SpeechMiner 8.1

User Manual

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SpeechMiner 8-1 User Manual

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Ask Us

If you're unable to find what you're looking for in this help system, try our support page:

http://www.genesyslab.com/support/general-pages/contact-us.aspx

or contact our support team at:

customercare@genesyslab.com

Home > Getting Started

Getting Started

SpeechMiner®, Genesys Telecommunications Laboratories's award-winning Speech Analytics platform, leverages recorded customer interactions (from any recording system) and analyzes each call for critical business topics and events. With unmatched accuracy, the system "listens" to conversations between customers and contact-center agents, precisely identifies the topics that were discussed, and categorizes what took place within each interaction.

SpeechMiner is made up of two software components:

1. SpeechMiner browser-based interface, which offers a variety of ways to access the results of the call analyses performed by the system. Users can employ this interface to find calls that have specific characteristics or that deal with particular topics, to identify and listen to the parts of calls that interest them, to audit and fine-tune SpeechMiner's call processing, and to keep track of a range of system-metrics.
2. SpeechMiner Administration Tool (SMART), which enables users to configure the Speech Analytics system to search calls for specific topics and other characteristics.

This manual explains how users can use the SpeechMiner browser-based interface. This first section explains how to log into SpeechMiner and gives an overview of the interface. Upcoming sections provide details about working with the interface. Information about using the SMART SpeechMiner component is available in the *SMART User Manual*.

See also

Logging into SpeechMiner
Overview of the Main Window
About Calls and Interactions

Home > Getting Started > Logging into SpeechMiner

Logging into SpeechMiner

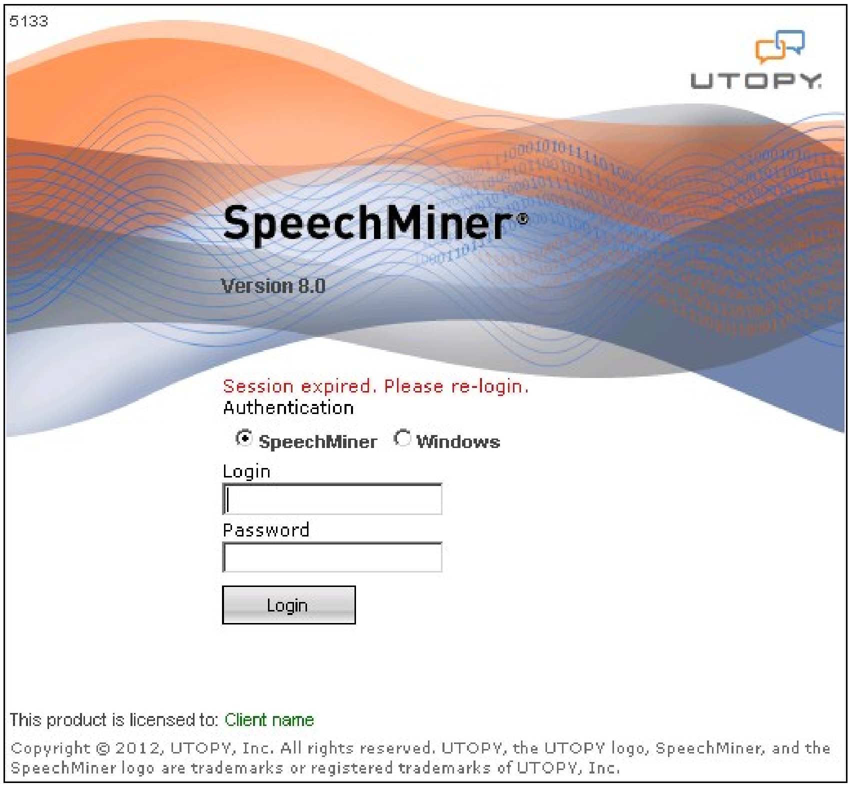
In order to work with SpeechMiner, you must log into the system with a username and password that is defined for you by your SpeechMiner system administrator.

When you log in, SpeechMiner automatically checks the roles and groups that are assigned to your account. The roles tell the system what SpeechMiner functions and features you can access. Only those items you have permissions to view are displayed in the interface when you are logged in. The groups tell the system which call data is relevant to you. The Interaction Lists, call searches, and reports you access in SpeechMiner will only include data from this body of calls. For additional information about roles and groups, see User Management.

To log into SpeechMiner

1. In an Internet Explorer browser window, navigate to the SpeechMiner address. The SpeechMiner Login page appears.

   Note: The SpeechMiner address should be given to you by your system administrator. Alternatively, when your account was created, you may have received an automated e-mail notification with this information.



SpeechMiner Login Page

2. Select **SpeechMiner** if your username and password are managed by SpeechMiner. Select **Windows** if you log into SpeechMiner using the same username and password you use to log into Windows. The fields required for the selected option are displayed.

   Note: If you are not sure which option to choose, contact your system administrator.

3. In the **Login** and **Password** fields, type your username and password.
4. If you selected **Windows** in step 2, in the **Domain** field, select your Windows domain.
5. Click **Login**. You are logged into the system, and your homepage is displayed. (If no homepage has been set in your profile settings, your **Views** page is opened.)

   Note: The first time you log in, the End User License agreement appears before you are logged in. Read the agreement. Then, select **I accept** and click **OK**. Your homepage is displayed.

See also

Overview of the Main Window
About Calls and Interactions

Home > Getting Started > Overview of the Main Window

Overview of the Main Window

The SpeechMiner interface is divided into pages from which you can access all of the system's functions. The following pages are included in the interface:

Page	Description
Views	The home page of the interface, this page can contain a number of Views, each of which can contain a selection of small applications that help you keep tabs on information that is of importance to you.

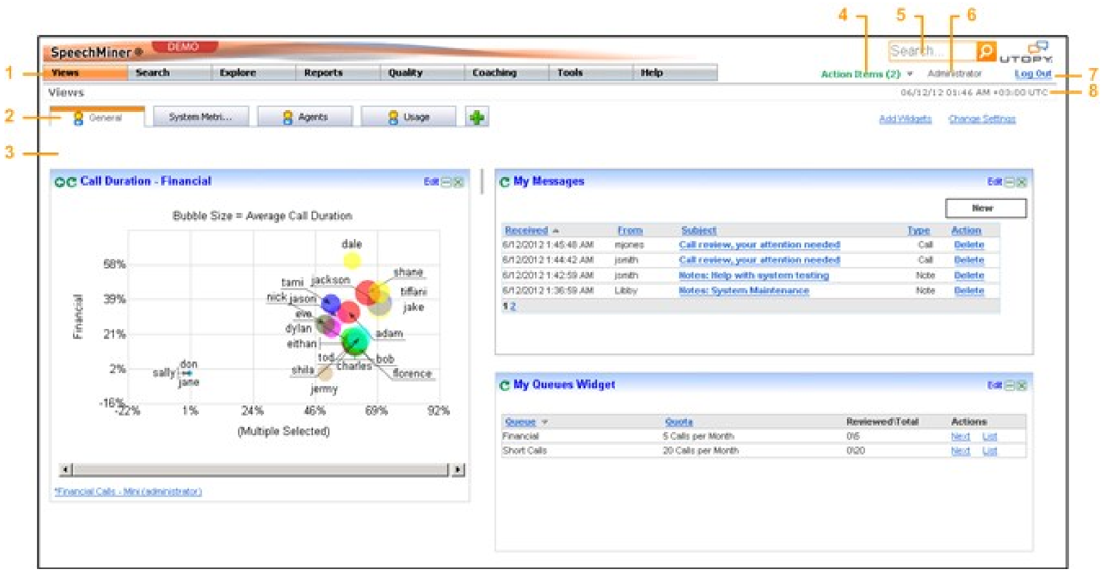
Search	Searching for calls and other interactions by their characteristics, listening to calls in SpeechMiner's multi-featured, proprietary Media Player; viewing the content of calls and other interactions
Explore	Identifying unexpected trends and problems by viewing automated analyses of the terms that were found in call transcripts and records of other interactions.
Reports	Managing reports by selecting filter criteria, generating reports, and handling the results.
Quality	Management of call monitoring. This system enables call monitors and supervisors to check selections of calls that meet specified criteria and fill in forms rating the calls and drawing attention to issues that arise in them.
Coaching	Management of coaching sessions. Coaching sessions provide managers with extensive tools for helping agents and other personnel to improve their performance. Each session directs the trainee to listen to particular recorded calls and can include notes on how lessons from these calls can be implemented by the agents in their work.
Tools	Access to system administration tools, including user management, Preset-View management, and system administration
Help	A dropdown menu that provides access to this guide, information about the current version of SpeechMiner, and a form for sending feedback about SpeechMiner to Genesys

To open a page:

- Place your mouse pointer over the name of the page in the Main Menu. If a dropdown menu opens, select one of the options in the menu. If no dropdown menu opens, click the name of the page.

Elements of the Interface

Each page of the interface contains some or all of the following elements:



Key to illustration:

Element	Number in Illustration	Description
Main Menu	1	A menu bar for navigating from page to page in the interface. Most of the menu options have dropdown submenus that provide quick access to the tabs of the page or to other functions. Place the mouse pointer on the menu item to view the dropdown menu. Most of the submenus have a default option. This option appears in the submenu in **bold** type. For these menu options, if you click the name of the menu option, the default option from the submenu is

		automatically selected. For example, in the **Views** menu option, the default option is the first View in the submenu. The name of this View appears in bold type in the submenu; clicking **Views** in the main menu opens this View.
Tabs	2	In many of the pages, the functionality is divided into tabs. The tabs appear below the Main Menu. Click a tab to display it.
Page contents	3	Below the Main Menu and tabs are the contents of the page. For example, in a **Views** page, the widgets of the current View are displayed, and in a **Search** page, in the **New Search** tab, a search form is displayed on the left, and, once a search has been performed, an Interaction Grid with the results appears on the right.
Action Items	4	A link that opens the current user's Action Items box, which is used to manage job assignments
Search box	5	Enter one or more terms in the box to perform a quick search for calls in which the terms were found.
User name	6	The user name of the user who is currently logged in
Logout	7	Click to log out of SpeechMiner
Date and time	8	The date and time at which the current page was loaded.

See also

Logging into SpeechMiner
About Calls and Interactions

Home > Getting Started > About Calls and Interactions

About Calls and Interactions

The basic SpeechMiner package works with audio calls that are recorded by external recording systems and then imported into the SpeechMiner database for further processing, such as transcription, identification of Topics, and association with Categories. An optional add-on enables SpeechMiner to also process various forms of written texts, such as e-mails and Facebook conversations. When this add-on is activated, SpeechMiner can include calls and other data in its processing. The general term used in SpeechMiner for data that includes both calls and other written sources is *interactions*.

If your system only includes the call-processing features, some of the menu items and labels in your SpeechMiner interface differ from those that appear in this manual, because they say *call* or *calls* instead of *interaction* or *interactions*. In addition, certain options are not included in the interface. For example, since only call data is available for searches, you will not see the options that allow you to select the types of interactions to include in a search (see Defining Search Criteria).

If your system includes both call-processing and text processing, the menu items, options, and labels in your SpeechMiner interface should match those that appear in this manual. In filters, you can choose the types of interactions to include. For example, you could choose to perform a search for specific terms in calls and e-mails, but not in social media. In a list of search results, individual items like calls or e-mails are labeled using icons that identify their source-types. For example, ▶ indicates a call, an e-mail, and an excerpt from Facebook.

See also

Logging into SpeechMiner
Overview of the Main Window

Workflows

See also

Welcome
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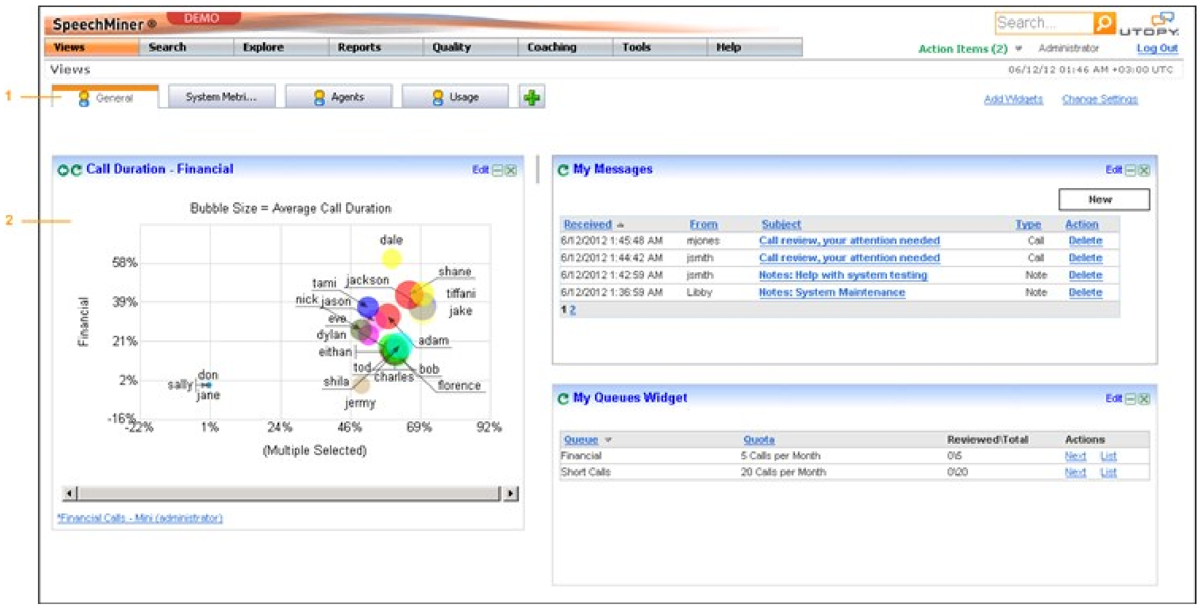
Appendix A: Standard Reports

Home > Views

Views

Your **Views** page is your customizable home page in SpeechMiner. The **Views** page can contain one or more *Views*. Each View contains small applications called widgets that display information or other content of interest to you. For example, a View could include a number of [Report](#) widgets to give you a snapshot of metrics and key performance indicators, a [My Messages](#) widget to display system messages, and a [My Queues](#) widget that enables you to easily access and play calls that require auditing.



Views Page

Key to Illustration:

Number	Description
1	View tabs
2	Widget

Two types of Views can be included in your **Views** page:

1. **Preset Views:** Views that were created by a manager or system administrator and published to your account.
2. **Personal Views:** Views that you created manually in your **Views** page. Personal Views are identified by an icon in its tab.

Note: Depending on your permissions, you may or may not be able to add personal views and remove or modify any of the Views in your **Views** page. If you do not have permission to perform an action described in this section, the buttons or controls required for that action will not appear in your interface. In addition, you can choose a different page as your homepage. If you do so, the page you select will open when you first log into SpeechMiner. For additional information, see [Editing Your User Profile](#).

To open a View:

- In the Main Menu, under **Views**, select the View. The **Views** page opens with the View displayed in a tab.

To switch to a different View:

- Click the desired tab, or select the View from the Main Menu, as described above.

To open the last View you had open in your Views page:

- In the Main Menu, select **Views**.

See also

Managing Views
Managing Widgets

Managing Preset Views

Home > Views > Managing Views

Managing Views

This section explains how you can create new personal Views, modify the name and widget layout of an existing View, change the order of the tabs in the Views page, and delete existing Views.

Note: Depending on your permissions, you may or may not be able to perform all of the actions described in this section.

Adding a New View

You can add as many new views to your Views page as you wish. Each view can contain a different selection of widgets. For example, if you are a manager of two workgroups, you may choose to create two different Views, to help keep track of each workgroup separately.

To create a new View:

1. In the **Views** page, click the plus sign () at the end of the tabs. A new blank View opens, and its tab is labeled **New Page**.
2. Modify the properties of the View; see *Renaming a View* and *Changing the Column Layout of a View* below.
3. Select widgets to add to the View; see Managing Widgets.

Renaming a View

You can change the name of an existing View.

To change the name of a View:

1. On the right side of the screen, click **Change Settings**. The setting options appear on the screen.
2. Under **Change View Title**, in the **Title** field, modify the name of the View.
3. Click **Save**. The name is applied to the View, and the setting options are closed.

Changing the Column Layout of a View

You can change the column layout of an existing View. The widgets in the View are arranged to fit into the column layout you select. The width of each widget is determined by the width of the column in which it appears. Within a given column layout, you can manually change the width of each column to suit the widgets that appear in them.

Note: You can move widgets within a View, or change their heights, to suit the column layout you choose. See Managing Widgets.

To change the column layout of a View:

1. On the right side of the screen, click **Change Settings**. The setting options appear on the screen.
2. Under **Change Columns**, click the desired layout, as follows:

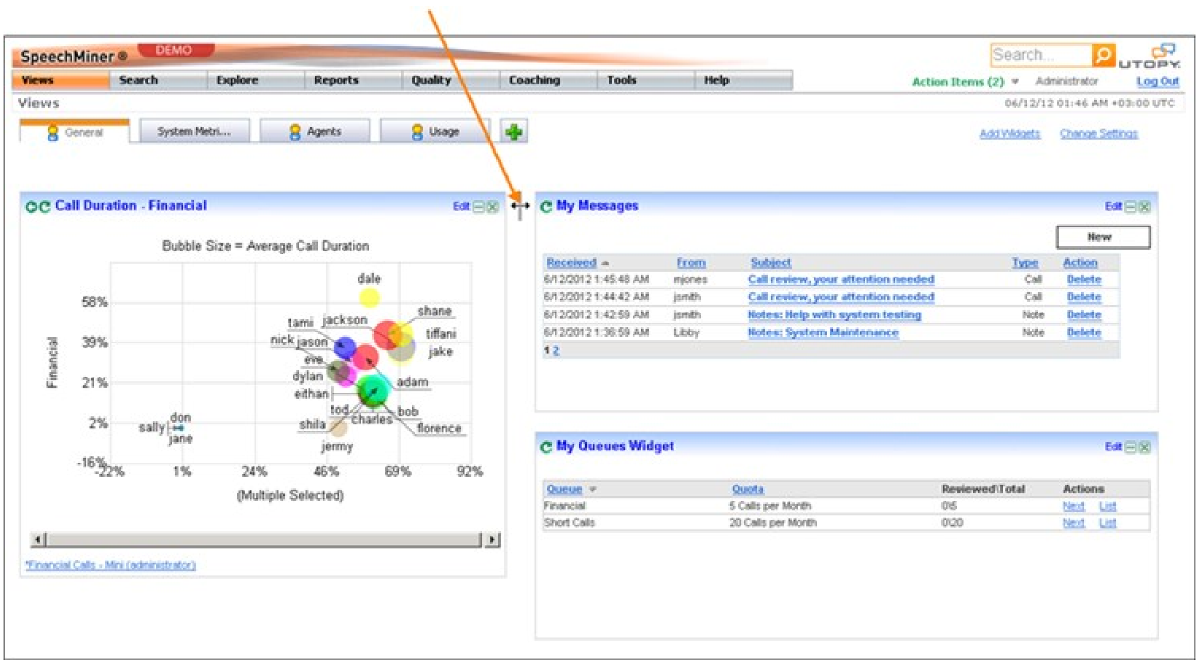
Icon	Description

	Three columns of equal widths
	Two columns, with the larger on the left
	Two columns with the larger on the right
	One column

The layout is applied to the View, and the setting options are closed.

To change the width of a column:

- Drag the border line at the top of the column to the left or right.



Changing the Order of the View Tabs

You can move the View tabs to change their order.

To move a View tab:

1. When the View is open, place you mouse pointer on the orange stripe across the top of the tab. The mouse pointer changes to .

2. Drag the tab. The location in which it will be placed when you release the mouse button is outlined.

3. When the outline appears in the desired location, release the mouse button. The tab is moved to that location.

Deleting a View

You can delete existing Views from the Views page.

To delete a view:

1. On the right side of the screen, click **Change Settings**. The setting options appear on the screen.
2. Under **Delete View**, click **Yes**. You are prompted to confirm that you want to delete the View.
3. Click **Yes**. The View is deleted, and the setting options are closed.

See also

Managing Preset Views
Views
Managing Widgets

Managing Widgets

Widgets are small applications that can be included in a View in the **Views** page. Each widget is displayed in the page as a small rectangle. Depending on your user permissions, you may be able to add widgets to a View, move widgets from one location to another within a View, modify the settings of widgets, minimize widgets, and remove widgets from a View.

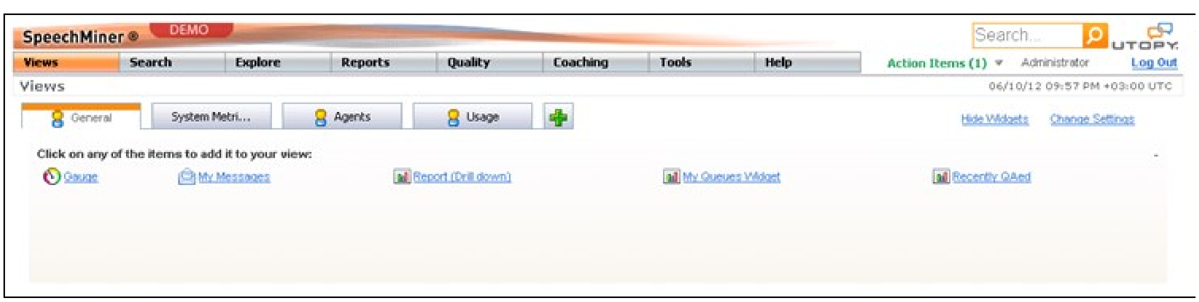
Various types of widgets can be included in a View: Gauge, Report, My Messages, My Queues, and Recently QAed. The Gauge and Report widgets can be configured to display information about a variety of topics, so you may find it useful to include more than one of them in a single View, or to create multiple Views in which these widgets display different data.

Adding a Widget

You can add any number of widgets to a View.

To add a widget to a view:

1. When you have the View open, click **Add Widgets**. The available widgets are displayed.



2. Click the widget you want to add to the View. The widget is added to the view.
3. Drag the widget to the desired location on the screen.

Editing a Widget

You can change the name, height, and refresh rate of all widgets. Some widgets have additional settings that you can change.

To change the name of a widget:

1. Click the title of the widget. The title becomes an editable text field.
2. Modify the title as required.
3. Click **OK**. The title is updated.

To change the height and other settings of a widget:

1. In the upper-right corner of the widget, click **Edit**. The widget's configurable settings are displayed.
2. Change the settings as required. For detailed information about the settings of each type of widget, see the description of the widget, as follows:
   Gauge Widget
   Report Widget
   My Messages Widget
   My Queues Widget
   Recently QAed Widget
3. Click **Save** to save your changes.
4. In the upper-right corner of the widget, click **Close**. The setting options are hidden.

Moving a Widget

You can move a widget from location to location within a View.

To move a widget:

- Drag the widget to its desired location.

Minimizing a Widget

If you do not want to see the contents of a widget temporarily, you can minimize the widget.

To minimize a widget:

- In the upper-right corner of the widget, click the minus sign (). The title bar of the widget is displayed, but its content is hidden.

To maximize a widget:

- In the upper-right corner of the widget, click the plus sign (). The content of the widget is displayed below its title bar.

Refreshing a Widget

The contents of widgets are refreshed automatically at specified intervals, but you can also refresh them manually.

To refresh a widget:

- Click .

Deleting a Widget

You can remove a widget from a View.

To remove a widget from a View:

1. In the upper-right corner of the widget, click the x (). You are prompted to confirm that you want to remove the widget from the View.
2. Click **Yes**. The widget is removed from the View.

See also

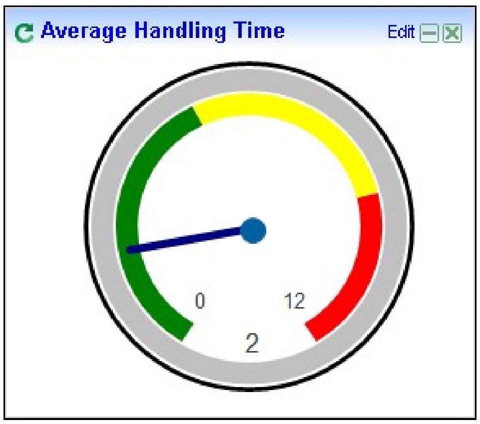
Gauge Widget
Report Widget
My Messages Widget
My Queues Widget
Recently QAed Widget

Managing Views

Home > Views > Managing Widgets > Gauge Widget

Gauge Widget

The Gauge widget provides a graphic representation of the current quantity of a selected type of data. For example, a Gauge widget can show the average handling time for calls received by the workgroup, or the number of calls waiting for your handling. You can choose from a selection of customizable SQL stored procedures that retrieve the data of your choice for display in a Gauge widget.



Gauge Widget

Configuring the Widget

You can configure the settings of a Gauge widget.

To configure a Gauge widget:

1. In the upper-right corner of the widget, click **Edit**. The widget's configurable settings are displayed.

Setting	Description
Height	The height of the widget, in pixels
Color Direction	Select one of the following: • **Green to Red:** The gauge will display green for the lower values, yellow for the middle values, and red for the highest values. • **Red to Green:** The gauge will display red for the lower values, yellow for the middle values, and green for the highest values.
Min	The minimum value to display
Max	The maximum value to display
Bound1	The value at the boundary between the first color and the yellow area
Bound2	The value at the boundary between the yellow area and the last color
SQL Stored Procedure	The name of the SQL procedure that will retrieve data for presentation in the gauge. **Note:** For information about the procedures that are available, contact your system administrator.

Refresh Rate	How often the data represented in the gauge should be refreshed, in minutes
Edit Filter	Select the data to include in the sample used for calculations: Click the **Edit Filter** icon ( ). The Filter Panel opens in a new window. Select the required filter settings, and then, at the bottom of the window, click **Save**. For additional information about working with the Filter Panel, see Defining Search Criteria.

