problems viewing SpeechMiner, refer to Appendix A - Configure the Browser.

SpeechMiner Menu Reference

Before you begin working with SMART, briefly examine its main features. The following list provides a brief description of each of the 7 SMART menus:

Dashboard:

Enables you to create one or more views. Each view can contain a selection of one or more widgets. The widgets shov

Explore:

Enables you to drill down and examine information about your system by searching for specific groups of interactions according to metadata, a specific date, and so on. With the SpeechMiner Media Player you can drill further down to investigate the potential root causes of the business trends that appear in the resulting interaction list.

Reports:

Enables you to analyze statistical data about agent-customer interactions according to a specific report (for example, Agent Comparison, Team Comparison and so on). By analyzing a reports, details and status, you can gain intelligence about your organization.

Quality:

Enables you to monitor agent-customer interactions, to improve agent productivity as well as customer satisfaction. The key features such as Forms Manager and Evaluations Manager can be utilized for evaluating agent productivity, as well as targeted agent training. Quality Management offers insight that has the potential to increase employee productivity, resolve future customer disputes and subsequently enhance customer service.

Tools:

Provides access to an array of global SpeechMiner functions and management features. Depending on your permissions and on your system's mode of operation, you can use Tools to manage user accounts and Permissions, and so on.

Administrator:

Enables you to manage users. With the options in this menu, you can control which interaction and system data that a specific user can see and activate by assigning the user to one or more group. Individual users can have multiple roles and belong to multiple groupings. If your users log in to SpeechMiner using a Genesys user account, the SpeechMiner User Management options are performed for their accounts in the Genesys Administrator Extension (GAX).

Dashboard

The SpeechMiner Dashboard displays summary information about a specific set of interactions through the use of dashboards and widgets.

You can customize each dashboard can be customized to display interaction details relevant to a particular interaction set. The Dashboard can have one or more dashboards and each dashboard can contain information about a different set of interactions.

By providing a summary dashboard of information, the dashboard allows you to quickly and easily understand the nature of all interactions within a specific interaction list. That is, dashboard provides you with the tools that enable you obtain an overall and complete impression of the business issue you are investigating. For example, you can create a dashboard with a Report widget (to give you a snapshot of metrics and key performance indicators) and a My Messages widget (to display stem messages).

A dashboard can contain one or both of the following widgets:

- Report: Displays any existing report.
- My Messages: Used to send and receive messages.

The Dashboard can the following view type:

- Personal View: A view created in your Dashboard that only you can view. By default, every view is a Personal View.

Note: You can only create a Personal view if you have the permissions to do so.

Dashboard Menu Reference

The following list provides a brief description of each Dashboard menu item:

New Dashboard:

Enables you to create a new dashboard for specific reports and notes.

Once you create a new dashboard, the new dashboard will be added to the list of dashboards in the Dashboa

<Dashboard Name>:

Displays an existing customized dashboard. This dashboard can only be edited by a user with the relevant

Create a New Dashboard

You can add as many new dashboards as you like and each dashboard can contain a different set of widgets.

For example, if you manage two work groups, you can create two dashboards (one for each group), to help keep track of each group separately.

To create a new personal dashboard:

1. Select **Dashboard > New Dashboard**. The dashboard is opened with all existing dashboards.
2. Click the **Add New Dashboard** icon +. A new empty dashboard opens.

   The new dashboard appears as a dashboard tab and the default name is New Dashboard.
3. Click **Add Widgets**. The list of available widgets appears at the top of the dashboard.
4. Click the link(s) associated with the widget you want to add to the dashboard. The widget automatically appears in the dashboard.
5. Click **Hide Widgets** to remove the widget links at the top of the dashboard.
6. Click **Change Settings**.
7. In the **Title** field enter the name of the new dashboard and click **Save**.
8. Under **Change Columns** select the layout for the dashboard widgets.

   The widgets in the dashboard are arranged to fit the column layout you select.

   The width of each widget is determined by the width of the column in which it appears.

   You can change the width of a column by manually dragging the border line that appears between the widgets (|).

   You can also change the column layout by simply dragging the widget to a different location in the dashboard.
9. Click **Hide Settings** to remove the Change Settings options from the dashboard. The new dashboard is created and you can edit it at any time.

Working with Dashboard

The following procedures enable you to modify an existing dashboard:

- Rename a Dashboard
- Change a Dashboard's Column Layout
- Change the order of the Dashboard Tabs
- Delete a Dashboard

To rename a dashboard:

1. Select **Dashboard** and the name of the dashboard you want to change.
2. Click **Change Settings**.
3. In the **Title** field change the name of the dashboard.
4. Click **Save**.
5. Click **Hide Settings**.

To change the column layout:

1. Select **Dashboard** and the name of the dashboard you want to change.
2. Click **Change Settings**.
3. Under **Change Columns** click the desired layout. The layout is applied to the dashboard.

To change the order of the dashboard tabs:

1. Select **Dashboard** and any dashboard to open the dashboard tabs.
2. Place your mouse over the top corner of the tab you want to move. The mouse pointer changes to a plus.
3. Drag the tab to its new location and release the mouse button. The tab is moved to its new location.

To delete a dashboard:

1. Select **Dashboard** or any dashboard to open the dashboard tabs.
2. Select the dashboard you want to delete.
3. Click **Change Settings**.
4. Click **Delete Dashboard**. A confirmation message appears.
5. Click **Yes**. The dashboard is deleted.

Widgets

The SpeechMiner Dashboard offers several mini applications called widgets. These widgets give you quick access to information about the nature of the multitude of interactions within a specific interaction list.

A dashboard can contain one or both of the following widgets:

- Report: Displays any existing report.
- My Messages: Used to send and receive messages.

Working with Widgets

Each widget is displayed in the dashboard as a rectangle.

Depending on your permissions you can:

- Add a widget.
- Move a widget within a dashboard.
- Edit a widget's settings.
- Minimize a widget within a dashboard.
- Manually refresh a widget.
- Delete a widget from a dashboard.

To add a new widget:

1. Select **Dashboard**.
2. Select the dashboard to which you want to add a widget.
3. Click **Add Widgets**. The available widgets are displayed at the top of the screen (Report widget and My Messages widget).
4. Click the link associated with the widget you want to add to the dashboard. The widget is added to the dashboard.

To move a widget within a dashboard:

1. Select **Dashboard**.
2. Select the dashboard whose widget you want to move.
3. Place your mouse on the widget title bar and click and drag the widget to its new location.

To edit a widget:

1. Select **Dashboard**.
2. Select the dashboard whose widget's you want to change.
3. To **Change the widget name** click on the name to make it an editable field. Type the new name and click **OK**.
4. Click **Edit** and perform any of the following:
   - **Change the widget height:** Enter the new height in the field provided.
   - **Change the widget refresh rate:** Enter the new refresh rate in the field provided.
   - **Change the report description:** Enter the new description in the field provided.
5. Click **Save** to save your changes.
6. Click **Close** to close the fields.

To minimize a widget:

1. Select **Dashboard**.
2. Select the dashboard whose widget you want to minimize / maximize.
3. Click the **Minus** icon to minimize the widget.
4. Click the **Plus** icon to maximize the widget.

To manually refresh a widget's data:

1. Select **Dashboard**.
2. Select the dashboard whose widget you want to refresh.
3. Click the **Refresh** icon to update the data in the widget.

To delete a widget:

1. Select **Dashboard**.

2. Select the dashboard whose widget you want to delete.

3. Click the **Delete** icon to remove the widget from the dashboard.

Report Widget

Use the Report widget to display any report saved in your system. You can configure it to display information about a variety of topics.

You can use this configurability to broaden the scope of information in a single dashboard by including more than one Report widget, where each Report widget displays different data.

From the Report widget you can:

- Run a Report.
- Drill Down.
- Configure a Report Widget.
- Edit a Report.

To run a report in the Report widget:

1. Select **Dashboard**.
2. Select the dashboard in which you want to run the report.
3. Click **Edit**.
4. From the **Select** list, chose the report you want to view.
5. Click **Save**. The report appears in the Report widget.
6. If the report is too large for the widget change the Report version:

   a. Click the report link in the bottom left corner of the widget. The report is opened in the Reports > Edit Report tab.

   b. From the **Version** list select **Mini**.

   c. Click **Run report**.

   d. Click **Save**.

   e. Select **Dashboard** and the name of the dashboard that contains the Report you are changing. The report

is re-sized to match
the size of the Report widget.

To drill down on any report:

1. Click within the Report widget on the information for which you want to receive additional data.

   The data may be in the form of additional reports or an interaction list (opened in a separate window).

   If a different report was accessed, click the **Back** icon to return to the original report results.

To configure a Report widget:

When configuring a Report widget you can change its height, how often it is updated and what report(s) it includes.

1. In the upper right corner of the Report widget click **Edit**. The widget's configurable settings are displayed.
2. Change the following settings as required:

   Height: The widget height in pixels.

   Refresh Rate: The rate (in minutes) at which the data in the report is refreshed.

   Report Description: An explanation about the report.

   Select: Select the report to display in the widget.

3. Click **Save**. The widget settings are saved and a link to the specific report is added to the bottom left corner of the widget.
4. Click **Close** in the top right corner of the widget to hide the setting options.

To edit the report:

1. Select **Dashboard**.
2. Select the dashboard that includes the report whose settings you want to change.
3. In the upper right corner of the Report widget, click **Edit**. The widget's configurable settings are displayed.
4. Click the **Edit Report** icon . The Report is opened in the Reports > Edit Report tab in a new and separate window.

Or

Click the name of the report in the bottom left corner of the specific widget. The Reports > Edit Report tab is opened for the specific report in the same window.

5. Modify the report settings as necessary.

6. Click **Save Report Settings** or **Save report settings as**.

   Note: If the saved report was not in your account, you are prompted to create a copy of the report by giving it a new name. The new report is saved in your account.

7. If you selected to edit the report in a new and separate window, click **X** to close the window.

My Messages Widget

The My Messages widget is essentially a mailbox where you can:

- Receive a message associated with a specific interaction list.
- Send a note.

The following messages types can appear in the My Messages widget:

- **Interaction:** A message containing a link to a specific interaction list. The **Interaction** type message is created when another
  user forwards an interaction(s) from the Interaction grid or Media Player. This type of message is sent by other users.
- **Note:** A message you send to, or receive from, another user.

To access and view an interactions list:

1. Select **Dashboard**.
2. Select the dashboard that includes the message containing the interaction(s) you want to see.
3. Click the message subject. The interaction list, along with the Media Player opens in a separate window.

To send a note:

1. Select **Dashboard**.
2. Select the dashboard from which you want to send a My Messages note.
3. Click **New** in the My Messages widget and select **Note**.
4. Configure the note with the fields provided.
5. Click **Send**. The note is sent to the user and is listed in the user's My Messages widget.

Explore

You can use several search options to filter massive quantities of interaction data to find interactions that are most related to the business issue you are investigating.

The search query that you create can be of varying complexity, ranging from a specific agent to sophisticated criteria that define not only the agent to search for,
but also their retrieval conditions (for example, date range, interaction type, metadata, and so on).

Once SpeechMiner generates an interaction list based on your search criteria, you can analyze the list using various SpeechMiner tools and options. The variety of
options enables you to obtain in-depth information about your specific business issue.

Explore enables you to filter and search for interaction data by:

- Searching: Enables you to create a set of search criteria. You can save search criteria so that it can be run in the future. For example, you could search for interactions
handled by Work group A, processed with either Group B or Group C and are assigned to Agent X.

- Interaction Lists: Enables you to create a collection of one or more interactions about a specific issue.

Explore Menu Reference

The following list provides a brief description of each Explore menu item:

Search:

Enables you to search for interactions about a specific business issue by providing the tools to filter through a massive interaction database.

Saved Searches:

Enables you to run the same search numerous times on different dates and times.

Interaction Lists:

Enables you to manually create an interaction list by selecting an interaction(s) from the Interactions Grid.

Search Results Grid

The Search Results grid contains detailed information about each interaction.

Note: Interactions that were imported from a Genesys Interaction Recording system may be divided into segments. When the interaction is divided into segments the standard interaction icon is replaced by a +.

The availability of each Search Results grid column depends on the type of search results you selected to view.

In some systems, additional columns can be opened for specific types of metadata. For example, if your system stores an interaction "Location" field, a Location column can be added whenever interactions are listed in an Search Results grid.

Since columns are added for all selected fields, some columns may be blank for some interactions. For example, Duration is only defined for interactions, and Sender is only defined for e-mails. For other types of interactions, these columns are blank.

Interactions in the Search Results grid can be:

- Played back so you can listen to specific parts of the interaction.
- Saved so you can run the search at a later time.

Search Results Grid Columns:

The Search Results grid can contain one or more of the following columns.

Column	Description	Available in:
Agent	The name of the agent who handled the interaction.	Interactions Screen Recordings
Agent First Name	The private name of the agent associated with the interaction.	Screen Recordings
Agent Last Name	The surname of the agent associated with the interaction.	Screen Recordings
Date/Time	The interaction start date and time (in hours:minutes).	Interactions
Duration	The duration of the interaction (in hours:minutes:seconds).	Interactions

External ID	A unique number assigned to the interaction by the external recording storage system.	Interactions
Interaction ID	A unique number assigned to the interaction in the SpeechMiner database.	Interactions Screen Recordings
Media	The type of interaction found. For example, interaction, email, video and so on.	Interactions Screen Recordings
Number of Segments	The number of segments in an interaction.	Interactions Screen Recordings
Tags	A list of tags associated with this interaction. For more information, refer to Search Filter > Tags	
Work group	The work group associated with the agent who handled the interaction.	Interactions

Working with the Search Results Grid

You can modify the Search Results grid to display a list of interactions with details specific to your inquiry.

From the Search Results grid you can:

- Configure grid columns.
- Generate the interactions list.
- Change the type of interactions displayed in the Interactions list.
- Play an interaction.
- Open a segmented interaction.
- View search criteria.

To configure the grid columns:

1. At the top right corner of the Search Results grid, click the **Select Columns** icon .
2. Select the columns you want to display and clear those you do not want to display.
3. Click the **Select Columns** icon to close the list. The list closes and the selected columns are displayed.

Note: To return the grid columns to their default state, click the **Select Columns** icon and the **Reset to defaults** link at the bottom of the list.
You can also change the order of the columns by dragging a column to a new location among the columns you selected to view.

To generate an interactions list in the Interactions grid:

1. Perform one of the following:
   - **Explore > Search**
   - **Explore > Saved Searches >** Click the **Run** icon .

Note: When you first access **Explore > Search**, the list that appears includes all the interactions in the system.

To change the type of interactions in the Interaction grid:

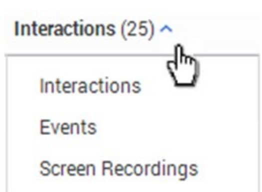
1. Access the Interaction grid.

2. Select one of the following from the menu above the Interactions grid (on the left):

   - **Interactions:** A list of all the interactions the meet the search criteria.

   - **Screen Recordings:** A list of all the Screen Recording interactions that meet the search criteria.

   The following image represents the menu you should open at the top of the list:

To play an interaction from the Search Results grid:

1. To play an interaction from the Search Results grid click **Play** on the row associated with the interaction you want to play back.

   - If you are trying to play back an audio interaction, the interaction is activated in the Media Player.

To open a segmented interaction:

Interactions imported from the Genesys Interaction Recording system may be divided into segments. When this happens a plus appears
instead of a Play icon .

1. In the **Search Results** grid click the plus icon associated with the interaction you want to open.

   When the interaction row is expanded a list of the interaction's segments is displayed. Each segment is identified with a Play icon.

   Note: the first segment is automatically played in the Media Player. Playback stops when the end of the segment is reached.

2. To play another segment from the same interaction click its Play icon .

To view search criteria:

If the Search Results grid was generated in response to a specific search, the upper left corner of the grid contains a summary of the search criteria and settings that were employed during the search.

1. Hover over the summary to see details about the search criteria.

For additional information, see Create a New Search.

What is an Interaction?

An interaction is the communication between an agent and a customer.

SpeechMiner can analyze the following interaction types:

- **Audio:** An agent-customer interaction from an audio-based communication channel (phone call).

- **Text:** An agent-customer interaction from a text-based communication channel (email, chat and social interactions).

An interaction can include the following information:

- Segment
- Comment

Note: SpeechMiner can analyze when the employee and customer are talking at the same time (talk-over time) and who is talking (agent/customer).

Segment:

A segment is created when a customer is transferred during an agent-customer audio interaction. If an interaction includes 4 segments, the customer was transferred 4 times.

For more information about segments, see: Working with the Search Results Grid.

Comment:

Comments are added to interactions to express a thought about the interaction. A comment can be general or associated with a specific time during the interaction.

User comments are indicated by icons above the audio wave in the Media Player and within the interaction transcript.

There are three types of comments:

- **Good :** Indicates a positive comment.

- **Bad :** Indicates a negative comment.

- **Neutral :** Indicates an unbiased comment.

For more information about how to add a comment to an interaction, see: Interaction Comments.

Screen Recordings

A Screen Recording is a video of the agent's screen during the agent-customer interaction. Screen Recording search results are different from the general search result list since they only contain the screen recording. When you play back a screen recording interaction only the video of the agent's screen is played back and not the complete interaction.

Screen recording search results are different from a general list of search results in the following ways:

- The items in the list represent screen recordings and not complete interactions.
- When you play back a screen recording, only the video of the agent's screen is played back and not the entire interaction.

To view a specific screen recording from within the interaction it was recorded, switch to the Search Results grid and search for the Interaction ID's associated with the specific screen recording. The interaction ID appears in the ID column of the Screen Recordings Search Results grid. The Search Results grid contains a list of all the screen recordings in the system.

Batch Actions

From the Search Results grid, you can perform the following batch actions for selected interactions:

- Export interactions
- Add interactions to a global interaction list of a Coaching session interaction list
- Delete an interaction

To export an interaction:

Exporting an interaction(s) creates a zip file containing the following files:

- A .csv file containing a list of audio interactions that were exported. The file also contains the search results grid data associated with each interaction.
- A .wav file for each audio interaction included in the list (optional).
- A text file is created when you export a text interaction.

Note:

- Some of the exported interactions may not be associated with an audio file.
- You must be assigned the **Export Interactions** permission to be able to export interactions. For more information refer to: Permission Definitions.

1. Select **Explore** > **Search**.
2. Run a search for the interaction(s) you want to export. See: Create a New Search.
3. In the title of the check box column, click the **Batch Actions** icon and select **Export**.
4. Select **Export the selected interactions** or **Export all the interactions**.

   Note: If you select **Export all the interactions**, all the interactions in all the search result pages will be exported.

5. Select the **Include audio and text interaction files** checkbox if you want to include these files in the .zip file and click **Export.**

   Note: If the **Include audio and text interaction files** checkbox is not active, it means that the size of the Export file exceeds the maximum limit. To include the audio and text interaction files, reduce the number of selected interactions.

A zip file is created with the exported interactions.

Note: If you selected **Export** and your system is configured to encrypt exported interactions, an **Export Interaction** window appears. In this window, you
will be instructed to create a password required when you attempt to unzip the exported interactions.

a. Enter a password of your choice in the **Create Password** field.
   Or
   Click **Generate Password** to enable the system to generate a password for you in the **Create Password** field.

b. Click **Export** to export the selected interactions.

c. Copy and save the password and click Done.

   When you try to unzip the file, you will be prompted for this password.

   Note: Windows default zip program does not support encrypted zip files. To unzip the file, you must use a different zip program.

To add interactions to a global interaction list:

An interaction list is a list of audio interactions that is saved for later use.

When working with interaction lists you can:

- Add interactions to an existing interaction list or a new interaction list.
- Select an existing interaction list from a Global Interaction list.

To add interactions to an existing global interaction list:

1. Select **Explore** > **Search**.
2. Run a search for the interaction(s) you want to add to an Interaction list. For more information, see: Create a New Search.
3. Select the interactions you want to add to the Interaction list.
4. In the title of the check box column click the **Batch Actions** icon and select **Add To**.
5. Select **Interaction List.**
6. Select the list to which you want to add the selected interactions.

7. Select **Export the selected interactions** or **Export all the interactions**.

   Note: If you select **Export all the interactions** all the interactions in all the search result pages will be exported.

8. Click **Add**. The selected interactions are added to the selected interaction list.

To delete an interaction:

1. Select **Explore** > **Search**.
2. Run a search for the interaction(s) you want to delete. See: Create a New Search.
3. In the title of the check box column click the **Batch Actions** icon and select **Delete**.
4. Click **Yes** when asked if you are sure you want to delete the interactions. The selected interactions are deleted.

Create a New Search

With SpeechMiner you can search for interactions and screen recordings.

When creating a search you can use filters to specify the types of interactions and screen recordings you want to view. When you run the search, SpeechMiner combs the database for interactions that match your filter selections. The search results are displayed in the Search Results grid.

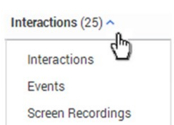
When performing a search SpeechMiner continues searching for interactions that match your search criteria until one of the following occurs:

- All the interactions in the database are checked for matches with your search criteria.
- The processing limit (defined in the system's database configuration settings) is reached. For example, if the processing limit is 1000 the first 1000 interactions that match the search criteria are retrieved and the search ends.

Once your search for specific interactions is complete, you can export selected interactions from the list or add interactions to an existing interactions list. See Batch Actions.

To create a new search:

1. Select **Explore** > **Search**. A list of interactions associated with the previous search appears.
2. In the left corner of the screen (under the Media Player), select the type of interactions you want to search for.

   Note: To view Screen Recording in Internet Explorer 10 and 11, you must enable the Miscellaneous > Access data sources across domains in the
   Security Settings - Trusted Sizes Zone window.
3. Click the **Search Filters** icon . For additional information, see Search Filter.
4. Configure the filter options.
5. Click one of the following:
   - **Search:** Update the current search results according to the new filter configuration.