2. Click **Save**. The settings are implemented.
3. Click **Close**. The settings are hidden.

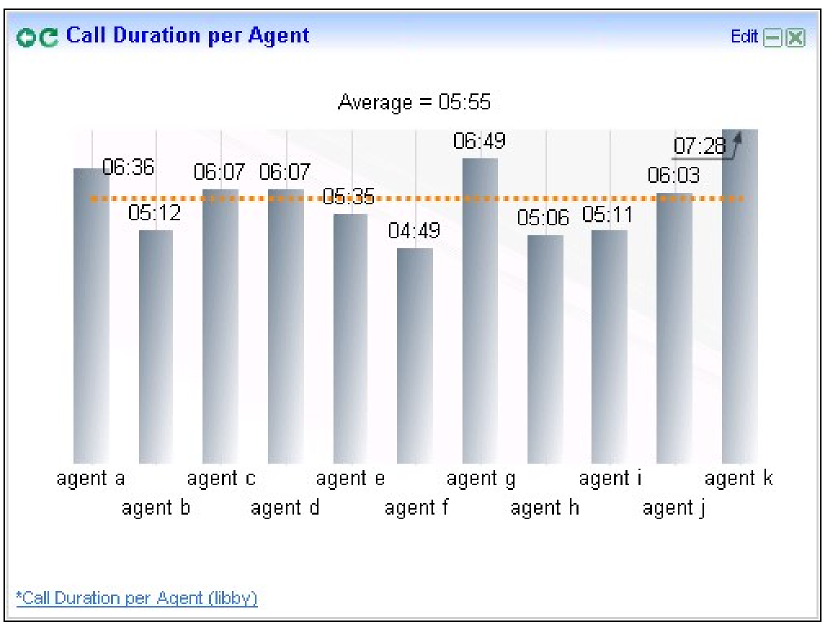
See also

Report Widget
My Messages Widget
My Queues Widget
Recently QAed Widget

Home > Views > Managing Widgets > Report Widget

Report Widget

The Report widget can be used to display any of the existing reports saved in the system. Many report templates are available in Mini versions that are specially formatted for the Views page because they require less space on your screen, but you can select reports of any size.



Report Widget

Drilling Down in a Report

Clicking on certain locations in the Report widget will drill down to other reports or to Interaction Lists, as appropriate for the item that was clicked. For example, clicking on a bar in the report above will open a list of calls specific to the agent whose name was clicked. Interaction Lists are opened in a separate window, but other drill-down reports are usually opened in the same widget. For information about available reports and the expected drill-down results, see Templates.

A **Back** () button appears in the left corner of the Report widget's title bar. If you have drilled down from a report to another report, you can use the back button to return to the original report.

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

- Click **Back** ().

Configuring a Report Widget

You can specify the height of a Report widget, how often it is updated, and what report is should contain.

To configure a Report widget:

1. In the upper-right corner of the widget, click **Edit**. The widget's configurable settings are displayed.
2. Fill in the fields as follows:

Setting	Description
Height	The height of the widget, in pixels
Refresh Rate	How often the data in the report should be refreshed, in minutes
Select	Select the report you want to display in the widget. The list contains all saved reports for which you have permissions. Reports that are saved in your account are marked with an asterisk (*). The name of the user who saved the report appears in parentheses after the name of the report.

Note: If a report has already been selected, additional configuration fields may appear.

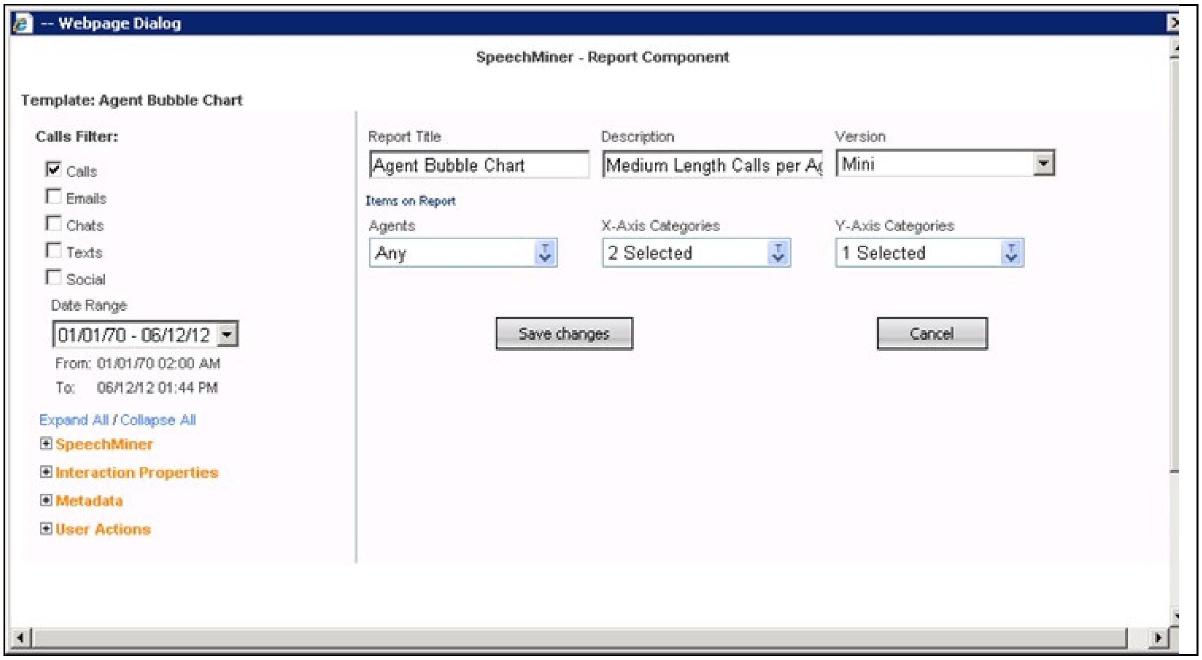
3. In the widget's settings, click **Save**. The settings are implemented, and the name of the saved report is displayed at the bottom-left of the widget.
4. In the upper-right corner of the widget, click **Close**. The setting options are hidden.

Changing the Settings of the Report

Once you have selected a saved report for display in a widget, you can modify the report's settings as necessary.

To change the settings of the report:

1. In the upper-right corner of the widget, click **Edit**. The widget's configurable settings are displayed.
2. Click the **Edit Report** icon (). The report template opens in a new window.



Report Template

3. Modify the settings as necessary.
4. Click **Save Changes**. The dialog box closes. The report is generated with the new settings, and the results are displayed in the widget.

   Note: If the saved report you modified was not in your account, you are prompted to provide a new name for the saved report. The modified settings are saved under the new name you specified, in your account. The original saved report in the other user's account is not changed.
5. In the upper-right corner of the widget, click **Close**. The setting options are hidden.

Opening the Edit Report Page

You can open the Edit Report page directly from a Report widget. You can then run the report with different settings, view a larger version of it, or create a new saved report.

To open the Edit Report page:

- In the bottom-left corner of the widget, click the name of the saved report. The **Edit Report** page opens.

  Note: To return to the **Views** page, use your browser's **Back** button.

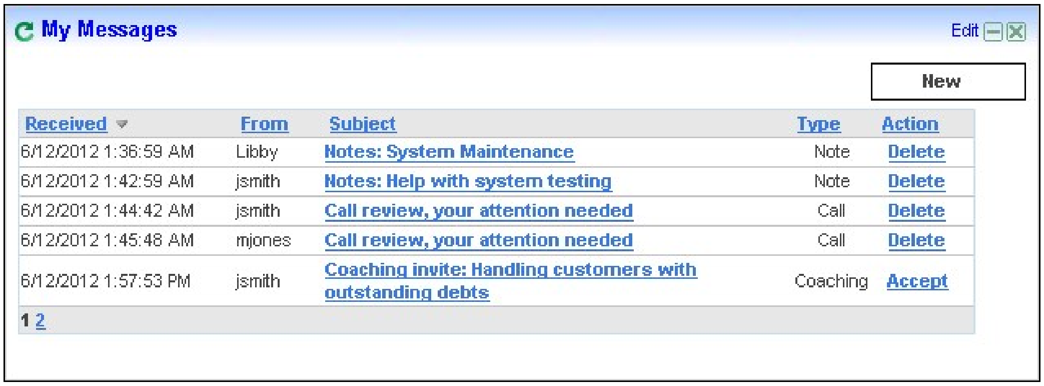
See also

Gauge Widget
My Messages Widget
My Queues Widget
Recently QAed Widget

Home > Views > Managing Widgets > My Messages Widget

My Messages Widget

The My Messages widget is a mailbox in which you can send and receive messages and schedule a new coaching session.



My Messages Widget

Three types of messages may appear in the My Messages widget:

Message Type	Description
Call	A message containing a link to a recorded call. This type of message is sent by other users. It contains a link to the call. Click the link to play the call. A SpeechMiner Media Player window opens and plays the call. **Note:** This type of message is sent when a user forwards a call from an Interaction Grid or from the Media Player.
Note	A note from another user
Coaching	An automated notice from the system informing you that another user has scheduled a coaching session for you. When you open the message, the **Session Details** page of the coaching session opens. To accept the coaching session, in the My Messages widget, under **Action**, click **Accept**. The coaching session is accepted, and the message is deleted from the message list.

To open a message:

- Click the subject of the message.

To send a message to another user:

1. Click **New** and then select **Note**. A **New Note** dialog box opens.
2. Fill in the fields and then click **Send**. A message pops up confirming that the message was sent successfully.

To schedule a new coaching session:

1. Click **New** and then select **Coaching Session**. A **New Coaching Session** dialog box opens.
2. Fill in the fields and then click **Save**. A message pops up confirming that the session was added successfully.

If your mailbox contains too many messages to display in the widget at one time, the message list is divided into pages. In this case, page numbers appear at the bottom of the list.

Note: The number of messages that can be displayed in a page depends on the height of the widget. You can change the height, as explained below.

To go to a different page in the mailbox:

- At the bottom of the list of messages, click the page number.

Configuring the Widget

You can configure the height and refresh rate of a My Messages widget.

To configure a My Messages widget:

1. In the upper-right corner of the widget, click **Edit**. The widget's configurable settings are displayed.

2. Fill in the fields as follows:

Setting	Description
Height	The height of the widget, in pixels
Refresh Rate	How often the list should be refreshed, in minutes

3. Click **Save**. The settings are implemented.
4. Click **Close**. The settings are hidden.

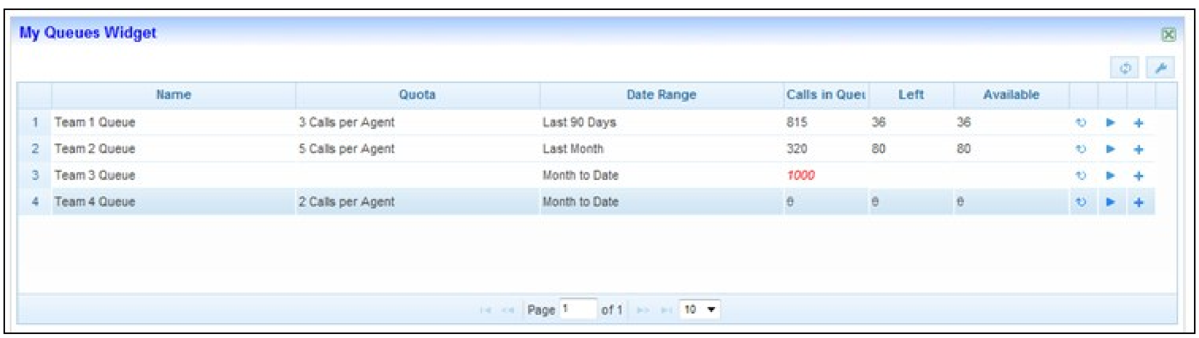
See also

Gauge Widget
Report Widget
My Queues Widget
Recently QAed Widget

Home > Views > Managing Widgets > My Queues Widget

My Queues Widget

The My Queues widget is used by quality analysts to quickly and easily access and keep track of the interactions they need to review. The widget displays a list of the queues that are assigned to you - those that you created and those that were created by others and shared with you. You can click a button to play the next call in a queue or to drill down in the list to view more details about the calls it contains.



My Queues widget

Columns in the Queue List

The Queue List contains the following columns:

Column	Description
Name	The name of the queue
Quota	The number of calls that should be reviewed per per agent; if the queue is an "opportunity" queue, with no quota specified, this field is blank
Date Range	The time period during which the calls took place
Calls in Queue	The total number of calls available in the database that meet the requirements of the queue and have not already been QAed. Calls handled by agents for whom the quota has already been filled are also excluded from this number. **Note:** This value is "0" for "opportunity" queues. **Note:** If this value appears in red, the number of calls available is larger than the maximum number of calls that can

	be displayed in search results in your system. For example, if the maximum number of calls that can be displayed is 1000, and 2000 calls are available that meet the queue criteria, the value displayed will be 1000.
Left	The number of calls that still must be reviewed in order to fill the quota **Note:** This value is blank for "opportunity" queues. **Note:** If this value appears in red, either the number of calls available is larger than the maximum number of calls that can be displayed in search results in your system, or the number displayed is an estimate. This latter situation may occur if the criteria for inclusion in the queue did not include any agents or groups.
Available	The number of calls that available in the database that can be used to meet the quota. This is the sum of all the calls in the database, for each agent included in the queue, that meet the criteria of the queue and have not already been QAed. **Note:** This value is blank for "opportunity" queues. **Note:** If this value appears in red, the number of calls available is larger than the maximum number of calls that can be displayed in search results in your system.
↻	Click to refresh the values displayed for this queue
▶	Click to play the next call in the queue **Note:** This option remains available even if the quota has already been met. Thus, you can listen to more calls from a queue than are required, as long as calls that meet the search criteria and were not yet reviewed are available in the database.
+	Click to drill down to the list of agents in the queue

Sorting the Columns

You can sort the rows of the Queues List by any of the columns.

To sort the list by a column:

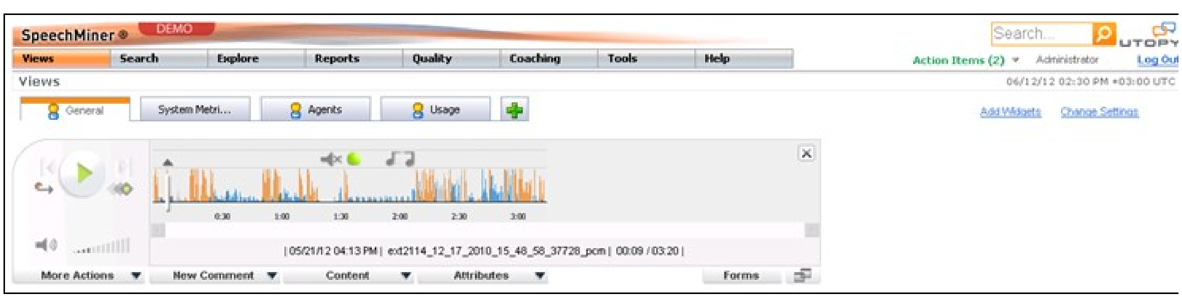
- Click the column heading. (To reverse the sort order, click the column heading again.)

Playing a Call

You can play the next call in a queue simply by clicking the ▶ button in the My Queues widget. The Media Player opens in the current **Views** page.

To play the next call in a queue:

- In the My Queues widget, click the ▶ in the row in which the queue appears. If it is not already open, the Media Player opens at the top of the **Views** page. Playback begins automatically. For information about working with the Media Player, see Using the Media Player.



Media Player opened in the Views page

Refreshing the List

You can refresh the list at any time in order to see the latest data about the queues in it.

To refresh the list:

- In the upper-right corner of the widget, above the list of queue, select .

Completed Quotas

When the quota of a queue has been filled, the queue still appears in the list, but the values under **Calls in Queue**, **Left**, and **Available**, are crossed out.

Drilling Down in the List

You can drill down from a queue to see it sub-divided into lists for each agent. From the agent list, you can drill down once again to a list of calls for the agent. All three levels of the queue list have the same basic functionality. You can play calls from any of these lists, refresh individual items in them, or refresh the entire lists, as described above.

Agent List

To drill down to the list of agents for a queue:

- In the My Queues widget, click the + icon in the row in which the queue appears. The list of agents is displayed in the widget:

List of calls per agent

To close the agent list and return to the queue list:

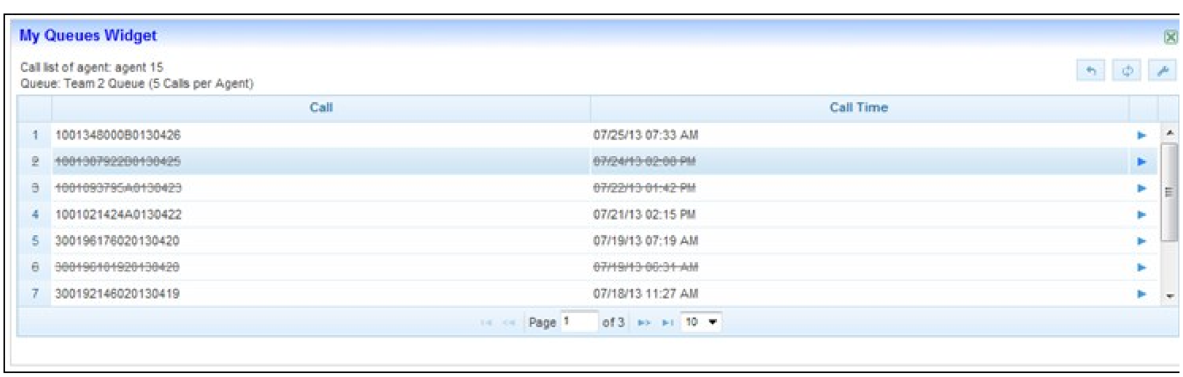
- In the upper-right corner of the My Queues widget, click (**Back**).

Call List

You can drill down from any agent in the agent list to see the list of calls in the queue that are associated with the agent.

To drill down to the list of calls for an agent:

- In the agent list, click the + icon in the row in which the agent appears. The list of calls for the agent is displayed in the widget:



Call List

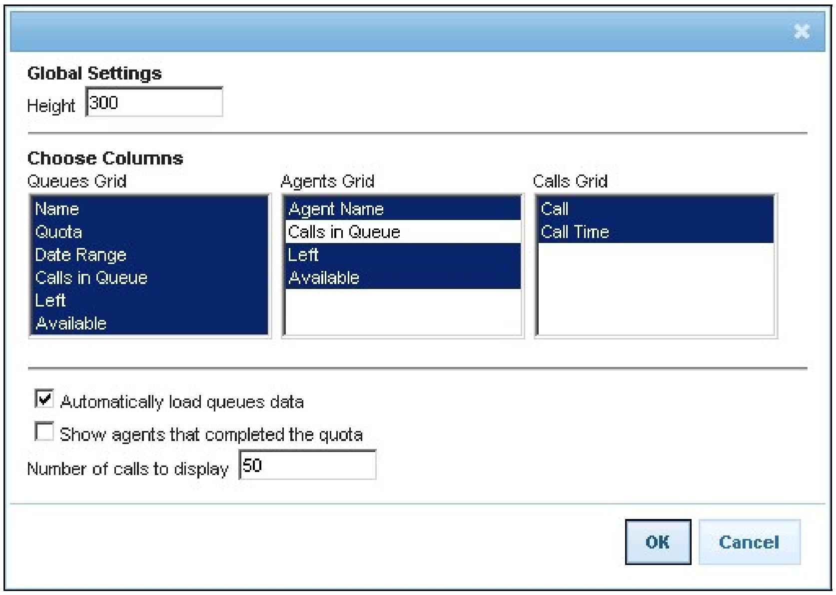
To close the call list and return to the agent list:

- In the upper-right corner of the My Queues widget, click (**Back**).

Configuring the Widget

You can configure the height of a My Queues widget, select the columns that will be displayed in for each of the lists (queues, agents, and calls), and configure some update and display options.

To configure a My Queues widget:

1. In the upper-right corner of the widget, click . The widget's configurable settings are displayed.
2. 

My Queues widget settings

1. Fill in the fields as follows:

Setting	Description
Height	The height of the widget, in pixels
Choose Columns	Select the columns you want to display in each of the lists. Selected items are highlighted in blue. Hold down the **Shift** or **Ctrl** keys to select multiple items in a list.
Automatically load queues data	Select this option to load the latest queue data for all the queues when the widget is opened (i.e., when the View tab is opened). Clear this option if you have a large number of queues and you don't need to see all of their data as soon as the widget opens. In this case, only the queue names will load automatically. To load the current data for a queue, refresh that queue (i.e., click the on the line in which it appears).
Show agents that completed the quota	Select this option to display data in the agent list for all agents included in the queue, even if the quotas for those agents were already filled. Clear this option to hides agents from the agent list when their quotas have been filled.
Number of calls to display	Specify the maximum number of calls to display in the call list. Range: 1-100. The smaller the value, the faster the call list will load.

2. Click **OK**. The settings are implemented.

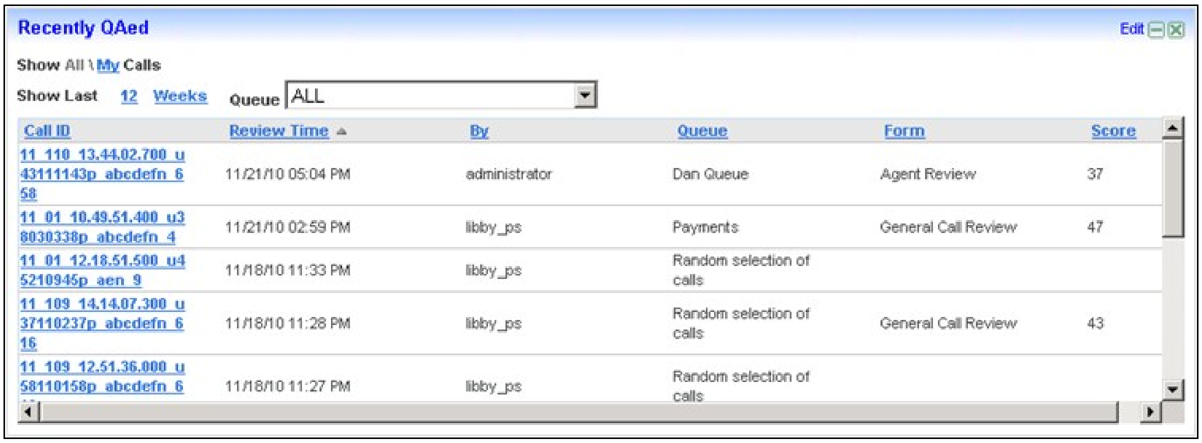
See also

Gauge Widget
Report Widget
My Messages Widget
Recently QAed Widget

Home > Views > Managing Widgets > Recently QAed Widget

Recently QAed Widget

The Recently QAed widget is used by quality analysts and their supervisors to keep track of the calls that have been reviewed. The widget displays a list of the calls that were reviewed in the specified time period, and included information about who reviewed them, when, and, if a form was filled out by the reviewer, which form and what the score was. You can click a link to play a call in the list, and filter the list by time period and by reviewer.



Recently QAed widget

Columns in the Interaction List

The Interaction List contains the following columns:

Column	Description
Call ID	The external ID of the call
Review Time	The date and time at which the call was reviewed
By	The user name of the reviewer
Queue	The name of the queue
Form	The name of the form the reviewer filled in, if any
Score	The score of the call in the form, if one was filled in

Sorting the Columns

You can sort the rows of the list by any of the columns.

To sort the list by a column:

- Click the column heading. (To reverse the sort order, click the column heading again.)

Filtering the List

Filter controls are located above the Interaction List. You can filter the Interaction List by reviewer, time period, and queue.

Filtering by Reviewer

You can choose to display calls that were reviewed by any reviewer or only those calls that you reviewed yourself.

To use the reviewer filter:

- In the upper-left corner of the widget, under **Show**, select **All** to view calls that were reviewed by any reviewer, or **My** to only view calls you reviewed. (The option that is currently selected is unavailable.)

Filtering by Time Period

You can choose the time period from which you want to view calls by choosing the time unit (days, weeks, or months) and the quantity of that unit (e.g., 5 hours, or 3 months). The Interaction List will only include calls that were reviewed during the selected time period. (The time period always ends with the current date. Thus, you can view calls from the previous three months, but not from six months ago to three months ago.)

To modify the quantity of time units:

1. Under **Show Last**, click the number. The number becomes a text field, and an **OK** button appears below it.
2. Enter the required number.
3. Click **OK**. The number is saved.

To modify the time units:

1. Under **Show Last**, click the time unit (**Hours**, **Weeks**, or **Months**). A time-unit dropdown list appears, with an **OK** button below it.
2. Select the required time unit.
3. Click **OK**. The selection is saved.

Filtering by Queue

You can choose to view all the calls that were reviewed or only those that belonged to a particular queue.

To use the queue filter:

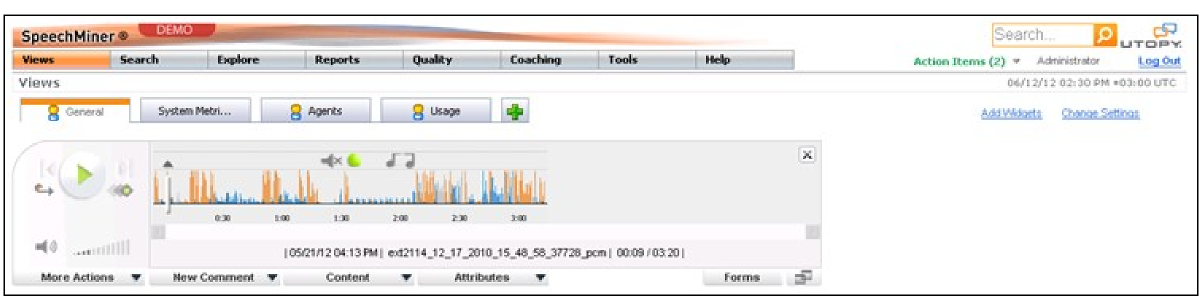
- Under **Queue**, select the name of the queue, or select **ALL** to view calls from all queues.

Playing a Call

You can play a call in the list simply by clicking the ID of the call. The Media Player opens in the current **Views** page, above the widget.

To play a call in the list:

- Click the ID number of the call. If it is not already open, the Media Player opens at the top of the **Views** page. Playback begins automatically. For information about working with the Media Player, see Using the Media Player.



Media Player opened in the Views page

Configuring the Widget

You can configure the height and refresh rate of a Recently QAed widget.

To configure a Recently QAed widget:

1. In the upper-right corner of the widget, click **Edit**. The widget's configurable settings are displayed.
2. Fill in the fields as follows:

Setting	Description
Height	The height of the widget, in pixels
Refresh Rate	How often the list should be refreshed, in minutes

3. Click **Save**. The settings are implemented.
4. Click **Close**. The settings are hidden.

See also

Gauge Widget
Report Widget
My Messages Widget
My Queues Widget

Home > Action Items

Action Items

The Action Items feature is a tool that helps users manage their SpeechMiner tasks, assign tasks to others, and monitor progress on these tasks. For example, a supervisor can create an Action Item for one of his staff members, asking him to perform a particular task at a particular time. The staff member will see that a new task has been assigned to him when he logs into SpeechMiner. He can see details about the task, add notes as he progresses with the task, and close the task when it is completed. The supervisor can monitor progress on the task by reading the notes that are added as it is performed and by keeping tabs on its status.

You can create new Action Items, and view the Action Items you have created or been assigned, from any SpeechMiner screen. Action Items can also be linked to specific Coaching sessions. If they are, you can also view them in the Coaching session page.