- **Save As:** Save the filter configuration as a Saved Search. You can run the saved search at a later time.
- **Clear Filters:** Clear the current filter configuration.

The search is run according to your selection.

Search Filter

You can refine you search criteria with the options available in the Filter panel.

Click the **Filter** icon in the **Search Results grid** to access the **Filter** panel.

When configuring the Filter panel consider the following:

- Only interaction that meet the conditions you set will be retrieved.
- The current search criteria is displayed at the top of the Search Results grid. When you make changes to the filter the display is automatically updated.
- The Add and Remove icons +/– enable you to add and remove additional filter selections and/or values.
- Once you save your filter configurations, the configuration is saved as a Saved Search and can be run in the future. See Working with Saved Searches.
- The Include / Exclude option enables you to define a negative condition. For example, when you select Exclude, the condition is met when none of the selections or values for the specific filter are found in the interaction(s).
- The **View selected only** option, enables you to display only the selected items associated with the specific filter.

The Filter panel is divided into the following groups:

- Date Range
- Agents & Workgroups
- Metadata
- Comments
- User Actions
- Segment

- Tags
- Interaction Properties

Date Range:

Enables you to filter for the Search Results grid according to a specific date range.

- **All:** The default value that includes all interactions in the database.
- **Yesterday:** Filter interactions recorded on the previous day from 00:00 until 23:59.
- **Today:** Filter interactions recorded on the same day from 00:00 until the exact time the search is performed.
- **Week to Date:** Filter interactions recorded from the beginning of the current week (the last Sunday at 00:00) until the
  exact time and date the search is performed.

  Note: In the U.S., the week starts on Sundays and ends on Saturdays; for users with Europe-localized versions of the software the
  week starts on Mondays and ends on Sundays.
- **Last 7 Days:** Filter interactions from seven days prior to today (at 00:00) until the exact time and date the search is performed.
- **Last Week:** Filter interactions from the beginning through the end of the previous week.
- **Month to Date:** Filter interactions from the first day of the current month at 00:00 until the exact time and date the search is performed.
- **Last 30 Days:** Filter interactions from thirty days prior to today (at 00:00) until the exact time and date the search is performed.
- **Last Month:** Filter interactions from 00:00 on the first day until 23:59 on the last day of the previous month.
- **Quarter to Date:** Filter interactions from 00:00 on the first day of the current quarter until the exact time and date the search is performed.
- **Last 90 Days:** Filter interactions from 90 days prior to today (at 00:00) until the exact time and date the search is performed.
- **Last Quarter:** Filter interactions from 00:00 on the first day until 23:59 on the last day of the previous quarter.

- **Custom:** Filter interactions from any date range selected from the two drop-down windows displayed. You can specify the exact day,
  month and year of both the beginning and end dates.

  Note: The times given are directly associated to the time zone at which your Web server is deployed, and therefore are not necessarily
  the same as the time where you are physically located.

Agents & Work Groups:

From the lists provided select any combination of agents and work groups to include in your search.

You can also choose to search for the "current user" rather than a specific agent or work group. In this case, the condition changes depending
on which user runs the report.

If you select a work group, all the agents in the work group are included in the search condition.

Metadata:

Metadata is collected by the recording system and relayed by it to SpeechMiner. The types of available metadata vary from system to system.

The Metadata filter enables you to filter the search results for selected metadata and metadata values.

The search results will only include interactions for which the selected types of metadata have defined values and when you specify values that
match the specified conditions.

Three types of metadata values can be used in the conditions you define:

- String of text (for example, "Detroit")
- Decimal number (for example, "10" or "32.5")
- Date

Dates must be entered manually in the same format used in your SpeechMiner web interface. For example, if your system represents dates in format:
mm/dd/yyyy hh:mm, you would enter Oct 24, 2013 at 10 AM as 10/24/2013 10:00;.

The format used in your system is specified in the webserviceparams table, in the "globalDateFormat" parameter.

For additional information, please consult your system administrator.

To define a metadata filter:

1. Select to Include/Exclude the metadata.

   Note: If you only want to specify that the interactions must have values for the specific metadata type, but any value is acceptable, you only need to select the name of the metadata type. You do not have to perform the remaining steps of this procedure.

2. Select the type of metadata from the list provided.
3. Click **Values** to configure the metadata.
4. In the first field, select:

   Equals to specify a specific value for the metadata type.

   Between to define a range of values. When you select Between an additional field is added to the box.

5. To add an additional **OR** condition, click the Add icon + to add a line in the box and fill it in as explained above.
6. Click outside the box to close the box.

Comments:

Enables you to filter the Search Results grid for interactions that contain comments made by selected users.

- **Blank text field:** The text that must appear in one of the interaction comments. Only interactions that contain comments in which this text is found are included in the search results.

  Note: If you leave the text field blank interactions that contain comments from the selected users are included in the search results regardless of the comments contents.

- **User:** searches for the user(s) who added a comment to the interaction when playing the interaction. Only interactions that contain comments from the selected users are included in the search results.
- **Good** : searches for the user(s) who selected Good when adding a comment to the interaction during playback.
- **Neutral** : searches for the user(s) who selected Neutral when adding a comment to the interaction during playback.
- **Bad** : searches for the user(s) who selected Bad when adding a comment to the interaction during playback.

User Actions:

Enables you to filter the Search Results grid with interactions that were reviewed (played back or opened) by the selected user(s).

Segment:

Enables you to filter the Search Results grid according to segment ID's. See What is an Interaction? > Segment.

Under Segment select the number of segments to include in the search results. In the first field, select either Less Than, Between, or More Than.

In the second text field or fields, fill in the amount of segments within an interaction that you want to search for.

- **Less Than:** Search results include only interactions with a number of segments that is smaller than the value you specified.
- **Between:** Search results include interactions that include a number of segments that is more than the first value and less than the second value.
- **More Than:** Search results include only interactions that contain a number of segments that is more than the value you specified.

Tags:

Tags enable you to label an interaction as a result of a specific action or a user defined category. That is, a tag is like a keyword that helps you identify an
interaction, and enables you to generate better search results.

Tags can also help you indicate which interactions cannot be deleted (see, Playback Controls row#13) and which interactions have been evaluated as part of a
Quality Management Evaluation Session (see, Perform an Evaluation Session step #8).

Note: The Tags filter is not available for Event and Screen Recording searches.

For additional information about how to create a tag, see Media Player Options and/or Define Tags.

To define a tag filter:

1. Select **Include**/**Exclude.** Select Exclude to define a negative condition. For example, when you select Exclude, the condition is met when none of the
selections or values for the tag filter are found in the interaction(s).
2. Select one or more tags from the list provided.
3. Click outside the box to close the box.

Interaction Properties:

Enables you to filter the Search Results grid list according to:

- **Types:** Select the type of interaction you are searching for (calls, email, chat or social interactions).

  Note: The Types selection is not offered if your system only includes audio interactions.

- **Duration:** Select the duration range of the interaction to include in the data set. In the first field, select either Less Than, Between, or More Than. In the second text field or fields, fill in the number of seconds.

  Less Than: Search results include only interactions that are shorter than the value you specified.

  Between: Search results include interactions whose duration's are longer than the first value and shorter than the second value.

  More Than: Search results include only interactions that are longer than the specified value.

- **Interaction ID:** Search results include only interactions with the value(s) you entered for the ID. In this field, you can enter up to 50 Interaction IDs.

- **External ID:** Search results include only interactions with the value you entered for the ID. External ID is a unique number assigned to the interaction by the external recording storage system.

Saved Searches

A Saved Search represents a group of interactions selected from a list of interactions that resulted due to a specific filter criteria (created in the Explore > Filter panel).

Creating a Saved Search enables you to combine a collection of interactions associated with the same topic. You can run this unique Saved Search whenever the information the query generates is required.

To access the Saved Searches list:

1. Select **Explore > Saved Searches**.

   The **Saved Search** tab is opened with the following options:

   - **Drop down list:** Find and select the user(s) whose saved searches you want to see.
   - **Text field:** Type a letter or sequence of letters that appears in the name of the saved search you want to find.
   - **Delete** : Select one or more searches from the list and click **Delete** to remove them from the system.
   - **Table:** See column descriptions below:

Column	Description
☐	Select the check boxes to delete or compare.
Run	Click the **Run** icon to run the search and display the results in the Search Results grid. If the specific search was a search for screen recordings, the Search Results grid will show a list of interactions with screen recordings.
Delete	Click the **Delete** icon to delete the specific saved search.
Name	The name of the saved search.
Status	The status of the saved search.
Sharing	The names of the user groups and users with whom the search is shared. Click the **Sharing** icon to share the saved search with others.
Created on	The date on which the search was created.

Permalink	Click **Copy** to create a Permalink to the specific saved search. You can copy this link to your clipboard and then paste it elsewhere as necessary. See Permalink for additional information.

Interaction Lists

An Interaction list enables you to create a collection of one or more interactions about a specific issue.

The list is made up of interactions that you manually select from the Search Results grid and add to the list.

You can add an interaction to an existing Interaction list or you can create a new Interaction list.

An Interaction list can be created from:

- Search Results list
- Interaction Lists tab

To create an Interaction list from the Search Results grid:

1. Select **Explore** > **Search**.
2. Run a search for the interaction(s) you want to add to the interaction list. See: Create a New Search.
3. Select the interactions you want to add to the new Interaction list.
4. In the title of the check box column click the **BatchActions** icon and select **Add To**.
5. Select **Interaction List**.
6. Click **New Interaction List** to create a new list with the selected interactions.
7. Click **OK**. The selected interactions are added to the selected interaction list.

To create an Interaction list from the Interaction Lists tab:

1. Select **Explore** > **Interaction Lists**.

   The Interaction Lists tab is opened with the following options:

   - **Drop down list:** Find and select the user(s) whose interaction lists you want to see.
   - **Text field:** Type a letter or sequence of letters that appears in the name of the interaction list you want to find.
   - **Delete** **:** Select one or more lists from the interaction list and click **Delete** to remove them from the system.

- **Rename an Interaction list** **:** Select the interaction list whose name you want to change. Click the **Rename** icon
  and give the list a new name.
- **Table:** See column descriptions below:

Column	Description
	Select the check box to delete or rename.
Run	Click the Run icon to run the interaction list and display the results in the Search Results grid. If the specific search was a search for screen recordings, the Search Results grid will show a list of interactions with screen recordings.
Delete	Click the Delete icon to delete the specific interaction list.
Name	The name of the interaction list.
Creator	The name of the user who created the interaction list.
Sharing	The names of the user groups and users with whom the list is shared. Click the **Sharing** icon to share the interaction list with others.
Created	The date on which the list was created.
Permalink	Click **Copy** to create a Permalink to the specific interaction list. You can copy this link to your clipboard and then paste it elsewhere as necessary. For additional information, see Permalink.

2. Click the **Create a new Interaction list** icon .
3. Enter a name for the new list.
4. Click **OK**.
5. Add interactions to the new list.
   a. Select **Explore** > **Search**.
   b. Select interactions from the Search Results grid.
   c. Click the **Batch Actions** icon and select **Add To**.
   d. Select **Interaction List**.
   e. Select the list you created at the beginning of this procedure.

f. Click **Add**.

6. Verify the interactions were added to the new Interaction list.

 a. Select **Explore > Interaction Lists**.

 b. Click the run icon ▶ to run the new list.

 c. Review the Search Results grid and verify that the interactions you selected were added to the list.

Media Player

The SpeechMiner Media Player enables you to play back the audio of recorded interactions.

The Media Player provides a range of interaction playback features that can help you to:

- Quickly and easily find information associated with the specific interaction.
- Add comments and view comments made by other users.

To activate the Media Player, click the **Play** icon in the Search Results grid. The Media Player is displayed as a timeline with various controls and a variety of information. If interactions are recorded with two audio channels (for example, one for the agent and the other for the customer), the audio channels are shown on both sides of the audio line (one speaker above and the other below).

To learn more about how to work with the Media Player refer to the following sections:

- Playback: Enables you to listen to a specific interaction.
- Interaction Comments: Enables you to view other users ideas and thoughts about the interaction and provides you with the option of
  making comments yourself.
- Interaction Attributes: Enables you to view specific characteristics about the interaction you are playing.
- Media Player Options: Enables you to perform numerous tasks associated with the interaction you are playing.

Note:

- To view Screen Recordings in Internet Explorer 10 and 11, you must enable the **Miscellaneous > Access data sources across domains** in the **Security Settings - Trusted Sizes Zone** window.
- Interaction are re-index when an interaction is played and when a comment is added or changed.

Playback

The Media Player is activated above the Search Results grid when you select to play back an audio interaction.

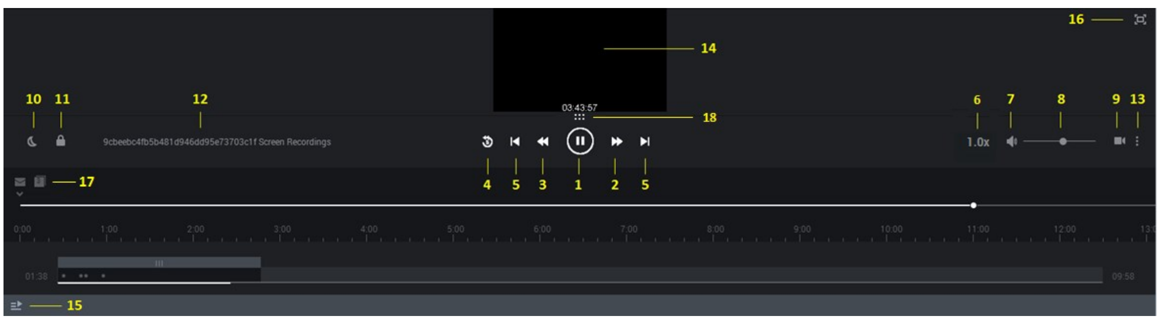
Before you begin working with the Media Player consider the following:

- You can play back an interaction from any point in the recording.
- Playback always begins from the location of the marker in the audio graph.
- When you play back an interaction from the Search Results grid, the marker moves to the beginning of the interaction.
- Playback begins automatically when the interaction is loaded.
- The Media Player includes various playback controls that enable you to better analyze the specific interaction. For additional information, see Playback Controls.
- You can work with the Media Player using keyboard shortcuts. For additional information see Media Player Keyboard Shortcuts.

Playback Controls

The following image and table represent all of the available **playback controls.** Each option is available for Audio Interactions and Screen Recordings.

Note: The Quality Management media player contains fewer controls then the Media Player. In addition, the Quality Management media player contains an icon that when clicked opens the media player in a new separate window. The advantage is that you can view the media player in one screen while looking at SpeechMiner data in a second screen. For more information about Quality Management, see Quality Management.



Number	Description
1	Play or pause the interaction in the current location.
2	Play the next comment.
3	Play the previous comment.
4	Rewind the playback 5 seconds from the current location of the marker.
5	Play the next or previous interaction.
6	Control the speed at which the interaction is played. 1.0 is the default normal speed and every number above is faster. For example, 2.0 is twice as fast as the normal speed.

7	Turn on/off the volume.
8	Select a volume level.
9	Show / Hide Screen Recording. **Note:** If the screen recording is longer than the available audio an ACW (after call work) icon appears . The ACW icon appears on the playback timeline at the time that is equal to the duration of the audio media file. The screen recording plays beyond the end of the audio file.
10	Change the screen's brightness.
11	Lock/Unlock the playback with the scroll bar. When this option is turned Off, you can scroll towards the end of the interaction before the playback reaches the same location. Turn this option On if you want the interaction to automatically scroll so that the part of the interaction that is currently being played back is always visible. The scroll bar moves automatically to keep up with the playback.

13	A menu with the following options: **Export:** Export the interaction to a zip file. **Add To...:** Add the interaction to an interaction list. **Tag:** Add a tag to the interaction to create a connection between the specific interaction and a specific topic. For more information, refer to Search Filter > Tags. **Evaluate:** Create an evaluation session (Ad-Hoc Evaluation) for the selected interaction. For details about how to create and work with an Ad-Hoc evaluation, see Create an Ad-Hoc Evaluation Session. **Delete:** Delete the specific interaction. **Protect from Deletion / Unprotect from Deletion:** Tag the selected interaction with a **Cannot Delete** tag so that it cannot be deleted, or conversely, remove the Cannot Delete tag from the selected interaction. Only users with the **Protect Interactions from Deletion** permission, can add/remove the Cannot Delete tag. . **Note:** For more information about some of these options refer to the Batch Actions page.
12	Indicates the specific interaction ID and agent name.
14	Screen Recording playback. In this area of the screen you can view the selected screen recording. A screen recording is a video of the agent's screen during the specific agent-customer interaction.
15	Return to the search results list.
16	Full screen view. **Note:** Internet Explorer 10 and 11 does not support this option.

17	The envelope (email) and paper (chat) icon appear in the location of the recording when an email was received or a chat conversation took place.
18	Enables you to enlarge the video screen in the media player.

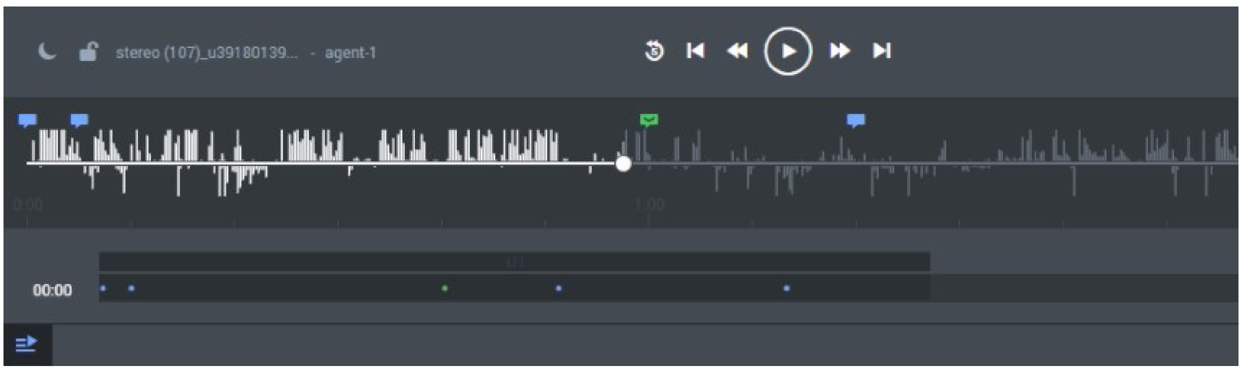
Media Player Keyboard Shortcuts

When working with the Media Player, you can use the following keyboard shortcuts:

Keys to Press	**Result**
Ctrl + Enter	Toggles between Play and Pause
Ctrl + Alt + n	Skips to the next interaction in the grid.
Ctrl + Alt + p	Skips to the previous interaction in the grid.

Dual-Channel Audio

Some recording systems use two audio channels, one for the agent's side of an interaction and the other for the customer's side of the interaction. If your recording system does this, an energy bar (as shown in the following image) will appear above and below the line in the audio graph so that you can tell who is speaking at any given moment. Filtered audio content is still displayed in gray. As a result, you may see as many as three different colors in the audio graph.



Interaction Comments

Comments enable you to add a remark about a thought you have regarding a specific interaction.

A comment can be added:

- At a specific time above the audio wave. When a comment is associated with a specific time in the interaction, it also appears in the
  transcript at the same time. Comments include a time stamp of the time and date when the comment was made/last edited.

Note: When working in a Recording Only deployment, the audio wave will appear only when working in Chrome.

There are three types of comments:

- **Good** : Indicates a positive comment.
- **Bad** : Indicates a negative comment.
- **Neutral** : Indicates an unbiased comment.

Interaction comments enable you to:

- View a comment(s).
- Add a comment about a thought you have regarding the specific interaction.
- Edit an existing comment.

To view a comment in an interaction:

1. Hover over the comment in the Media Player. The comment appears in a pop up window.

To add a comment to an interaction:

1. Select **Explore** > **Search**.
2. Play back the interaction to which you want to add a comment.
3. Click **Add Comment** .

4. To add the comment at a specific time during the interaction select **Specify time** and enter the time in the **Time** field.

   Note: The time in the **Time** field is automatically set to the time associated with the location of the cursor on the audio graph.

5. Enter your comment in the field provided.

6. Select one of the following:

   - **Good** : Indicates a positive comment.
   - **Bad** : Indicates a negative comment.
   - **Neutral** : Indicates an unbiased comment.

7. Click **Add** to add the comment to the interaction.

To edit an existing comment:

1. Click the comment icon associated with the comment you want to edit either from the Media Player.

2. Modify the comment as required.

3. If necessary change the comments sentiment (good, bad, neutral).

4. Click **Apply** to modify the comment.

Interaction Attributes

The Interaction Attributes panel enables you to view characteristics about the interactions in the Search Results grid.

Click the **Interaction Attributes** icon in the Search Results grid to view following information:

- **Interaction processing time:** Indicates the date and time the interaction was processed in the system.
- **Work groups:** Indicates the work group associated with the agent(s) that participated in the interaction.
- **Agents:** Indicates the agent(s) that participated in the interaction.
- **Metadata values:** Indicates the metadata values associated with the interaction.
- **Tags:** Indicates the tags associated with the interaction.

Media Player Options

In addition to playing back an interaction, the Media Player enables you to perform numerous tasks.

In this page you will learn how to:

- Export an interaction to an interaction list.
- Add an interaction to an interaction list.
- Delete an interaction from the current interaction list.
- Create a permalink to the interaction.
- Tag an interaction.

Note: The list of available options is dependent on your permissions.