Viewing the List of Action Items

The **Action Items** link in the upper-right corner of the SpeechMiner screens provides information about the number of Action Items assigned to you, and indicates whether any new action items exist that you have not yet read, as follows:

- If no Action Items are assigned to you, the **Action Items** link appears in black.
- If Action Items are assigned to you, the link appears in green, and the number of Action Items appears after the link in parentheses.
- If new Action Items are assigned to you that you have not yet read, or the status of an existing Action Item has changed, the **Action Items** link appears in **bold green**.

To view your Action Items:

1. In the upper-right corner of any SpeechMiner page, click the **Action Items** link. The **Action Items** box opens below the link.
2. Click the **My Items** tab to view a list of the Action Items assigned to you; click the **I Created** tab to view a list of the Action Items you created.

Action Items box

Key to illustration:

Number	Description
1	Tabs
2	An Action Item that was already read by the assignee; status is displayed in plain text
3	An Action Item that was not yet read by the assignee, or whose status has changed since it was last read;

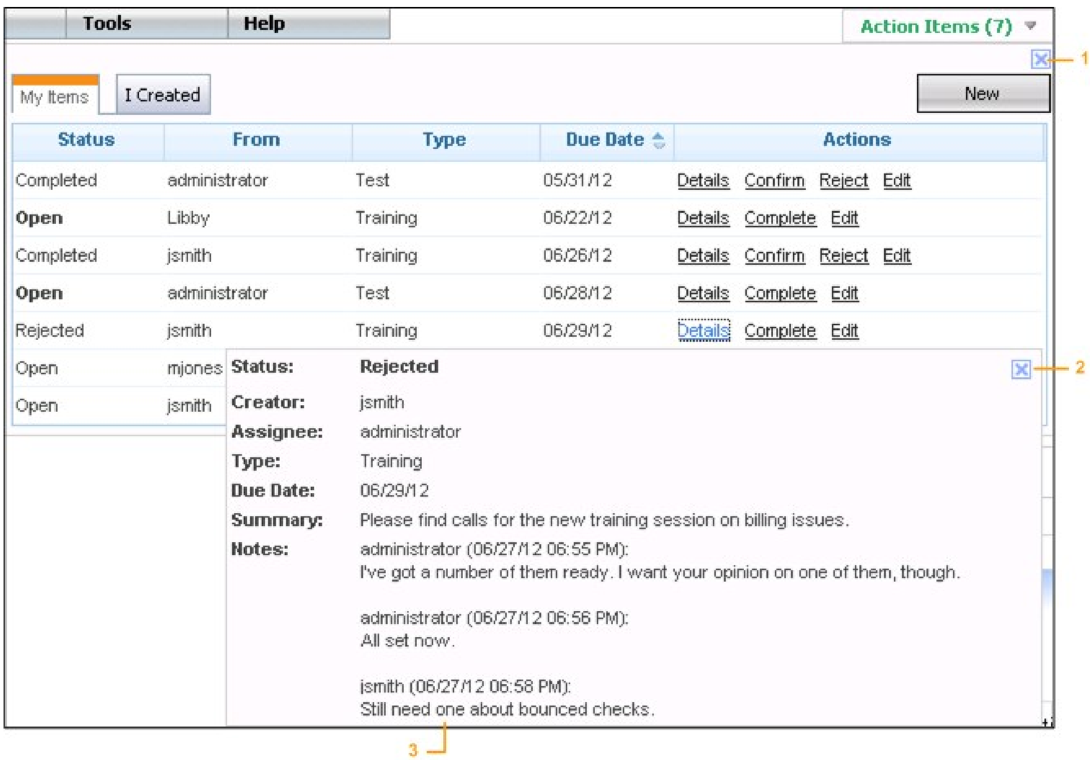
	status is displayed in bold text
4	The number of Action Items assigned to the current user
5	Click to close the **Action Items** box.
6	Click to create a new Action Item (see Creating a New Action Item).

Viewing Item Details

An Action Item appears as unread until you view the item's details. The status of unread items appears in bold. When an item is read, its status appears in plain text.

To view an Action Item's details:

- In the **Action Items** box, under **Actions**, click **Details**. The item's details are displayed below the item.



Action Items box with item details displayed

Key to illustration:

Number	Description
1	Close **Action Items** box
2	Close **Details** area
3	Details area

To close an Action Item's details:

- Click the in the upper-right corner of the Details area.

Sorting Action Items

You can sort the lists of Action Items by any of the columns. For example, you can sort the list by **Status** or **Due Date**.

To sort a list of Action Items:

- Click the heading of the column by which you want to sort the list. For example, click the **Status** heading to sort by status.

  Note: Click the heading a second time to reverse the order (e.g., *z* to *a* instead of *a* to *z*).

See also

Welcome
Getting Started
Workflows
Views
Search
Using the Media Player
Explore
Quality Monitoring
Coaching
Reports
Tools
Permalinks
Appendix A: Standard Reports

Managing Action Items

Both the creator and the assignee of an Action Item can modify an Action Item and add notes to it. The notes are displayed with the item details.

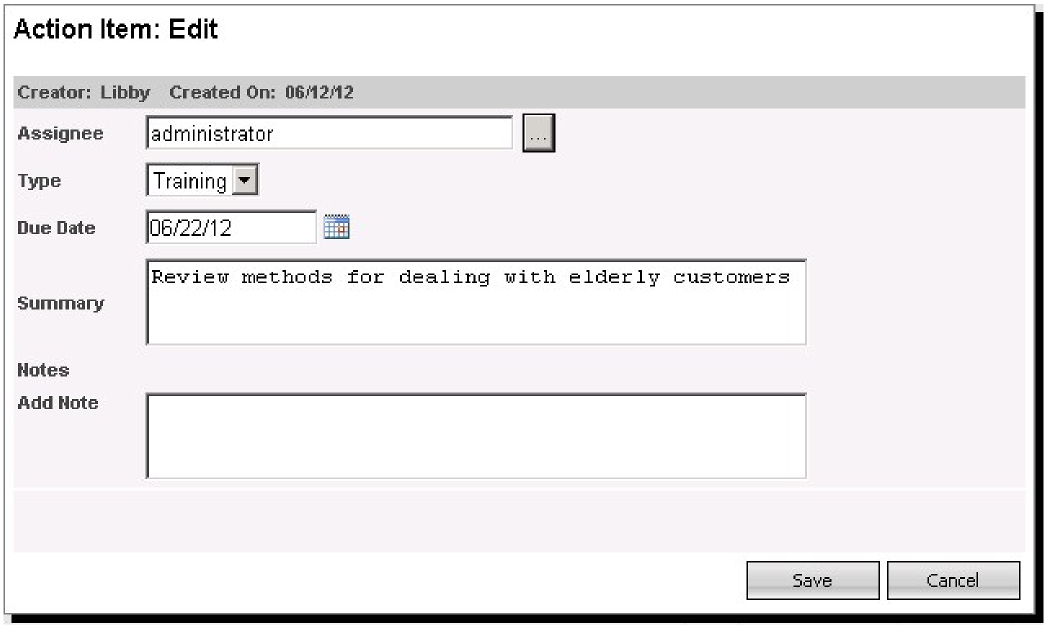
When the assignee has completed an Action Item, they should change its status to **Completed**. The creator can then either confirm that the item is completed or reject the change of status. When the change of status is confirmed, the item is closed and is no longer displayed in the lists of Action Items. When the change of status is rejected, the item continues to appear in the lists. The assignee can continue to work on the item, and change its status to **Completed** again later on.

Editing an Action Item

You can modify the settings of and Action Item and add notes to it as necessary. All notes are displayed when the item's details are displayed.

To modify an Action Item and/or add a note to it:

1. In the **Action Items** box, under **Actions**, click **Edit**. The **Action Item: Edit** dialog box opens.



Action Item: Edit dialog box

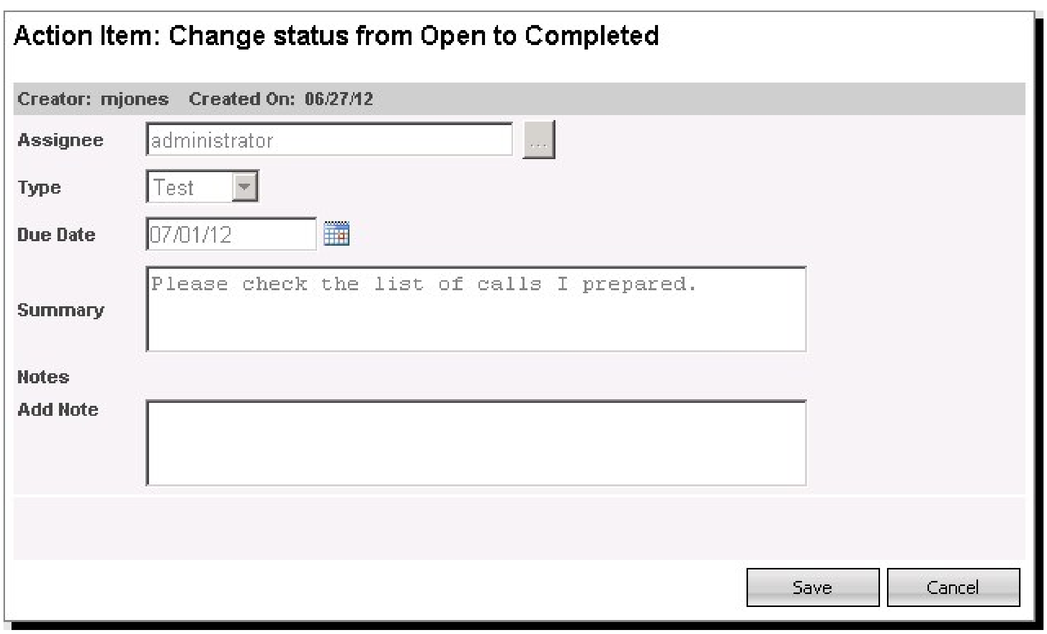
2. Modify the settings as required.
3. If you want to add a note to the **Action Item**, under **Add Note**, type the note.
4. Click **Save**. The dialog box closes and the changes are implemented.

Changing the Status of an Action Item to Completed

When you have completed and Action Item that is assigned to you, you change its status to **Completed**.

To change the status of an Action Item to Completed:

1. In the **Action Items** box, under **Actions**, click **Complete**. The **Action Item: Change Status from Open to Completed** dialog box opens.



Action Item: Change status from Open to Completed dialog box

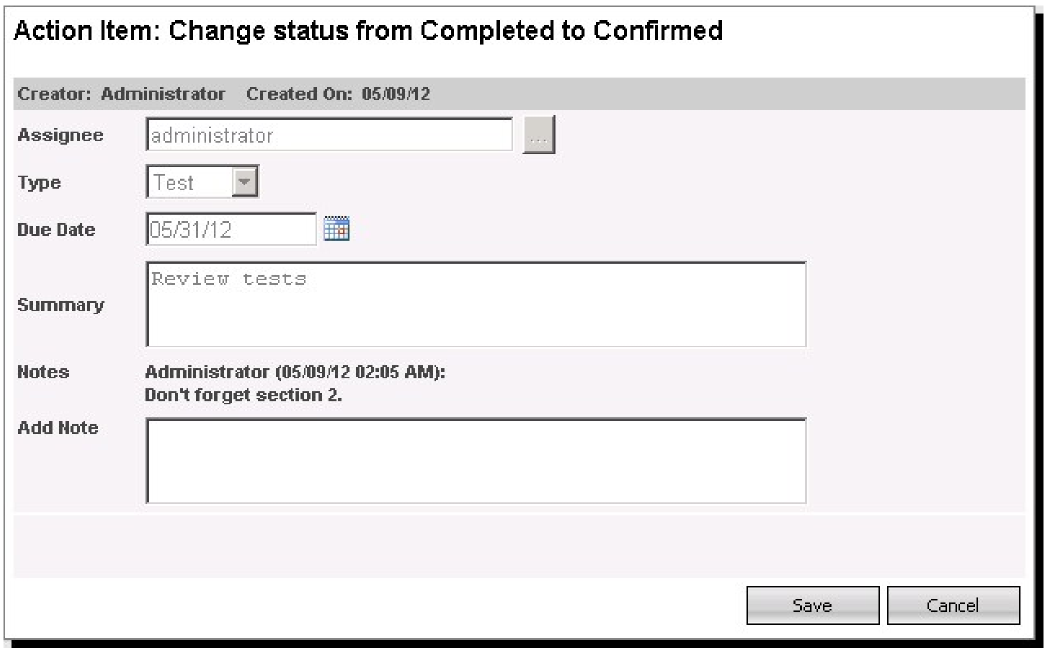
2. If you want to add a note to the **Action Item**, under **Add Note**, type the note.
3. Click **Save**. The dialog box closes and the status is changed. In the **Action Items** box, under **Actions**, the options **Confirm** and **Reject** appear instead of the **Complete** option.

Confirming or Rejecting a Completed Action Item

When the assignee changes the status of an Action Item to **Completed**, the creator should either confirm that the item was properly completed or reject the change in status in order to indicate to the assignee that more work is required to complete the item satisfactorily.

To confirm a completed Action Item:

1. In the **Action Items** box, under **Actions**, click **Confirm**. The **Action Item: Change Status from Completed to Confirmed** dialog box opens.

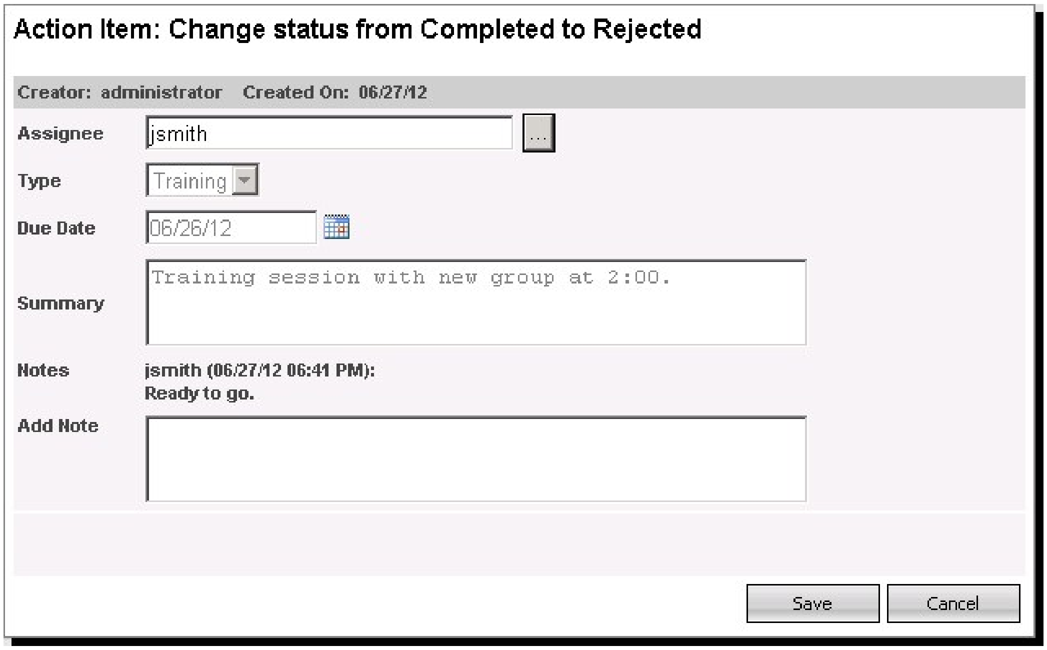


Action Item: Change status from Completed to Confirmed dialog box

2. If you want to add a note to the **Action Item**, under **Add Note**, type the note.
3. Click **Save**. The dialog box closes. The Action Item is closed and removed from the list of Action Items.

To reject a completed Action Item:

1. In the **Action Items** box, under **Actions**, click **Reject**. The **Action Item: Change Status from Completed to Rejected** dialog box opens.



Action Item: Change status from Completed to Rejected dialog box

2. If you want to add a note to the **Action Item**, under **Add Note**, type the note.
3. Click **Save**. The dialog box closes. The Action Item is reopened with the status **Rejected**.

See also

Creating a New Action Item

Home > Action Items > Creating a New Action Item

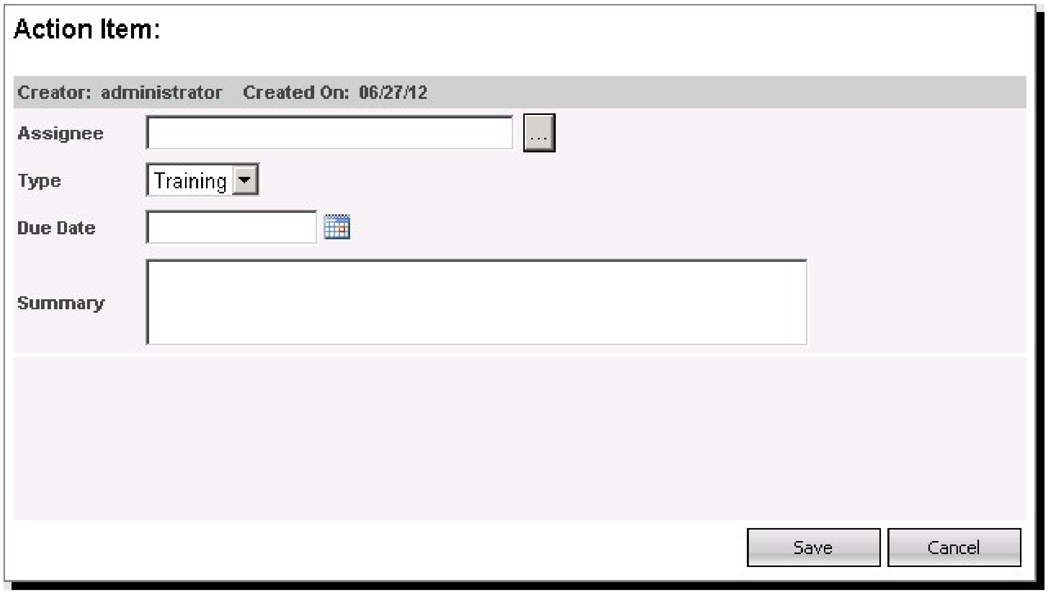
Creating a New Action Item

You can create new Action Items as required, and assign them to the appropriate person. If you wish, you can assign Action Items to yourself, to help you keep track of your own tasks.

Note: Action Items can also be created as part of coaching sessions. When they are, they appear both in the general lists of Action Items and in the Coaching session screen. For additional information, see Creating a New Coaching Session.

To create a new Action Item:

1. In the **Action Items** box, click **New**. The **Action Item** dialog box opens



Action Item dialog box

2. Fill in the fields as follows:

Field	Description
Assignee	Select the assignee in one of the following ways: ◦ In the text field, type part of the name or username of the assignee. As you type, names and user names containing those letters are displayed in a dropdown list. Select the assignee from the list. ◦ Click the ... button (...) beside the text field. In the dialog box, select the user from the list of users in the relevant workgroup.
Type	Select the type of Action Item
Due Date	Click the calendar icon ( ) to select the date by which you want the assignee to perform the task.
Summary	Type a description of the Action Item

3. Click **Save**. The Action Item is opened. It appears in your **Action Items** box in the **I Created** tab, and will appear in the assignee's **Action Items** box in their **My Items** tab the next time they open it.

See also

Managing Action Items

Search

The **Search** page provides you with tools that help you filter massive quantities of interaction data so that you can find the data you are interested in. Filtering can be performed in one of two ways:

1. **Searching:** Creating a set of criteria and then searching for interactions or Events that meet those criteria. The set of criteria can be saved as a Saved Search. The search can then be run again as necessary. For example, you could search for calls that were handled by workgroup A, were processed using either Program B or Program C, and had the Category "Frustration" assigned to them. A list of calls matching these criteria would be displayed in an Interaction Grid.
2. **Browsing:** Navigating in a tree structure in which recorded interactions are divided into groups based on specified characteristics. This method of sifting provides a visual overview of the database of interactions. You can *browse* through the database by expanding nodes to see more detailed breakdowns of interactions in a particular group, by filtering the tree to limit the display to certain types of interactions, and by viewing details about selected groups of interactions in an Interaction Grid. For example, you could browse through the database of interactions by dividing it into groups based on the workgroups that handled the interactions. If you expanded the nodes, you could see information about which interactions were handled by each agent in the workgroup.

Regardless of which sifting process you use, the end result is a list of items that is displayed in a grid. The grid lists interactions or Events that match your search criteria and contains detailed information about each item. You can use the results in a variety of ways and for many different purposes. For example, you can listen to selected calls, save the list of results for further use, or save selected calls from the grid in an Interaction List for use in a coaching session. In addition, the SpeechMiner Media Player can help you find the important parts of calls and play them back without wasting precious time listening to every second of each call.

See also

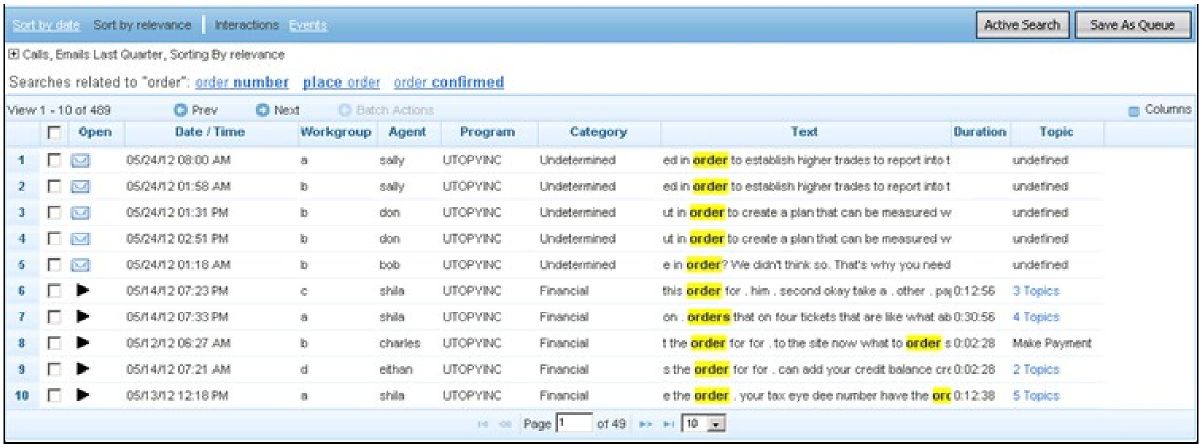
Using an Interaction Grid
Searching for Interactions
Saved Searches
Call Lists
Browsing Interactions

Using an Interaction Grid

Lists of interactions are generated by SpeechMiner in the **Search** page when you do one of the following:

1. In the **New Search** tab, click **Search**
2. In the **Saved Searches** tab, click **Display**
3. In the **Content Browser** tab, click a line in the tree structure
4. Click a Permalink to a list of interactions

The list of interactions is presented in an *Interaction Grid* either at the bottom or the right side of the page. The Interaction Grid contains detailed information about each interaction. You can modify the display to suit your requirements by selecting which columns you want to include in the grid and sorting the interactions in the grid by one of the columns. If you want to listen to a call or view other types of interactions, you can select them in the grid and they will be opened above the grid. You can also save calls in a Call List, export calls, and send links to calls to other users.



Interaction Grid

Note: If you performed a search in the New Search tab, the grid may contain a list of Events instead of a list of interactions. For additional information, see Using an Event Grid.

Columns in the Interaction Grid

The Interaction Grid can display any or all of the following columns:

Column	Description
Open	An icon indicating the type of interaction (see About Calls and Interactions). Click the icon to open the interaction above the grid.
ID	A unique number assigned to the interaction in the SpeechMiner database
External ID	A unique number assigned to the interaction by the external recording or storage system
Date/Time	The start date and time of the interaction
Workgroup	The workgroup of the agent who handled the interaction
Agent	The agent who handled the interaction
Program	The program that was used by SpeechMiner to analyze the interaction
Category	The Category or Categories that were assigned to the interaction. If only one Category was assigned, the name of the Category appears. If multiple Categories were assigned, the number of Categories appears; place your mouse pointer on the value to see a list of the Categories.
Duration	The duration of the interaction, in *hours:minutes:seconds*
Topic	The Topic or Topics SpeechMiner identified in the interaction. If only one Topic was identified, the name of the Topic appears. If multiple Topics were identified, the number of Topics appears. Place your mouse pointer on the value to see a list of the Topics.
Text	An excerpt from the interaction text containing a term that was included in a search . (The term must be specified in the SpeechMiner filter group.) The term is highlighted in the excerpt. **Note:** This column is only visible in Interaction Grids that contain search results from searches that included terms.

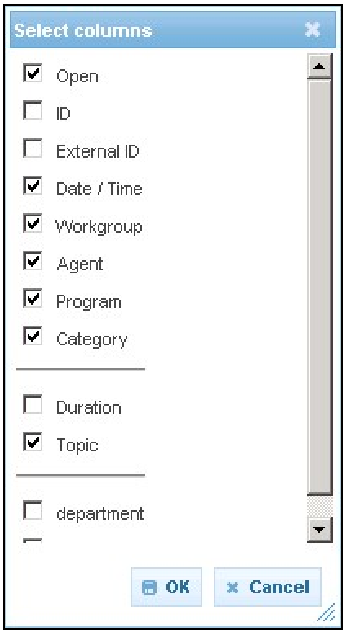
Additional columns may appear if specific types of interactions are included in the grid. For example, if e-mails are in the grid, the columns *Subject*, *Sender*, *Receiver*, *CC*, and *BCC* appear. In addition, in some systems, additional columns can be opened for specific types of metadata. For example, if your system stores a "Location" field for calls, a *Location* column can be opened whenever calls are listed in an Interaction Grid. Because columns are added for all selected fields that are relevant to all the types of interactions included in the grid, some columns may be blank for some interactions. For example, *Duration* is only defined for calls, and *Sender* is only defined for e-mails. For other types of interactions, these columns are blank.

Choosing the Columns to Display

You can choose which columns to display in the Interaction Grid.

To choose which columns to display in the Interaction Grid:

1. At the top of the Interaction Grid, click **Columns**. A list of all the available columns opens.



List of available columns

2. Select the checkboxes beside the columns you want displayed and clear the checkboxes beside those you do not want displayed.
3. Click **OK**. The list closes, and the columns are displayed in accordance with your choices.

Sorting the Columns

You can choose to sort the Interaction Grid by any column.

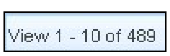
To sort the Interaction Grid by a column:

- Click the title of the column.

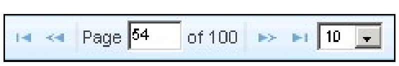
  Note: Click the title a second time to reverse the sort order.

Interaction-Grid Pages

When an Interaction Grid contains a large number of items, it is divided into pages. The **Page** field of the page navigator at the bottom of the grid shows which page is currently being displayed. In addition, the *View* information at the top-left of the grid shows how many interactions are in the list, and which of these are displayed in the current page.