To export an interaction:

If you want to save an interaction or send it to another user, you can export the interaction as a .zip file that contains the following:

- A CSV file with information about the interaction. This file can be opened using a spreadsheet application such as Microsoft Excel.
- A WAV file. A playable audio file of the interaction (optional).

Note: You must be assigned the **Export Interactions** permission to be able to export interactions. For more information refer to: Permission Definitions.

1. Select **Explore** > **Search**.
2. Select the interaction(s) that you want to export.
3. Click **More** and select **Export**. A dialog box opens and asks if you want to include the audio files with the export.
4. Select **Export the selected interactions** or **Export all the interactions**.

   Note: If you select **Export all the interactions**, all the interactions in all the search result pages will be exported.

5. Select the **Include audio and text interaction files** checkbox if you want to include these files in the .zip file and click **Export**.

   Note: If the **Include audio and text interaction files** checkbox is not active, it means that the size of the Export file exceeds the maximum limit.

6. Select the desired option. If you select **Open**, the file opens in the application that is configured to open ZIP files on your computer. If you select **Save**, a **Save As** dialog box opens.

7. Navigate to the folder in which you want to save the file, and then click **Save**. The file is saved in the selected location.

To add an interaction to a list:

An interaction list is a list of interactions that is saved for later use.

You can add an interaction to a global interaction list.

For additional information, see: Batch Actions.

To delete an interaction from the current interaction list:

1. Select **Explore** > **Search**.

2. Select the interaction(s) that you want to delete.

3. Select **More** ⋮ and click **Delete**.

4. Click **OK** when asked if you are sure you want to delete. The selected interactions are deleted.

To create a permalink to an interaction:

1. Select **Explore** > **Search**.

2. Select the interaction(s) that you want to delete.

3. Select **More** ⋮ and click **Permalink**.

4. Copy the link from the dialog box that opens.

To tag an interaction:

1. Perform a search. See Create a New Search for details.

2. From the search results list, select the interaction that you want to tag.

3. Select the **More** menu in the media player and click **Tag...**. The **Tag Interaction** window appears.

4. In the **Tag Interaction** window, select one or more tags and click **Confirm.** The selected interaction is tagged with the selected tags.

Note: In multiple segment interactions, tags will be associated with the entire interaction and not a specific segment. Segments will not have their own tags.

To remove a tag from an interaction:

1. Search for the interaction whose tag you want to remove.

2. Select the interaction.

3. Select the **More** menu in the media player and click **Tag...**. The **Tag Interaction** window appears.

4. In the **Tag Interaction** window, clear the checkbox associated with the tag you want to remove from the interaction and click **Confirm.** The tag is removed from the selected interaction.

Reports

Reports are summaries and analyses of interaction and external metadata. You can generate reports for analysis, view report details and status, and share the data with users throughout the enterprise. You can view reports in your browser, print them or send them via email.

To help you monitor your business, SpeechMiner offers a wide range of standard reports that can be customized to better suit your needs.

Depending on the type of report, the results may be presented as lists or data and/or in graphic form.

In some reports, you can drill down within a report to see additional details.

In this section you will learn how to:

- Create and run a report: To review and analyze interaction, speech and external metadata.
- Edit saved reports: To modify the report data to suit your needs.
- Work with saved reports: To periodically view data for business issues that may reoccur.
- Understand report layouts and parameters: To better absorb the report information.

Reports Menu Reference

The following list provides a brief description of each Report menu item:

Templates:
Enables you to select to create a report from a wide variety of report templates.

Saved Reports:

Enables you to run the same report numerous times on different dates and times.

Edit Report:

Enables you to change an existing report.

Create a New Report

New reports are based on an existing template.

To create a new report:

1. Select **Explore** > **Reports**.
2. Select **Templates.**
3. Decide which report template will act as the basis of your new report.
4. Click the **Preview** link to see an example of the report template.
5. Click the **Edit** link associated with the template on which you want to base your new report. The **Edit Report** tab is opened.
   The name of the selected template appears in the Template list.

   Note: You can change the template by selecting a different template from the **Template** list.
6. Configure the report as necessary using the available parameters at the top of the screen and under **Interactions Filter** on the left side of the screen.
   For additional in formation about each parameter refer to Report Parameters.

   Note: Not all templates include **Interactions Filter** on the left side of the screen.
7. Click **Run Report**. The report appears at the bottom of the screen under that report parameters.
8. Optional: Click **Save** to save the report.

   You do not have to save a report to run it.

   To create a report based on a saved report click **Save As** .

Edit a Report

After a report is created you can change its properties.

Note: The ability to change report properties depends on the permissions you were given.

To edit an existing report:

1. Select **Explore** > **Saved Reports**. The Saved Reports tab is opened.
2. Click the **Edit** icon . The Edit Report tab is opened.
3. Configure the report as necessary using the available parameters at the top of the screen and under **InteractionsFilter** on the left side of the screen. For additional information about each parameter, refer to Report Parameters.

   Note: Not all templates include **InteractionsFilter** on the left side of the screen.
4. Click **Save** to save your changes to the existing report.

   If you are creating a report based on a saved report click **SaveAs**.
5. Click **Run Report**. The report appears at the bottom of the screen under that report parameters.

Run a Report

You can run a report in a number of ways:

- Run the report and view the results in the browser.
- Run the report from the Edit Report tab.
- Run the report and send the results as an email attachment to selected recipients.

Note: You do not have to save a report to run it.

To run the report and view the results in the browser:

1. Select **Reports** > **Saved Reports** to run an existing report.
2. From the Saved Reports list click **Run** . The report results are displayed as you requested in the SpeechMiner Report Viewer window.

To run a report from the Edit Report tab:

1. Select **Reports** > **Saved Reports** to run an existing report.
2. From the **Saved Reports** list, click the **Edit** icon . The **Edit Report** tab is opened.
3. Select how to view the report results in the browser:
   - To view the results in a new browser window, at the top of the form select **Open in new window**.
   - To view the results below the template form, clear the **Open in new window** check box.
4. Click Run report. The report results are displayed.

To run the report and send the results via e-mail:

Note: The results are sent as an MHT file. The .mht file is opened in a browser and is linked to the SpeechMiner system.

1. Select **Reports** > **Saved Reports** to run an existing report.

2. From the **Saved Reports** list, click the **Edit** icon . The **Edit Report** tab is opened.

3. At the top of the form, click **Email Report** . A dialog box opens.

4. Under **To** enter the required e-mail addresses.

   Separate multiple addresses with semi-colons (`;`).

5. Under **Notes** type any text you want to include in the body of the e-mail.

6. Click **Send**. The report runs and the results are sent to the recipients you specified. A confirmation message appears when the results are sent.

Analyze Report Data

Report templates that include the **Agents Data Set** filter can be configured to analyze data for the current user or work group, rather than a specific user or work group.

When the report runs, the data set used changes depending on which user runs it. For example, if the user is agent 12, the report will only include interactions that were handled by agent 12.

This feature will only work if the user's profile includes mapping. For instance:

- If the user is an agent, the mapping gives the name of the agent. The reports that are filtered for the current user only include data about that agent.
- If the user is a manager, the mapping gives the name of the manager's work group. The reports that are filtered for the current user include data for the entire work group.

To configure a report to analyze data for the current user:

1. Select **Explore** > **Saved Reports**.
2. Click the **Edit** icon for the report you would like to edit for the current user. The reports opens in the **Edit Report**.
3. Under **Interactions Filter**, select the current user from the **Agents** list and click **Add**.
4. Click **Done**. Once the report is configured, different users can create the report to analyze their own data and the report can be shared with other users.

Drill Down a Report

Depending on the type of report, the report results may be in the form of a graph, a histogram, or a table.

You can drill down to the underlying data on which any graphic component is based (graph bars, lines, or table headers).

When you do this, you will be presented with a new report that is based on the data point you clicked on.

To drill down to the underlying data of a report component:

- Click the component.

To play back an interaction from a drill-down list:

- Under **Open**, click the icon.
  The Media Player opens in a new browser window and begins to play back the interaction.

To close the drill-down list and return to the report results:

- If the report was displayed in the **Customize Report** tab click **Back** at the bottom of the form.
- If the report was opened in a separate window or tab, use the browser's **Back** button or press **Backspace**.

To sort data in a table:

- Click the heading of the column by which you want to sort the table.

Working with Saved Reports

A saved report is a customized report template that you can run as often as you need. You can run the saved report on demand or according to a schedule.

From the Saved Reports grid you can:

- Filter the Saved Reports list.
- Drill down to view additional details about the specific report.
- Delete a saved report.

The Saved Reports grid contains the following columns:

Column	Description
Run	Click the **Run** icon to run the report and display the results in a new window.
Edit	Click the **Edit** icon to open the report in the Edit Report tab where you can change the parameters and settings.
Delete	Click the **Delete** icon to delete the selected report.
Name	The saved report name.
Template	The template on which the report is based.
Created By	The name of the user who created the report.
Sharing	A black **Sharing** icon marks reports that you created. A faded Sharing icon marks reports that other users created and shared with you. The names of the groups and users that share the report appear in the table beside the Sharing icon. Click the Sharing icon to open a dialog box in which you can select the groups and individual users with whom you want to share the report. The members of the selected groups and selected users will see the report listed in their Saved Reports tab. **Note:** You can only edit reports that you created. If you want to edit a report that you did not create you must first save the report under a new name.

Schedule	Indicates whether the report is scheduled to run at a specific date and time. Click the **Schedule** icon to activate, deactivate, create or modify the report's schedule.
Last Modified	The date on which the report was last edited and saved.
Permalink	Click **Copy** to create a Permalink to the specific report.

To filter the Saved Reports list:

Use the filter options to limit the saved reports that are displayed in the list to those that meet specific criteria.

The following filter controls are located in the top right corner of the list:

Filter	Description
Delete	Click the **Delete** icon to delete the selected report.
Name	Enter a sequence of characters. Only the saved reports whose name contains the letters you entered are displayed.
Template	Select the report template to include in the list and click **Done** to activate the filter. Only the saved reports based on the template(s) you selected are displayed.
Created By	Select the users to include in the list and click **Done** to activate the filter. Only the saved reports that were created by the selected user(s) are displayed.
Sharing	Select My Reports to display only those reports that you created or Shared Reports to display only those reports that were created by other users and shared with you. Click **Done** to activate the filter.

To drill down and view additional details about the report:

1. Create a new report or open a saved report.
2. Run the report. The report is opened in the SpeechMiner Report Viewer.
3. Click a graphic component in the report to drill down to the underlying data represented by the graphic component.

To delete a saved report:

1. Select **Reports** > **Saved Reports**.
2. Select the report or reports you want to delete.

   Note: If you did not create the report you cannot delete it and a check box will not be available for the report.
3. Click the **Delete** icon .

   If you selected to delete one report, click the **Delete** icon in the report row. If you selected to delete more than one report click the **Delete** icon in the top right corner of the screen.
4. Click **Yes**. The report is deleted.

Schedule a Report

You can schedule a report to run automatically at specified times. The results are automatically sent via email to the recipients.

The type of report schedule is indicated in the Schedule column. The following list represents the two types of report schedules:

- **Deactivated:** The report is not scheduled to run.
- **Time Based:** The report runs automatically at specific times.

Note: You can only create or modify the schedules for the reports you created.

The report scheduling feature enables you to:

- Create a report schedule for a specific report.
- Create a report schedule for a group of reports.
- Send the report to specific recipients.
- Deactivate a report schedule.

To create a report schedule for a single report:

1. Select **Reports > Saved Reports**.
2. Select the report you want to run according to a specific schedule.
3. Click the **Schedule** icon.
4. Click **Active** and select the **Schedule** tab.
5. From the **Schedule Type** list select **Time Based**.
6. From the **Date Range** fields select the start and end of the schedule.
7. Select the period of time for the scheduled report.

For example, if you want to run the report every weekday, select week. If you want to run the report on specific days select Day and then the specific days.

The parameters that appear on the right side of the window change according to your time period selection

8. Select the Recipients tab and configure the available parameters.

9. Click **Schedule**. The report is scheduled to automatically run according to the settings you configured.

To create a report schedule for a group of reports:

1. Select **Reports > Saved Reports**.

2. Select the group of reports you want to run according to a specific schedule.

3. Click the **Schedule** icon .

4. Click **Active** and select the **Schedule** tab.

5. From the **Schedule Type** list, select **Time Based**.

6. From the **Date Range** fields, select the start and end of the schedule.

7. Select the period of time for the scheduled report.

   For example, if you want to run the report every weekday, select week. If you want to run the report on specific days, select Day and then the specific days.

   The parameters that appear on the right side of the window change according to the selected time period.

8. Select the Recipients tab and configure the available parameters.

9. Click **Schedule**. The reports are scheduled to automatically run according to the settings you configured.

To send the report to specific recipients:

Regardless of the schedule type selected, you must specify one or more recipients for the report.

1. Select **Reports > Saved Reports**.

2. Select the group of reports you want to run according to a specific schedule.

3. Click the **Schedule** icon .

4. Select the **Recipients** tab and configure the fields as follows:

    - **To:** The e-mail addresses of the report recipients. Separate multiple addresses with semi-colons (;).

    - **Reply To:** The sender's address.

    - **Subject:** The text that should appear in the subject line of the e-mail.

    - **Report Format:** Select **Web archive** to create the results in an MHT file that can be opened in Internet Explorer. Or, select **PDF** to create the results in a PDF file.

      Note: If the Schedule Report does not produce expected results refer to the *Configuring the Reporting Services* in the *Administration Guide*.

    - **Priority:** Select the desired priority level for the e-mail message.

5. Click **Schedule**. The reports are scheduled as specified in the Schedule tab and the recipients are set as specified in the Recipients tab.

To deactivate a report schedule:

1. Select **Reports > Saved Reports**.

2. Select the report(s) for which you want to deactivate the schedule.

3. Click the **Schedule** icon .

4. At the top of the scheduling dialog box, clear the **Active** check box.

   Note: If you selected a group of saved reports before you opened the Scheduling window, the **Active** check box is not selected.

5. Click **Schedule** check box.

Report Templates

SpeechMiner reports are interactive. That is, you can drill down within the report to view additional details about any graphic component (for example, graph bars, line or table headers), by simply clicking the component. In addition, you can play an interaction directly from the Interaction list in the generated report.

Below is a list of all the available SpeechMiner reports. For additional information, see Report Parameters.

Before you begin working with reports consider the following:

- Some reports offer options not included in the remaining reports. When a report contains additional options, they will be described in an
Actions section in the report description.

- Some reports have a number of available versions (for example, Full and Wide). Use the **Version** parameter to select the desired version.

- The information visible in the reports you create is limited to the data to which you have access.

- Some reports may not be available to all users.

- You may have access to reports that were not documented, because they were custom-made for your organization.

The following table lists all of the available report templates and shows the report templates only available with a Quality Management license:

Report Template	Available with a Quality Management License
Agent Comparison	
Agent Comparison by Segment	
Agent Evaluation Comparison	X
Agent Trend	
Agent Trend by Segment	
Auto Fail	X
Calibration Score	X
Evaluation Summary	X

Evaluator Evaluation Comparison	X
Interaction Evaluation Summary	X
Interactions	
Metadata Frequency	
Team Comparison	
Team Comparison by Segment	
Team Evaluation Comparison	X
Usage Tracking	

Report Template Layout

This section explains the general report template layout. The layout includes:

- First Row
- Second Row
- Third Row
- Data Seat Filters

The SpeechMiner report template has a maximum of three parameter rows. Each row deals with different functions in the report.

In addition, most report templates have a Data Set filter section on the left side of the screen.

This section explains the report template layout using the Agent Comparison template as an example. The Agent Comparison report
represents the most common template layout.

First Row:

The first row contains:

- Controls for working with report results (see Create a New Report)
- Template field, in which you can select the type of report
- Report Name field, used to name the report.

Second Row:

The second row contains fields for defining the report title and an optional report description. These items are displayed at the top of the report results. By default, the name of the report template is used as the report title and you can modify it as necessary. Some templates also have a Version parameter in this row. The Version parameter can be used to select the size or format of the report output.

Third Row:

The third row contains the Items on Report parameters. That is, the fields that determine which items will appear graphically on the report.In some reports, one or more of the parameters may also have statistical functions.

Data Seat Filters:

The left side of most report templates contains the Data Set filters. These filters specify which data will be included in the report's analyses. For additional information about the filters and how to configure them, see Report Parameters. The current filter settings are displayed on the right side of the template below the first row.

Report Parameters

Most report parameters have the same function no matter which template you use. Exceptions are briefly explained in this section, and dealt with in detail
in the documentation on individual reports, in the Templates section.

The following is a list of the the most common parameters:

- Template
- Report Name
- Report Title
- Description
- Version
- Data Set Filters
- Items on Report
- Agents
- Data Type of Compare
- Period Type or Period
- Top or Display

Template

From the Template list, you can choose or switch to any of the available report templates.

Report Name

Text entered in this field will be used as a file name for the report, if you choose to save the report. This name will appear under the **Saved Reports** tab for future access.

Report Title

Text entered in this field will be displayed in large, bold type at the top of the report results. The report title is optional. The name of the report template appears in this field by default, but can be modified or deleted.

Description

Text entered in this field will be displayed in fine print directly below the Report Title in the report results. The description is optional.

Version

The output of some reports can be generated in different versions and different sizes or formats.

In this field, select the desired output version from the drop down list.

The available options vary depending on the template.

Depending on your permissions, the following Version options may be available:

- **Full Report:** a full-size report output optimized for printing (either 11" wide x 8.5" high, or 8.5" wide by 11" high, depending on the template). Full reports often contain two parts: a graph or chart followed by a summary table which may also contain additional details. In some cases, when a Full report contains items that can be expanded to display more details, the version has two options, **Expanded** and **Collapsed**. When **Full Report (Expanded)** is selected, all items are initially expanded when the report is displayed. When **Full Report (Collapsed)** is selected, all items are initially collapsed.

- **Mini:** a small output for display in the Dashboard view (480px wide x 288px high).

- **Wide:** a wide-width output for display in the wider columns of the Dashboard view (768px wide x 288px high).

- **Table Only:** a full-size report output that only includes the summary table. Graphs and diagrams are not printed (either 11" wide x 8.5" high, or 8.5" wide by 11" high, depending on the template).

- **X-Axis Only:** a bubble chart option. Select this option to specify report output in the form of a table, with a bar graph representing the x-axis values. No bubble-chart is produced and y-axis values are not represented (Width: 768px).

- **Y-Axis Only:** a bubble chart option. Select this option to specify report output in the form of a table, with a bar graph representing the y-axis values. No bubble-chart is produced, and x-axis values are not represented (Width: 768px).

Data Set Filters

The Data Set Filter options allow you to narrow down the data from the entire database, so you can base your report on a subset of the available data.

All of the Data Set Filters have an "AND" relationship. This means that each filter further restricts the options available and all interaction represented in your final data set satisfy all Data Set Filters.

Should you choose options from two different filters that mutually exclude each other (for example, a Date metadata entered for April 2015 and a date range between February and March 2014), you will have zero data in your report.

Note: Parameters that appear under **Items on Report** (for example, the third row of parameters) allow you to select specific information from the database selected under Data Set Filters.

Distributional information presented in the report is calculated for the items selected under **Items on Report**,and is built upon the base of data that is selected using the Data Set Filters. The Data Set Filters appear in the Filter Panel on the left side of the report template for all reports that support them. The filters are divided into groups. The basic filters appear at the top of the Filter Panel and are always displayed when the panel is displayed. The remaining filter groups can be expanded or collapsed.

The following groups of filters are available:

Filter Group	Description
Basic filters	Enables you to filter for interaction types and date range. **Note:** A day begins at 0:00 and ends at 23:59. **To Date** date filters (All, Today, Week to Date, Last 7 Days, Month to Date. Last Month, Q Last 90 Days) include the interactions collected in the system up until the exact time and date generated. The times given are for the time zone where your Web server is deployed, and therefore are n the same as the times where you are physically located.
Interaction Properties	Enables you to select agents, interaction length, and interaction ID properties. For additional information about each option, see Search Filter.

Metadata	Enables you to filter according to metadata values. Metadata is collected by the recording system and is relayed to SpeechMiner. The types of available metadata vary from system to system. You can select any type of metac your system and, if you wish, you can specify a value for it. The search results will only include interactions for which the selected type of metadata has ar manually defined value.
User Actions	Enables you to filter interactions according to: • Specific user comments added to the interaction. • Interactions that were played back. Under **Interaction Comment Text**, specify the text that must appear in a comment that was interaction. In the other fields, select the users who must have performed the specified actions.

Items on Report

The parameters in this section allow you to select specific information and calculate distributional information on the data in the data set that was selected using the Data Set Filters. If you make no selections under **Items on Report**, default values will determine how the data will appear in the report. Since the parameters in Items on Report differ from report to report, this section explains only the most common ones listed alphabetically. Less common parameters are explained in their respective templates.

Agents

You can select the specific agents or work groups to be analyzed and displayed in your report. The default value (Any) includes all agents.

If your Data Set Filters are not set to Any, your selections for Agents must match your selections in the Data Set Filters (for example, the same work groups or agents, belonging to the same interaction types). In other words, the report output will only include agents who were selected here and who were not excluded from the data set in the Data Set Filters.

Data Type or Compare

You can specify the type of data you wish to display in your report.

The most common choices are:

- **Number of Interactions:** Displays the number of interactions per each report item. Data may vary depending on the other filters selected.

- **Percentage of Interactions:** Displays the percentage of interactions per report item in your data set.

- **Average Interaction Duration:** Displays the average length, in minutes, of all interactions for each report item. The entire conversation for the interaction recording session is considered, excluding the wrap time after the interaction.

- **Total Resources:** Displays the total amount of time, in hours, of all the interactions per report item. It is essentially the sum of all interaction duration's.

Period Type or Period

This parameter is most commonly seen on reports that show trends. The output of the report will be displayed in increments of the selected Period Type.
For each increment, the value of the selected Data Type will be displayed for each particular report item. For example, if the Data Type is "Number of Interactions"
and the Period Type is "Day," the number of interactions for each day in the date range included in the report will be shown.

Top or Display

In this parameter, you can choose how many of the highest or lowest values are displayed on the report. The options may include 5, 10, 15, 20, All, All Sorted, and All Unsorted.

Available Templates

The following is a list of all the available templates:

- Agent Comparison
- Agent Comparison by Segment
- Agent Evaluation Comparison
- Agent Trend
- Agent Trend by Segment
- Auto Fail
- Calibration Score
- Evaluation Summary
- Evaluator Evaluation Comparison
- Interaction Evaluation Summary
- Interactions
- Metadata Frequency
- Team Comparison
- Team Comparison by Segment
- Team Evaluation Comparison
- Usage Tracking

Agent Comparison

Description

The Agent Comparison report consists of a bar graph comparing Agents' performance against each other, as well as against the average
value of all the agents that are represented.

Common Usages

- Plot agent performance statistics to see who performs above and below the benchmark (the average of a group is determined by the filter selections).
- Drill down on specific agents to play their interactions and find examples about effective agent behavior or areas that need improvement.

Customizing the Report

General Settings

- **Version:** Available in Full Report (standard size), Mini, Wide, X-Axis Only, and Y-Axis Only versions.

For additional information, see Report Parameters.

Actions

- Click on a bar in the graph or an item in a table to open a list of interactions included in the specific item.

Agent Comparison by Segment

Description

The Agent Comparison by Segment report consists of a bar graph comparing Agents' performance against each other, as well as against the average value of all the agents that are represented.
The numbers in the table and graph represent a segment count.

Common Usages

- Plot agent performance statistics to see who performs above and below the benchmark (the average of a group is determined by the filter selections).

- Drill down on specific agents to play their interactions and find examples about effective agent behavior or areas that need improvement.

- Utilize the data obtained from the report to identify training needs for effective agent coaching.

Customizing the Report

General Settings

- **Version:** Available in Full Report (standard size), Mini, Wide, X-Axis Only, and Y-Axis Only versions.

For additional information, see Report Parameters.

Actions

- Click on a bar in the graph or an item in a table to open a list of segments included in the specific item.

Agent Evaluation Comparison

Description

The Agent Evaluation Comparison report summarizes the average evaluation score for select agents.

Common Usages

Used to compare agent evaluation scores.

Customizing the Report

General Settings

- **Date Range:** Enables you to select the period of time on which to base the report.
- **Form:** Enables you to select the specific form to be analyzed and displayed in the report.

  Tip: If the Form list does not include the form you want to select, refresh the page.
- **Agents:** Enables you to select the agents that should be analyzed in the report.
- **Show Form:** Enables you to view the complete form(s) associated with the specific report. To view the form you must select an agent.

For additional information refer to Report Parameters.

Actions

Click an agent in the Y-axis to drill down and view the form scores associated with the selected agent.

Agent Trend

Description

The Agent Trend report is a line graph that displays agent performance in relation to one or more selected categories over time.

Common Usages

- Use to track an agent's performance progress over time to monitor effectiveness of training programs.
- Use to use the graph to measure and compare performance and provide feedback to the agent.

Customizing the Report

General Settings

- **Version:** Available in Full Report (standard size), Mini, Wide, X-Axis Only, and Y-Axis Only versions.

For additional information, see Report Parameters.

Actions

Click on a line in the graph or an item in the table to open the interaction list included in the item.

Agent Trend by Segment

Description

The Agent Trend by Segment report is a line graph that displays agent performance in relation to one or more selected categories over time.
The numbers in the table and graph represent a segment count.

Common Usages

- Tracks an agent's performance progress over time to monitor effectiveness of training programs.
- Measures and compares performance to provide feedback to the agent.

Customizing the Report

General Settings

- **Version:** Available in Full Report (standard size), Mini, Wide, X-Axis Only, and Y-Axis Only versions.

For additional information, see Report Parameters.

Actions

Click on a line in the graph or an item in the table to open the segment list included in the item.

Auto Fail

Description

The Auto Fail report provides a summary of all the Quality Monitoring evaluation forms that were designated as auto fail for selected evaluations.

Common Usages

Enables you to monitor evaluation with evaluation forms that were designated as auto fail.

Customizing the Report

General Settings

- **Evaluation:** Enables you to select from a list of evaluations that contain forms that were assigned as auto fail.
- **Form:** Enables you to select from a list of forms that were assigned as auto fail.
- **Date Range:** Enables you to select the period of time on which to base the report.

Actions

Click on a form name to see a list of all the evaluation session that failed due to the auto fail designation.

From the list that appears, you can click on the **Agent Name** to view the specific form that failed.

Note: If you select a specific form from the **Form** list at the top of the report, you will receive the list of the evaluation sessions that failed for the selected form.

Calibration Score

Description

The Calibration Score summarizes all the evaluation sessions for one Calibration Evaluation and provides a graph that shows the specific Calibration Evaluation form scores.

Common Usages

Enables you to create a report that compares two or more evaluators performance.

Customizing the Report

General Settings

- **Evaluation:** Enables you to select the Calibration Evaluation on which to base the Calibration Score report.

  Tip: If the Evaluation list does not include the evaluation you want to select, refresh the page.

- **Baseline Average:** Enables you to highlight a score by which evaluators are compared. For example, if you enter 80% for the Baseline Average you will be able to see who scored about and below 80%..

For additional information refer to Report Parameters.

Actions

Sort the evaluator names in the Y-axis.

Evaluation Summary

Description

The Evaluation Summary report summarizes the evaluation performance of one or more evaluators. The report is shown in a Doughnut chart.

Common Usages

Enables you to monitor evaluator performance.

Customizing the Report

General Settings

- **Date Range:** Enables you to select the period of time on which to base the report.
- **Evaluators:** Enables you to select the evaluators whose performance you would like to compare.

  For additional, see Report Parameters.

Evaluator Evaluation Comparison

Description

The Evaluator Evaluation Comparison Report summarizes the average evaluation score for selected evaluators.

Common Usages

Enables you to compare evaluator evaluation scores.

Customizing the Report

General Settings

- **Date Range:** Use to select the period of time on which to base the report.
- **Form:** Use to select the specific form to be analyzed and displayed in your report.

  Note: If the Form list does not include the form you want to select refresh the page.
- **Evaluators:** Use to select the specific evaluators to be analyzed and displayed in your report.

For additional settings, see Report Parameters.

Actions

Click an agent in the Y-axis to drill down and view the form scores associated with the selected evaluator.

Interaction Evaluation Summary

Description

The Interaction Evaluation Summary report shows the evaluation score for the last evaluation session, associated with a specific evaluator and interaction.

Common Usages

Enables you to monitor evaluation session scores for a specific evaluator.

Customizing the Report

General Settings

- **Form:** Enables you to select the specific form to be analyzed and displayed in the report.

  Tip: If the Form list does not include the form you want to select, refresh the page.
- **Interaction ID:** Enables you to select the specific internal interaction ID to be analyzed and displayed in the report.
- **Evaluator:** Use to select the specific evaluator to be analyzed and displayed in your report.

  For additional information, see Report Parameters.

Interactions

Description

The Interactions report provides a list of all interactions that were recorded.

Common Usages

- Validate recorded interactions.

Customizing the Report

Items on Report

- **Metadata Field name:** Select the metadata field for which you want to run the report.

  Note: The field selected must be within the range selected in the Data Set Filters. If it is not within the range, the report will be empty.

- **Pattern to Include:** Enter a series of one or more characters that must be found in the field value in order for it to be included in the
  report (optional; leave the field blank to include all patterns).

- **Values to Exclude:** Enter one or more field values to exclude from the report. If you enter more than one value, separate the multiple
  values with commas and do not leave a space after the comma (optional; leave the field blank to include all values).

For additional information, see Report Parameters.

Actions

- Click a row in the table to listen to the selected interaction.

- Click the metadata summary to see and playback a list of interactions with the same metadata value.

Metadata Frequency

Description

The Metadata Frequency report is a histogram that shows values for a specific metadata field.

The histogram shows how many interactions in the data set are associated with the selected metadata field.

The Metadata Frequency report includes:

- The top of the graph is a summary of the data. It shows how many interactions are associated with each value and the percentage
  of all the interactions in the data set that had the values. For example, if the metadata field "department" is selected, the report
  shows how many departments (values) were represented in the data set, and divides the departments into groups based on how
  many interactions they had.
- The bottom of the graph provides details for one of the groups in the top level. It lists the values associated with the number of
  interactions represented by the group and shows the amount.

Common Usages

- Classify and quantify interactions according to a metadata field.
- Utilize the comparative data obtained from the report to identify issues that may require attention.

Customizing the Report

General Settings

- **Version:** Available in Full Report (standard size), Mini, Wide, X-Axis Only, and Y-Axis Only versions.

Items on Report

- **Metadata Field name:** Select the metadata field for which you want to run the report.

  Note: The field selected must be within the range selected in the Data Set Filters. If it is not within the range, the report will be empty.

- **Pattern to Include:** Enter a series of one or more characters that must be found in the field value in order for it to be included
  in the report (optional; leave the field blank to include all patterns).

- **Values to Exclude:** Enter one or more field values to exclude from the report. If you enter more than one value, separate the
multiple values with commas and do not leave a space after the comma (optional; leave the field blank to include all values).

- **Minimum Interaction Count:** The minimum number of interactions that must be found for a value, in order for the value to be
included in the report.

For additional information, see Report Parameters.

Actions

At the top of the graph, click a bar in the graph to drill down to the lower level.

At the bottom of the graph:

- Click a bar in the graph to search for interactions that have the field value represented by the bar.

Team Comparison

Description

The Team Comparison report is a bar graph that compares performance between teams and against the average value of all teams represented.

Common Usages

- Analyze the report data to optimize team and operations management.
- Provide clear visual reports for training assessment and feedback.

Customizing the Report

General Settings

- **Version:** available in Full Report (standard size), Mini, Wide, X-Axis Only, and Y-Axis Only versions.

Items on Report

- **Teams:** Select specific work groups to be analyzed and displayed in your report. The default value ("Any") includes all work groups. You must also make the appropriate selections for the work group or Agent in the Data Set Filters. If you select individual agents instead of work groups, you must select the team that contains the agents you selected, otherwise results will not be returned.

- **Compare:** Select the data type you want to compare.

For additional information, see Report Parameters.

Actions

Click a bar in the graph to open a list of interactions included in the item.

Team Comparison by Segment

Description

The Team Comparison report is a bar graph that compares performance between teams and against the average value of all teams represented.
The numbers in the table and graph represent a segment count.

Common Usages

- Analyze the report data to optimize team and operations management.
- Provide clear visual reports for training assessment and feedback.

Customizing the Report

General Settings

- **Version:** available in Full Report (standard size), Mini, Wide, X-Axis Only, and Y-Axis Only versions.

Items on Report

- **Teams:** Select specific work groups to be analyzed and displayed in your report. The default value ("Any") includes all work groups. You must also make the appropriate selections for the work group or Agent, Language, and Program filters in the Data Set Filters. If you select individual agents instead of work groups, you must select the team that contains the agents you selected, otherwise results will not be returned.

- **Compare:** Select the data type you want to compare.

- **Categories:** Select specific interaction categories to limit the data set analyzed for your report.

For additional information, see Report Parameters.

Actions

Click a bar in the graph to open a list of segments included in the item.

Team Evaluation Comparison

Description

The Team Evaluation Comparison report summarizes the average evaluation score for the selected teams.

Common Usages

To compare team evaluation scores.

Customizing the Report

General Settings

- **Date Range:** Use to select the period of time on which to base the report.
- **Form:** Use to select the specific form to be analyzed and displayed in your report.

  Note: If the Form list does not include the form you want to select, refresh the page.

- **Teams:** Use to select the specific teams to be analyzed and displayed in your report.
- **Show Form:** Enables you to view the complete form(s) associated with the specific report. To view the form you must select a team.

For all other settings, see Report Parameters.

Actions

Click a team in the Y-axis to drill down and create an Agent Evaluation Comparison report for the agents in the selected team.

Usage Tracking

Description

The Usage Tracking report shows information about user activity over a selected date range.

Common Usages

- Monitor the activity of SpeechMiner users.
- See which interactions have been listened to.

Customizing the Report

For additional information, see Report Parameters.

Actions

- Click a user to drill down to a log of the user's actions.
- In the user action log, click one of the tabs at the top of the list to filter the list. For example, click **Logins** to see a list of when the user logged into or out of the system.

Quality Management

Quality Management (QM) helps organizations move beyond random sampling to gain a deeper understanding of its agent/customer interactions by monitoring, evaluating, and studying customer interactions. Quality Management not only helps organizations identify agents who under perform, but it also helps them identify the root cause of an agent's behavior.

By understanding agent performance and productivity issues at a granular level, Quality Management offers insight into customer interactions and ways in which agents can improve them. That is, Quality Management offers insight that can increase employee productivity, resolve future customer disputes and subsequently enhance customer service. It enables you to ensure consistent and professional service.

The QM module is a tool that helps organizations improve agent productivity as well as customer satisfaction. The key features such as Forms Manager and Evaluations Manager can be utilized for evaluating agent productivity, as well as targeted agent training. These features allow easy detection and training of agents who do not adhere to compliance or specified procedures.

The means to satisfied customers and great service is this cycle of data collection, analysis, training, and improvement.

Quality Management key features include:

- Forms Manager: Enables you to create feedback forms to use when evaluating your contact center agents.
- Evaluations manager: Enables you to create evaluations to monitor your agents productivity and efficiency.
- Evaluation Sessions: Provides a list of existing evaluation sessions.
- Reports: Enables you to monitor agent or evaluator progress using predefined reports, identify areas for training, and calibrate evaluator responses to limit evaluation variations.

Quality Management Menu Reference

The following list provides a brief description of each Quality menu item:

Forms Manager:

Enables you to create feedback forms to use when evaluating your contact center agents.

Evaluations Manager:

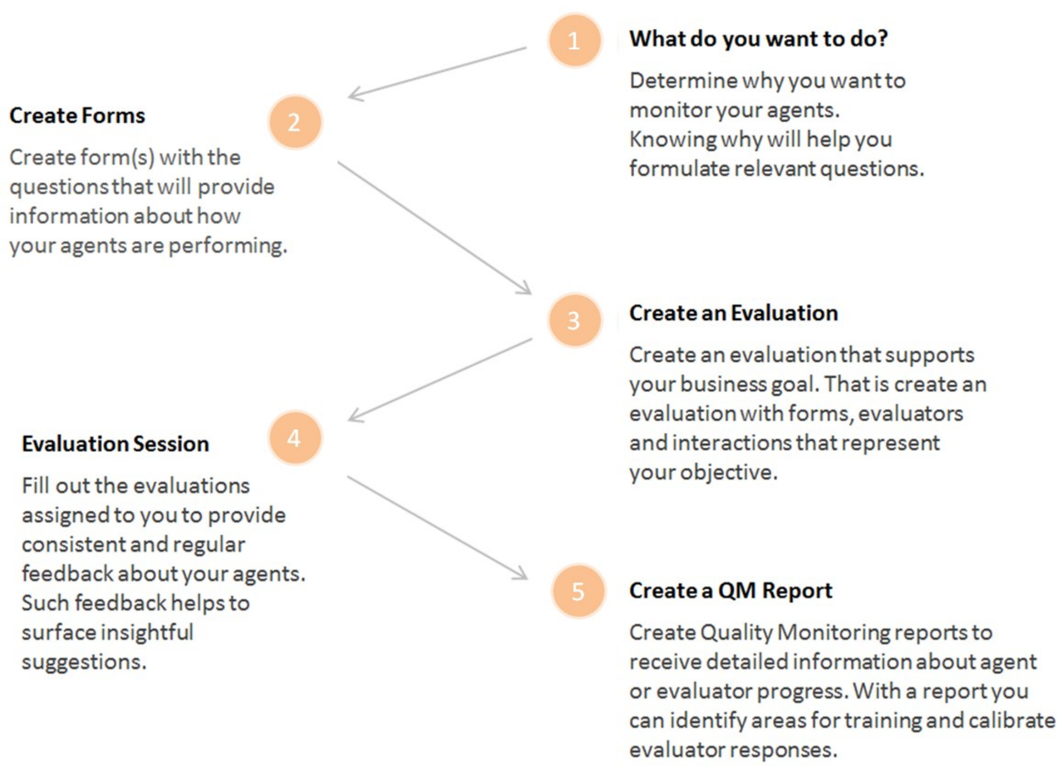
Enables you to create evaluations to monitor your agents productivity and efficiency.

Evaluation Sessions:

Provides a list of the existing evaluation sessions. From this list you can tell which session was or was not completed. A completed evaluation session provides a view into how an agent communicates with consumers.

Quality Management Workflow

Review the following QM workflow to get an overall idea about the SpeechMiner Quality Management process:



Forms Manager

With the Quality Management - Forms Manager you can create and manage forms that enable evaluators to provide feedback about a specific agent. That is, when a form is included in an evaluation, it becomes part of a process that helps you identify how an agent is functioning, and subsequently what the agent needs to do in order to maximize your business goals and customer satisfaction.

Before you create a form consider the following:

- Each form has a name, optional description and a list of questions.
- Forms can contain one or more of the following question types:
    - Yes/No
    - Multiple Choice
    - Choose from List
    - Free Form
    - Sliding Scale
- Questions are created and contained within groups. A group can contain one or more questions.
- Each question can be defined as mandatory or optional.
- Multiple Choice, Choose from List, Yes/No and Sliding Scale questions are assigned weights. The given weight is used to calculate cumulative scores and the overall score of the form.
- Yes/No, Multiple Choice, the minimum Sliding Scale value and Choose from List questions can include Auto-Fail answers.
- Forms are inactive until you activate them.
- Only active forms can be attached to an evaluation.
- Each evaluation can contain one or more forms.

- A form used in one or more evaluations cannot be deleted.
- Each active form can be attached to one or more evaluations.

Forms Manager Grid

The Quality Management - Forms Manager grid contains a list of all the inactive and active forms.

From the grid you can quickly see when the form was created, the last time it was modified who created the form and so on.

The Forms Manager grid contains the following information:

Parameter / Column	**Description**
New Form	Use to create a new form.
Filter by name	Use to search for a specific form by its name.
	Deletes the selected form(s).
0 Selected	The number of forms selected in the grid.
Name	The name of the form. **Note:** Hover over the form name to view the description of the specific form.
Description	The description added to the **Description** field about the specific form. **Note:** By default, the **Description** column does not appear in the grid. To add the **Description** column to the grid, click the icon and select the **Description** checkbox.
Creator	The name of the user who created the form.
Created	The date and time when the form was created.
Modified	The date and time when the form was changed.
Status	Indicates if the form is active or inactive.
	Use to select the columns that appear in the grid. **Note:** To return the grid columns to their default state, click **Reset to defaults** from the Select Columns list().

Create a New Form

Quality Management forms are included in evaluation sessions. These forms enable evaluators to obtain feedback about how an agent is functioning, and subsequently determine what the agent needs to do to maximize your business goals and customer satisfaction.

To create a new quality management form:

1. Click **Quality** > **Forms Manager**. The Forms Manager grid appears.
2. Click **New Form**. A blank form appears.
3. In the **Untitled Form** field enter a name for the form.
4. In the **Description** field enter a description about the form you are creating. (optional)
5. Click **Insert** and select to create a group of questions, add a group with an existing question type or add an existing question group from the
   Question Library.

   Note: By default one empty group already exists when you create a new form. For example, a form about agent/customer communication could have a group of questions called Interaction, containing questions about the interaction and another group called Agent, containing questions about how the agent handled the interaction.

   For details about how to create, edit and use question groups, see: Question Library.
6. In the fields provided, add a group name and group description.
7. Click **Insert Question** to add a question to the group and select one of the following question types:

   For details about each question type refer to: Form Questions.

Question	Description
Yes/No or N/A	A question whose expected answer is either yes, no or not applicable.
Choose from List	A closed ended question that enables the user to select multiple answers from a list of choices.

Multiple Choice	A closed ended question that enables the user to select one answer from a list of answers.
Free Form	A text box for users to input short answers to the question.
Sliding Scale	A scale with a minimum and maximum value, where the maximum value represents a stronger association to the question.

8. If a question is mandatory, select the **Required** check box.

   When Required is selected, the user must answer the question before completing the form.

   Note: You can move the location of a question using the arrows provided ↑ ↓.

9. Repeat steps 5-8 until the form contains all of the groups and questions you want.

   Tip: Click **Clone Group** to create a copy of an existing group of questions.

10. Click **Auto-fail** for a Yes/No, Multiple Choice, the minimum Sliding Scale value or Choose from List answer, to create a form that will automatically fail when the user selects an answer to one of these questions.

11. Click **Done** when you complete a group of questions. All of the group options will disappear and the group will appear as it will in the final form.

    Note: To edit the same group simply click within the group. The group options will reappear.

12. Click **Weighting...** to assign your questions a weight.

    Weights can only be assigned to **Multiple Choice**, **Yes/No**, **Choose from List** and **Sliding Scale** questions.

    The weights indicate the relative importance of each question and are used by the system to calculate the form's score.

    The sum of the weights for each form and each group must be 100%.

    Note: Each form must contain at least one question that can be given a weight. For more information see: Configure Question Weights.

13. Click the **Preview Form** icon to review the form before you save it.

14. Click the **Active/Inactive** option Active to activate/deactivate the form. (optional)

    Only an active form can be attached to an evaluation. An inactive form is not available and cannot be associated with an evaluation. In addition, an active form cannot be edited.