View information



Page navigator

You can use the page navigator to go to a particular page in the list and to select the page size - the maximum number of interactions to display in a single page.

To navigate to a different page in an Interaction List:

- In the page navigator. select one of the following:

Option	Description
	Go to the first page
	Go back one page
Page	Type the required page number in the field, and then press **Enter**.
	Go forward one page
	Go to the last page

To select the page size:

- In the page navigator. in the dropdown list on the right, select the page size. The available options are 10, 25, 50, and 100.

Viewing Interaction Search Criteria

If the Interaction Grid was generated in response to a search, the upper-left corner of the Interaction Grid contains a summary of the search criteria and settings that were employed during the search. Click the beside the summary to expand it and see more details about the search criteria.

In addition, if the grid was generated in response to a search for terms, the system may list a "related search" term below the search criteria. For additional information, see Related Searches.

Furthermore, if the system determines that one or more of the search terms was spelled incorrectly, it will correct the apparent errors and indicate this in a note below the search criteria. For additional information, see Spelling Corrections.

Opening an Interaction

You can play a call or open an interaction from the Interaction Grid. The interactions are opened above the Interaction Grid.

To open an interaction:

- In the **Open** column, click the icon of the interaction. For example, to open a call, click the . If the interaction is a call, the Media Player opens above the grid, and the call automatically begins to play. If it is a non-call interaction, the text of the interaction is displayed above the grid.

To open the previous or next interaction in the grid:

- At the top of the grid, click **Prev** or **Next**.

Exporting Calls

If you want to save some or all of the call results, or send them to someone else, you can export them. Exporting calls from the Interaction Grid creates a ZIP file that contains the following:

- A CSV file containing a list of the calls that were exported, including all the information about the calls that was presented in the Interaction Grid. This file can be opened using a spreadsheet application such as Microsoft Excel.
- A WAV file for each call included in the list (optional). The WAV file is a playable audio file of the call.

Note: Only calls can be exported.

To export one or more calls from the Interaction Grid:

1. Select the checkbox to the left of each call you want to include in the export file. To select all of the calls in the grid, select the checkbox in the column title.

Note: If you select both calls and other types of interactions, the calls are exported, but the other interactions are not. If you only select non-call interactions, no action is performed.

2. Under **Batch Actions**, select **Export**. A dialog box opens and asks if you want to include the audio files with the export.
3. Select **Yes** if you want to export the audio along with the CSV file, or **No** if you only want the CSV file. A dialog box opens and asks if you want to open or save the ZIP file.
4. 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.
5. If you selected **Save**, navigate to the folder in which you want to save the file, and then click **Save**. The file is saved in the selected location.

Forwarding Links to Calls

You can send links to calls to other users in the system. Each call link is sent in a separate *Call* message that appears in the recipient's My Messages widget in the Views page. When the recipient clicks the message, a SpeechMiner Media Player window opens and plays the call.

If you wish, you can also send the recipient an e-mail notification with links to the selected calls. When the recipient clicks a link, the Media Player opens in a new browser tab or window and plays the call. If the recipient is not already logged into SpeechMiner, they are prompted to do so before the Media Player opens.

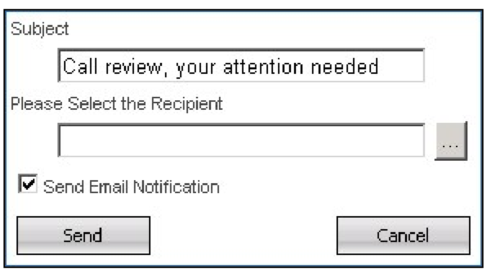
Note: Only calls can be forwarded.

To send a call link to another user:

1. Select the checkbox to the left of each call you want to forward. To select all of the calls in the grid, select the checkbox in the column title.

   Note: If you select both calls and other types of interactions, the calls are forwarded, but the other interactions are not. If you only select non-call interactions, no action is performed.

2. Under **Batch Actions**, select **Forward**. A dialog box opens.



Forward dialog box

3. Under **Subject**, modify the subject text if you wish.
4. Under **Please Select the Recipient**, select the user you want to send the link to, in one of the following ways:
   - In the text field, type part of the name or username of the recipient. As you type, names and user names containing those letters are displayed in a dropdown list. Select the recipient from the list.
   - Click the ... button () beside the text field. In the dialog box, select the user from the list of users in the relevant workgroup.
5. If you want to send notifications to the user's e-mail address as well as to their My Messages box, select **Send Email Notification**.
6. Click **Send**. A *Call* message is sent to the recipient's My Messages box for each call you selected. If you chose to send the user an e-mail notification, an e-mail is also sent for each call.

Adding Calls to a Call List

A *Call List* is a list of calls that is saved for later use. SpeechMiner supports two types of Call Lists: global Call Lists and coaching-session Call Lists. You can see existing global Call Lists in the **Search** page in the Call Lists tab, under **Call Lists**. Coaching-session Call Lists can only be viewed within the coaching session. For additional information about coaching sessions, see Coaching.

You can add calls to an existing Call List or a new list. You can select an existing Call List from a list of global Call Lists or select a coaching-session Call List from those that are attached to the Coaching session. If you wish, you can add a new Coaching session directly from the Interaction Grid, and then add calls to a Call List that is attached to that session.

Note: Only calls can be added to a Call List.

To add calls to a Call List:

1. Select the checkbox to the left of each call you want to include in the Call List. To select all of the calls in the grid, select the checkbox in the column title.

   Note: If you select both calls and other types of interactions, the calls are included in the Call List, but the other interactions are not. If you only select non-call interactions, no action is performed.

2. Under **Batch Actions**, select **Add To**, and then select one of the following:

To	Select	Result
Create a new Coaching session and a new coaching Call List within that session, and add the calls to the new Call List	**Coaching** > **New**	A **New coaching session** dialog box opens. Specify the name and other settings of the Coaching session, and then click **Save**. The dialog box closes, and a new Call List dialog box opens. In the text field, type a name for the Call List, and then click **OK**. The Coaching session and Call List are created, and the calls are added to the Call List.
Create a new coaching Call List within an existing Coaching session, and add the calls to the new Call List	**Coaching** > [existing Coaching session] > **New**	A Call List dialog box opens. In the text field, type a name for the Call List, and then click **OK**. The new coaching Call List is created and attached to the Coaching session, and the calls are added to the Call List.
Add the calls to an existing coaching Call List that is attached to an existing Coaching session	**Coaching** > [existing Coaching session] > [existing Call List]	The calls are added to the selected coaching Call List.
Add the calls to a new Call List	**Call List** > **New**	A Call List dialog box opens. In the text field, type a name for the Call List, and then click **OK**. The new Call List is created and the calls are added to it.
Add the calls to an existing Call List	**Call List**> [existing Call List]	The calls are added to the selected Call List.

See also

Searching for Interactions
Saved Searches
Call Lists
Browsing Interactions

Home > Search > Searching for Interactions

Searching for Interactions

This section explains how to search for interactions or Events by specifying their parameters. In order to perform a search, you use filters to specify which types of interactions or Events you want to see. When you run the search, SpeechMiner combs the database for interactions that match the filter settings you selected, and displays the results in a grid. You can sort the results by date or by relevance (how well the item matches the search parameters).

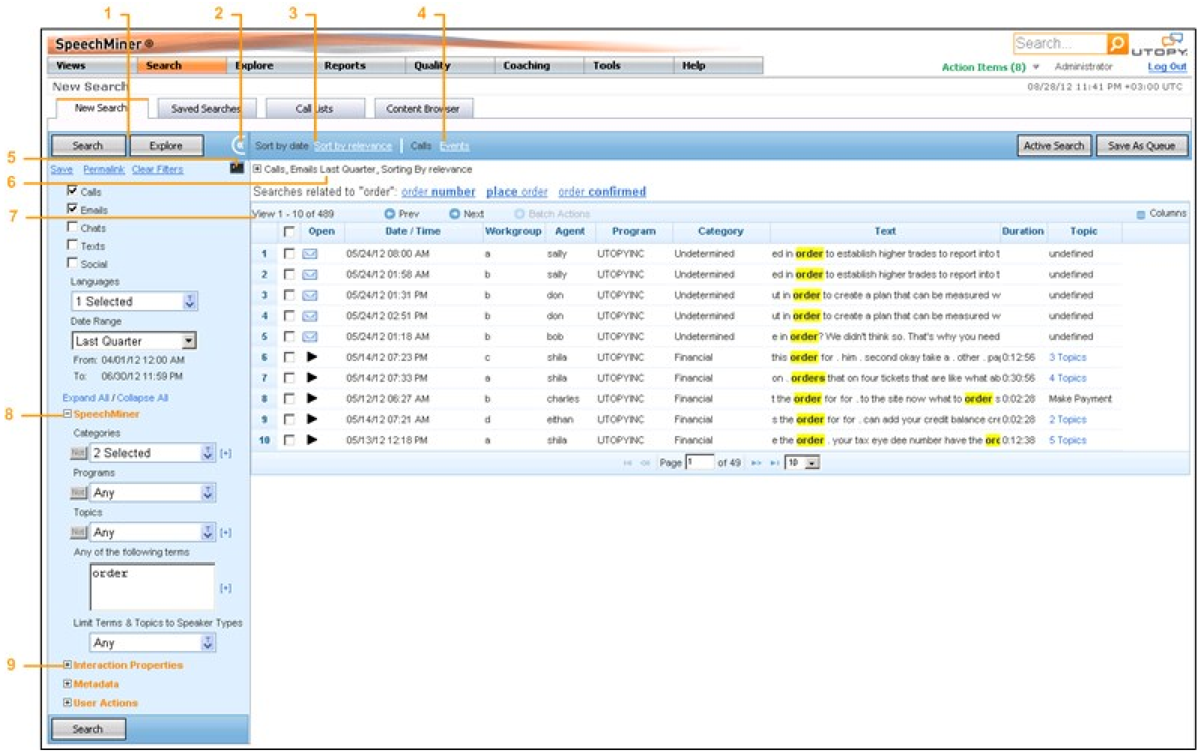
Search criteria are defined in the New Search tab, in the Filter Panel. Once you have defined the criteria, you can run the search and see the results in a grid that appears in the New Search tab, to the right of the Filter Panel. If you wish, you can then hide the Filter Panel, to make more room for the results grid.

You can also perform a search for terms using the Search box. This box is available in all SpeechMiner screens, and can be used without opening the New Search tab.

Sets of search criteria can be saved as Saved Searches or Queues, and can then easily be used again. A Permalink to a set of search criteria can also be created, and, in addition, search results can be exported.

To open the New Search tab:

- In the Main Menu, under **Search**, select **New Search**. The New Search tab opens.



New Search tab

Key to Illustration:

Number	Description
1	Filter Panel (see Defining Search Criteria)
2	**Hide Filter Panel** button (see Performing a Search)
3	Select sorting method (see Performing a Search)
4	Select grid type (see Performing a Search)
5	**Switch to Text Mode** button (see Using Text Mode)
6	Filter summary (see Defining Search Criteria)
7	Search results grid (see Performing a Search)
8	Expanded filter set (see Defining Search Criteria)
9	Collapsed filter set (see Defining Search Criteria)

See also

Using an Interaction Grid
Saved Searches
Call Lists
Browsing Interactions

Home > Search > Searching for Interactions > Defining Search Criteria

Defining Search Criteria

Search criteria are specified in the Filter Panel by selecting values for the various filters available. In order to make it easier for you to find the filters you need, most of them are grouped into sets. You can expand the sets to access the filters they contain, and collapse them when you do not want to view them. Most filters provide Multi-Select boxes that enable you to select multiple values for the filter. In addition, some filters allow you to create multiple sets of values; the conditions specified in each set of values must be met for a call to be included in the search results.

The currently defined search criteria are always displayed at the top of the right panel of the New Search tab (no. 6 in the illustration above). As you add conditions to the search criteria, the display is automatically updated, so you can always see what the current selections are.

You can save the current set of search criteria in a number of ways: as a Saved Search, as a Permalink, or as a queue.

Note: The Filter Panel can be used in one of two modes, Standard mode and Text mode. This section explains how to use the Filter Panel in Standard mode. For information about using Text mode, see Using Text Mode.

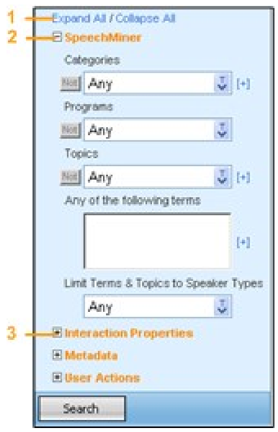
Filter Groups

The filters in the Filter Panel are divided into groups. The basic settings - interaction types, languages, date range, and processing limit - appear at the top of the Filter Panel and are always displayed when the Filter Panel is displayed. The other groups of filters can be expanded or collapsed. The following groups of filters are available:

Filter Group	Description
SpeechMiner	Filters for selecting the Categories and Programs of calls, and/or the Topics and terms that must be found in them
Call Properties	Filters that allow you to select agents, call length, and external call ID properties
Metadata	Filters for selecting metadata values
User Actions	Filters for finding calls that have user comments, were played back by users, about which forms were filled out, or quality checking was performed
Audit and Implementation	Filters for finding Events based on their confidence ratings and auditing results **Note:** This group only appears if the Events grid type is selected.

Expanding and Collapsing Filter Groups

You can expand or collapse a single group, or all of the groups.



Expanded and collapsed filter groups

To expand or collapse all of the groups:

- Click **Expand All** or **Collapse All** (no. 1 in the illustration above).

To expand a single group of filters:

- Click the name of the group or the beside it (no. 3 in the illustration above).

To collapse a single group of filters:

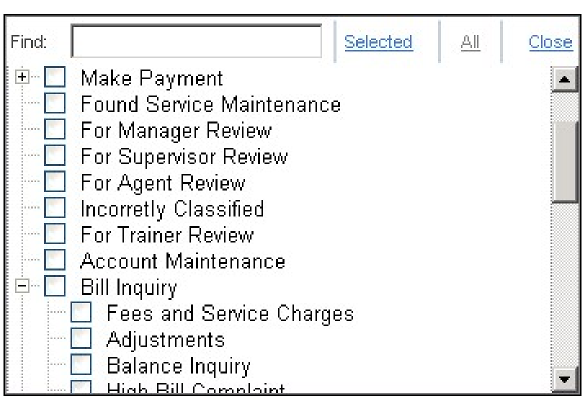
- Click the name of the group or the beside it (no. 2 in the illustration above).

Using Multi-Select Boxes

Many of the filters allow you to select more than one item. For example, you can select three Categories to include in your search. A specially designed Multi-Select box enables you to select the items you require for each filter. The symbol beside a field indicates that selections for the field are made using the Multi-Select box.

Note: The logical relationship between all items selected in a single Multi-Select box is OR. That is, if **any** of the items is found to be true for a call, the call is considered to have met the specified condition. If you want to define an AND relationship between two or more items, you must add additional lines to the field, as explained below.

Two types of Multi-Select boxes exist: Standard Multi-Select boxes and Agent Multi-Select boxes. Standard Multi-Select boxes are used for all multiple-selection tasks except the selection of agents and workgroups. The Agent Multi-Select box was specifically designed to make selecting agents simple and efficient.

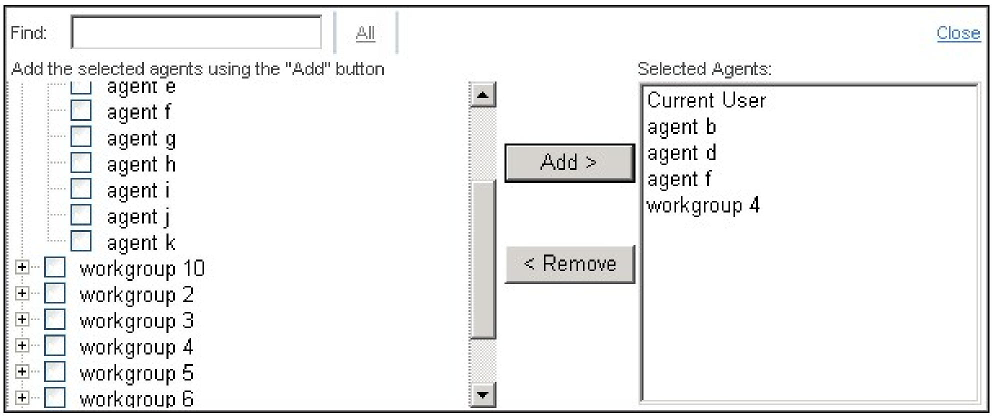


Standard Multi-Select box

To select items for a field using a Standard Multi-Select box:

1. Click the beside the field. The Multi-Select box opens below the field.
2. Select the checkbox beside each item you want to select. If necessary, expand an item to select one or more of the items it contains. Use the dropdown menu to select all items or all of the sub-items of an item. Use the Find feature and the Selected display option to help you find the items you need and keep track of what you have selected. For additional information, see below.
3. Click outside of the Multi-Selector box, or, at the top of the box, click **Close**. The Multi-Select box closes. The text field indicates how many items were selected. Place your mouse over the text field to see a list of the selected items.

Agent Multi-Select boxes allow you to quickly and easily find and select individual agents or groups of agents. The expandable list on the left contains all available workgroups and agents. The list on the right shows the agents and workgroups that are currently selected.



Agent Multi-Select box

To select agents or workgroups using an Agent Multi-Select box:

1. Click the beside the **Agents** field. The Agent Multi-Select box opens below the field.
2. In the left column, select the checkbox beside each workgroup or agent you want to select. If necessary, expand a workgroup to select one or more of the agents it contains. Use the dropdown menu to select all items or all of the sub-items of an item. Use the Find feature to help you find the items you need.
3. Click **Add**. The selected workgroups and agents are added to the list on the right.
4. Repeat the previous two steps as necessary to add additional workgroups or agents to the list.
5. Click outside of the Multi-Selector box, or, at the top of the box, click **Close**. The Agent Multi-Select box closes. The text field indicates how many items were selected. Place your mouse over the text field to see a list of the selected items.

Expanding and Collapsing Items

The list of items in a Multi-Select box has a tree structure. When an item contains other items, a ⊞ or ⊟ appears to the left of that item's checkbox. You can expand an item to see and select the items it contains, or collapse an expanded item if you do not want to display its contents. You can also expand or collapse all of the items in the list.

To expand an item:

- Click the ⊞ beside the item.

To collapse an expanded item:

- Click the ⊟ beside the item.

To expand all of the items in the list:

- Right-click any item in the list, and then select **Expand All**.

To collapse all of the items in the list:

- Right-click any item in the list, and then select **Collapse All**.

Selecting Groups of Items

You can select all of the items in the list, or all of the sub-items of an item in the list. You can also clear all selections or all selections of an item's sub-items.

To select all of the items in the list:

- Right-click any item in the list, and then select **Check All**.

To select all of the sub-items of an item in the list:

- Right-click the item, and then select **Check SubTree**.

To clear all selections in the list:

- Right-click any item in the list, and then select **Uncheck All**.

To clear all selections of an item's sub-items:

- Right-click the item, and then select **Uncheck SubTree**.

Using Find to Locate an Item in the List

To help you find items in the list quickly, the Multi-Select box contains a Find option. This option enables you to filter the list so that it only displays items that include the sequence of letters you specify.

To use the Find option:

- At the top of the Multi-Select box, in the **Find** field, type a letter or sequence of letters that appears in the item you are looking for. The list is filtered as you type; only those items that contain the sequence you typed are displayed.

Displaying Selected Items Only

In the Standard Multi-Select box, you can choose to display only those items that are currently selected.

To display only those items that are currently selected:

- At the top of the Standard Multi-Select box, click **Selected**.

To switch back to display of all items:

- At the top of the Standard Multi-Select box, click **All**.

Removing Items from the List of Selected Agents

In the Agent Multi-Select box, you can remove items from the list of selected agents in the right column as required.

To remove items from the list of selected agents:

1. In the list of selected agents, select the workgroups and agents you want to remove. Hold down the **Ctrl** key to select multiple items, or the **Shift** key to select a group of adjacent items (by selecting the first and last item in the group).
2. Click **Remove**. The items are removed from the list.

Negative Conditions

By default, a condition is met when one or more of the items selected for a field are true found in a call or are true for a call. You can also choose to define negative conditions for many fields. When you define a negative condition, the condition is met when none of the items selected for the field are found in the call or are true for the call. For example, you can choose to find all calls to which Categories A, B, and C do not apply.

When it is possible to define a negative condition for a field, a **Not** () button appears to the left of the field.

To define a negative condition for a field:

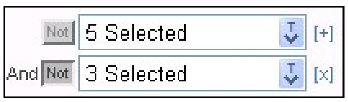
1. Click the Not button beside the field. The button is turned on, and looks like this Not.
2. Select the conditions for the field as usual. These are the conditions that a call must *not* fulfill in order to be included in the search results.

Adding a Line to a Filter

When you select multiple items in a Multi-Select box, an OR logical relationship is defined between the items. For example, if you select two Categories, a call that belongs to either of the two Categories meets the condition. If you want to define multiple conditions that must all be met in order for a call to be included in the search results, you must define each of the conditions in a separate line. For example, if you want to find calls that belong both to Category A and to Category B, you have to select Category A in the first field of the Category, then add a new line to the Category filter and select Category B in the new field it contains.

To add a line to a filter:

- Click the [+] to the right an existing line in the filter. A new line is added below the existing line, with the word **And** at the beginning of the line.



New line added to filter

Available Filters

This section explains the filters that are available in each filter group.

General Filters

The general filters, which appear at the top of the Filter Panel, are always visible. The following filters are in this group:

Filter	Description
Interaction Type	Select the types of interactions to include in the search. **Note:** This set of filters is not displayed if your system only includes calls (see About Calls and Interactions).
Language	Select the language or languages of the calls you want to include in the search. **Note:** In some systems, some or all calls do not undergo speech-recognition processing. In these systems, the option **No Speech Recognition** appears in the list of Languages. Select this value to include calls that did not undergo speech recognition processing. **Note:** This set of filters is not displayed if your system only includes one language, and all calls undergo speech-recognition processing.
Date Range	Select the range of dates to include in the search. The following options are available: • **All:** This is the default value, which includes all calls in the database. • **Yesterday:** Filters calls recorded on the previous day from 00:00 until 23:59. • **Today:** Filters calls recorded on the same day from 00:00 until the exact time the search is performed. • **Week to Date:** Filters calls 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:** Filters calls from seven days prior to today (at 0:00) until the exact time and date the search is performed. • **Last Week:** Filters calls from the beginning through the end of the previous week. • **Month to Date:** Filters calls from the first day of the current month at 00:00 until the exact time and date the search is performed. • **Last 30 Days:** Filters calls from thirty days prior to today (at 00:00) until the exact time and date the search is performed.

	• **Last Month:** Filters calls from 00:00 on the first day until 23:59 on the last day of the previous month. • **Quarter to Date:** Filters calls from 00:00 on the first day of the current quarter until the exact time and date the search is performed. • **Last 90 Days:** Filters calls from 90 days prior to today (at 00:00) until the exact time and date the search is performed. • **Last Quarter:** Filters calls from 00:00 on the first day until 23:59 on the last day of the previous quarter. • **Custom:** Filters calls 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 ending dates. **Note:** The times given are for the time zone where your Web server is deployed, and therefore are not necessarily the same as the times where you are physically located.
Limit Processing	Specify the maximum number of calls to reprocess when Active Search is selected. **Note:** If you do not have the required permissions, this field is not visible. In this case, the processing limit is fixed and you cannot change it.

SpeechMiner Filters

The SpeechMiner filter group includes the following filters:

Filter	Description
Categories	Select one or more Categories. Only calls in which at least one of these Categories was identified are included in the search results. If you add lines to the filter, only calls that meet the conditions of all the lines are included.
Programs	Select one or more Programs. Only calls that were analyzed using one of these Programs are included in the search results. Since no call can belong to more than one program, you cannot add additional lines to this filter.
Topics	Select one or more Topics. Only calls in which at least one of these Topics was identified are included in the search results. If you add lines to the filter, only calls that meet the conditions of all the lines are included.
Any of the following terms	Define a list of one or more terms (words or phrases) that must be in the call. Multiple terms should be separated by pressing **Enter** to place them on different lines. Calls containing any of the terms are included in the results of the search. An excerpt from the text of the call in which the term appears is displayed in the Interaction Grid in the **Text** column. If you add text boxes to the filter (by clicking the [+] beside an existing text box), only calls that meet the conditions in all the text boxes are included.
Limit Terms and Topics to Speaker Types	Select one or more Speaker Types from the list. Only calls in which the Topics and terms specified in the search filters were found in one of the following situations are included in the search results: • For calls with only one audio channel (in which the system cannot identify who is speaking at any particular time in the call): At least one of the selected Speaker Types were involved in the call. For example, the Topic "Payments" was found at least once in the call, and one of the participants in the call was a speaker of type "Agent." • For calls with more than one audio channel (which allows the system to identify who is speaking at every moment in the call): At least one of the selected Speaker Types mentioned the required Topics and/or terms at least once in the call. For example, the "Agent" in the call talked about the Topic "payments."

Call Properties Filters

The Call Properties filter group includes the following filters:

Filter	Description
Agents	Select any combination of agents and workgroups. If you select a workgroup, all the agents in the workgroup are included in the search condition. You can also choose to search for the "current user" rather than a specific agent or workgroup. In this case, when the search runs, the condition changes depending on which user runs it. For example, if the user is *agent 12*, the search results will only include calls that were handled by *agent 12*. If the user is a manager, the "current user" option includes

	data for the entire workgroup. This option is useful if you want to save the search criteria and share them with other users so they can run the search themselves on their own calls (see Saved Searches). **Note:** The "current user" feature will only work if the user's profile includes a *mapping*. For additional information about user profiles and mapping users to agents or workgroups, see Managing Users.
Call Length	Select the range of call durations to include in the search: 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. If you selected **Less Than**, only calls that are shorter than the value you specified are included in the search. If you selected **Between**, calls whose durations are more than the first value and less than the second value are included in the search. If you selected **More Than**, only calls that are longer than the value you specified are included in the search.
Call External ID	Type any portion of a call's external ID; any calls whose external IDs include the characters you specify are included in the results. You can use the * character as a wildcard. Place it at the beginning or end of a sequence of characters to indicate that at least one other character must be in that position in the sequence. For example, type ***123** to specify external IDs that begin with any sequence, but end with 123, or type **123*** to specify external IDs that begin with 123 and end with any other sequence of characters.

Metadata Filters

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

You can define one or more metadata conditions to apply to the search results. The search results will only include calls for which the selected types of metadata have values defined, and, if you specify values or a range of values, for which the values match the specified conditions.

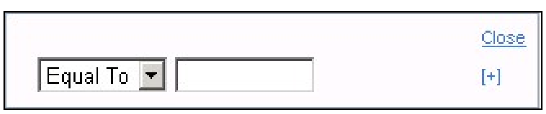
Three types of metadata values can be used in the conditions you define: a string of text (e.g., "Detroit"), a decimal number (e.g., "10" or "32.5"), and a date. Dates must be entered manually in the format that is used in your SpeechMiner web interface. For example, if your system represents dates in this 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:

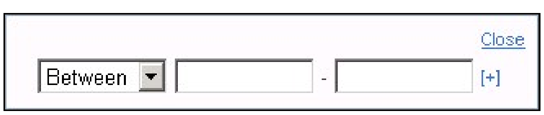
1. In the **Name** field, select one of the available types of metadata.

   Note: If you only want to specify that the calls must have values for the specified type of metadata, but any value is acceptible, you only have to select the name of the metadata type; you do not have to perform any of the steps below.

2. If you want to specify a value or range of values for the selected type of metadata, select . A box opens in which you can define the values.

3. In the first field, select **Equal To** if you want to specify a specific value for the type of metadata, or **Between**, if you want to define a range of values. If you select **Between**, a third field is added to the box.

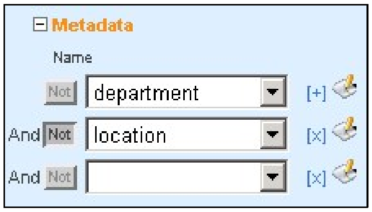
   

4. If you selected **Equal To**, in the second field, type the required value. If you selected **Between**, in the other two fields, enter the range of values.

   Note: If you want to define a range that is greater than a specified value, enter the value in the first field. If you want to define a range that is less than a specified value, enter the value in the second field.

5. To add an additional **OR** condition on this type of metadata value, click the [+] to add a line in the box, and fill it in as explained above.
6. Click the [+] as necessary to add additional **OR** conditions.
7. Select **Close** to close the box.
8. To convert the condition into a negative condition (i.e., to exclude calls with the specified metadata values from the data set), in the **Filter** panel, select the **Not** (Not) button to the left of the condition.

9. To add an additional **AND** metadata condition, either on the same type of metadata or on a different type, in the **Filter** panel, beside the **Name** field, click the [+]. A new line is added to the metadata conditions. Follow the steps above to specify the values for this condition.
10. Click the [+] as necessary to add additional **AND** conditions.



User Actions Filters

User Action filters let you search for calls based on how SpeechMiner users interacted with them after they were recorded.

Filter	Description
Call Comment: Text	Specify text that must appear in a comment that a user added to a call. Only calls that contain comments in which this text is found are included in the search results. If you leave this field blank, calls that contain comments from the users selected in the next field are included in the search results, regardless of the contents of the comments.
Call Comment: User	Select the users who must have added comments to a call. Only calls that contain comments from the selected users are included in the search results.
Call Playback By	Select the users who must have played a call. Only calls that were played back by the selected users are included in the search results.
Form Filled By	Select the users who must have filled in a feedback form about a call. Only calls for which forms were filled in by the selected users are included in the search results
Quality Checked By	Select the users who must have checked the quality of a call. Only calls whose quality was checked by the selected users are included in the search results

Audit and Implementation Filters

If the Events grid type is selected, this filter group appears in the Filter Panel. The group includes the following filters:

Filter	Description
Confidence threshold	Select the minimum Confidence value required. Only Events whose Confidence values are at least this high are included in the search results. **Note:** The Confidence value is generated by SpeechMiner during call processing. It indicates how reliable the identification of the Event is; the higher the value, the greater the degree of certainty.
Term ID	Specify the ID number of a term that is included in a Topic. **Note:** This field only appears if you have Event Audit permissions. **Note:** The Term ID of each term that is found during a search appears in the Event Grid.
Exclude audited events	Select this checkbox to exclude calls that have already been audited from the search.
TP, FP, SFP	Select the audit ratings required. Only audited Events whose ratings match one of the selected types are included in the search results.

Saving the Query

After you have selected your search criteria, you can save the criteria in the system as a Saved Search. Then if you want to run the search again, you can do so without redefining the criteria. Saved Searches can be accessed in the Saved Searches tab. They can also be attached to Coaching sessions.

To save your search criteria as a Saved Search:

1. At the top of the Filter Panel, click **Save**. You are prompted to provide a name for the query.
2. In the text field, type a name for the query and then click **OK**. The search criteria are saved as a Saved Search, and the name you specified appears at the top of the search form.

If you opened the search criteria by selecting a Saved Search in the Saved Searches tab, you can choose either to save the current search criteria with the same name or as a new Saved Search with a new name. In this case, in addition to the **Save** option, a **Save as** option appears at the top of the Filter Panel. If you click **Save**, the search criteria are saved under the original name; if you click **Save as**, you are prompted to provide a name for the new query.

Generating a Link to the Query

After you have selected your search criteria, you can generate and save a *Permalink* to the query. To run the search again, you need only open the link in a browser.

Note: For additional information, see Permalinks.

To create a Permalink to the current search criteria:

- At the top of the Filter Panel, select **Permalink**. A **Permalink** dialog box opens and displays the Permalink.

Saving the Query as a Queue

You can save the current search criteria as a queue for Quality Monitoring. When you do, the queue appears in your Queues screen and your My Queues widget. For a detailed description of this feature, see Quality Monitoring.

To save the current search criteria as a quality-monitoring queue:

1. At the upper-right of the screen, click **Save As Queue**. A **New Queue** dialog box opens.
2. Fill in the dialog box. (For additional information, see Quality Monitoring.)
3. Click **Save**. The search criteria are saved as a queue.

Deleting Filter Conditions

You can clear all of the filter conditions in order to begin defining new conditions from scratch..

To clear all the filter conditions:

1. At the top of the Filter Panel, click **Clear Filters**. You are prompted to confirm that you want to delete all of the currently defined filters.
2. Click **Yes**. The filters are cleared.

See also

Using Text Mode
Performing a Search
Using an Event Grid
Performing a Quick Search for Terms
Exploring Terms with a Custom Data Set
Comparing Two Data Sets

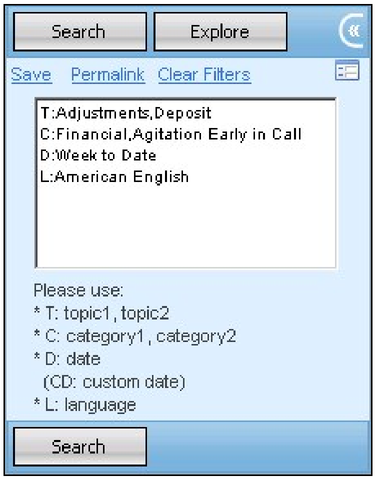
Home > Search > Searching for Interactions > Using Text Mode

Using Text Mode

Search criteria can be specified in the Filter Panel in one of two modes:

- **Standard mode:** The user selects options from lists in each filter category
- **Text mode:** The user types the search criteria in a text box using a specified syntax

In general, Standard mode is easier to use. In addition, it includes the full range of search options available, while Text mode only includes the more basic options. However, in some cases, Super Users who know exactly what they want to include in their search criteria may find it faster to type the criteria in Text mode.



Filter Panel in Text mode

You can switch back and forth between the two modes while you are in the process of defining search criteria. The display in each mode is automatically updated to include the changes that were made in the other mode.

This section explains how to use Text mode. For information about using Standard mode, see Defining Search Criteria.

Switching to and from Text Mode

You can open Text mode at any time while you are defining search criteria. The criteria that are currently selected are displayed in both modes.

To switch into Text mode:

- At the upper-right corner of the Filter Panel, click .

To switch into Standard mode:

- At the upper-right corner of the Filter Panel, click .

Defining a Filter Condition in Text Mode

You define filter conditions by typing the code for the type of filter and selecting the condition from a dropdown menu.

Filter Codes

You can use the following codes in Text mode:

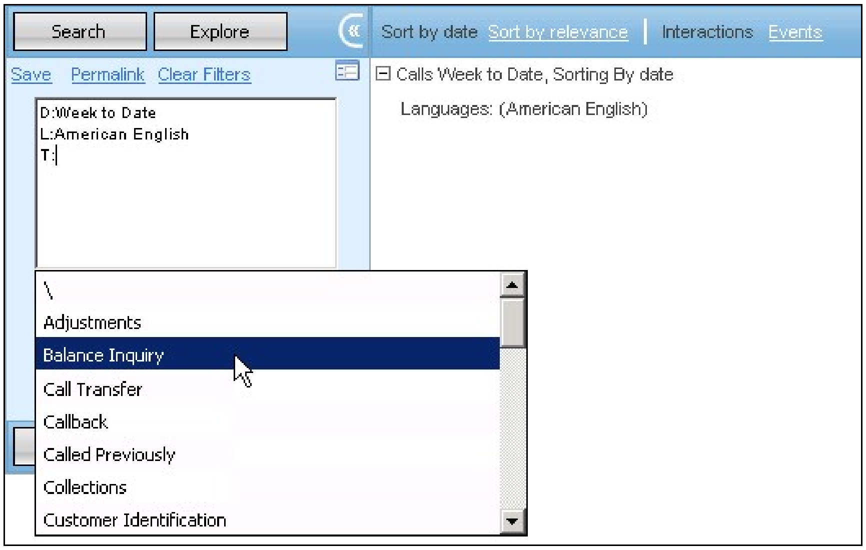
Code	Description
T	Topic
C	Category
D	Date
CD	Custom Date

L	Language

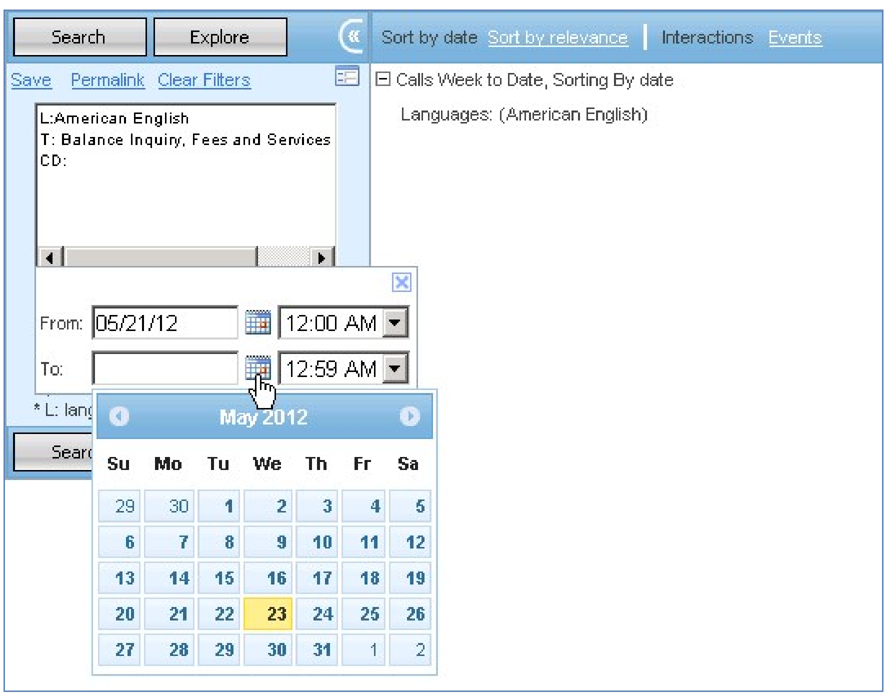
Inserting Filter Conditions

You can insert one language and one date condition, and multiple Category and Topic conditions. Each Category and Topic condition can also include multiple items. The logical relationship between items within a single condition is OR - if any of the items are in the call, the call will be included in the search results. The logical relationship between separate conditions is AND - only calls that meet both conditions are included in the search results.

1. In the text field, type the code of the type of filter you want to use, followed by a colon (:). A dropdown menu (or date and time selectors, if you type the CD code) opens and displays a list of the available options for the filter.



Dropdown menu for the Topics option (code T).



Date and time selectors for the Custom Date option (code CD)

2. Select the required option from the list. The dropdown menu closes and the option appears in the text field.

Note: To filter the list, begin typing a sequence of characters that appear in the name of the option. Only those options that contain the specified sequence of characters are displayed.

3. For the Categories and Topics filters, if you want to add an additional selection to the filter, type a comma (,). The relevant dropdown menu opens again. Select the additional option as explained above.

4. To add another filter condition, press **Enter** and then repeat the steps above.

   Note: You can insert multiple Category and Topic filter conditions. The search results will only include calls or Events that match all of the filter conditions. For example, if you insert two Category conditions, **`C:Accounting`** and **`C:Short Calls`**, only calls that are in both Categories are included in the search results. Note, however, that within a single filter condition, if you select multiple items, the logical relationship between the items is OR. That is, if any of the items is found in a call, the call is included in the search results. For example, if you insert one condition, **`C:Accounting, Short Calls`**, calls that are in either Category are included in the search results.

Deleting Filter Conditions

You can delete filter conditions as necessary by editing the text field. In addition, you can clear all of the filter conditions. Note that if you clear all filter conditions, even conditions that are only visible in Standard mode, and cannot be seen in Text mode, are deleted.

To delete a filter condition:

- Select the condition and press **Delete**.

To clear all the filter conditions:

1. At the top of the Filter Panel, click **Clear Filters**. You are prompted to confirm that you want to delete all of the currently defined filters (including those that are not currently visible).
2. Click **Yes**. The filters are cleared.

See also

Defining Search Criteria
Performing a Search
Using an Event Grid
Performing a Quick Search for Terms
Exploring Terms with a Custom Data Set
Comparing Two Data Sets

Performing a Search

Once you have selected the required parameter values for a Search, as explained under Defining Search Criteria, you can perform a search. The search results are displayed in a grid on the right side of the screen. The grid is sorted either by relevance or by date, depending on the sorting method that was selected when you initiated the search. It either contains a list of interactions (Interaction Grid) or a list of Events (Event Grid), depending on which grid type was selected. You can change the sorting method whenever you wish. If the search included Topics or terms, you can also change the grid type. In addition, after you run a search, you can hide the Filter Panel, to make more room for the display of the search results.

Note: You can export or forward calls from the list of search results, or add the calls to a Call List. For additional information about these options, see Using an Interaction Grid.

To perform a search:

- At either the top or the bottom of the Filter Panel, click **Search**. The search is performed, and the results are displayed in a grid to the right of the panel.

Choosing the Sorting Method

During a search, SpeechMiner continues searching for items that match your search criteria until one of two things occurs:

- All the items in the database are checked for matches with the 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 calls that match the search criteria are retrieved and the search ends.

You can choose the sorting method that is employed during the search. This can be significant if the database contains more items that match your search criteria than the processing limit. Two sorting methods are available:

- **By date:** The newest items that match your search criteria are retrieved
- **By relevance:** The items that most closely match your search criteria are retrieved

Note: Initially, the search results are sorted in the grid based on the sorting method. You can then choose to sort the results based on any column (see Sorting the Columns). Sorting by column changes the order in which the items that were found are displayed, but does not affect which items are included in the list. When you choose a sorting method, the items that are included in the list may be effected.

The current sorting method appears as plain text at the top of the grid. Beside it is a link that activates the alternative method. (See #3 in the illustration above, in which the current selection is **Sort by date**.)

To choose the sorting method of the search:

- At the top of the grid, select **Sort by date** to retrieve calls in chronological order, or **Sort by relevance** to retrieve calls in order of relevance. The search runs again, and the new results appear in the grid.

Choosing the Grid Type

When a search includes *Terms*, *Topics*, and/or *Term IDs*, the results can be displayed as a list of interactions or as a list of Events. When the grid contains a list of interactions, it offers the standard functionality of the Interaction Grid. You can use it to open interactions, export them, save them in interaction lists, etc. When the grid contains a list of Events, the columns of the grid are somewhat different from those of the Interaction Grid, and the functionality available is also slightly different, as explained under Using an Event Grid.

The current grid type appears as plain text at the top of the grid. Beside it is a link that activates the alternative method. (See #4 in the illustration above, in which the current selection is **Interactions**.)

Note: Searches for Events can only be performed on calls. Other types of interactions are not included in Event searches.

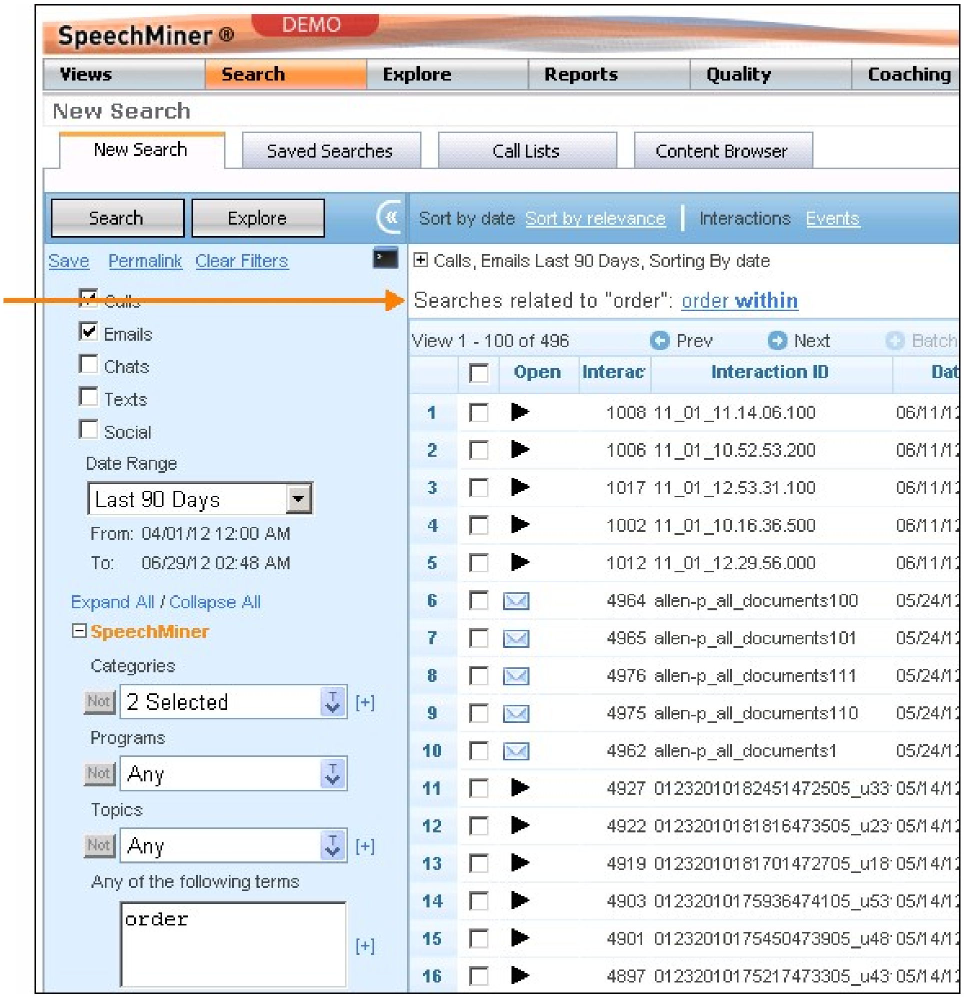
To change the grid from a list of interactions to a list of Events or vice versa:

- At the top of the grid, select **Events** to view a list of Events or **Interactions** to view a list of interactions. The search runs again, and the new results appear in the grid.

Related Searches

When a search includes *Terms*, the results may include a "related search" that is suggested by the system. For example, if you search for the term "order," the list of results includes interactions in which "order" appears. If the system finds that another term is often found in these same interactions, it may suggest a new search for interactions in which both terms appear. In the example below, the system has found that the term "within" is related to "order" in this way, and suggests performing a search for interactions in which both "order" and "within" appear.

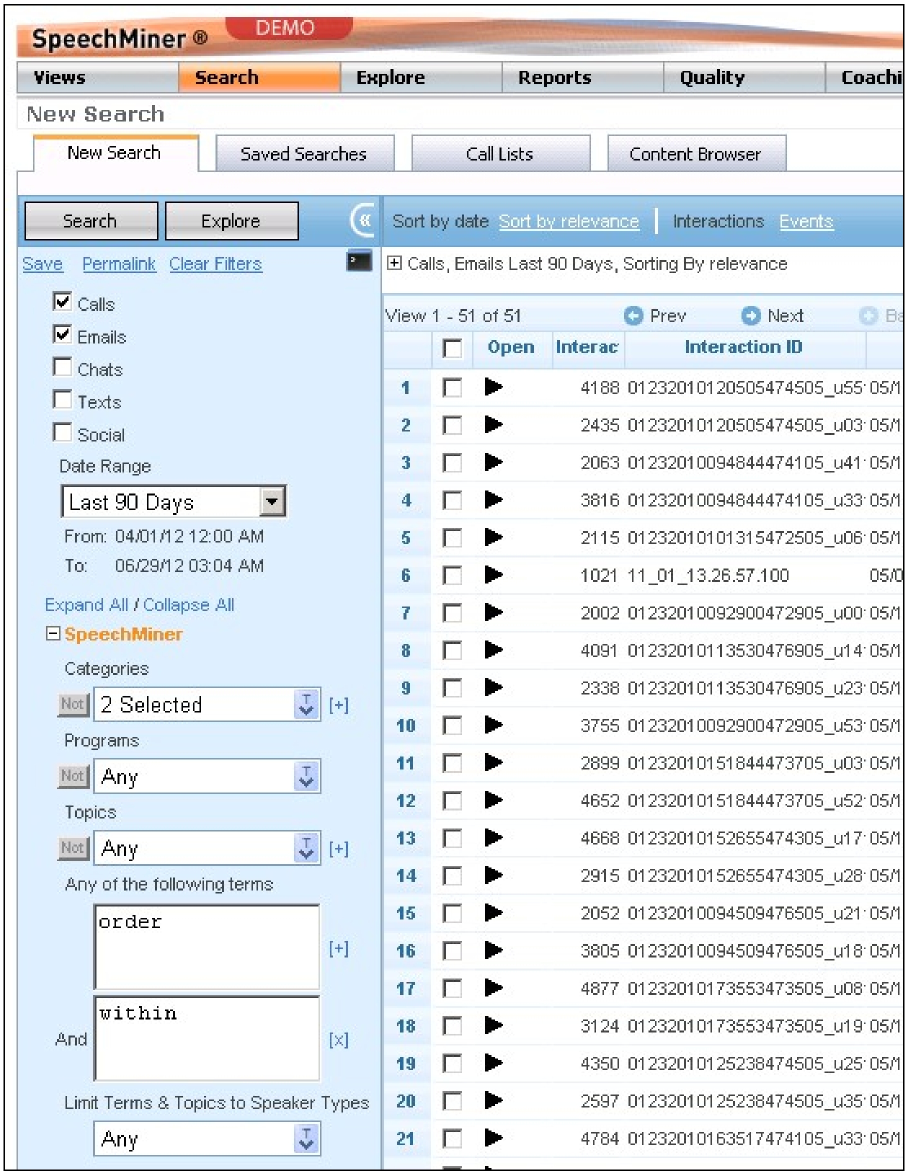
When the system suggests a related search, the suggestion appears above the Interaction Grid after the initial search is performed.



Related-search suggestion

To run a related search:

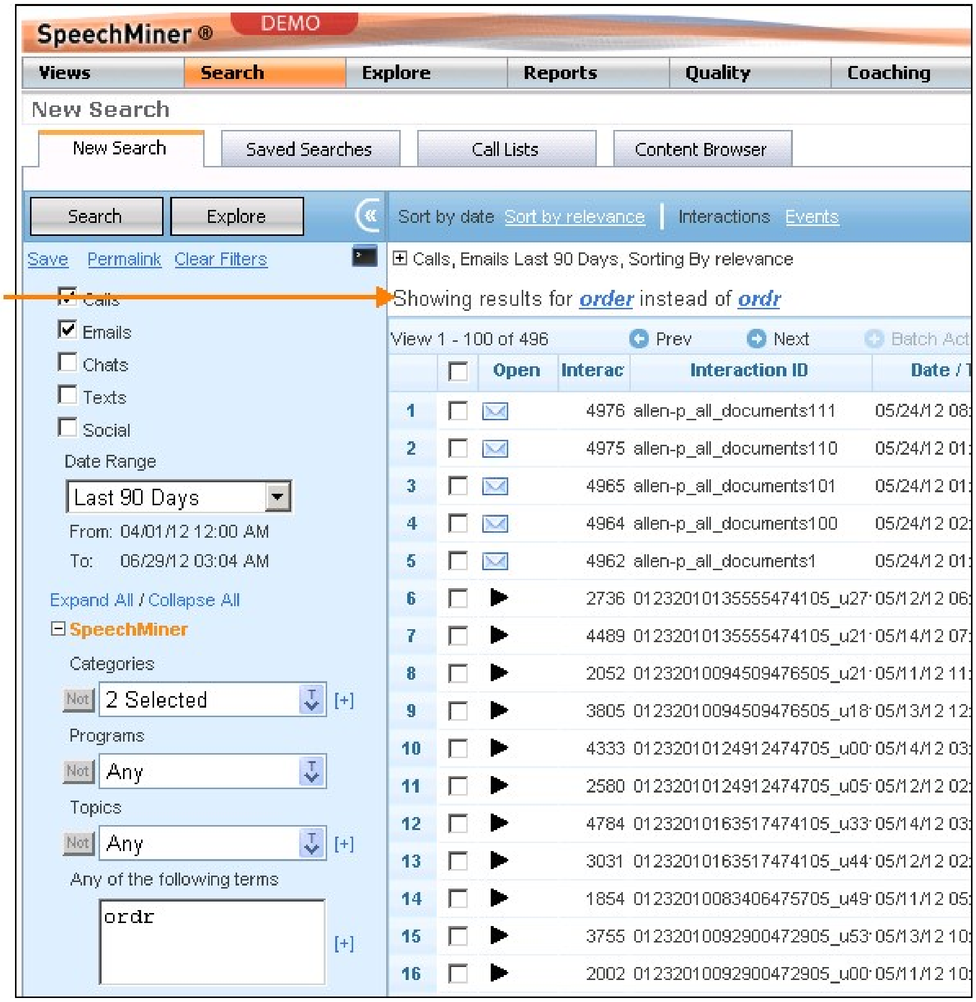
- In the related-search suggestion, click the suggested term or terms. (For example, click the "order within" link.) The search runs and the results are displayed in an Interaction Grid.



Related-search results

Spelling Corrections

When a search includes *Terms*, the system may determine that one or more of the terms was spelled incorrectly. In this case, it attempts to correct the apparent errors, and performs the search using the corrected terms. When this occurs, the spelling correction is indicated by a note above the Interaction Grid.