15. Click **Save** to save the form. The screen reloads with the **Forms Manager** and the new form appears in the list.

Form Questions

A Quality Management form can contain one or more of the following question types:

- Yes/No
- Multiple Choice
- Choose from List
- Free Form
- Sliding Scale

Note: Weights are assigned to Multiple Choice, Choose from List, Yes/No and Sliding Scale questions. The weights indicate the relative importance of
each question and are used by the system to calculate the form's score. For more information, see Configure Question Weights.

Yes/No:

A Yes/No question requires the user to select one answer.

The question offers three answers: Yes, No or Not Applicable (N/A).

To add a Yes/No question:

1. In a new or existing form, click **Insert** in the form group to which you want to add the Yes/No question.
2. Select **Yes/No**. The question appears without a title but with the two options (Yes, No).
3. Click the **Question Title** field and enter the question.
4. Click the **Question Description** field and enter a description for the question. You can expand the Question Description field (click and drag the bottom right corner) and enter up to 4096 characters.
5. Click **Add N/A** to add the not applicable option.
6. If the question is mandatory, select the **Required** check box.
7. Click **Auto Fail** next to the answer that will cause the entire form to fail and receive a score of 0 when

selected .

8. Click **Done**.

Multiple Choice:

A Multiple Choice question enables the user to select one answer from a list of answers.

To add a Multiple Choice question:

1. In a new or existing form, click **Insert** in the form group to which you want to add the Multiple Choice question.

2. Select **Multiple Choice**. The question appears without a title and the statement "No answers defined".

3. Click the **Question Title** field and enter the question.

4. Click the **Question Description** field and enter a description for the question. You can expand the Question Description field (click and drag the bottom right corner) and enter up to 4096 characters.

5. Click **Add new choice** to add the first of a number of choices.

6. Repeat step #5 until you have added all the possible answers.

   When the form is saved, a list of radio buttons will appear along with the answers.

7. If the question is mandatory, select the **Required** check box associated with the specific question.

8. Click **Auto Fail** next to the answer that will cause the entire form to fail and receive a score of 0 when selected.

9. Click **Done**.

Choose from List:

A Choose from List question enables the user to select multiple answers from a list of choices.

To add a Choose from List question:

1. In a new or existing form, click **Insert** in the form group to which you want to add the Choose from List question.

2. Select **Choose from List**. The question appears without a title and the statement "No answers defined".

3. Click the **Question Title** field and enter the question.

4. Click the **Question Description** field and enter a description for the question. You can expand the Question

Description field (click and drag the bottom right corner) and enter up to 4096 characters.

5. Click **Add new choice** to add the first of a number of answers.

6. Repeat step #5 until you have added all the Choose from List answers.

   When the form is saved, a list of check boxes will appear along with the answers.

7. If the question is mandatory, select the **Required** check box.

8. Click **Auto Fail** next to the answer that will cause the entire form to fail and receive a score of 0 when selected.

9. Click **Done**.

Free Form:

A Free Form question enables the user to freely formulate an answer.

To add a Free Form question:

1. In a new or existing form, click **Insert** in the form group to which you want to add the Free Form question.

2. Select **Free Form**. The question appears without a title.

3. Click the **Question Title** field and enter the question.

4. Click the **Question Description** field and enter a description for the question. You can expand the Question Description field (click and drag the bottom right corner) and enter up to 4096 characters.

   When the form is saved, the question appears with a text field in which the user can write a response.

5. If the question is mandatory, select the **Required** check box.

6. Click **Done**.

Sliding Scale:

A Sliding Scale question enables the user to set a scale with a minimum and maximum value, where the maximum value represents a stronger association to the question.

To add a Sliding Scale question:

1. In a new or existing form, click **Insert** in the form group to which you want to add the Sliding Scale question.

2. Select **Sliding Scale**. The question appears without a title.

3. Click the **Question Title** field and enter the question.

4. Click the **Question Description** field and enter a description for the question. You can expand the Question Description field (click and drag the bottom right corner) and enter up to 4096 characters.

5. From the menus provided select a minimum and maximum value.

6. In the **Minimum** text box, provide a name for the minimum value.

7. In the **Maximum** text box, provide a name for the maximum value.

8. If the question is mandatory, select the **Required** check box.

9. Click **Auto Fail** to cause the entire form to fail and receive a score of 0 when the minimum is selected.

10. Click **Done**.

Question Library

A Quality Management form must contain one or more questions. Each question is part of a group. The question group can be saved for later use in the Question library.

Once a question group is saved in the Question library, you can add it to one or more forms as often as required. You can also edit a
question group either in the Question library or in the form. Once you edit and change a question group in the form, you can give it a
new name and add it to the Question library as a new question group.

With the Quality Management - Question library you can:

- Add a question group to a form.
- Create a question group.
- Edit a question group.

To add a question group to form:

1. Click **Quality** > **Forms Manager**. The Forms Manager grid appears.
2. Click **New Form** or the name of an existing form in the Name column.
3. Click **Insert Group** > **From Library....** The **Insert question group** window appears.
4. Select the question group(s) you want to add to the form.
5. Click **Insert**. The question group is added to the form.

To create a question group:

1. Click **Quality** > **Forms Manager**. The Forms Manager grid appears.
2. Click **New Form** or **open** an existing form.
3. Click **Insert Group** and select one of the following options:

- **Insert Group:** To create a new empty group.
- **Yes No:** To create a new group with one Yes No question.
- **Multiple Choice:** To create a new group with one Multiple Choice question.
- **Choose from list:** To create a new group with one Choose from list question.
- **Free form:** To create a new group with one Free form question.
- **Sliding scale:** To create a new group with one Sliding scale question.
- **From Library...:** To enter an existing question group.

For details about each question type, see Form Questions.

4. Enter a group name in the **Untitled Group** field.
5. Add one or more questions to the group.
6. Click **Add to library...**. The Add to Question Library window appears.
7. Click **Add**. A success message appears.

   Note: If a question group with the same name already exists you will be asked to give the question group a new name.

8. Click **View in Question Library**. The Question Group Library window is opened and the question group appears
   among the list of existing question groups.
9. Click **Cancel** to close the library.

To edit a question group:

1. Click **Quality** > **Forms Manager**. The Forms Manager grid appears.
2. Click **New Form** or **open** an existing form.
3. Create a new group and click **Add to library...** (see: Create a question group) or click **Insert Group > From Library...**.
4. From the Question Group list, select the question group you want to edit.

5. Click **Edit** and add/remove questions from the group.

6. Click **Save.** The question group is saved with your changes.

Configure Question Weights

Weights are assigned to Multiple Choice, Yes/No, Choose from list and Sliding Scale questions.

The weights indicate the relative importance of each question and are used by the system to calculate the form's score.

Before you create a form consider the following:

- The sum of the group weights for each form must be 100%. If the sum of the group weights is not 100%, the form cannot be activated.
- The sum of the questions within each group must be 100%. If the sum of the questions weights within a group is not 100%, the form cannot be activated.
- When a question is marked as Required it must be answered.
- Each Multiple Choice and Choose from List answer should be assigned a weight.
- The weight for each answer, question, and/or group is either entered manually or distributed equally among the following by clicking the **Redistribute** button:
  - Answers in a Multiple Choice question.
  - Answers in a Choose from list question.
  - All of the groups within a form.
  - All of the questions within a group.

For a better understanding, refer to how weights are calculated for each of the following questions and answers types, review a number of basic scenarios and follow the procedure below:

- Yes/No
- Multiple Choice
- Choose from list
- Sliding Scale
- Free Form
- Not Applicable, Not Required or Not Answered questions
- Auto Fail

Yes/No:

The score for a Yes/No question is 100 if the answer is Yes and 0 if the answer is No.

Multiple Choice:

Each Multiple Choice answer can receive a weight from 0 to 100.

The score associated with a Multiple Choice question is the weight of the selected answer.

For example: If a Multiple Choice question has four answers, the weights can be:

- Answer 1 = 0%
- Answer 2 = 40 %
- Answer 3 = 70 %
- Answer 4 = 100%

Choose from list:

Each Choose from list answer can receive a weight. The sum of all the weights must total 100%.

The score associated with a Choose from list question is the sum of the wights of the selected answers.

For example: If a Choose from list question has four answers, the weights can be:

- Answer 1 = 20%
- Answer 2 = 40 %
- Answer 3 = 40 %
- Answer 4 = 0%

If the evaluator selects answers 1 and 3, the Choose from list question score is 60%.

Sliding Scale:

Each Scale question has a low (that is, minimum) value and high (that is, a maximum) value.

The score for the low value is 0 and the score for the high value is 100.

The Scale score is calculated as follows: (chosen value - low value) / (high value - low value) * 100%

For example:

The low value = 0 and the high value = 10.

If the evaluator selects 7, the score is (7 - 0) / (10 - 0) * 100 = 70%

Free Form:

Free form questions do not have a score and therefore they cannot be assigned a weight.

Not Applicable (N/A), Not Required and Not Answered:

A Yes/No question can include a N/A answer.

If a question is not marked as required the evaluator does not have to answer the question.

Selecting N/A or not answering a question will not affect the final form score.

Auto Fail:

When an answer marked as Auto Fail is selected, the form will automatically fail.

The Yes/No, Multiple Choice, Choose from list questions can have answers with an Auto Fail answer, and the minimum Sliding Scale
answer can be assigned the Auto Fail value.

If the evaluator selects an Auto Fail answer for one or more questions, the total score of the form will be 0. The scores of all remaining
questions and groups will be calculated normally.

Basic Scenarios:

- Scenario 1: A form has 2 groups. One group includes a N/A answer and the other group includes a question that was not answered.
- Scenario 2: A form with 2 groups where all questions are answered.
- Scenario 3: A form with 2 groups where all questions are either not answered or answered N/A.
- Scenario 4: A form where all the questions are Free Form questions.

Scenario 1: A form has 2 groups. One group includes a N/A answer and the other group includes a question that was not answered.

Group One:

- 2 questions

- Group weight = 50%

Question	Answer	Question Score (%)	Question Weight	Score	Max Possible Score
1		80%	60%	24	30
2	N/A	-	40%	-	-

Group One Score: 24 / 30 = 80%

Group Two:

- 3 questions

- Group weight = 50%

Question	Answer	Question Score (%)	Question Weight	Score	Max Possible Score
1		50%	60%	15	30

2		20%	20%	2	10
3	Not Answered	-	20%	-	

Group Two Score: 17 / 40 = 42.5%

Total Form Score: (80% * 50%) + (42.5% * 50%) = 61%

Scenario 2: A form with 2 groups where all questions are answered.

Group One:

- 2 questions

- Group weight = 50%

Question	Question Score (%)	Question Weight	Question's Score	Absolute Question's Score	Max Possible Score
1	100%	50%	100%*50%*50%=25%	25	25
2	80%	50%	80%*50%*50%=25%	20	25

Group One Score: 45 / 50 = 90%

Group Two:

- 3 questions

- Group weight = 50%

Question	Question Score (%)	Question Weight	Question's Score	Absolute Question's Score	Max Possible Score
1	50%	60%	50%*60%*50%=15%	15	30
2	20%	20%	20%*20%*50%=2%	2	10
3	100%	20%	100%*20%*50%=10%	10	10

Group One Score: 27 / 50 = 54%

Total Form Score: (90% * 50%) + (54% * 50%) = 72%

Scenario 3: A form with 2 groups where all questions are either not answered or answered N/A. In this case, the group is removed
from the total and will not affect the form score.

Group One:

- 2 questions

- Group weight = 50%

Question	Answer	Question Score	Question Weight	Score
1	N/A	-	50%	-
2	N/A	-	50%	-

Group One Score: no score

Group Two:

- 3 questions

- Group weight = 50%

Question	**Answer**	**Question Score**	**Question Weight**	**Score**	**Maximum Possible Score**
1		50%	60%	15	30
2		20%	20%	2	10
3	Not Answered	-	20%		

Group One Score: 17 / 40 = 43%

Total Form Score: 43%

Scenario 4: A form where all the questions in the for are Free Form questions.

Free Form questions do not have a weight. For this reason, this form will not have a score. The message "no score" will appear and this
form will not be included in the reports.

To configure weights for a group, question or answer:

1. Create a form with with one or more groups of questions.
2. Click **Weighting...**. The **Weighting for <form name>** window appears.
3. Enter a weight for each group in the fields provided or click **Redistribute** to distribute the weights equally among each group in the form.
4. Verify that the group weights total is 100.
5. Click the name of each group to see a list of the group's questions.
6. Enter a weight for each question within the group, and verify that the total of the weights for the group's questions is 100 or click the
Redistribute button to distribute the weights equally among each question within the group.
7. If you included a Multiple Choice or Choose from list question in your group, click the name of the question to see a list of the question's answer.
8. Enter a weight for each answer associated with the Multiple Choice or Choose from list question or click the **Redistribute** button to distribute
the weights equally among each answer within the question.

9. Repeat steps 5-8 for each group in the form.

10. Save the form.

    Note: When the form is filled out by an evaluator, the form's score and the evaluation score are based on the values entered during this procedure.

Manage a Form

Once a Quality Management form is created and appears in the Forms Manager grid, you can:

- Save a Form
- Edit a Form
- Delete a Form
- Delete a Question
- Copy a Form
- Preview a Form
- Collapse/Expand a Question Group

Note: Forms associated with one or more evaluations, or an active evaluation, cannot be edited, deleted and/or deactivated.

To save a form:

Selecting **Save** enables you to save your form changes.

To save a form, you must give it a name.

1. Create a new form or open an existing form.
2. Configure the form.
3. Click **Save > Save**. The form is saved.

To change an existing form:

1. Select **Quality > Forms Manager**. The list of existing forms appears.
2. Click the name of the form you want to edit. The specific form is opened.
3. Change the form.

4. Click **Save** to save your changes.

To delete a form:

You can delete a form(s) in one of two ways.

To delete one or more forms:

1. Select **Quality > Forms Manager**. The list of existing forms appears.
2. Select the check box associated with the form(s) you want to delete.
3. Above the Forms Manager list click **Delete** . The form(s) is deleted.

To delete a specific form:

1. Select **Quality > Forms Manager**. The list of existing forms appears.
2. Click the form you want to delete. The specific form is opened.
3. Click **Delete** in the top right corner of the form. The form(s) is deleted.

To delete a form question:

1. Select **Quality > Forms Manager**. The list of existing forms appears.
2. Click the form whose question you want to delete. The specific form is opened.
3. Click **Delete** next to the question you want to delete. The question is deleted.
4. Click **Save > Save** to save your changes.

To create a copy of an existing form:

Select Save As to create a copy of the form you are currently creating/editing.

1. Open the form you want to copy.
2. Click **Save > Save as**.
3. Enter a form name. A copy of the form is created and is listed in the Forms Manager grid.

To preview a form:

As you add questions and question groups to a form, you may want to see how the form appears to users.

1. In a new or existing form, click the **Preview Form** icon . The form appears in a new window as it will appear when accessed by a user.

2. Click **X** in the top right corner of the Preview Form window to close the preview.

To collapse/expand all the groups:

As you add questions and question groups to a form, the form can become long. You may want to either collapse all the groups or see specific groups while hiding others.

To collapse/expand all the groups:

1. In a new or existing form, click the Collapse/Expand questions icon to expand or collapse all the question groups.

To collapse/expand a specific group:

1. In a new or existing form, click the Collapse/Expand questions icon 6 questions in the group you want to expand or collapse.
   The number in this option specifies the amount of question in the group.

Evaluations Manager

Quality Management evaluations are the best way to evaluate and improve agent behaviors that support your business goals.

They drive the behaviors that promote a specific agenda by enabling you to assess how well your agents are performing during customer interactions.

With the knowledge obtained from an evaluation you can create positive customer experiences and exceed customer expectations by:

- Providing agents with objective assessments using specific criteria and customized forms.
- Motivating agents with training opportunities and positive feedback.
- Recognizing and keeping top employees.
- Creating evaluation reports to help managers monitor agents' progress, identify training requirements, and calibrate evaluator responses to limit variations in evaluations.

Before you create an evaluation consider the following:

- Only an administrator or a user with QM Manager Role permissions can create evaluations.
- SpeechMiner Quality Management enables you to create five types of evaluations (Distributed (Interaction + Agent), Shared, Calibration and Ad-Hoc).
- Once an evaluation is saved, one or more evaluation sessions are created according to a predefined schedule.
- If you selected Interactions when working with a One Time schedule, each evaluation creates one evaluation session for every agent associated with selected interactions and each evaluation session is assigned to each evaluator. For example, if an evaluation contains 2 evaluators and 3 interactions (each with 1 agent), 6 evaluation sessions will be created. That is, each evaluator will be asked to fill out the evaluation for each of the 3 agents. If an evaluation contains 2 evaluators and 3 interactions (each with a set of 2 agents), 12 evaluation sessions will be created.
- If you selected Criteria when working with a One Time schedule, the interactions are randomly distributed among the evaluators.
- A Shared Evaluation session creates evaluation sessions that are not assigned to a specific evaluator. Instead, each evaluator associated with the session can select and assign himself/herself a specific session from the

available pool of session.

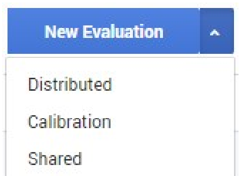
- A Calibration Evaluation session is filled out in the same way as a Distributed or Shared evaluation session. But, unlike a Distributed or Shared evaluation a Calibration evaluation can be used as part of a report that compares the performance of two or more evaluators.

Evaluations Manager Grid

The Quality Manager - Evaluations Manager grid contains a list of all the inactive and active evaluations.

From the grid, you can quickly see when the evaluation was created, the last time it created a session(s), etc.

The Evaluations Manager grid contains the following information and options:

- **New Evaluation** 

: Use to create a new Distributed, Shared or Calibration evaluation.

- **Delete** **:** Deletes the selected evaluation.
  Note: When you delete an evaluation in the Evaluation Manager list, all the sessions that were created as a result of the specific evaluation will also be deleted.

- **Filter by name:** Enables you to search for a specific evaluation.

- **0 Selected:** The number of forms selected in the grid.

- **Name:** The name of the evaluation.
  Note: Hover over the evaluation name to view the description of the specific evaluation.

- **Description:** The description added to the **Description** field about the specific evaluation.
  Note: By default, the **Description** column does not appear in the grid. To add the **Description** column to the grid, click the icon and select the **Description** checkbox.

- **Creator:** The name of the user who created the evaluation.

- **Evaluators:** If you selected Interactions when working with a One Time schedule, this parameter indicates the amount of evaluators associated with the specific evaluation. Each one of these evaluators will be required to perform the same evaluation sessions. For example, if an evaluation with 3 evaluators is scheduled for over the course of a month, and is configured to generate 30 sessions, each evaluator will receive 10 different interactions. If you selected Criteria when working with a One Time schedule, the interactions are randomly distributed among the evaluators.

- **Schedule:** Indicates whether the evaluation is a one-time evaluation or a recurring evaluation.

- **Type:** Indicates whether the evaluation is a Distributed, Shared or Calibration evaluation. For details, see Evaluations manager.
- **Form(s):** Indicates the number of forms associated with the evaluation.
- **Last Activity:** Indicates the last time the evaluation created one or more evaluation sessions..
- **Status:** Indicates if the evaluation is active or inactive. An inactive evaluation cannot create evaluation sessions.
- **Created:** Indicates the date on which the evaluation was created.
- **Evaluation Sessions:** Indicates the number of evaluation sessions created as a result of the evaluation.
- **:** Use to select the columns that appear in the grid.
  Note: To return the grid columns to their default state, click **Reset to defaults** from the Select Columns list.

Create an Evaluation

SpeechMiner Quality Management enables you to create five types of evaluations:

- **Distributed Interaction Evaluation:** Creates evaluation sessions about interactions for selected evaluators. Each evaluator will be assigned an evaluation session for each agent associated with the evaluation. The evaluation is created about the agents who participated in the interactions that are added to the evaluation. For example, if you add 2 evaluators and 3 interactions (each with a different agent) to the evaluation, 6 evaluation sessions will be created. That is, each evaluator will be asked to fill out the evaluation for each one of the 3 agents.

- **Distributed Agent Evaluation:** Creates evaluation sessions about one or more specific agent's performance during customer interactions for a specific evaluator. The selected evaluator is assigned an evaluation session associated with the selected agents. For example, if you select 18 agents to be evaluated by a specific evaluator, 1 evaluation session will be created for each of the 18 agents according to the selected interaction filter criteria.

- **Shared Evaluation:** Creates evaluation sessions about an agent's performance during customer interactions without assigning the sessions to a specific evaluator(s). Instead, each evaluator associated with the session can select and assign himself/herself the Shared session from the available pool of Shared sessions. Once an evaluator selects a Shared session, the specific session is no longer available to other evaluators.

- **Calibration Evaluation:** Use this evaluation to compare evaluator performance, to ensure consistency across teams. A Calibration Evaluation is performed on one evaluation in the same way as a Distributed Interaction Evaluation session, the difference is that the result of these evaluation sessions can be used in a Calibration Score report (that is, a report that compares how the evaluators filled out the same evaluation session)..

- **Ad-Hoc Evaluation:** Creates an evaluation session for a specific interaction or segment currently being played in the Media Player.

Refer to Quality Management Workflow for a better understanding about the evaluation process.

Distributed Interaction Evaluation

The SpeechMiner Quality Management - Distributed Interaction Evaluation creates evaluation sessions about interactions for selected evaluators. Each evaluator will be assigned an evaluation session for each agent associated with the evaluation. The evaluation is created about the agents who participated in the interactions that are added to the evaluation. For example, if you add 2 evaluators and 3 interactions (each with a different agent) to the evaluation, 6 evaluation sessions will be created. That is, each evaluator will be asked to fill out the evaluation for each one of the 3 agents.

Before You Begin:

- Create forms to attach to your evaluation(s).
- Verify that you have been assigned a QM Manager role. For additional information see: Administer Roles.