Spelling corrected

To repeat the search with the original terms you typed:

- In the spelling-correction note, click the original terms.

Active Search

You can choose to reprocess calls in order to see if they contain terms that were not sought in their original processing. When you do this, SpeechMiner reprocesses the calls and, as it does so, it gives added weight to the terms listed in the **Terms** field of the search form. This helps to ensure that more occurences of the term will be found if they exist. Reprocessing is performed after an initial search for the required terms has been performed using the results of the original call processing.

To reprocess calls:

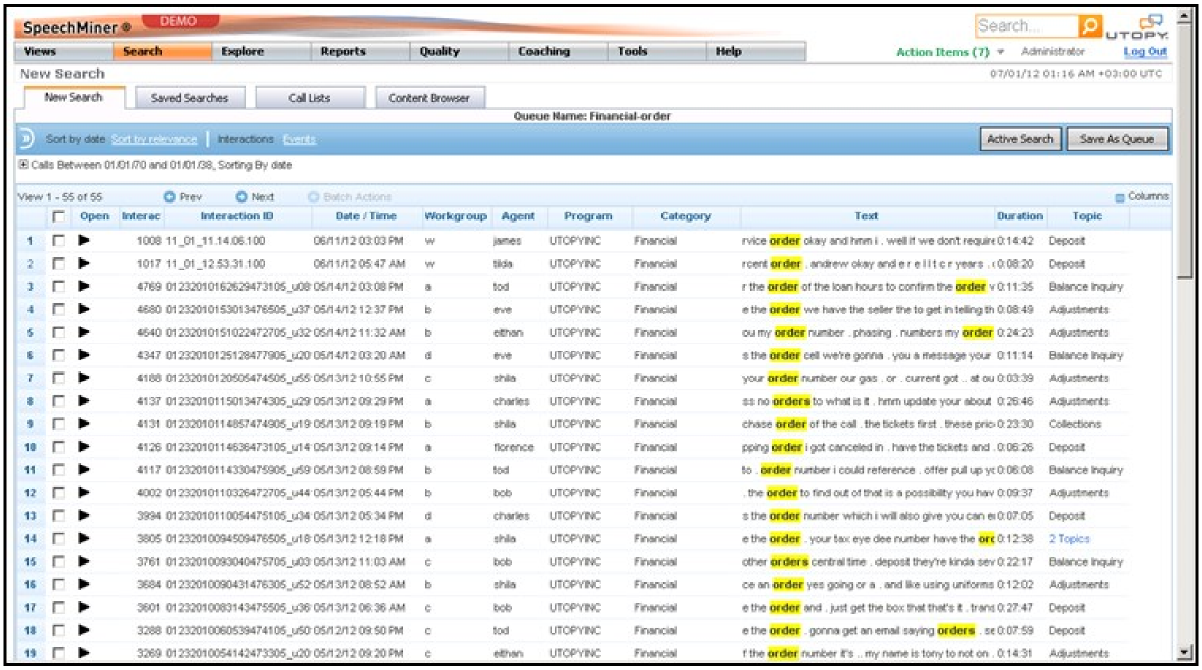
1. Type the terms you want to search for in the **Terms** field.
2. Fill in the other search parameters as required.

   Note: If the **Language** filter appears in the Filter Panel, make sure to select one of the languages. Active Search is not available unless a language is selected.
3. Click **Search**. The search is performed and the results appear in the grid on the right side of the screen.
4. At the upper-right of the grid, click **Active Search**. A dialog box opens and prompts you to provide a name for your new query.
5. Type a name for the query, and then click **OK**. The query begins to run, and is also saved as a [Saved Search](). When the processing of the query is completed, the results appear in the grid.

   Note: you can see the status of the Active Search as it runs in the [Saved Search]() screen.

Hiding the Filter Panel

After you specify search criteria and run a search, you may want to hide the Filter Panel while you are working with the search results, because this will allow you to use a larger portion of the screen for the interaction grid.



Filter Panel hidden

To hide the Filter Panel:

- At the upper-right of the Filter Panel, click .

To display the Filter Panel when it is hidden:

- On the left side of the screen, click .

See also

Defining Search Criteria
Using Text Mode
Using an Event Grid
Performing a Quick Search for Terms
Exploring Terms with a Custom Data Set
Comparing Two Data Sets

Home > Search > Searching for Interactions > Using an Event Grid

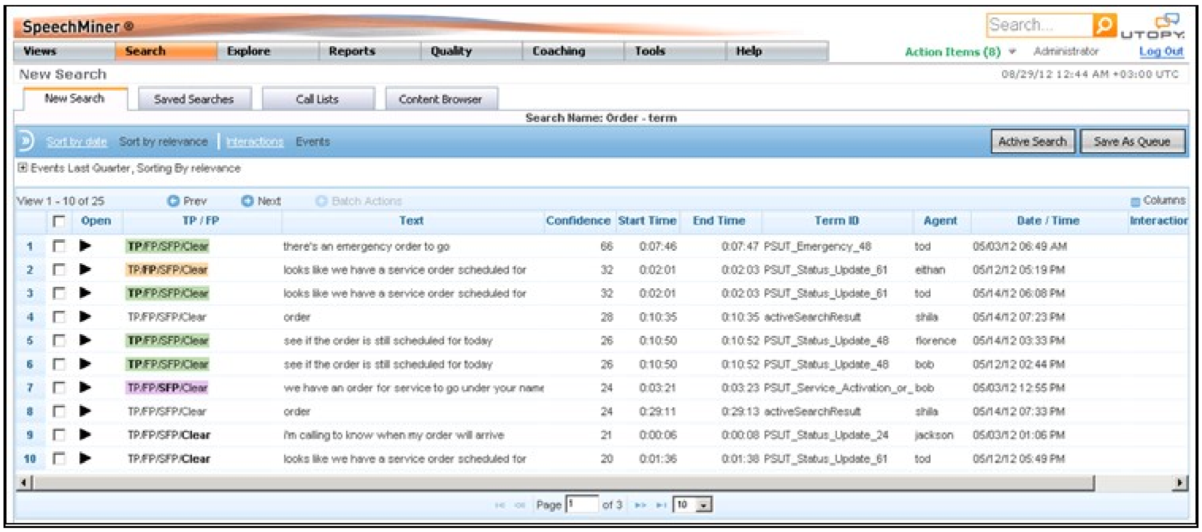
Using an Event Grid

When you search for calls by Event, the results are presented in an Event Grid. The Event Grid is identical in structure to an Interaction Grid, but it differs in a number of ways:

- The items listed in an Event Grid are Events, not calls. Thus, the same call may appear more than once in the grid, if Events matching the search criteria are found in it multiple times.

- The columns of an Event Grid are different from the columns of an Interaction Grid.
- When you play back an Event that is in the grid, the entire call in which the Event was found is opened in the Media Player, but playback begins at the beginning of the Event.
- Events can be audited in an Event Grid.
- Only calls are included in Event searches; other types of interactions never appear in Event Grids.

This section describes the columns of Event Grids, and explains how to audit Events. For general information about the functionality of Event Grids, including information about choosing which columns to display and choosing a column to sort the list by, see Using an Interaction Grid.



Event Grid

Columns in an Event Grid

The Event Grid can display any or all of the columns listed below. In addition, Event Grids may contain additional columns in which metadata specific to your system is displayed.

Column	Description
Open	A **Play** (▶) button; clicking the button opens the call in the Media Player.
TP/FP	If the Event has been audited, one of the following values is selected, and the entire cell is color-coded: **TP**: True Positive, color-coded green **FP**: False Positive, color-coded peach **SFP**: Sense False Positive, color-coded pink If you have Event Auditor permissions, you can select a value in this column. To select a value, click it. To clear the selection, click **Clear**. **Note:** If you selected **Exclude events that have been audited** before you initiated your search, previously audited Events will not appear in the grid.
Text	If the Event was a linguistic event, the text of the Event
Confidence	A value indicating how reliable the identification of Events in the call is. The higher the number, the greater the degree of certainty. You can use this information to choose calls for auditing. Sort the list by this column (by clicking in the column title) and select those calls whose Confidence value is below a certain threshold. **Note:** This number is not a percentage, but it does range from 1 to 100.
Start Time	The start time of the Event, offset from the start of the call, in *hours:minutes:seconds*
End Time	The end time of the Event, offset from the start of the call, in *hours:minutes:seconds*

Term ID	The ID number of the term that was identified in the Topic
Resource Name	The name of the Topic corresponding to the Event
Agent	The agent who handled the call
Date/Time	The start date and time (in *hours:minutes*) of the call
Program	The program that was used to process the call
External ID	A unique number assigned to the call by the external recording system
ID	A unique number assigned to the call by SpeechMiner
Auditor	If the Event was audited, the name of the auditor

Auditing an Event

Each linguistic Event that is recognized in a call can be *audited*. This means that a SpeechMiner user listens to the Event and then rates the accuracy of the identification. Auditing is an important part of fine-tuning the SpeechMiner's speech-recognition accuracy.

In order to audit an Event, the auditor listens to the Event, and then rates the accuracy of the Event recognition by selecting one of the following values in the TP/FP column of the Event Grid.:

- **TP** (True Positive): The Event was correctly identified by SpeechMiner.
- **FP** (False Positive): The Event was incorrectly identified by SpeechMiner.
- **SFP** (Sense False Positive): The words were correctly identified by SpeechMiner, but they were used in a sense that does not match the intent of the Topic.

Summary information about Event auditing in your system can be seen in the Audit Analysis and Topic Analysis - Audits reports. Existing audit data can be managed globally in the Calls Admin screen.

See also

Defining Search Criteria
Using Text Mode
Performing a Search
Performing a Quick Search for Terms
Exploring Terms with a Custom Data Set
Comparing Two Data Sets

Home > Search > Searching for Interactions > Performing a Quick Search for Terms

Performing a Quick Search for Terms

You can perform a search for terms from any screen using the **Search** box in the upper-right corner of the screen. All calls from the last 30 days are included in the search. As you type, the **Search** box may offer search suggestions for terms that are related to the terms you type.

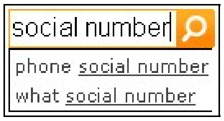
To perform a quick search for terms:

1. In any screen, in the **Search** box, type one or more terms you want to search for. Separate multiple terms with spaces or commas.

   Note: Multiple terms are inserted in the search query with AND operators. That is, if you type in two words, the search will find calls in which *both* words appear.

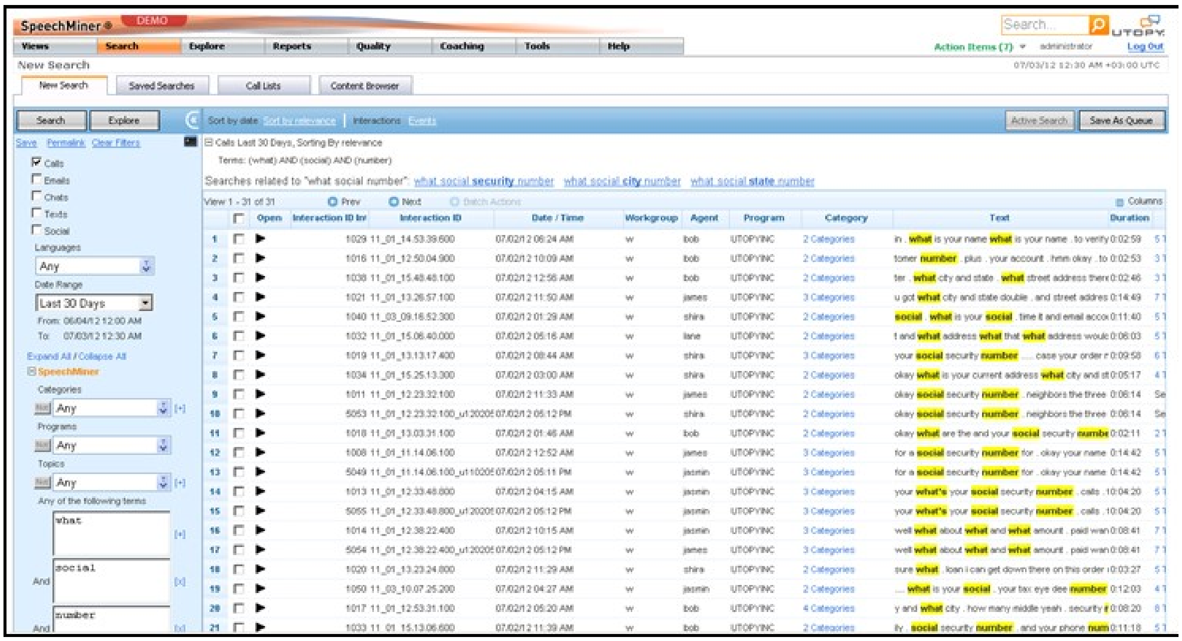
Search box

2. If search suggestions appear below the **Search** box, and you want to select one of them, click the suggestion. The text you typed is replaced by the suggestion you selected.



Search suggestions below the Search box

3. Click . The search is performed, the **New Search** tab opens, and the results are displayed in it. The terms you specified appear in the Filter Panel, in the SpeechMiner filter group.



Search results

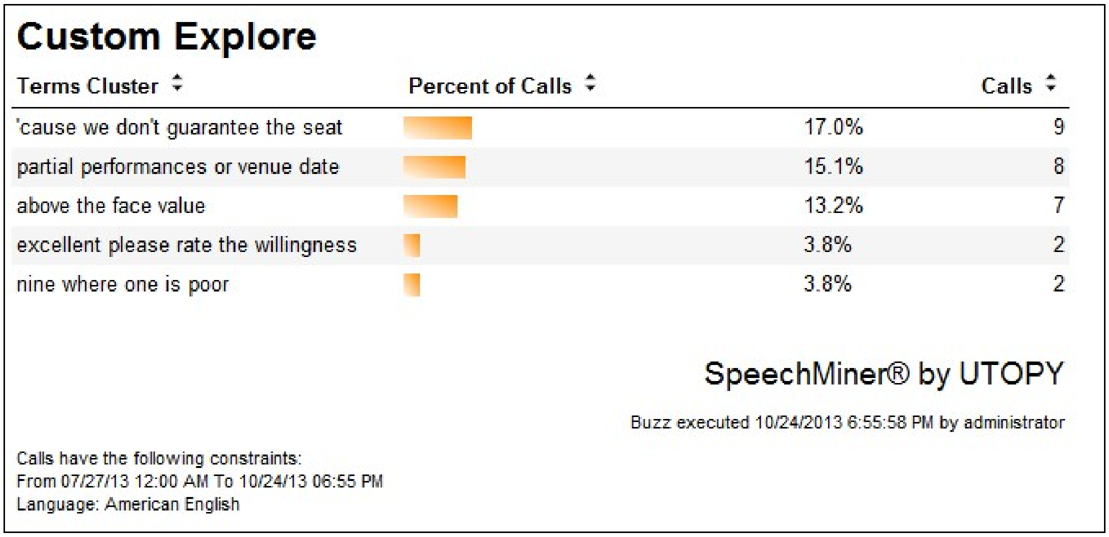
Note: As with any other search performed in the New Search tab, the system automatically corrects apparent spelling errors and makes suggestions for related searches.

See also

Defining Search Criteria
Using Text Mode
Performing a Search
Using an Event Grid
Exploring Terms with a Custom Data Set
Comparing Two Data Sets

Exploring Terms with a Custom Data Set

SpeechMiner's Explore feature provides an additional way to mine call transcripts for useful information. The exploration process produces reports that graphically illustrate the distribution of particular terms in calls. The standard Explore feature is completely automated, and is based on the analysis of all the calls in the database that took place during a specified period of time. The **Search** page offers you an alternative way of performing the exploration process, in which you can filter the data set that is included in the report in order to hone in on the particular calls that you want to explore. The process produces a Common Terms report for the filtered data set, which shows the most common term clusters in the selected dataset.



Custom Explore

Terms Cluster	Percent of Calls	Calls
'cause we don't guarantee the seat	17.0%	9
partial performances or venue date	15.1%	8
above the face value	13.2%	7
excellent please rate the willingness	3.8%	2
nine where one is poor	3.8%	2

SpeechMiner® by UTOPY

Buzz executed 10/24/2013 6:55:58 PM by administrator

Calls have the following constraints:
From 07/27/13 12:00 AM To 10/24/13 06:55 PM
Language: American English

Common Terms report for custom Explore data set

When you initiate the exploration process in the **Search** page, the results of the exploration are sent to you via e-mail when they are ready. In addition, you can open them in the Saved Reports tab of the Reports page.

Note: Only calls can be included in data sets that are used for exploration.

To run an Explore process on a custom data set:

1. In the **Search** page, select the **New Search** tab.
2. In the Filter Panel, define the data set you want to use for the exploration, as explained under Defining Search Criteria. Be sure to select a single language, and only the **Calls** interaction type.
3. At either the top or the bottom of the Filter Panel, click **Explore**. You are prompted to provide a name for the report.
4. Enter a name, and then select **OK**. A message appears, informing you that the report is being generated, and that an e-mail will be sent to you when the report is available.

See also

Defining Search Criteria
Using Text Mode
Performing a Search
Using an Event Grid
Performing a Quick Search for Terms
Comparing Two Data Sets

Home > Search > Searching for Interactions > Comparing Two Data Sets

Comparing Two Data Sets

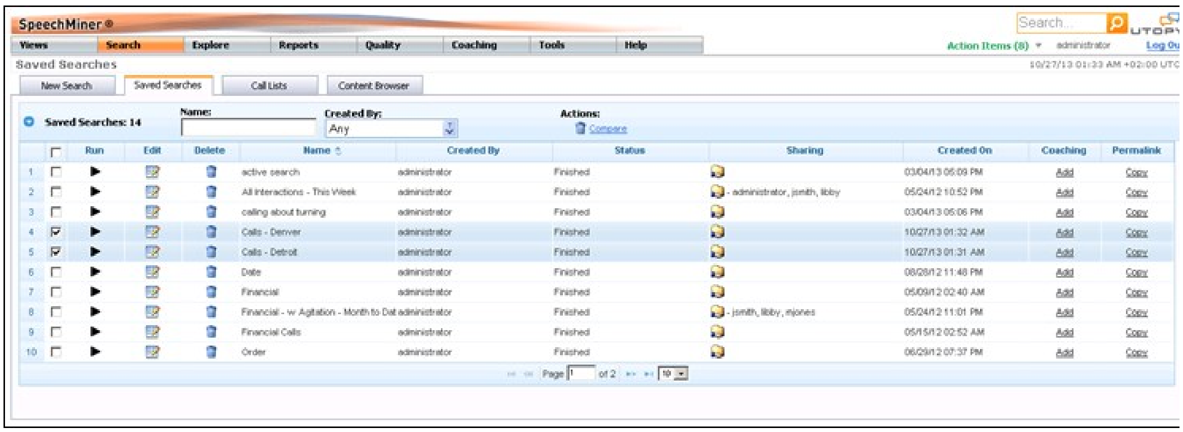
You can compare two custom data sets to see how they differ with regard to specific search criteria. For example, you could compare two teams of customer-service agents to see which team has more Dissatisfaction in the calls it handles. You can also compare the results of Explore processes between two data sets to see whether there are any noticable differences between them with regard to the most common terms that appear in their call flows.

Setting up comparisons of this sort is a two-stage process. In the first stage, you define the data sets you want to compare in the New Search tab, and save each of them as Saved Searches. In the second stage, you select the two data sets in the Saved Searched tab and then initiate the comparison process. The results of the comparison included in a report that is sent to you via e-mail when it is ready. In addition, you can open the report in the Saved Reports tab of the Reports page.

Note: Only calls can be included in the custom data sets that are compared.

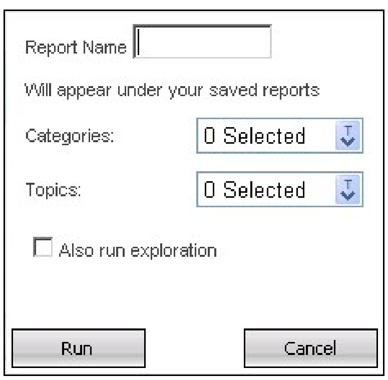
To compare two custom data sets:

1. In the **Search** page, select the **New Search** tab.
2. In the Filter Panel, define the first data set you want to use for the comparison, as explained under Defining Search Criteria. Be sure to select a single language, and only the **Calls** interaction type.
3. At either the top or the bottom of the Filter Panel, click **Save**. You are prompted to provide a name for the Saved Search.
4. Enter a name and select **OK**. The data set is saved as a Saved Search.
5. Repeat the steps above to define the second data set you want to use in the comparison and save it with a different name.
6. In the **Search** page, select the **Saved Searches** tab.
7. Select the checkboxes beside the two Saved Searches you created. The **Compare** option in the **Actions** area above the table of Saved Searches becomes active.



Saved Searches tab with two Saved Searches selected

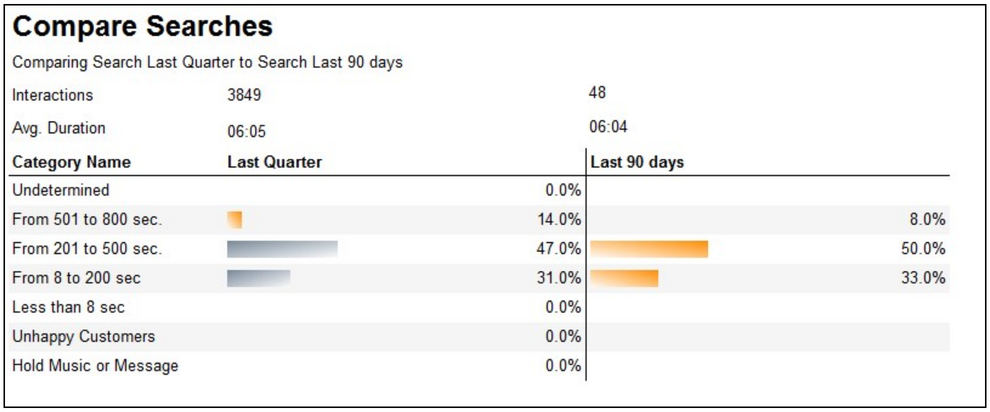
8. Select **Compare**. A dialog box opens.



Compare dialog box

9. Under **Report Name**, enter a name for the comparison report.
10. Under **Categories** and **Topics**, click the buttons beside each of these options and select the Categories and Topics you want to compare. (For information about using the Multi-Select box that opens when you select , see Defining Search Criteria.)
11. If you also want to receive an Exploration report for the two datasets, select **Also run exploration**.
12. Select **Run**. A message appears, informing you that the report is being generated, and that an e-mail will be sent to you when the report is available.

Sample Report



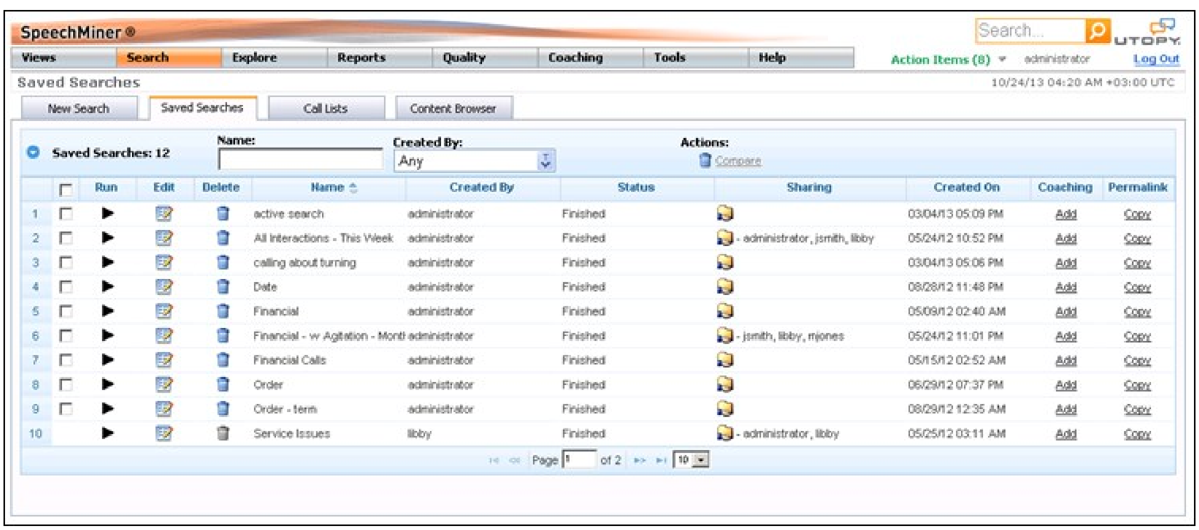
See also

Defining Search Criteria
Using Text Mode
Performing a Search
Using an Event Grid
Performing a Quick Search for Terms
Exploring Terms with a Custom Data Set

Home > Search > Saved Searches

Saved Searches

The criteria of a search can be saved as a *query*, so that the search can be easily run again using the same criteria whenever it is required. You can access saved searches in the Saved Searches tab.



Saved Searches tab

To open the Saved Searches tab:

- In the Main Menu, under **Search**, select **Saved Searches**. The Saved Searches tab opens, and displays a list of the searches you have saved or other users have shared with you.

Columns in the Saved Searches Table

The following columns appear in the Saved Searches table:

Column	Description
☐	Select the checkbox to include the search in a *Delete* action (see below). **Note:** If you did not create the search, this option is not available.
Display	Click the ▶ icon to run the search and display the results in an Interaction Grid or an Event Grid at the bottom of the screen. (The type of grid depends on which type was selected in the search's settings when it was saved.)
Edit	Click the icon to open the Saved Search in the **New Search** tab, where you can change the parameters and settings and make use of all of the other features of the **New Search** tab.
Delete	Click the icon to delete the search. **Note:** If you did not create the search, this option is not available, and the icon appears as .
Name	The name of the search.
Created by	The name of the user who created the search
Status	The status of the Saved Search. The following statuses may appear: • **Finished:** The search was completed. • **Starting:** The search is about to be executed. When this status appears, a **Stop** link appears beside it. Click the link to prevent the search from running. Processing stops and the status is changed to *Stopping*. • **Running:** The search is being executed now. When this status appears, a **Stop** link appears beside it. Click the link to stop running the search. Processing stops and the status is changed to *Stopping*. • **Stopping:** The **Stop** link was clicked during execution, and the search is in the process of stopping. When the process is completed, the status changes to *Finished*.
Sharing	The names of the groups and users with whom the search is shared appear in the table beside the icon. Click the icon to open a dialog box in which you can select the groups and individual users with whom you want to share the search. The members of the selected groups and the selected users will see the search listed in their Saved Searches tab, and will be able to run them. **Note:** You can only modify or delete searches that you created. If you want to modify the search criteria of other searches, you must save them under a new name.
Created on	The date on which the search was created
Coaching	Click **Add** to add the search to a Coaching session.
Permalink	Click **Copy** to create a Permalink to the search. You can copy the link to your clipboard and then paste it elsewhere as necessary. Later, you can use a browser to navigate to the Permalink address. When you do, the search will open in the browser. For additional information, see Permalinks.

Sorting the Columns

You can choose to sort the tables by any column that contains a call parameter.

To sort a table by a column:

- Click the title of the column.

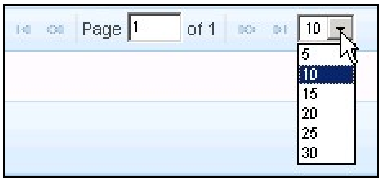
  Note: Click the title a second time to reverse the sort order.

Selecting the Number of Rows

You can choose how many rows to show in each of the tables.

To select the number of rows to display in a table:

- At the bottom of the table, in the dropdown list, select the desired number of rows.



Selecting the number of rows to display at one time

Filtering a Table

If there are a lot of items in a table, you can find the items you are interested in by filtering the display. You can filter by item name and/or by the name of the user who created the item.

To filter the items in a table by name:

- At the top of the table, in the **Name** field, type a letter or sequence of letters that appears in the name of the item you are looking for. The list is filtered as you type; only those names that contain the sequence you typed are displayed in the table.

To filter the items in a table by their creators:

1. At the top of the table, under **Created by**, click the . A Multi-Select box opens.
2. Select the users whose searches you want to see.
3. Click **Close**. The list is filtered; only those items that were create by users you selected are displayed in the table.

   Note: For additional information about using the Multi-Select box, see Defining Search Criteria.

Collapsing a Table

If you do not want to display one or both of the tables, you can collapse them. This may be convenient, for example, when an Interaction Grid is displayed at the bottom of the screen.

To collapse a table:

- At the upper-left corner of the table, beside the title of the table, click .

To expand a collapsed table:

- Click the beside the name of the table.

Deleting Multiple Saved Searches

You can delete multiple saved searches in one action.

To delete multiple saved searches:

1. In the table, select the checkbox to the left of each item you want to delete.
2. Above the table, under **Actions**, click . You are prompted to confirm that you want to delete the selected items.
3. Click **Yes**. The items are deleted.

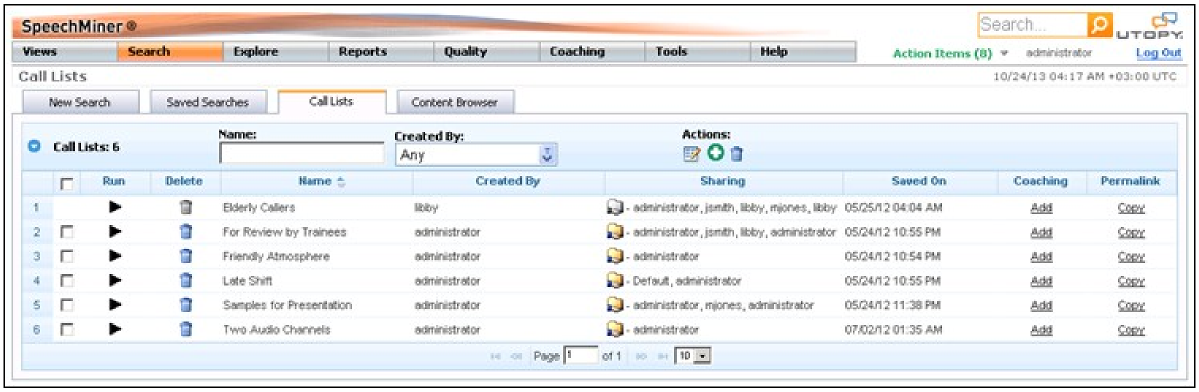
See also

Using an Interaction Grid
Searching for Interactions
Call Lists
Browsing Interactions

Home > Search > Call Lists

Call Lists

A *Call List* is a static list of calls that were added to the list manually by selecting them from an Interaction Grid. You can access existing Call Lists and create new, empty Call Lists in the Call Lists tab. (Calls Lists can also be created on the fly in an Interaction Grid; see Adding Calls to a Call List.)



Call Lists tab

To open the Call Lists tab:

- In the Main Menu, under **Search**, select **Call Lists**. The Call Lists tab opens and displays a list of the Call Lists you have created or other users have shared with you.

Columns in the Call Lists Table

The following columns appear in the Call Lists table:

Column	Description
☐	Select the checkbox to include the Call List in a *Delete* action (see below). **Note:** If you did not create the Call List, this option is not available.
Display	Click the ▶ icon to display the list of calls in an Interaction Grid at the bottom of the screen.
Delete	Click the icon to delete the Call List. **Note:** If you did not create the Call List, this option is not available, and the icon appears as .
Name	The name of the Call List.
Created by	The name of the user who created the Call List
Sharing	The names of the groups and users with whom the Call List is shared appear in the table beside the icon. Click the icon to open a dialog box in which you can select the groups and individual users with whom you want to share the Call List. The members of the selected groups and the selected users will see the Call List listed in their Call Lists tab, and will be able to see the contents of lists. **Note:** You can only modify or delete Call Lists that you created.
Saved on	The date on which the Call List was initially saved.
Coaching	Click **Add** to add the Call List to a Coaching session.
Permalink	Click **Copy** to create a Permalink to the Call List. You can copy the link to your clipboard and then paste it elsewhere

	as necessary. Later, you can use a browser to navigate to the Permalink address. When you do, the Call List will open in the browser. For additional information, see Permalinks. **Note:** Permalinks to Call Lists allow any user to open any of the calls in the list, even if the user does not have permissions to open the partitions to which the calls belong.

Sorting the Columns

You can choose to sort the tables by any column that contains a call parameter.

To sort a table by a column:

- Click the title of the column.

  Note: Click the title a second time to reverse the sort order.

Selecting the Number of Rows

You can choose how many rows to show in each of the tables.

To select the number of rows to display in a table:

- At the bottom of the table, in the dropdown list, select the desired number of rows.

Selecting the number of rows to display at one time

Filtering a Table

If there are a lot of items in a table, you can find the items you are interested in by filtering the display. You can filter by item name and/or by the name of the user who created the item.

To filter the items in a table by name:

- At the top of the table, in the **Name** field, type a letter or sequence of letters that appears in the name of the item you are looking for. The list is filtered as you type; only those names that contain the sequence you typed are displayed in the table.

To filter the items in a table by their creators:

1. At the top of the table, under **Created by**, click the . A Multi-Select box opens.
2. Select the users whose searches or Call Lists you want to see.
3. Click **Close**. The list is filtered; only those items that were create by users you selected are displayed in the table.

   Note: For additional information about using the Multi-Select box, see Defining Search Criteria.

Collapsing a Table

If you do not want to display the table, you can collapse it. This may be convenient, for example, when an Interaction Grid is displayed at the bottom of the screen.

To collapse the table:

- At the upper-left corner of the table, beside the name of the table , click .

To expand a collapsed table:

- Click the beside the name of the table.

Creating a New Call List

New Call Lists can be created in one of two ways:

- **On the fly:** You can create a new Call List on the fly in an Interaction Grid. The new Call List cannot be created empty - calls must be selected in the Interaction Grid, and the selected calls are automatically added to the new Call List. For additional information, see Using an Interaction Grid.
- **New empty Call List:** You can create an empty Call List in the Call Lists tab. Calls can be added to the list from an Interaction Grid later on, as necessary.

To create an empty Call List:

1. Above the Call Lists table, under **Actions**, click . You are prompted to enter a name for the new list.
2. Enter a name, and then click **OK**. The new Call List is created and added to the Call Lists table.

Removing a Call from a Call List

You can remove one or more calls from a Call List.

To remove calls from a Call List:

1. In the Call List table, click **Display** () to display the list of calls in an Interaction Grid at the bottom of the screen.
2. Select the checkbox to the left of each call you want to remove from the Call List.
3. Under **Batch Actions**, select **Delete from List**. The selected calls are deleted from the list.

Deleting Multiple Call Lists

You can delete multiple Call Lists in one action.

To delete multiple Call Lists:

1. In the table, select the checkbox to the left of each item you want to delete.
2. Above the table, under **Actions**, click . You are prompted to confirm that you want to delete the selected items.
3. Click **Yes**. The items are deleted.

See also

Using an Interaction Grid
Searching for Interactions
Saved Searches
Browsing Interactions

Home > Search > Browsing Interactions

Browsing Interactions

This section explains how to use the Content Browser to find interactions with the characteristics that interest you.

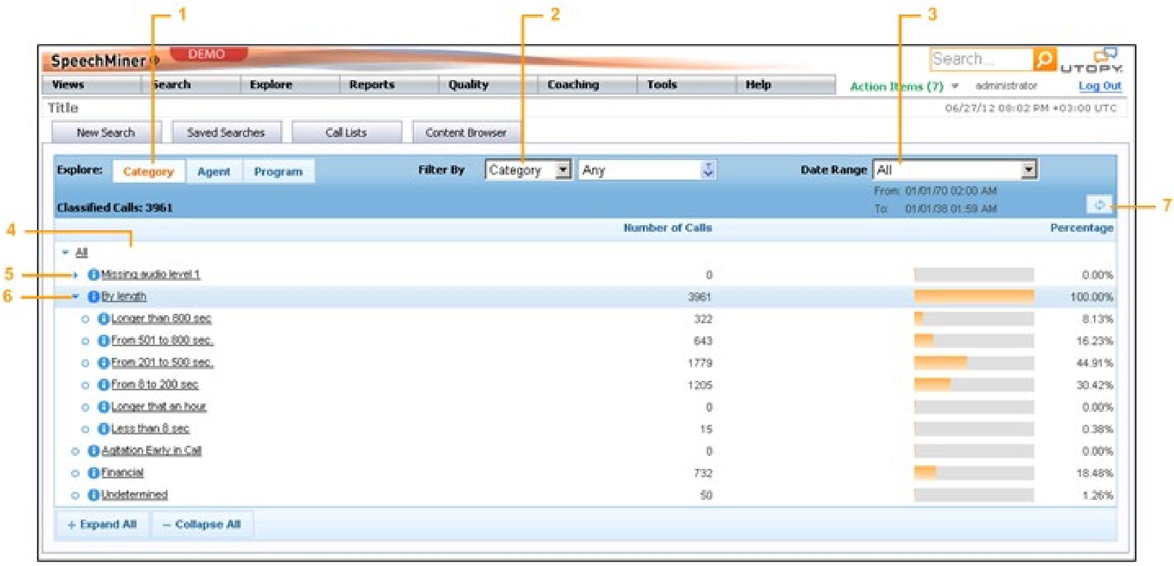
Content Browsing begins by selecting a classification base. This base defines how the interactions will be organized in the tree structure.

Classification Base	Description
Categories	The tree structure is based on Categories that are assigned to interactions. These Categories are defined in the Category Manager and assigned automatically to interactions when the system processes them. Each Category consists of a group of characteristics that identify the type of interaction and its content. When the tree structure is based on Categories, interactions are listed under the Categories that were assigned to them.

Agents	The tree structure is based on Workgroups and can be subdivided by agents. Workgroup and agent information is metadata; for calls, it is collected by the recording system and relayed to SpeechMiner along with the recordings of the calls; for e-mails and other texts, it is written in the database when the texts are imported. When the tree structure is based on Agents, interactions are listed under the workgroups of the agents who handled the interactions.
Programs	The tree structure is based on Programs. These Programs are sets of processing instructions for interactions; they are defined in SMART. When the tree structure is based on Programs, interactions are listed under the Programs that were used by the system to analyze them.

To open the Content Browser:

- In the Main Menu, under **Search**, select **Content Browser**. The Content Browser opens with the default base classification, **Category**, selected.



Content Browser

Key to Illustration:

Number	Description
1	Classification base tab
2	*Filter By* classification
3	*Filter By* date range
4	Tree structure
5	Collapsed node
6	Expanded node
7	Refresh button

Filtering the Interaction Tree

When you first open the Content Browser, all interactions that are in the database are included in the tree structure. You can filter the interactions in one of two ways:

- **Filter by classification:** Show only those interactions that are in a particular subgroup of one of the classification types. For example, show only interactions in Workgroup A.

- **Filter by date range:** Show only those interactions that took place during a specified period of time.

You can apply both types of filters simultaneously if you wish.

To filter by classification:

1. Under **Filter By**, in the first dropdown list, select the type of classification you want to filter by: **Category**, **Workgroup**, or **Program**.
2. In the second dropdown list, select the subgroup you want to see. The tree structure is updated. Only the interactions in the selected subgroup appear in the tree structure.

To filter by date range:

- Under **Date Range**, select a date range. The tree structure is updated. Only the interactions in the selected date range appear in the tree structure.

Selecting From the Filtered Interaction Tree

Once you have filtered the Interaction List, you can explore the tree structure to see which interactions interest you. You can then select a node in the tree to see more details about the interactions listed in it in an Interaction Grid at the bottom of the screen.

Understanding the Tree Structure

The tree structure lists interactions in groups according to the classification base. Each line contains additional information about the interactions in that group. The following information appears for each line:

Classification Base	Column Name	Description
All	Number of Calls	The number of interactions grouped in the line
	Percentage	The number of interactions grouped in the line as a proportion of the total number of interactions included in the tree. **Note:** This information is given as a percentage, in two forms: a bar illustrating the percentage, and a number representing the percentage.
Agent	Last Call	The recording time of the last interaction included in the group **Note:** This value is only defined for calls.
	Number of Agents	The number of agents included in the group
Program	Priority	The priority that is assigned to the Program
	Last Updated	The date on which the Program was last updated
	Language	The language of the Program

Expanding and Collapsing the Tree Structure

You can expand or collapse the tree structure to see the level of detail that is most convenient for you. You can expand or collapse individual nodes or the entire structure.

To expand or collapse a node of the tree structure:

- Click ▸ to expand the node or ▾ to collapse it.

Note: If a node does not have any levels below it, ○ appears beside it.

To expand or collapse an entire level of the tree structure:

- At the bottom of the tree structure, click the 

button to expand the tree one level, or the 

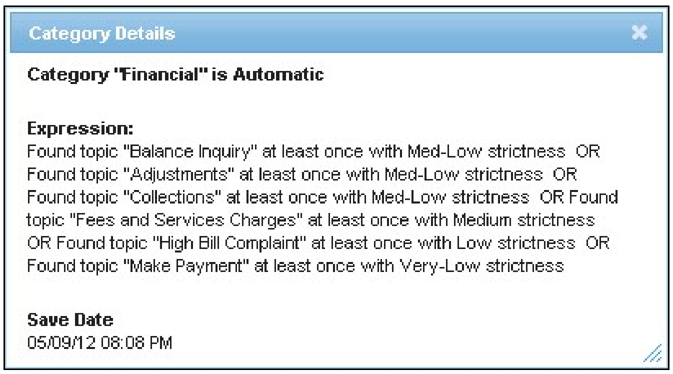
button to collapse it one level.

Viewing Category Details

In the Category Browser, you can see a detailed definition of each Category that appears in the tree structure.

To see the definition of a Category:

- In the tree structure, click the icon beside the name of the Category. A window opens and displays the Category definition.



Category definition

Changing the Classification Base

When the Content Browser is open, you can change the classification base from within the page.

To change the classification base:

- Click the appropriate tab to select the desired classification base.

Viewing Interaction Details

You can view interaction details for the interactions in any line in the tree structure.

To view interaction details for a group of interactions:

- In the tree structure, click the group of interactions. An *Interaction Grid* opens at the bottom of the page and displays detailed information about the interactions.

Note: For detailed information about the Interaction Grid, including how you can listen to calls or view texts via the Interaction Grid, see Using the Interaction Grid.

Refreshing the Tree

If new interactions are added to the database while you are viewing the Content Browser, you can add them to the tree by refreshing it.

To refresh the tree:

- Above the tree, on the right, click  (#7 in the illustration above).

See also

Using an Interaction Grid
Searching for Interactions

Saved Searches
Call Lists

Search

Home > Using the Media Player

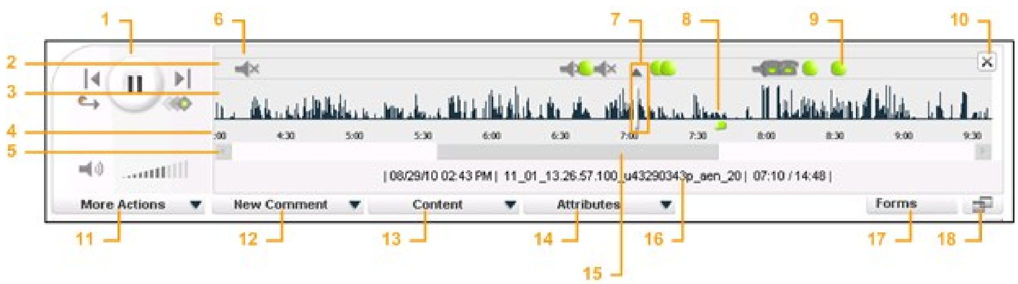
Using the Media Player

The SpeechMiner Media Player is used to play the audio of recorded calls. It provides a range of call playback features that can help you quickly and easily find the parts of calls that interest you, find information about call properties, view transcripts of calls, add comments to calls and view the comments of other users. To open the Media Player, you simply click a **Play** button beside a call in a Interaction Grid or an event in an Event Grid.

The Media Player is displayed as a timeline with various controls and information surrounding it. The center of the timeline is an audio graph that visually indicates the level of sound in the call at any given moment, so you can skip over silence or find times when voices were raised. If calls are recorded with two audio channels - for example, one for the agent and the other for the customer - the audio channels are color-coded to clearly identify who was speaking at any given moment in the call.

Detected Events, both linguist and non-linguistic, are indicated by icons above the audio graph. User comments are indicated by icons below the audio graph; the comments can be general or linked to specific times in the call. You can easily play calls back from the moment that concerns you by clicking in the timeline at the time of interest.

The illustration below shows the main elements of the Media Player, including some common icons.



Main Media Player elements

Key to Illustration:

Number	Description
1	Player controls: Play, Pause, etc. (see Playing Back a Call)
2	Event bar containing icons that indicate where Events of various types were detected (see Event Icons)
3	Audio graph showing the volume levels at every moment of the call. If the recording system uses two audio channels, the channels are color-coded.
4	Timeline indicating the offset from the beginning of the call
5	Scrollbar indicating which part of the call is currently displayed. Drag the slider or click elsewhere in the scrollbar to view other parts of the call. **Note:** If the entire call is visible at one time, the scrollbar is not active and it does not have a slider. **Note:** If the display is auto-synced, the scrollbar automatically moves so that the part of the call that is playing is always visible (see Playing Back a Call).
6	Event icon indicating an Event was detected at this location in the call (see Event Icons)
7	Marker indicating the current location of playback. Click elsewhere in the audio graph to move the marker to another location and begin playback from there.
8	Comment icon indicating that a user added a comment at this location in the call (see Call Comments).
9	Event icon indicating that a Topic was detected at this location in the call (see Event Icons)

10	Click to close the Media Player.
11	**More Actions** dropdown menu (see More Actions Options)
12	**New Comment** button: Click to add a comment to the call (see Managing Comments).
13	**Content** button: Click to open or close the Content panel, in which you can see the text of the call, the Events that were detected, and user comments (see Viewing Call Content Details).
14	**Attributes** button: Click to open or close the Attributes panel, in which you can see the attributes of the call and assign manual Categories to the call (see Viewing Call Attributes).
15	Slider indicating the part of the call that is currently displayed. Drag to view a different part of the call.
16	Call information: The date and time at which the call took place, the ID of the call, the current time in playback (offset from the start of the call), and the total length of the call
17	**Forms** button: Click to select a form to fill out about the call, or to edit a form you have already filled out (see Filling in Forms).
18	Click to open the Media Player in a separate window (see Detaching the Player).

See also

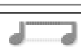
Event Icons
Playing Back a Call
Viewing Call Content
Call Comments
Call Attributes
Filling in Forms
Detaching the Player
More Actions Options

Home > Using the Media Player > Event Icons

Event Icons

Icons indicating when Events were detected appear above the audio graph. Both linguistic and non-linguistic Events are marked. You can see details about the Event that is represented by an icon by placing your mouse pointer on the icon. Event icons and information also appear in the Content panel.

The following non-linguistic Event icons are in use:

Icon	Description
	Dialtone
	Ringback: A signal used in PSTN (Public Switched Telephone Networks - standard "land lines") to indicate that the line is being called or an incoming call is present.
	Silence
	Silent period lasting more than 2 seconds (A  icon marks the beginning of the period, and an  icon marks the end of the period.)
	Crosstalk: In dual-channel calls, a time when both speakers were talking simultaneously
	Music and noise (A  icon marks the beginning of the period, and an  icon marks the end of the period.)
	Agitation

	Key press on a touch-tone phone. 16 keys can be identified using DTMF (Dual Tone Multi Frequency); the icon indicates which key was pressed.

The following linguistic Event icons are in use:

Icon	Description
	A Topic that was recognized by SpeechMiner
	A Topic that was recognized by SpeechMiner **and** is relevant to the specific search the user executed
	A deprecated Topic Event: the Topic definition has changed since it was found in this specific call
	A deprecated Topic Event that is relevant to the specific search the user executed
	A term that was found by an active search (after Active Search was selected in an Interaction Search)
	An active search Event that is relevant to the specific search the user executed

See also

Playing Back a Call
Viewing Call Content
Call Comments
Call Attributes
Filling in Forms
Detaching the Player
More Actions Options

Home > Using the Media Player > Playing Back a Call

Playing Back a Call

The Media Player opens above a Call or Event Grid when you select a call or Event for playback. For information about opening the Media Player, see Playing a Call and Playing an Event. This section explains how to use the Media Player to play and manage the open call.

Playing Back a Call

You can play the open call from any point in the recording. Playback always begins from the location of the marker in the audio graph. When you open a call from an Interaction Grid, the marker is placed at the beginning of the call. When you open a call from an Event Grid, the marker is placed at the beginning of the Event. Playback begins automatically when the call is loaded.

To play a call from the current location of the marker:

- Click **Play** ( ).

To play a call from the location of an Event:

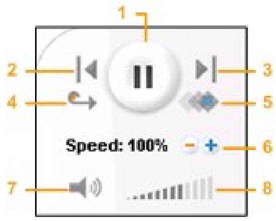
- Click the Event icon.

To play back a call from any location in the call:

- Click the location in the audio graph.

Playback Controls

The playback controls are located on the left side of the Media Player. The following controls are available:



Playback controls

Key to illustration:

Number	Description
1	**Play/Pause:** • **Play** **:** When playback is paused, the **Play** button appears. Click the button to begin playback from the current location of the marker in the audio graph. • **Pause** **:** During playback the **Pause** button appears. Click the button to stop playback and leave the marker at its current location in the audio graph.
2	**Previous:** Play the previous call in the Call or Event Grid.
3	**Next:** Play the next call in the Call or Event Grid.
4	**Skip back:** Restart playback from 5 seconds before the current location of the marker.
5	**Auto-Scroll:** Turn this option on if you want the call to automatically scroll so that the part of the call that is currently being played back is always visible. The scroll bar moves automatically to keep up with the playback. **Note:** When the option is turned on, the center of the button is blue (); if it is off, the center of the button is green (). **Note:** This option has no effect if the entire call is visible at one time.
6	**Playback Speed:** Click to increase the playback speed, or to decrease the speed. **Note:** This option is not available in all systems. When it is available, the available speeds may vary. Typically, they are **1.00**, **1.25**, **1.50**, and **2.00**.
7	**Mute:** Turn the volume off
8	**Volume:** Click a line in the icon to select the corresponding volume level.

Keyboard Shortcuts

The following keyboard shortcuts can be used in the Media Player:

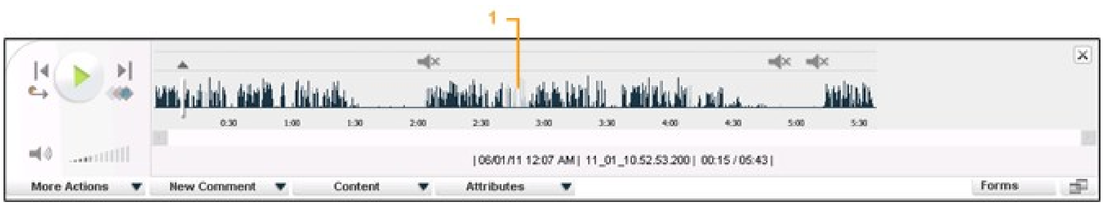
Keys to Press	Result
Ctrl + Enter	Toggles between Play and Pause
Ctrl + Shift + n	Skips to the next call in the grid
Ctrl + Shift + p	Skips to the previous call in the grid
Ctrl + Shift + t	In an Event Grid, marks the current event as TP (True Positive)

Ctrl + Shift + f	In an Event Grid, marks the current event as FP (False Positive)
Ctrl + Shift + s	In an Event Grid, marks the current event as SFP (Sense False Positive)
Ctrl + Shift + c	In an Event Grid, clears an Event rating

Note: TP, FP, and SFP ratings are assigned to Events during the auditing process (see Using an Event Grid).

Filtered Content

Call audio and text may be filtered in your system to ensure confidential information cannot be accessed by users who do not have permission to do so. Different users may have different permissions in this regard, so certain parts of a call may be filtered out for some users but not others. Parts of a call that have been filtered out appear in the audio graph in gray (#1 in the illustration below) rather than black. The text of the filtered parts in not included in the call Contents, and the Media Player skips these areas during playback.



Filtered audio content

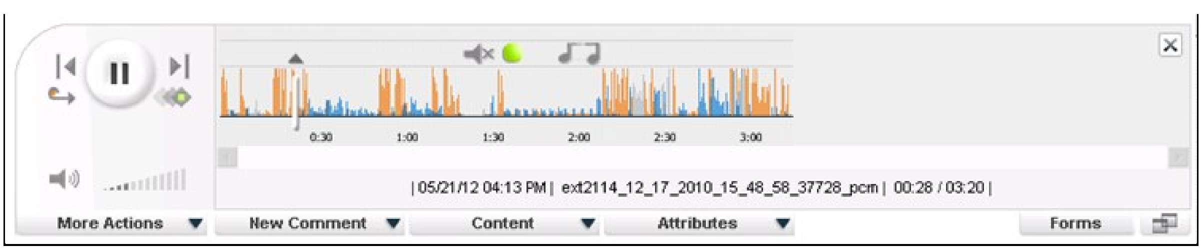
Filters can be implemented in the following ways:

- **Sensitive Topics:** Some Topics may be defined in your system as *Sensitive*. (This attribute is assigned to Topics in the SMART application.) Only users with special permissions can hear the audio or see the text of Sensitive Topics.
- **Numbers:** Numbers consisting of more than two digits may be filtered out of calls, in order to ensure unauthorized users do not have access to credit card numbers and other confidential information.
- **Comments-Only permission:** Some users may only be able to access those parts of calls to which comments have been attached.