To create a Distributed Interaction evaluation:

1. Click **Quality > Evaluations Manager**. The Evaluations Manager grid appears.
2. Click the drop down arrow next to **New Evaluation** and select **Distributed > Interaction**.
3. In the **Untitled Evaluation** field, enter the name of your evaluation.
4. In the **Description** field, enter a description of the evaluation.
5. From the **Schedule** list select one of the following, and configure the schedule using the options available (see table in this step):
   - **Recurring:** Use to create an evaluation that repeatedly produces evaluation sessions for a configurable time interval.
   - **One Time:** Use to create an evaluation that only produces evaluation sessions once.

Option	Description
Start	The date on which the evaluation session(s) should be created.
	The time at which the evaluation session(s) should begin.
Occur every	The frequency (Minutes, Hours, Days, Weeks or Months) with which the evaluation recurs.
Expires after	The time (Minutes, Hours, Days, Weeks or Months) at which the evaluation session should be performed after the evaluation is created.

6. Select the **Forms** tab and from the **Forms** list, select the forms to add to the evaluation.

   As soon as you select a form from the list, it appears in the Evaluation Summary under Forms.
   Select the form again to remove the form from the Evaluation Summary.
   The forms selected consist of the questions that must be answered to complete the evaluation session.

7. Select the **Evaluators** tab and from the **Evaluators** list, select the evaluator(s) that should perform the evaluation session(s).

   As soon as you select an evaluator from the list, the evaluator name appears in the Evaluation Summary under Evaluators.
   Select the evaluator again to remove the evaluator from the Evaluation Summary.
   Each evaluator will receive an evaluation session to evaluate the agent(s) associated with the selected interactions.

8. Select the **Interactions** tab.

   a. Select **Recurring** or **One Time**.

      If you selected a **Recurring** schedule in step #5, you cannot select the interactions yourself. The resulting interaction list associated with the evaluation, corresponds to what you entered in the search filter.

      If you selected a **One Time** schedule, select one of the following:

      - **Interactions:** Enables you to select interactions from the list of interactions created after you click Search.

      - **Interaction Criteria:** Randomly selects interactions from the interaction list resulting from your specific search. The amount of interactions selected correspond to what you entered in the **Exactly** field.

        Note: If you select Interaction Criteria, continue directly to step 9.

   b. Configure the evaluation filter options on the left side of the screen, to generate a list of interactions.

      Your filter selections should be directly related to the business issue for which you want to evaluate an agent(s).
      For additional information, see Search Filter.

   c. Click **Search.**

      Note: If you selected **Interactions** in step 8a, from the list provided select the interactions (one at a time) that you would like to add to the evaluation.

As soon as you select an interaction from the list, it appears in the Evaluation Summary under Interactions.
Clear an interaction's check box to remove that specific interaction from the Evaluation Summary

Tip: You can play back an interaction to verify its relevancy to the purpose of the evaluation. Simply click the **Play** icon associated with the interaction you want to hear. For more information about playing an interaction, see Media Player.

9. Click the **Inactive** option Inactive to activate Active the evaluation. Only an active evaluation will create evaluation sessions.

10. Click **Save and Activate**. Once the evaluation is saved and activated, it will start to create evaluation sessions according to the schedule configured at the beginning of this procedure.

    Note: the Evaluation Session list will automatically refresh when a new set of evaluation sessions is available. To manually refresh the Evaluation Session list, click the **Refresh** button .

Distributed Agent Evaluation

The SpeechMiner Quality Management - Distributed Agent Evaluation creates evaluation sessions about one or more specific agent performances during customer interactions. The Distributed Agent Evaluation is assigned to one evaluator. The selected evaluator is assigned an evaluation session associated with the selected agent. For example, if you select 18 agents to be evaluated by a specific evaluator, 1 evaluation session will be created for each of the 18 agents according to the selected interaction filter criteria.

Before You Begin:

- Create forms to attach to your evaluation(s).
- Verify that you have been assigned a QM Manager role. For additional information see: Permissions.

To create a Distributed Agent Evaluation:

1. Click **Quality** > **Evaluations Manager**. The **Evaluations Manager** grid appears.
2. Click the drop down arrow next to **New Evaluation** and select **Distributed** > **Agent**.
3. In the **Untitled Evaluation** field, enter the name of your evaluation.
4. In the **Description** field, enter a description of the evaluation.
5. From the **Schedule** list select one of the following, and configure the schedule using the options available (see table in this step):
   - **Recurring:** Use to create an evaluation that repeatedly produces evaluation sessions for a configurable time interval.
   - **One Time:** Use to create an evaluation that only produces evaluation sessions once.

Option	Description
Start	The date on which the evaluation session(s) should be created.
	The time at which the evaluation session(s) should begin.
Occur every	The frequency (Minutes, Hours, Days, Weeks or Months) with which the evaluation recurs.
Expires after	The time (Minutes, Hours, Days, Weeks or Months) at which the evaluation session should be performed after the evaluation is created.

6. Select the **Forms** tab. From the **Forms** list, select the forms to add to the evaluation.

   As soon as you select a form from the list, it appears in the Evaluation Summary under Forms. Select the form again to remove the form from the Evaluation Summary. The forms selected consist of the questions that must be answered to complete the evaluation session.

7. Select the **Evaluators** tab. From the **Evaluators** list, select the evaluator(s) that should perform the evaluation session(s).

   As soon as you select an evaluator from the list, the evaluator name appears in the Evaluation Summary under Evaluators. Select the evaluator again to remove the evaluator from the Evaluation Summary. The selected evaluator will receive an evaluation session to evaluate the agent(s) associated with the selected interactions

8. Select the **Agents** tab. From the **Agents** list, select the agent(s) whose interactions you want to evaluate.

   As soon as you select an agent from the list, the agent's name appears in the Evaluation Summary under Agents. Select the agent again to remove the agent from the Evaluation Summary.
   If you select a manager, the sessions will only be created for the agents associated with the selected manager and not for the manager.

9. Select the **Interactions** tab.

   Note: You cannot manually select a list of Interactions. The resulting interaction list associated with the evaluation, corresponds to what you entered in the search filter.

   a. Configure the evaluation filter options on the left side of the screen, to generate a list of interactions.

      Your filter selections should be directly related to the business issue for which you want to evaluate an agent(s).
      For additional information, see Search Filter.

   b. Click **Search.**

      Tip: You can play back an interaction to verify its relevancy to the purpose of the evaluation. Simply click the **Play** icon associated with the interaction you want to hear. For more information about playing an interaction, see Media Player.

10. Click the **Inactive** option Inactive to activate Active the evaluation. Only an active evaluation will create evaluation sessions.

11. Click **Save and Activate**. Once the evaluation is saved and activated, it will start to create evaluation sessions according to the schedule configured at the beginning of this procedure.

    Note: the Evaluation Session list will automatically refresh when a new set of evaluation sessions is available. To manually refresh the Evaluation Session list, click the **Refresh** button  .

Shared Evaluation

The SpeechMiner Quality Management - Distributed Shared Evaluation creates evaluation sessions about an agent's performance during customer interactions without assigning the sessions to a specific evaluator. Instead, each evaluator associated with the session can select and assign himself/herself the Shared session from the available pool of Shared sessions. Once an evaluator selects a Shared session, the specific session is no longer available to other evaluators.

Before You Begin:

- Create forms to attach to your evaluation(s).
- Verify that you have been assigned a QM Manager role. For additional information see: Permissions.

To create a Distributed Agent Evaluation:

1. Click **Quality** > **Evaluations Manager**. The Evaluations Manager grid appears.
2. Click the drop down arrow next to **New Evaluation** and select **Shared**.
3. In the **Untitled Evaluation** field, enter the name of your evaluation.
4. In the **Description** field, enter a description of the evaluation.
5. From the **Schedule** list select one of the following, and configure the schedule using the options available (see table in this step):
    - **Recurring:** Use to create an evaluation that repeatedly produces evaluation sessions for a configurable time interval.
    - **One Time:** Use to create an evaluation that only produces evaluation sessions once.

Option	Description
Start	The date on which the evaluation session(s) should be created.
	The time at which the evaluation session(s) should begin.
Occur every	The frequency (Minutes, Hours, Days, Weeks or Months) with which the evaluation recurs.
Expires after	The time (Minutes, Hours, Days, Weeks or Months) at which the evaluation session should be performed after the evaluation is created.

6. Select the **Forms** tab and from the **Forms** list, select the forms to add to the evaluation.

As soon as you select a form from the list, it appears in the Evaluation Summary under Forms. Select the form again to remove the form from the Evaluation Summary. The forms selected consist of the questions that must be answered to complete the evaluation session.

7. Select the **Evaluators** tab and from the **Evaluators** list, select the evaluator(s) that should perform the evaluation session(s).

   As soon as you select an evaluator from the list, the evaluator name appears in the Evaluation Summary under Evaluators. Select the evaluator again to remove the evaluator from the Evaluation Summary. Each evaluator will receive an evaluation session to evaluate the agent(s) associated with the selected interactions.

8. Select the **Interactions** tab.

   a. Select **Recurring** or **One Time**.

      If you selected a **Recurring** schedule in step #5, you cannot select the interactions yourself. The resulting interaction list associated with
      the evaluation, corresponds to what you entered in the search filter.

      If you selected a **One Time** schedule, select one of the following:

      - **Interactions:** Enables you to select interactions from the list of interactions created after you click Search.

      - **Interaction Criteria:** Randomly selects interactions from the interaction list resulting from your specific search. The amount of interactions selected correspond to what you entered in the **Exactly** field.

        Note: If you select Interaction Criteria, continue directly to step 9.

   b. Configure the evaluation filter options on the left side of the screen, to generate a list of interactions.

      Your filter selections should be directly related to the business issue for which you want to evaluate an agent(s).
      For additional information, see Search Filter.

   c. Click **Search.**

      Note: If you selected **Interactions** in step 8a, from the list provided select the interactions (one at a time) that you would like to add to the evaluation.

      As soon as you select an interaction from the list, it appears in the Evaluation Summary under Interactions. Clear an interaction's check box to remove that specific interaction from the Evaluation

Summary.

Tip: You can play back an interaction to verify its relevancy to the purpose of the evaluation. Simply click the **Play** icon associated with the interaction you want to hear. For more information about playing an interaction, see Media Player.

9. Click the **Inactive** option Inactive to activate Active the evaluation. Only an active evaluation will create evaluation sessions.

10. Click **Save and Activate**. Once the evaluation is saved and activated, it will start to create evaluation sessions according to the schedule configured at the beginning of this procedure.

    Note: the Evaluation Session list will automatically refresh when a new set of evaluation sessions is available. To manually refresh the Evaluation Session list, click the **Refresh** button .

Calibration Evaluation

The SpeechMiner Quality Management - Calibration Evaluation creates evaluation sessions that can be used to compare evaluator performance, to ensure consistency across teams. A Calibration Evaluation is performed on one evaluation in the same way as a Distributed Interaction Evaluation session, the difference is that the result of these evaluation sessions can be used in a Calibration Score report (that is, a report that compares how the evaluators filled out the same evaluation session).

Before You Begin:

- Create forms to attach to your evaluation(s).
- Verify that you have been assigned a QM Manager role. For additional information see: Permissions.

To create a Distributed Interaction evaluation:

1. Click **Quality > Evaluations Manager**. The Evaluations Manager grid appears.
2. Click the drop down arrow next to **New Evaluation** and select **Calibration**.
3. In the **Untitled Evaluation** field, enter the name of your evaluation.
4. In the **Description** field, enter a description of the evaluation.
5. From the **Schedule** list select one of the following, and configure the schedule using the options available (see table in this step):
    - **Recurring:** Use to create an evaluation that repeatedly produces evaluation sessions for a configurable time interval.
    - **One Time:** Use to create an evaluation that only produces evaluation sessions once.

Option	Description
Start	The date on which the evaluation session(s) should be created.
	The time at which the evaluation session(s) should begin.
Occur every	The frequency (Minutes, Hours, Days, Weeks or Months) with which the evaluation recurs.
Expires after	The time (Minutes, Hours, Days, Weeks or Months) at which the evaluation session should be performed after the evaluation is created.

6. Select the **Forms** tab and from the **Forms** list, select the forms to add to the evaluation.

   As soon as you select a form from the list, it appears in the Evaluation Summary under Forms. Select the form again to remove the form from the Evaluation Summary. The forms selected consist of the questions that must be answered to complete the evaluation session.

7. Select the **Evaluators** tab and from the **Evaluators** list, select the evaluator(s) that should perform the evaluation session(s).

   As soon as you select an evaluator from the list, the evaluator name appears in the Evaluation Summary under Evaluators. Select the evaluator again to remove the evaluator from the Evaluation Summary. Each evaluator will receive an evaluation session to evaluate the agent(s) associated with the selected interactions.

8. Select the **Interactions** tab, configure the evaluation filter options on the left side of the screen, to generate a list of interactions and click **Search**.

   Note: A Calibration evaluation cannot be a **Recurring** evaluation.

   Your filter selections should be directly related to the business issue for which you want to evaluate an agent(s). For additional information, see Search Filter.

   a. Select one interaction.

      As soon as you select an interaction from the list, it appears in the Evaluation Summary under Interactions. Clear an interaction's check box to remove that specific interaction from the Evaluation Summary.

      Note: If you select more than one interaction, the Calibration Evaluation session will be not activated.

9. Click the **Inactive** option Inactive to activate Active the evaluation. Only an active evaluation will create evaluation sessions.

10. Click **Save and Activate**. Once the evaluation is saved and activated, it will start to create evaluation sessions according to the schedule configured at the beginning of this procedure.

    Note: the Evaluation Session list will automatically refresh when a new set of evaluation sessions is available. To manually refresh the Evaluation Session list, click the **Refresh** button .

Create an Ad-Hoc Evaluation Session

The Ad-Hoc evaluation enables you to create an evaluation session for a specific interaction or segment currently being played in the Media Player.

Before you create and/or perform an Ad-Hoc evaluation, consider the following:

- By default, the Ad-Hoc evaluation will expire 24 hours after it is created.
- An Ad-Hoc evaluation is only visible to the user who created it and to users with the permission to edit all evaluation sessions.
- An Ad-Hoc evaluation can only be created from the Media Player > More options menu for the interaction currently being played.

To create an Ad-Hoc evaluation session:

1. Select an interaction and click **Play** . For more information about playing an interaction, see Media Player.
2. Click **More** in the Media Player and select **Evaluate**. The **Evaluate Interaction** window appears.
3. Enter a name in the **Evaluation Name** field.
4. From the **Form(s)** list, select the forms that should be included in the Ad-Hoc evaluation session. For additional details about Forms, see Forms Manager.
5. Click **Create**. The new Ad-Hoc evaluation session is opened.
6. Perform the evaluation. For details on how to perform an evaluation session, see Perform an Evaluation Session.

Evaluation Sessions

To help ensure that an agent's participation in an interaction coincides with a specific business agenda, SpeechMiner Quality Management evaluators
receive a list of evaluation sessions that they must fill out according to a configurable schedule.

A completed evaluation session provides a view into how an agent communicates with consumers. Such evaluation sessions provide consistent and regular
feedback that helps surface insightful reports, comments and suggestions that can lead to formal skills training and action plans to improve an agent's performance.

Before you perform an evaluation consider the following:

- Every evaluation session is associated with at least one interaction. When working with a Recording license, every evaluation session is associated with one segment.
- An evaluation session can be saved and continued at a later time. Only when you select Complete will the evaluation session end.
- You can export an uncompleted evaluation session. When you export an uncompleted evaluation session, an uncompleted prefix is added to the exported file.
- A Shared Evaluation session creates evaluation sessions that are not assigned to a specific evaluator. Instead, each evaluator associated with the session can
select and assign himself/herself a specific session from the available session pool.
- Archived evaluation sessions are removed from the Evaluation Session grid, and will only be visible when you filter to view archived sessions.
- A Calibration Evaluation session is filled out in the same way as a Distributed or Shared evaluation session. But, unlike a Distributed or Shared evaluation a
Calibration Evaluation can be used as part of a report that compares the performance of two or more evaluators.
- When performing an evaluation, you have the option of enabling the evaluator to see their evaluation score when the evaluation session is completed.
- To complete an evaluation session, you must answer all the required questions in all the forms associated with

the specific evaluation session.

- An evaluation session score is visible throughout the evaluation session.

Evaluation Sessions Grid

The Quality Manager - Evaluations Sessions grid contains a list of all evaluation sessions an evaluator must fill out.

From the grid you can:

- View which evaluation sessions were started, in progress and or completed
- View whether or not a session was assigned to an evaluator and which evaluator it was assigned to.
- Filter the evaluation session list to quickly find and work with a subset of the list.

The Evaluations Sessions grid contains the following information and options:

Parameter / Column	**Description**
	Use to delete the selected evaluation session.
	Use to refresh the Evaluation Session grid with the latest evaluation sessions.
	Use to archive selected evaluation sessions and remove them from the grid.
Filter by name	Use to search for a specific evaluation session according to the session's name.
0 Selected	The number of evaluation sessions selected in the grid.

Parameter / Column	Description
Filter	Select one or more of the following filter options to limit the evaluation session list, so you quickly find the information you are looking for: • **Sessions** - Filter the list to show all unarchived evaluation sessions. • **Archived** - Filter the list to only show archived evaluation sessions. • **Expired** - Filter the list to only show expired evaluation sessions. • **Status** - Filter the list to only show sessions that have not been started, are in progress and/or have been completed. • **Types** - Filter the list to only show distributed, shared, calibration and/or ad-hoc sessions. • **Creation Date** - Filter the list to only show sessions that were created on a specific date. • **Due Date** - Filter the list to only show sessions that should be completed on a specific date. • **Completion Date** - Filter the list to only show sessions that were completed on a specific date. • **Agent** - Filter the list to only show sessions associated with a specific agent. • **Evaluator** - Filter the list to only show sessions associated with a specific evaluator. • **Unassigned** - Filter the list to only show sessions that have not been assigned to an evaluator.
Name	The name of the evaluation session.
Evaluator	The name of the evaluator to whom the evaluation session was assigned. **Note:** Unassigned sessions are only associated with Shared Evaluations. Unassigned signifies that you can select the session and assign it to yourself if you are part of the selected evaluators. Once you assign an Unassigned session to yourself, your name will appear in the Evaluator column.
Interaction ID	The interaction in which the agent participated.
Agent	The agent for which the evaluation session was created.
Description	Contains an explanation about the specific evaluation session.
Type	Indicates whether the evaluation session is a Distributed, Shared or Calibration session. For details, see Create an Evaluation.
Form(s)	The number of forms associated with the evaluation session.
Created	The date on which the evaluation session was created.
Due	The date on which the evaluation session must be completed.
Completed	The date on which the evaluation session was completed.
Stats	Indicates if the evaluation session is: • **In Progress** - The evaluation has started, but has not been completed. • **Ready** - The evaluation has not started. • **Completed** - The evaluation session has been completed.
Creator	The name of the person who created the evaluation session..

Parameter / Column	Description
Score	The score the agent received as a result of the evaluation.
	Enables you to select the columns that appear in the Evaluations Manager grid. **Note:** To return the grid columns to their default state click **Reset to defaults** from the Select Columns list.

Perform an Evaluation Session

The results of an evaluation session provides data in a way that makes it easier to identify the skill sets of your agents, as well as any skill gaps that need to be filled by additional training.

Note: When performing an evaluation session, you can always click the **Clear Form** option at the bottom of the form to clear all of your input.

To perform an evaluation session:

1. Click **Quality** > **Evaluation Sessions**. The **Evaluation Sessions grid** appears.

2. Click the name of the evaluation you want to perform.

   Note: If you select an Unassigned evaluation session, you will be asked to confirm that the specific session should be assigned to you.

3. From the **Form** list at the top of the screen, select the first form you want to fill out.

   Once you complete the selected form, continue filling out the remaining forms.

4. Answer the questions provided. If necessary, click **+More** to view the entire question.

   Note: You cannot complete an evaluation session without answering all the required form questions. Required form questions are marked with a red star *.

5. Click the **Play** icon to playback the interaction to hear the discussion between the agent and the customer. (optional). For more information about playing an interaction, refer to Media Player.

6. Click the inactive **Show score** option Show score to enable the evaluator to see the evaluation session scores during the evaluation and a final score when the evaluation is completed.

   For more details about scores see Configure Question Weights.

7. If the interaction is not suitable in any way (for example, poor audio/video quality, irrelevant interaction, and so on), you can click the **Replace Interaction** icon to select a different interaction for the evaluation session (optional).

   Note: The Replace Interaction option is only available in evaluation sessions associated with interactions derived from a search criteria. Evaluation sessions associated with manually selected interactions, Calibration evaluations and Ad-Hoc evaluations will not include the Replace Interaction option. Replacing the interaction associated with the evaluation session will reset all the answers in the form(s) associated with the same evaluation session.

8. Select one of the following options:

   Note: When an evaluation session is completed, the interaction associated with the evaluation session is automatically tagged **Evaluated**.
   The Evaluated tag (visible both in the Search Filters and the Search Results grid), enables you to recognize interactions that have already been part of an evaluation session and subsequently prevents evaluated interactions from being reused.

   - Scroll down to the bottom of the form and click **Complete** to finalize the evaluation session. A summary of the completed evaluation session appears.

     a. Click **Show More Options:** for the following options:

        - **Export Session to CSV:** Downloads the evaluation session to an Excel (password protected) document and is saved in a location of your choice.
        - **Export Session to PDF:** Downloads the evaluation session to a PDF document and is saved in a location of your choice.
        - **Notify agent of results:** Creates an action item for the agent associated with the specific evaluation session. See the **Notify agent** bullet below for further instructions.

     b. Click **Complete** at the bottom of the window to finalize this process. The process will continue according to your **Show More Options:** selection. The evaluation session's status in the Evaluation Session grid will change to **Completed.**

   - In the top right corner of the screen, open the **Save** menu and select one of the following options:

     - **Save:** Save your work so you can continue at a later time. If you select to save the evaluation session, its status in the Evaluation Session grid will be **In Progress**.

     - **Complete:** Finalize the evaluation session. A summary of the completed evaluation session appears.

       a. Click **Show More Options:** for the following options:

          - **Export Session to CSV:** Downloads the evaluation session to an Excel (password protected) document and is saved in a location of your choice.
          - **Export Session to PDF:** Downloads the evaluation session to a PDF document

and is saved in a location of your choice.

- **Notify agent of results:** Creates an action item for the agent associated with the specific evaluation session. See the **Notify agent** bullet below for further instructions.

b. Click **Complete** at the bottom of the window to finalize this process. The process will continue according to your **Show More Options:** selection. The evaluation session's status in the Evaluation Session grid will change to **Completed.**

Note: You can edit a session with an expired due date, but you cannot select Complete if the session due date has passed.

- **Export to CSV:** Create a .csv file that contains evaluation session details in an Excel worksheet. Since the evaluation session has not been completed, an uncompleted prefix will be added to the exported file.

- **Export to PDF:** Create a Adobe PDF file that contains evaluation session details.

- **Close:** Close the evaluation session without saving your work.

- **Notify agent:** Send the agent associated with the evaluation an action item about the specific evaluation. The **Add Action Item** window appears.

1. In the window that appears, enter a **due date** by which the specific agent must perform this action item, enter what you would like the agent to do in the **Summary** field and select the **Show the agent his/her evaluation score** checkbox if you want the agent to be aware of the score he/she received.

   To learn more about scores refer to Configure Question Weights.

2. Click **Complete.** An **Evaluator Message** is added to the specific agent's Action Items list. See Action Items for additional details.

   Note:

   - You do not have to wait to complete the evaluation session to select **Save > Notify agent**. You can send the action item at anytime during the evaluation session.

   - When the agent opens the new Notify Agent action item (Type: **EvaluatorMessage**), he/she can review the specific evaluation session and send a response back to the evaluator. In the Evaluator Message action item, the Summary instructions are a link to the associated evaluation session..

Open and Edit a Completed Evaluation Session

A completed evaluation session provides an overview of the agent's productivity in relation to a specific business goal.

After an evaluation session is completed users assigned to the evaluation session can change the question's answers. Once this change
is saved the evaluation session score is automatically updated.

Note: Users who are given the Edit All Evaluation Sessions permission, can also edit and complete evaluation sessions not assigned to them,
if the session contains interactions they have permission to view.

To open and edit a completed evaluation session:

1. Click **Quality** > **Evaluation Sessions**. The Evaluation Sessions grid appears.
2. Click the name of the completed evaluation session you want to review. The completed evaluation opens with the following options:

Parameter / Column	Description
Form List	View the different evaluation session forms and the given answers.
Show Score	View the evaluation session score. The score appears next to the Form list and within the exported Excel worksheet. The score is automatically updated if a change is made to one or more answers.

Save	Select one of the following options: **Save:** Save your work so you can continue at a later time. **Export to CSV:** Create a .csv file that contains evaluation session details in an Excel worksheet. Since the evaluation session has not been completed, an uncompleted prefix will be added to the exported file. **Export to PDF:** Create a Adobe PDF file that contains evaluation session details. **Note:** You can select the Export option even if the evaluation session has not been completed. In this case, a **uncompleted** prefix will be added to the exported file. **Close:** Close the evaluation session without saving your work. **Notify agent:** Send the agent associated with the evaluation an action item about the specific evaluation. For details about each of these options, refer to Perform an Evaluation Session.
Interaction ID	A unique number assigned to the interaction in the SpeechMiner database.
Media Player	Play back the interaction associated with the evaluation session. For more information about playing an interaction, refer to Media Player.
Session Characteristics	To see when the session was last changed and who changed it, click the arrow in the top right corner of the screen next to the date and time and notice the information associated with **Last edited by**.

3. Edit the session if required.

4. Click **Save** to save your changes.

Note: If you do not save your changes when you change an evaluation session's answers, your changes will not effect the session score.

Archive an Evaluation Session

Archiving evaluation sessions, enables you to remove sessions no longer needed online, but which must still be accessible at a later date if required.
That is, archived sessions will be removed from the session grid, and will only be visible when the user filters to view archived sessions. By limiting the
number of sessions that appear, archiving also enables you to maximize performance by minimizing search and filter response times.

There are two types of archiving options:

- Manual Archive - Enables you to select specific sessions to archive.
- Automatic Archive - Enables you to schedule archiving after a specific period of time.

Note: You can only archive completed and expired evaluation sessions.

To manually archive an evaluation session:

1. Select **Quality > Evaluation Sessions**. A list of evaluation sessions appears.

2. Select the evaluation sessions you want to archive.

3. Click the **Archive** button . The selected sessions are removed from the grid and archived.

Note: if the Archive button is not visible, you do not have the permission required for archiving sessions.

To automatically archive an evaluation session:

Automatic archive is configured when the entire system is installed and configured.

To change how often Automatic archive is run, you must change the default value.

To change the default value refer to *SpeechMiner Administration Guide > Configuring SpeechMiner > Additional Configurations > Archive QM Evaluation Sessions*.

Tools

SpeechMiner Tools provide access to an array of global SpeechMiner functions and management features.

For a list of functions and management features refer to:

- System Admin
- Export Completed QM Sessions
- Define Tags

Depending on your permissions, and on your system's mode of operation, you may be able to use these features to:

- Manage user accounts and permissions.
- Monitor and manage the system and its servers.

Tools Menu Reference

The following list provides a brief description of each Tools menu item:

System Admin:

Enables you to monitor and manage the system and its servers as well as some of its global features (for example, Monitor System).

Export Completed QM Sessions

Enables you to enables you to perform a batch export of QM session data associated with sessions that were completed during a specific date range.

Define Tags

Enables you to create tags that can be used to establish a connection between a specific interaction and a specific topic.

System Admin

System Administration tools enable you to monitor and manage the system and its servers, as well as some of its global features (for example, Monitor System and so on).

System Administration tools include:

- Monitor System: Used to monitor the status of SpeechMiner modules, start / stop system machines and view system messages.
- Manage Cache: Used to reset the cache for all or specific interface elements such as agents, saved reports, users and groups and so on.
- System Configuration: Used to review system configuration and security information to enable you to better understand the environment you are working in.
- Metadata Manager: Used to change the names of metadata filter options and metadata columns in the search results so that the names clearly represent the meaning of the data.

Monitor System

With the Monitor System tool you monitor the status of SpeechMiner modules, start / stop system machines and view system messages.

With the Monitor System tool you can:

- Monitor module status.
- View system messages.

To monitor module status:

1. Select **Tools** > **System Admin** > **Monitor System**.
2. Review the following status information:

Status	Description
All Interactions	Indicates the number of interactions currently in the SpeechMiner database.
Not Processed:	Indicates the number of interactions waiting to be processed. This is the number of interactions that have been added to the system by the fetcher, but have not gone through recognition.
Last Interaction Time:	Indicates the last time an interaction was added to the system.

Statistics	**Log Errors:** The number of errors that have not been handled. **In Process:** The number of interactions currently being processed. **Waiting for Categorization:** The number of interactions waiting to be processed, plus interactions that completed processing but are awaiting categorization. **Waiting for Indexing:** The number of interactions that have not been indexed and therefore will not appear in the Search Results grid. **Log Warnings:** The number of warnings that have not been handled. **Total Processed (24H):** The number of interactions that were processed in the last 24 hours. This is a good indicator of how well the processing system is functioning. **Total Categorized (24H):** The number of interactions that were categorized in the last 24 hours. This is a good indicator of how well the categorization system is functioning. **Total Indexed (24H):** The number of interactions that were indexed in the last 24 hours. This is a good indicator of how well the indexing system is functioning.
Queue table	**SpeechMiner:** The number of interactions that were fetched but were not processed. **Input Folders:** The number of interactions that need to be fetched. **Recording System:** The number of interactions in the recording system that have not been fetched. **Total:** The total of all interactions in all folders that need to be either fetched or processed.
Start / Stop System	Enables you to start or stop some or all of the machines in the system. In the left panel, select the machine you want to stop/start. **Note:** Stopping the system does not turn off the UPlatform.exe service. To do that, you must run the SMConfig tool.

Sites	**Sites:** Indicates the status of all sites. **Folders:** Indicates the status of the Input, Filter and Store folders. If available space is low, a warning or error is generated. **Computers:** Indicates the status of the various computers. **Note:** The red and white x indicates the machine was stopped.
Messages	Displays system messages for specific machines.

Note: When there are Log Errors the administrator can investigate using the information in the Monitor System window as well as by running the
Monitor System report or by using the **ULogger** utility directly on a server.

To view system messages:

You can view system messages, as well as additional system-status information by running the Monitor System report.

1. Select **Tools** > **System Admin** > **Monitor System**.
2. Set the filters at the bottom of the screen under the **Messages** title.
3. Click **Show**. The messages are displayed below the filters.
4. Place your mouse on the message text to see the full message.
5. Click **Mark as Read** once you have viewed the message.

Manage Cache

SpeechMiner enables you to reset the cache for all or specific interface elements such as agents, saved reports, users and groups and so on.

The contents of the SpeechMiner cache are automatically reset at a configured time interval.

When you manage the cache, you can also reset the cache manually. For example, you may wish to manually reset the cache when a
new agent begins working, so that the agent's name will appear in the system.

To reset the cache:

1. Select **Tools** > **System Admin** > **Manage Cache**.
2. In the drop-down list provided select one of the following:
3. Click **Reset**.
    - **All:** Reset the cache for all of the SpeechMiner contents.
    - **Users and Groups:** Reset the cache with updated user and group information.
    - **Agents:** Reset the cache with updated agent details.
    - **Searches:** Reset the cache with updated saved search definitions.
    - **Metadata fields:** Reset the cache with updated metadata fields.
    - **Items on Report:** Reset the cache with the current report templates and report template definitions.
    - **Saved reports:** Reset the cache with the current saved report definitions.

   The cache for the selected element is reset and a confirmation message appears.
4. Click **OK**.

System Configuration

With SpeechMiner, you can review system configuration and security information that enables you to better understand the environment you are working in.

Although the configuration information is intended for view purposes only, some of the security settings can be changed.

With the System Configuration tool you can:

- View system information.
- Manage security settings.
- Manage PCI settings.
- Monitor the security log.

To view system information:

You can review a summary of information about the different system components.

1. Select **Tools > System Admin > System Configuration**.
2. The **Default** tab is displayed.
3. Review the system configuration information.

To manage security settings:

SpeechMiner complies with the security standards defined in the PCI-DSS standard (Payment Card Industry Data Security Standard). These standards are designed to prevent confidential information from being accessed by unauthorized individuals. For example, one purpose of SpeechMiner security settings is to prevent unauthorized people from hearing interactions that are stored in the database.

Note: The information in this section is intended to explain how to work with the Security Center interface. It includes a general overview to the subject of PCI implementation in SpeechMiner.

Following these guidelines does not ensure that your entire system is PCI-DSS compliant, or guarantee the confidentiality of your data. It is your company's responsibility to work with your IT department to ensure that your hardware and network systems are secure from internal as well as external intrusions. Genesys Telecommunications Laboratories makes no claims about the security of your network or the extent to which it is PCI-DSS compliant.

Some of the options that must be implemented in SpeechMiner in order for it to conform to the PCI-DSS standard are:

- Interaction export is disabled for all users.
- All audio files are encrypted.
- The password for encrypting audio files has been changed from its default value.
- The password for the default user account (Administrator) has been changed from its default value.
- Access to the SpeechMiner browser-based interface is available using Windows, Genesys or SpeechMiner authentication.
- Access to the system is blocked after ten consecutive attempts to log in with an invalid password.
- Permissions are set properly for all users and components of the system.
- All web services use a secure API, and can only be accessed using a token that is supplied by the system upon user login.
- Secure SSL connections are used for all connections to and between servers in the system.
- The SSL certificate is valid and includes all the domains used by the site.
- Tracing is disabled on all web servers in the system.

The settings that must be configured in order to implement these options are defined in various locations in the system, including SMConfig (the SpeechMiner configuration tool), the SpeechMiner web interface, and the configuration files of specific system features. In some cases, more than one setting must be configured in order for a requirement to be met. For example, SSL connection requirements must be configured separately for different servers in the system. The Security Center lists all of the PCI-related settings in your system and, whenever possible, automatically checks the system to see if they conform to the standard. In some cases, the system can correct an issue for you by changing the relevant settings; in other cases, you must manually correct the settings. You can also choose not to implement some or all of the PCI requirements and you can manually change the settings as you see fit.

The Security Center also contains a log of all security-related actions that were performed in the system. The log lists configuration changes
and failed login attempts. This information can be used to monitor the system for security breaches.

To open the security center:

The Security Center is accessed from the System Configuration screen. The upper part of the tab contains PCI-compliance information. The lower part contains a log of security-related user actions. Both tables can be sorted by any of the columns they contain.

1. In the System Configuration screen, click the **Security Center** tab.

To manage PCI settings:

The PCI-DSS recommended configuration section contains a table that lists all of the PCI related settings. The table contains the following columns:

- **Setting:** The name of the setting.
- **Explanation:** A description of what conditions must be met in order for the setting to conform to the standard.

  Note: If the system cannot check whether the setting meets the conditions, "Make sure that ..." appears at the beginning of the explanation.
- **Action:** Indicates the current setting status and/or the type of action required to correct it.
- **Fixed:** Indicates that the setting conforms to the PCI requirements.
- **Fix:** Indicates that the setting does not conform, but the system can correct it.
- **Manual:** Indicates that either the setting does not conform or the system cannot check whether the setting conforms.

To correct a setting that can be fixed automatically:

1. Select **Tools** > **System Admin** > **System Configuration**.
2. Select the **Security Center** tab.
3. Under the **Action** column, click **Fix**. You are prompted to confirm that you want to change the setting.
4. Click **Yes**. The system corrects the setting and changes its Action status to Fixed.

To manually correct a setting:

1. Select **Tools** > **System Admin** > **System Configuration**.
2. Select the **Security Center** tab.
3. Follow the instructions under the **Explanation** column to manually correct the problem.

To correct all the settings that can be fixed automatically:

1. Select **Tools** > **System Admin** > **System Configuration**.
2. Select the **Security Center** tab.
3. Click **Reset**. You are prompted to confirm that you want to change the settings.

4. Click **Yes**. The system corrects the settings and changes their Action status to Fixed.

Note: Settings that require a manual correction are not changed when Reset is selected.

To monitor the security log:

The lower table in the Security Center tab lists system configuration changes and failed logins that occurred during a specific time period.

Note: System configuration changes are changes that are implemented using SMConfig (the SpeechMiner system configuration tool).

1. Select **Tools > System Admin > System Configuration**.
2. Select the **Security Center** tab.
3. Select what should be displayed in the table as follows:
   - **Last:** Enter the number of hours or days (prior to the current time) to include in the table.
   - **Time Unit:** Select hours or days.
   - **Failed Login:** Select to include failed logins in the list.
   - **Configuration Change:** Select to include configuration changes in the list.
4. Click **Refresh**. The table is updated to match the options you selected.

Metadata Manager

Occasionally, the terminology used for search result column names and metadata filter options is not a clear representation of the significance of the metadata (sometimes referred to as Key Value Pair). With **Metadata Manager** you can change the names of metadata filter options and metadata columns in the search results so that the names clearly represent the meaning of the data.

Note: To change the names you must have Metadata Manager permissions. In addition, the change occurs for all SpeechMiner users.

To change a search result column and filter option name:

1. Select **Tools > System Admin**.
2. Select **Metadata Manager**. A predefined list of metadata names appears.
3. In the **UI Term** field, type the name that will appear in the SpeechMiner application; for the **Metadata Key's** name you want to change, .
4. Click **Save**. To undo your changes, click **Reset**.

Export Completed QM Sessions

The Export Completed QM Sessions tool enables you to perform a batch export of QM session data associated with sessions that were
completed during a specific date range.

The completed QM sessions data is exported in a .zip file that contains a .csv file.

To export completed QM sessions:

1. Click **Tools** > **Export Completed QM Sessions**.
2. From the **Date Range** list select the date range in which the QM sessions were completed.
3. Click **Export**. The following question appears:

   Do you want to add a score to the exported evaluation session?

   Note: The completed QM sessions are exported in an ***evaluation Sessions_<username>_<time>.zip*** file that contains a
   evaluation Sessions_<username>_<time>.csv file. Each row in the .csv file represents an one evaluation session.
   The exported file contains the fields listed under **Exported Fields** in the **Export Completed QM Sessions** page.
4. Click **Yes** to add a score to the exported QM sessions. The **Export Completed QM Sessions** dialog box appears.

   Note: If you selected Yes and your system is configured to encrypt exported interactions, an **Export Completed QM Sessions** window
   appears. In this window, you will be instructed to create a password required when you attempt to unzip the exported interactions.
5. Enter a password of your choice in the **Create Password** field.
   Or
   Enter a new password and click **Generate Password** to enable the system to generate a password for you in the **Create Password** field.
6. Click **Export** to export the completed QM sessions.
7. Copy and save the password that appears and click **Done**.

When you try to unzip the file, you will be prompted for this password.

Note: Windows default zip program does not support encrypted zip files. To unzip the file, you must use a different zip program.

Define Tags

With SpeechMiner you can mark an interaction with a tag to better focus your searches, protect an interaction from deletion and indicate that an interaction was evaluated as part of a Quality Management evaluation session. That is, a tag labels an interaction as a result of a specific action (Cannot Delete or Evaluated) or a user defined category.

The **Define Tags** tool enables you to create and delete interaction tags.

To define a tag:

1. Click **Tools** > **Define Tags**.
2. Click **Add a new tag**.
3. Enter the tag name in the field provided and click the check-mark button. The new tag is added to the tags list and will now
   appear as an option in More > Tag.

Note: If you decide to delete a tag that is associated with an interaction, the tag will no longer be associated with the specific interaction and it will no longer appear as part of the interaction's details.

Action Items

Action Items enable you to manage SpeechMiner tasks.

To view your Action Items click the **Action Items** link in the upper right corner of the SpeechMiner screen.

The Action Items link contains round brackets. The number within those brackets indicates the amount of Action Items assigned to you.

- A black Action Item link indicates that no items are assigned to you.
- A green Action Item link indicates that the list contains items assigned to you.
- A bold green Action Item link indicates that new items have not been read or the status of an existing Action Item has been changed.

With Action Items you can:

- Create an Action Item: Used to indicate and specify to a user what should be done.
- Edit an Action Item: Used to modify the content and purpose of an action item.
- Change the Action Item Status: Used to indicate if the action item has been completed, and whether or not it was either rejected or accepted.

Note: The summary in an **Evaluator Message** action item is also a link to the Evaluation Session associated with the action item. If you received this action
item type, read the **Summary** instructions and click the link to the associated evaluation session, to better understand the action item before you perform
and complete it.

Create an Action Item

An Action Item can be modified by both the creator and the user it is assigned to.

To create an Action Item:

1. In the top right corner of your SpeechMiner screen, click **Action Items**.
2. Click **New Item.**
3. Configure the following Action Item parameters:
    - **Assignee:** The user to whom the Action Item will be assigned.
    - **Type:** The Action Item subject
    - **Due Date:** The date on which the Action Item must be completed.
    - **Summary:** a detailed description of what the user must do.
4. Click **OK.** The Action Item is created and appears in the **My Items** list.

Edit an Action Item

When you edit an Action Item you can add a note(s). Notes are used to clarify, describe and point out thoughts and decisions about the Action Item.

Note: You can view an Action Item's details from the Action Item list. To do so, simply click the **Details** link.

To edit an Action Item:

1. In the top right corner of your SpeechMiner screen, click **Action Items**.
2. Click **Edit.**
3. Modify the parameter settings as required.

   Note: When you edit an Action Item the Edit Action Item window contains an area for notes.
4. Under **Notes** add your thoughts (for example, decisions made, limitations, ideas, and so on).
5. Click **OK**.

Change the Action Item Status

When an action item is completed, change its status to **Completed**.

Once the status is changed to Completed, the user who created the action item must either **Confirm** or **Reject** the change.

When it is confirmed that the action item has been completed, the action item will no longer appear in the Action Item list.

When the Completed status is rejected, the action item remains in the Action Item list and the option to Complete becomes available again.

When you finish the tasks associated with an Action Item you can:

- Select to Complete the Action Item.
- Confirm that the Action Item has been completed.
- Reject that the Action Item has been completed.

To complete an Action Item:

1. In the top right corner of your SpeechMiner screen click **Action Items**.
2. Under **Actions,** click the **Complete** link associated with the Action Item that has been completed.
3. In the **Complete Action Item** window, add a note that describes why the Action Item is complete.
4. Click **OK**.

   Note: If you add a note in the **Note** field, the action item will be sent back to the evaluator for review.

To confirm that an Action Item has been completed:

1. In the top right corner of your SpeechMiner screen click **Action Items**.
2. Under **Actions,** click the **Confirm** link to approve the Complete status.
3. In the **Confirm Action Item** window, add a note that describes why you agreed to the complete status.
4. Click **OK**.

To reject the decision to complete an Action Item:

1. In the top right corner of your SpeechMiner screen click **Action Items**.
2. Under **Actions,** click the **Reject** link to dismiss the Complete status.
3. In the **Reject Action Item** window add a note that describes why you disagree with the complete status.
4. Click **OK**.

Permission Definitions

Access to SpeechMiner features and information is determined by the permissions a SpeechMiner user is granted.

A SpeechMiner user can be given one or more permissions associated with the following permission categories:

- Web Site
- Reports
- SMConfig

Web Site Permissions

The following is a list of all the Web Site permission categories. Refer to each section for a detailed list of permissions and their definitions:

- Action Items
- Interactions
- Coaching
- External
- Help
- My View
- QM
- Reports
- System
- Users
- Miscellaneous

Action Items:

- **Edit Action Items -** This permission enables the user to edit and manage action items (that is, SpeechMiner tasks) assigned by default to the
  Administrator, QM Manager and Power User roles.

- **Complete Action Items -** This permission enables the user to complete his/her action items (that is, SpeechMiner tasks) assigned by default to the
  Administrator, QM Manager, Power User, Regular User and QM User roles.

Interactions:

- **Add Interaction Comment -** This permission enables the user to add a comment to a selected interaction. The user's comment appears in the interaction transcript.
- **Agents Filter -** This permission enables the user to filter interactions according to a specific agent(s).
- **Interaction Search Page -** This permission enables the user to select the Explore > Search option and search for interactions using the Search Filter.
- **Define Tags Page -** This permission will enable the user to create or remove new tags.
- **Delete Interaction List Interactions -** This permission enables the user to remove interactions from an interaction list.
- **Edit Interaction Comments -** This permission enables the user to edit an interaction's comments.
- **Edit Others' Comment -** This permission enables the user to edit all comments in every interaction, in addition to the comments he/she created.
- **Explore Menu -** This permission enables the user to access the Explore menu and search for specific interactions by filtering massive quantities of interaction data.
- **Export Interactions -** This permission enables the user to export interactions.
- **Forward Interactions -** This permission enables the user to forward interactions to another user. The message with the link to the forwarded interaction will appear in the My Messages widget.
- **Interaction ID Filter -** This permission enables the user to show/hide the Interaction ID search filter option.
- **Partitions Filter -** This permission enables the user to define a user group as a list of partitions. Partitions identify interaction data using the identification system that was used by the recording system.
- **Protect Interactions from Deletion -** This permission will enable the user to protect interactions from deletion.
- **Saved Searches Page -** This permission allows the user to reuse saved search queries.
- **Screen Recordings Grid -** This permission enables the user to view and analyze screen recordings.

- **Search Interactions -** This permission enables the user to search for interactions.

- **Search Comparison -** This permission allows the user to create a report that compares two saved searches. The result is a report that shows how the two
data sets differ.

- **Tag Interactions -** This permission will enable the user to add or remove a tag from an interaction.

- **User Actions Filters -** This permission enables the user to display/hide the User Actions search filter options.

Coaching:

- **Coaching Menu -** This permission enables users to create, edit and delete coaching sessions.

- **Create Session -** This permission enables the user to create a Coaching session.

- **Delete Session -** This permission enables the user to delete a Coaching session.

- **Edit Session Types -** This permission enables the user to change a Coaching session type.

- **Manage All Coaching Forms -** This permission enables the user to edit and delete coaching sessions created by other users, plus the coaching sessions
he/she created.

- **Manage My Coaching Forms -** This permission enables the user to only edit and delete the coaching sessions he/she created.

- **View All Sessions -** This permission enables the user to display all the sessions that he/she has permissions to see. That is, session in which the user is the
creator, coach or trainee.

External:

- **External Interaction list -** This permission enables the user to view an interaction list in a separate browser window.

- **External Player -** This permission enables the user to open and playback an interaction in a separate browser window.

Help:

- **Help Index Page -** This permission enables the user to view and use the SpeechMiner Online Help Index.

- **Help Menu -** This permission enables the user to view the SpeechMiner Online Help.
- **Send Feedback Page -** This permission enables the user to send Genesys Customer Care an email with feedback about the application.

My View:

- **My Messages Widget -** This permission enables the user to add, edit or view the My Messages widget.
- **My View -** This permission enables the user to create and edit a Dashboard view.
- **Report (Drill down) -** This permission enables the user to edit, add or view the Report widget in the Dashboard view.

QM:

- **Add Evaluations -** This permission enables the user to create Quality Management evaluations.
- **Archive Evaluation Session -** This permission enables the user to archive an evaluation session.
- **Complete Evaluation Session -** This permission enables the user to complete an evaluation session.
- **Create Ad-Hoc Evaluation -** This permission will enable you to evaluate interactions from the Explore page.
- **Create Library Item -** This permission enables the user to create and add a new question to the QM Question Library
- **Create New Form -** This permission enables the user to create a new Quality Management evaluation form.
- **Delete Evaluation Session I created -** This permission enables the user to delete a Quality Management evaluation session that he/she created.
- **Delete Evaluations -** This permission enables the user to delete Quality Management evaluations.
- **Delete Evaluation Session -** This permission enables the user to delete Quality Management evaluation sessions.
- **Delete Form -** This permission enables the user to delete a Quality Management form.
- **Delete Library Item -** This permission enables the user to delete a question from the QM Question Library.

- **Edit Evaluations -** This permission enables the user to change the properties of a Quality Management evaluation.
- **Edit All Evaluation Sessions -** This permission enables the user to view, edit and complete all evaluation sessions, only when the session contains
  interactions the user has permission to view. With this permission you cannot view, edit and complete a Shared evaluation session that is not assigned
  to a user, unless you are one of the evaluators associated with the Shared evaluation.
- **Edit Form -** This permission enables the user to change the properties of a Quality Management form.
- **Edit Library Item -** This permission enables the user to change an existing question in the QM Question Library.
- **Export Evaluation Session -** This permission enables the user to export a QM Evaluation Session in a PDF or Excel format.
- **Export Completed QM Sessions Page -** This permission enables enables the user to perform a batch export of QM session data associated with sessions
  that were completed during a specific date range.
- **Evaluations Manager Page -** This permission enables the user to view the list of active/inactive evaluations and create, edit and delete evaluations.
- **Evaluation Sessions Page -** This permission enables the user to view a list of existing evaluation session and perform evaluation sessions assigned to him/her.
- **Forms Manager Page -** This permission enables the user to create and manage forms that enable evaluators to provide feedback about a specific agent.
- **QM Menu -** This permission enables the user to create, edit and delete Quality Management forms, evaluations and evaluation sessions.
- **Replace an Evaluation Session Interaction -** This permission will enable the user to replace an interaction within an existing evaluation session.
- **Show Evaluation Session Score -** This permission enables the user to view the evaluation session score. If this permission is disabled, the user can only
  view the evaluation session score if the **Show the agent his/her evaluation score** option is selected when the Notify Agent action item (Type: **Evaluator Message)** is created.
- **View Library Item -** This permission enables the user to view one or more question groups.

Reports:

- **Export to Excel -** This permission enables the user to export a report to an Excel document from the Reports > Edit Report tab.

- **My Dashboard Page -** This permission enables the user to display summary information about a specific set of interactions through the use of Views and Widgets.

- **Reports Menu -** This permission enables the user to generate and edit reports for analysis, view report details and status and share the data with users throughout the enterprise.

- **View All Reports -** This permission enables the user to view all saved reports that were created by the user regardless of their Sharing definitions.

System:

- **Manage Cache Page -** This permission enables the user to reset the cache for all or specific interface elements such as agents, saved reports, users and groups and so on.

- **Meta Data Manager -** This permission enables the user to change the names of metadata filter options and metadata columns in the search results so that the names clearly represent the meaning of the data.

- **Monitor System Page -** This permission enables the user to monitor that status of SpeechMiner modules, start/stop system machines and view system messages.

- **System Admin Menu -** This permission enables the user to monitor the system and its servers as well as some of its global features (for example, Monitor System).

- **System Configuration Page -** This permission enables the user to review system configuration and security information. This information enables the user to better understand the environment he/she is working in.

Users:

- **Activate and Deactivate Users -** This permission enables the user to make a selected user account accessible or unavailable.

- **Administer Groups Page -** This permission enables the user to create a new user group, edit an existing user group or delete a user group.

- **Administer Roles Page -** This permission enables the user to provide or remove permissions to features and tools.

- **Administer Users Page -** This permission enables the user to add, remove and/or edit a user profile.

- **Edit Profile Page -** This permission enables the user to change his/her SpeechMiner profile.

- **Edit User Groups -** This permission enables the user to change SpeechMiner user group properties. When a user belongs to a particular group, they have access to the interaction data that is assigned to that group. All Interaction Lists, searches, and reports they access will only include data about the interactions in their group.

- **Edit User Mapping -** This permission enables the user to map users to interaction-center agents. Mapping makes it possible to create a Saved Report for a specific user.

- **Edit User Partitions -** This permission enables the user to edit the partition associated with a specific user. Partitions identify the interaction data using the identification system used by the recording system.

- **Edit User Roles -** This permission enables the user to edit the roles associated with a specific user.

- **Reset Other Users Passwords -** This permission enables the user to change another users password without the specific users involvement.

- **Tools Menu -** This permission enables the user to access the tools that enables him/her to monitor and manage the system and its servers as well as some of its global features.

Miscellaneous

- **Customer Sensitive Data -** This permission enables the user to display sensitive customer metadata, such as data attached from CIM, in the SpeechMiner GUI. Data is visible when this permission is enabled.

- **Agent Sensitive Data -** This permission enables the user to display sensitive agent metadata, such as the agent name, in the SpeechMiner GUI. Data is visible when this permission is enabled.

Note: Both the **Custom Sensitive Data permission** and the **Agent Sensitive Data permission** will not affect report results. That is, sensitive data will be included in reports.
If you do not want sensitive data to be included in reports you must disable the relevant report. For additional

information, see Reports Permissions.

Reports Permissions

The following is a list of all the Reports permission categories. Refer to each section for a detailed list of permissions and their definitions:

- Administration
- Agent Analysis
- Data Analysis

Administration:

- **Usage Tracking -** This permission enables the user to create, edit and/or view the Usage Tracing report. The report is used to monitor user activity
over a selected date range.

Agent Analysis:

- **Agent Comparison Reports -** This permission enables the user to create, edit and/or view the Agent Comparison report (by Interaction or by Segment). The is used to compare
agents' performance against each other as well as against the average value of all represented agents.

- **Agent Evaluation Comparison -** This permission allows the user to enable or disable the Agent Evaluation Comparison report. The report is used to
summarize the average evaluation score for selected agents.

- **Auto Fail -** This permission enables the user to create, edit and/or view the Auto Fail report. The report displays a list of all the Quality Monitoring
evaluation forms that were designated as auto fail for selected evaluations.

- **Agent Trend -** This permission enables the user to create, edit and/or view the Agent Trend report (by Interaction or by Segment). The report displays an agents' performance in relation to one or more selected categories over time.

- **Calibration Score -** This permission allows the user to enable or disable the Calibration Score report. The report shows scores from the
Calibration Evaluation form.

- **Evaluation Summary -** This permission enables the user to create an Evaluation Summary report.

- **Interaction Evaluation Summary -** This permission enables and disables the Interaction Evaluation Summary report. The report displays the score for specific evaluation sessions.

- **Evaluator Evaluation Comparison -** This permission enables and disables the Evaluator Evaluation Comparison report. The report is used to summarize the average evaluation score for selected evaluators.

- **Team Comparison -** This permission enables the user to create, edit and/or view the Team Comparison report (by Interaction or by Segment). The report is used to compare performance between teams and against the average value of all teams represented.

- **Team Evaluation Comparison -** This permission allows the user to enable or disable the Team Evaluation Comparison report. The report is used to summarize the average evaluation score for select teams.

Data Analysis:

- **MetaData Frequency -** This permission enables the user to create, edit and/or view the Metadata Frequency report. The report is used to show for a selected metadata field how many interactions in the data set had each of the values in the field.

- **Interactions -** This permission enables the user to view and create the Interactions report.

SMConfig Permissions

The following is a list of all the **SMConfig** permission categories.

- **Index Panel -** This permission enables the user to manage index related tasks. For example, backup, restore, and index optimization.

- **License Panel -** This permission enables the user to process interactions and enter the licenses received from Genesys.

- **Log Parameters Panel -** This permission enables the user to configure the logging output for the following components: Platform,
Web and Client Applications.

- **Login To SMConfig -** This permission enables the user to log into SMConfig.

- **Recording Panel -** This permission enables the user to configure Tenant, Application Name and Users Access Group in the systems Configuration
Server. It also enables the user to configure Interaction Receiver, RP Authorization, MCP Authorization and Playback.

- **Reports Panel -** This permission enables the user to deploy both the MRS library (a DLL that provides support for various report features),
and all required reports on the report server.

- **Services Panel -** This permission enables the user to register all the SpeechMiner services on each machine in the system, update the SpeechMiner
configuration files on each machine and start, restart and stop services.

- **Sites & Machines Panel -** This permission enables the user to configure the layout of the system as well as additional system-wide parameters.

Permalink

The Permalink feature enables you to save a network address for a particular item, such as a query or a report. This makes it easy to access the item again. After you select search criteria for a new interaction search, you can generate and save a Permalink to the query. After you copy the Permalink you can paste it into the **Address** field of your browser. When you press **Enter**, the search form is opened with all of your search criteria specified. You can save the Permalink on your computer or as a favorite in your browser, or you can send it to other users by e-mail or IM. When you or the recipient want to run the search, you need only open the link in a browser.

In some cases, when you generate a Permalink, you can specify whether it can be accessed by anyone who has the link or only by SpeechMiner users who have permissions in the system for the item. In these cases, if you choose the latter option, users must provide their SpeechMiner username and password in order to access the item. When this option is not available, a SpeechMiner username and password are always required.

Permalinks can be created for a variety of item types, including specific interactions, interaction searches and reports. When you choose to generate a Permalink for one of these items, a Permalink dialog box opens and displays the Permalink URL.

To save a generated Permalink:

1. Select **Explore** > **Interaction Lists**.
2. Click the **Copy** link in the **Permalink** column for the list whose permalink you want to copy.
3. Copy the link:
    - When working with Internet Explorer, click **Copy & Close**.
    - When working with Chrome, manually select and copy the link and click **Close**.
4. Paste the link in a text file, the address field of your browser, an email message, and so on, as required.

Note: Most permalinks only enable users to open interactions that belong to partitions for which they have permissions. Some permalinks point users to interactions from partitions for which they do not have permissions. When this is the case, a warning message appears in the Permalink dialog box.

Frequently Asked Questions

The following is a list of topics that provide answers to a few of the most frequently asked questions:

- Quality Management (QM)

Quality Management (QM)

Q: Can the name of a Quality Management form be changed once the form is active?

A: A form cannot be changed once it is activated and added to an evaluation. If the form is active but it was not added to an evaluation, you can deactivate the form, change it and activate it again.

Q: Can inactive Quality Management forms be archived?

A: Inactive forms cannot be archived.

Q: Can a group of questions have a 0 weight value?

A: A group can have a 0 weight value as long as there are additional question groups that are assigned a weight. The rule is that the sum of all the group weights must be 100.

Q: What is the best option when you want to create a form with Introduction questions that do not have a weight value?

A: It is best to use Free Form questions as Introduction questions since they are not assigned a weight value.

Q: What does the Expire status mean in the Evaluation Manager?

A: An Expire status means that the due date for the specific session has passed. An expired evaluation session appears in the evaluator's Session grid, but it can not be filled by the evaluator. Expired sessions will appear in reports that display all sessions (for example, Evaluation Summary).

Q: What is the Derivation (that is, Variance) value in the Calibration Score report?

A: Derivation is the difference between a specific score and the average score.

Q: Does the Evaluator report provide a value for derivation over time?

A: No.

Q: What is the purpose of the Average Quality Score in the Calibration Score report?

A: When you create a Calibration evaluation for a specific call, you can determine what the correct score and/or answers should be. You can then compare the evaluators response (score and answer) to what you determined was the correct score and answer.

For additional information, see Quality Management.

Appendix A - Configure the Browser

SpeechMiner end users access the SpeechMiner browser-based interface from Internet Explorer or Google Chrome. The selected browser
connects to the SpeechMiner Web server through the local network.

In order for the SpeechMiner interface to work properly, you must configure your browser as explained in the relevant browser page:

- Internet Explorer
- Chrome

The required configuration should be performed:

- To enable the use to pop-ups from the SpeechMiner Domain.
- To treat the SpeechMiner domain as part of the local intranet (or as a trusted site).
- To enable automatic updating of cached web pages.

Note: To run SpeechMiner 8.5.5, you must use a minimum resolution of 1280X1024. It is recommended that you work with a 1680X1050 resolution.

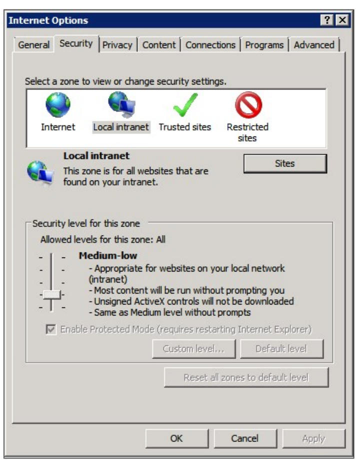
Internet Explorer

Perform the following steps to configure Internet Explorer to work properly with SpeechMiner:

Note:
- If Internet Explorer is running on a Windows Server 2008 machine or Windows Server 2012 machine, the Enhanced Security
Configuration feature should be turned off.
- When working with Internet Explorer 11+, the Online Help documentation may not appear as it should due to your Internet Explorer compatibility view settings. To view the Online Help properly, go to the **Tools** menu, select **Compatibility View Settings** and verify that **Display intranet sites in Compatibility View** is not checked.

Refer to the Turning Off the Enhanced Security Configuration Feature on Windows Server 2008 / Windows Server 2012 section.

1. Open the **Internet Options** dialog box.



2. Select the **Security tab** and **Local Intranet.**

3. Add the SpeechMiner domain to the list of web sites in the **Local Intranet** zone.

4. Click **Sites > Advanced** and add ***.genesyscloud.com** to the list of safe websites.

   Note: This step is not required if you already turned off the Enhanced Security Configuration Feature.

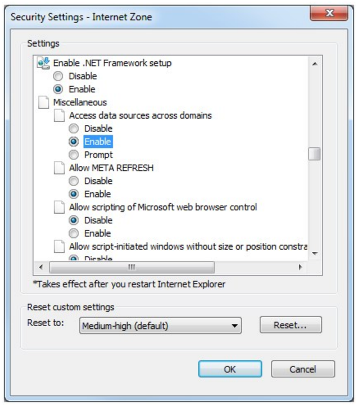
5. Click **Custom Level** to customize the local intranet zone security.

   Note: When working with Internet Explorer 11+, the Online Help documentation may not appear as it should. To view the Online Help properly, you must enable **Active Scripting** in the **Internet Options > Security >**

Custom Level window.

6. Under **Miscellaneous** change **Access data sources across domains** to **Enable**.

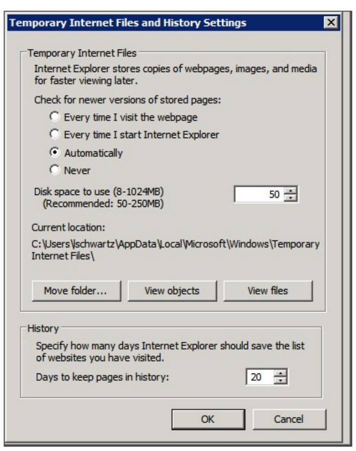
   Selecting Enable makes Screen Recording playback possible because it allows access from the browser to HTCC.



7. In the **Privacy** tab, add the SpeechMiner domain to the list of web sites that are permitted to open pop-ups.

8. In the **General** tab, under **Browsing History**, select **Settings.**

9. Under **Check for newer versions of stored pages**, select **Automatically.**



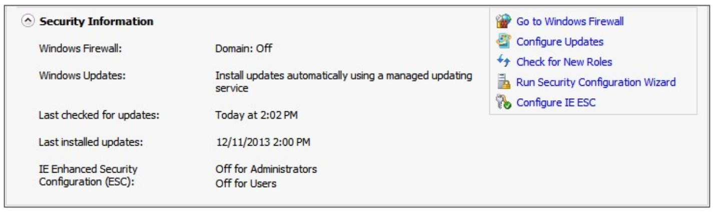
10. Click **OK** to save the changes.

    Note: If the SpeechMiner domain is treated as part of the local intranet, Local Intranet 

    should appear in the Status Bar at the
    bottom of the Internet Explorer window whenever the browser displays a SpeechMiner page. In newer versions of Internet Explorer, the same
    information can be found in **File > Properties**.

Turning Off the Enhanced Security Configuration Feature on Windows Server 2008 / Windows Server 2012

1. In **Server Manager's** home page (the top level), expand the **Security Information** section. The current settings for the Enhanced Security
Configuration feature appear under **IE Enhanced Security Configuration (ESC)**.



2. If the current settings are not **Off** for **Administrators** and **Off** for **Users,** click **Configure IE ESC**. The **Internet Explorer Adavnced Security
Configuration** dialog box opens.

3. For both **Administrators** and **Users,** select **Off.**

4. Click **OK** to save the changes.

Chrome

Perform the following steps to configure Chrome to work properly with SpeechMiner:

1. In the Chrome browser, click the Chrome menu , and select **Settings**.
2. Under **Privacy**, click **Content Settings...**.
3. Under Pop-ups, verify that **Allow all sites to show pop-ups** is selected. If it is not selected perform the following:
   a. Click **Manage exceptions...**.
   b. In the field provided, type ***. genesyscloud.com** and select the **Allow** behavior.
   c. Press **Enter** and click **Done**.

Verify that Java Script is Enabled

1. In the Chrome Browser, navigate to "'Chrome Settings > Show Advanced Settings > Privacy > Content Settings'".
2. Under "'Java Script'", select "'Allow all sites to run Java Script (recommended)'".

For more information about enabling Java Script, see the following example https://support.google.com/adsense/answer/12654.