For information about the filter rules in your system, consult your system administrator.

Dual-Channel Audio

Some recording systems use two audio channels, one for the agent's side of a call and the other for the customer's side of the call. If your recording system does this, SpeechMiner color-codes the channels 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 described above, so you may see as many as three different colors in the audio graph, as in the figure below.



Dual-channel audio graph with filtered content

See also

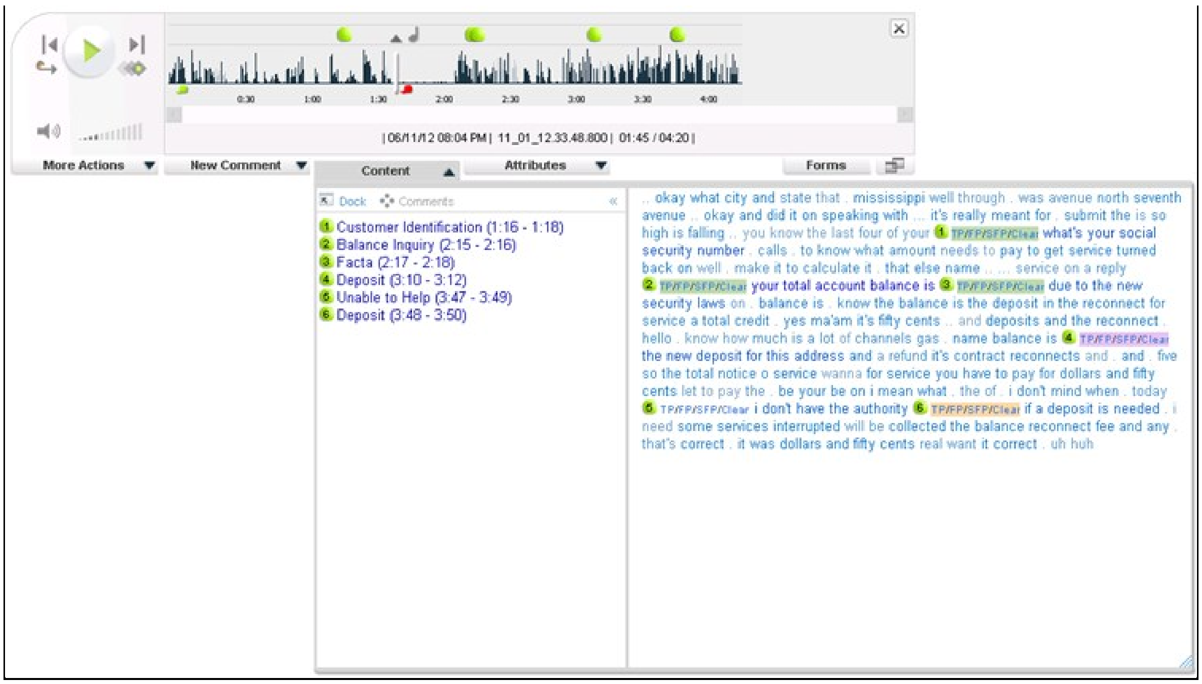
Event Icons
Viewing Call Content
Call Comments

Call Attributes
Filling in Forms
Detaching the Player
More Actions Options

Home > Using the Media Player > Viewing Call Content

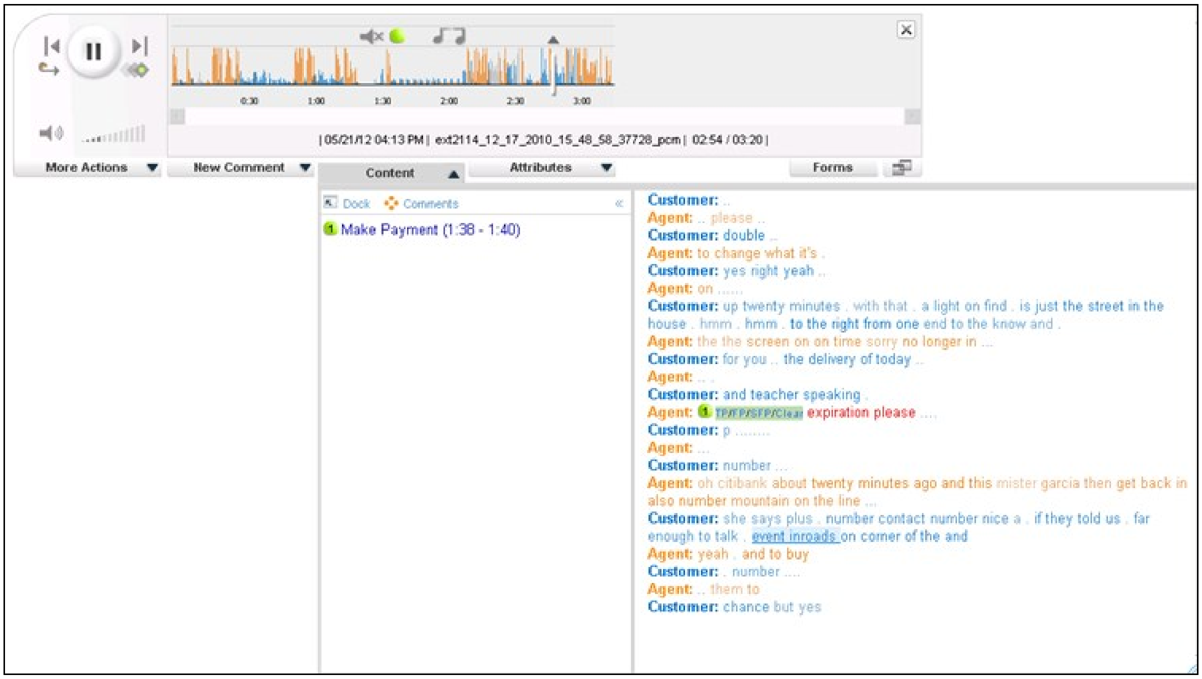
Viewing Call Content

The Content panel can be used to view a transcript of the call that is open in the Media Player, as well as the Events that SpeechMiner detected in the call and comments that were added to the call by users. The panel is divided into two panes. The right pane contains the transcript of the conversation, with the Events marked, and the left pane contains a list of the Events that were found in the call. You can choose to display or hide the comments that users added to the call. If you choose to display them, they are listed in the left pane and also marked in their locations in the right pane. You can also adjust the size of the panels and the widths of the two panes.



Content panel showing text and Events, with comments hidden

In the transcript, the current playback location is indicated by a light-blue highlight, and the typeface of the text reflects how certain SpeechMiner is that it correctly transcribed the conversation: the darker the text, the higher its accuracy. If your system employs multiple audio channels, the speakers are identified in the transcript, and the text is color-coded to match the speakers.



Content panel showing two audio channels

Opening and Closing the Content Panel

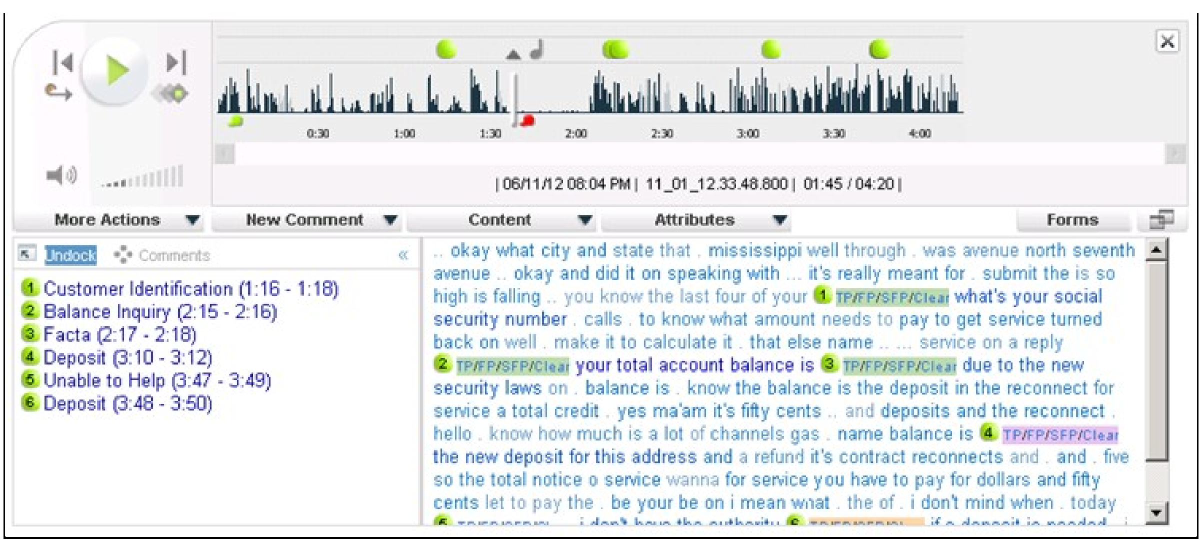
You can open the Content panel when you want to see it, and close it when it does not interest you.

To open or close the Content panel:

- Click the **Content** button.

Docking the Content Panel

You can dock the Content panel - open it in its own section below the Media Player - whenever you wish. This may be convenient if you want to use it for an extended period of time, because it provides a wider display and does not hide any other screen items you may want to look at.



Content panel docked

To dock the Content panel:

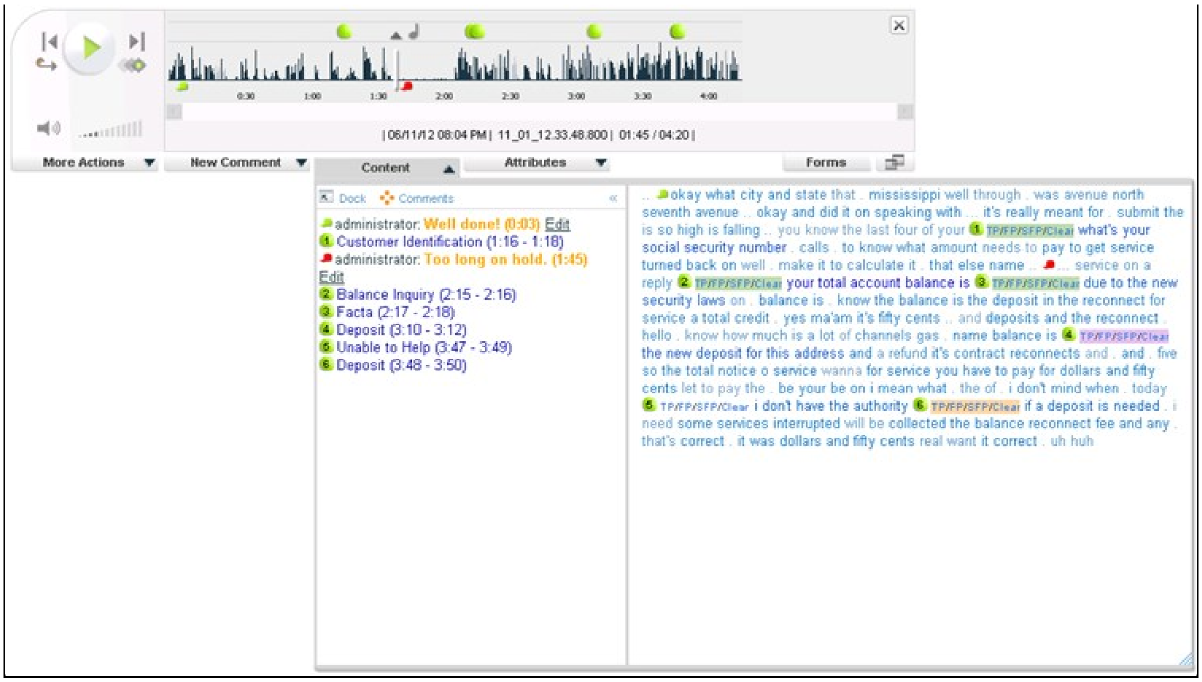
- When the panel is open, in the upper-left corner of the panel, click **Dock**.

To undock the Content panel:

- In the upper-left corner of the docked panel, click **Undock**.

Displaying or Hiding Comments

When the Content panel is open, you can choose to display or hide the comments that users have attached to the call.



Content panel with Comments displayed

To display or hide the comments:

- At the top of the Content panel, click **Comments**.

Hiding the Left Pane

You can hide the left pane to provide more space for the right pane.

Content panel with the left pane hidden

To hide the left pane:

- In the upper-right corner of the pane, click «.

To display the left pane:

- In the upper-left corner of the Content panel, click ».

Adjusting the Sizes of the Panel and Panes

You can adjust the height and width of the Content panel and the sizes of the right and left panes.

To adjust the size of the panel:

- Drag the bottom-right corner of the panel in any direction.
  Note: Dragging right or left only affects the width of the right pane.

To adjust the widths of the right and left panes:

- Drag the dividing line between the panes right or left.

Working with Events

The locations of Events are indicated in the transcript by numbered Event icons. The numbers match the Event numbers that appear in the left pane. In either pane, you can see the text of a Topic Event by placing your mouse cursor on it. In the right pane, you can also see the name of the Event by placing your mouse cursor on the text of the Event. (The names of the Events are displayed with their icons in the left panel.)

Events in the transcript are preceded by an auditing rating selector. If the Event has already been audited, the audit value is bolded, and the entire selector is color-coded, as follows:

Audit Value	Description	Color-coding
TP	True Positive	green
FP	False Positive	peach
SFP	Sense False Positive	pink

For additional information, see Using an Event Grid.

If you have auditing permissions, you can select or modify the audit ratings of Events in the call transcript.

To select an audit value:

- Click the value.

To clear the selected audit value:

- Click **Clear**

Viewing Related Words

You can run a Related Words report for any word in the call transcipt.

To run a Related Words report for a word:

1. Place your mouse cursor on the word. A pop-menu appears.
2. Select **Related Words**. The Related Words report results are opened in a new window.

   Note: For additional information about this type of report, see Finding Related Words.

See also

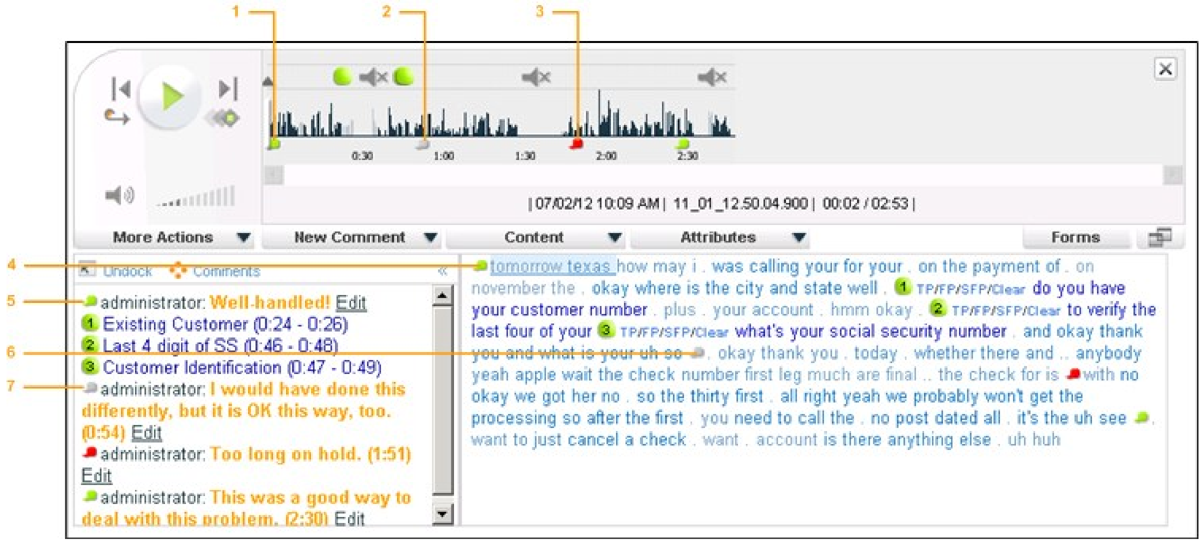
Event Icons
Playing Back a Call
Call Comments
Call Attributes
Filling in Forms
Detaching the Player
More Actions Options

Call Comments

Comments can be added to calls either as global comments, which relate to the entire call, or time-linked comments, which relate to a particular time in the call.

Comments are indicated in the Media Player by Comment icons. In the player area, the icons appear below the audio graph (nos. 1, 2, and 3 in the figure below), and in the Content panel, they appear in the call transcript. The icons are color-coded to indicate whether the comments are positive ( ), general ( ), or negative ( ). You can view the text of a comment by placing your mouse cursor on the icon. In addition, the text of each comment appears in the left pane of the Content panel along with the name of the user who inserted the comment. Global comments appear at the beginning of the call (nos. 1, 4, and 5 in the figure) and time-linked comments appear in their appropriate locations (nos. 2, 3, 6, and 7 in the figure).

Note: If you cannot see the call comments in the Content panel, at the top of the left pane of the panel, click **Comments**. For additional information, see Viewing Call Content.



Call comments

Adding a Comment to a Call

You can add global and time-linked comments to a call, and indicate whether the comments you add are positive, negative, or general.

To add a comment to a call:

1. Click **New Comment**. The **New Comment** box opens.

New Comment box

2. If you want to add a time-linked comment, select the checkbox beside the **Time** field.

   Note: The time in the **Time** field is automatically set to the time at the location of the cursor in the audio graph. Modify the time if you wish.

3. In the text area below the **Time** field, type your comment.
4. Select one of the following:

Option	Description
Good	Positive comment
General	Neutral comment
Bad	Negative comment

5. Click **Add**. The comment is added to the call.

Editing an Existing Comment

You can modify the text and rating (Good, General, or Bad) of any comment you added to a call. If you have the required permissions, you can also modify other users' comments in this way. You cannot change a global comment into a time-linked comment, or vice-versa, and you cannot change the time of a time-linked comment. You also cannot delete a comment entirely.

To edit a comment:

1. In the Content panel, click **Edit** at the end of the comment. The **Edit Comment** box opens.

Edit Comment box

2. Modify the text of the comment as required.
3. Change the rating of the comment, if necessary.
4. Click **Update**. The comment is modified.

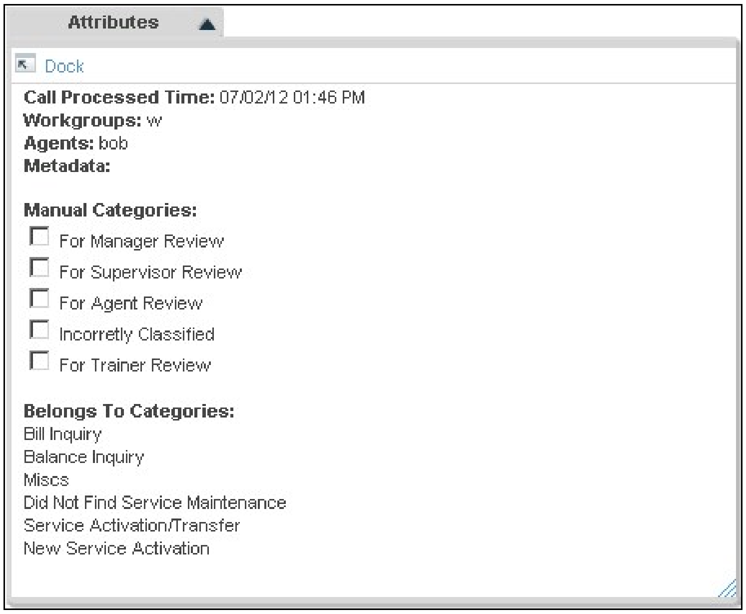
See also

Event Icons
Playing Back a Call
Viewing Call Content
Call Attributes
Filling in Forms
Detaching the Player
More Actions Options

Home > Using the Media Player > Call Attributes

Call Attributes

The Attributes panel can be used to view the attributes of the call that is open in the Media Player. In addition, you can use it to assign manual Categories to the call.



Attributes panel

The following types of call attributes are displayed in the Attributes panel:

- Call processing time
- Workgroups
- Agents
- Metadata values
- Manually assigned Categories
- Automatically assigned Categories

Opening and Closing the Attributes Panel

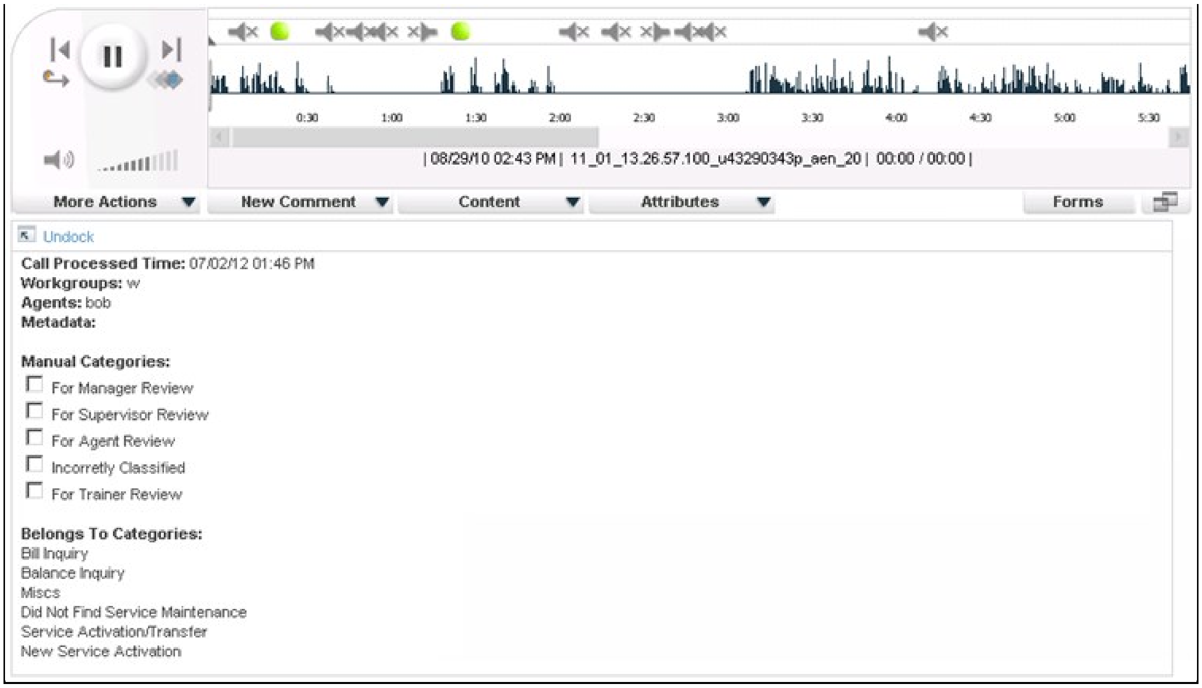
You can open the Attributes panel when you want to see it, and close it when it does not interest you.

To open or close the Attributes panel:

- Click the **Attributes** button.

Docking the Attributes Panel

You can dock the Attributes panel - open it in its own section below the Media Player - whenever you wish. This may be convenient if you want to use it for an extended period of time, because it provides a wider display and does not hide any other screen items you may want to look at.



Attributes panel docked

To dock the Attributes panel:

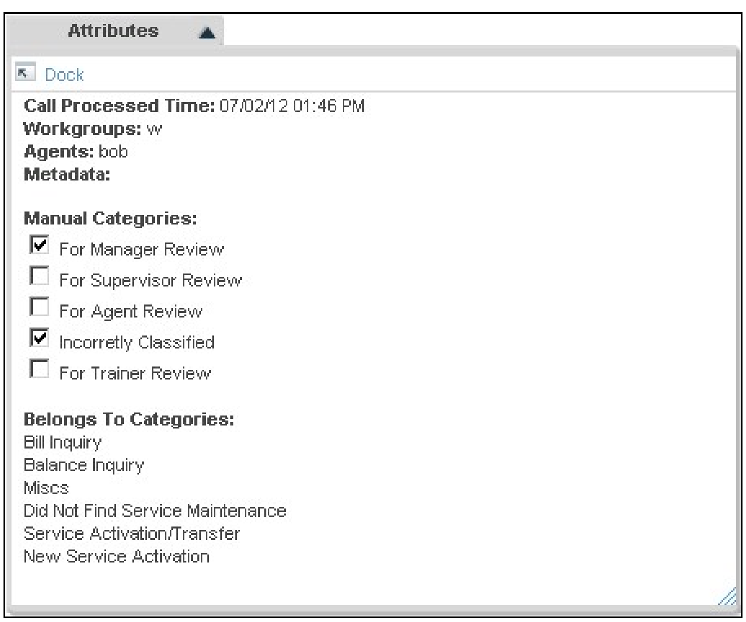
- When the panel is open, in the upper-right corner of the panel, click **Dock**.

To undock the Attributes panel:

- In the upper-right corner of the docked panel, click **Undock**.

Assigning Manual Categories

When the Attributes panel is open, you can assign manual Categories to the call that is open in the Media Player.



Attributes panel with manual Categories selected

To assign a manual Category to a call:

- In the Attributes panel, under **Manual Categories**, select the checkbox beside the Category.

To remove a manual Category from a call:

- Clear the checkbox beside the Category.

See also

Event Icons
Playing Back a Call
Viewing Call Content
Call Comments
Filling in Forms
Detaching the Player
More Actions Options

Filling in Forms

You can fill in a form about the call that is opened in the Media Player. For example, you could fill in a form rating the agent's handling of the call, if a form of that type is in use in your system.

Only one form can be filled out by each user for each call. If you have already filled out a form, you can edit it if you wish. If you want to fill out a different form, you must first delete the first form.

Note: For information about creating forms, see Forms.

Filling in a New Form

If you have not yet filled in a form for the call, you can select the form to fill in and then fill it in.

To fill in a new form:

1. Click **Form**. The **Select Form** dialog box opens and displays a list of available forms.
2. Click the form you want to fill out. The form opens in a new window.
3. Fill in the form and then click **Submit Changes**. The values you chose are saved in the system.
4. To close the form, click **Close**.

Editing a Form

If you have already filled in a form for the call, it automatically opens when you click the **Form** button. You can edit or delete the form at this stage. If you want to fill out a different form, you must first delete this form.

To edit a form:

1. Click **Form**. The form opens in a new window.
2. Modify the form as necessary, and then click **Submit Changes**. The changes are saved.
3. To close the form, click **Close**.

Deleting a Form

You can delete a form you have already filled out as necessary.

To delete a form:

1. Click **Form**. The form opens in a new window.

2. Click **Delete**. You are prompted to confirm that you want to delete the form.
3. Click **Yes**. The form is deleted and the window closes.

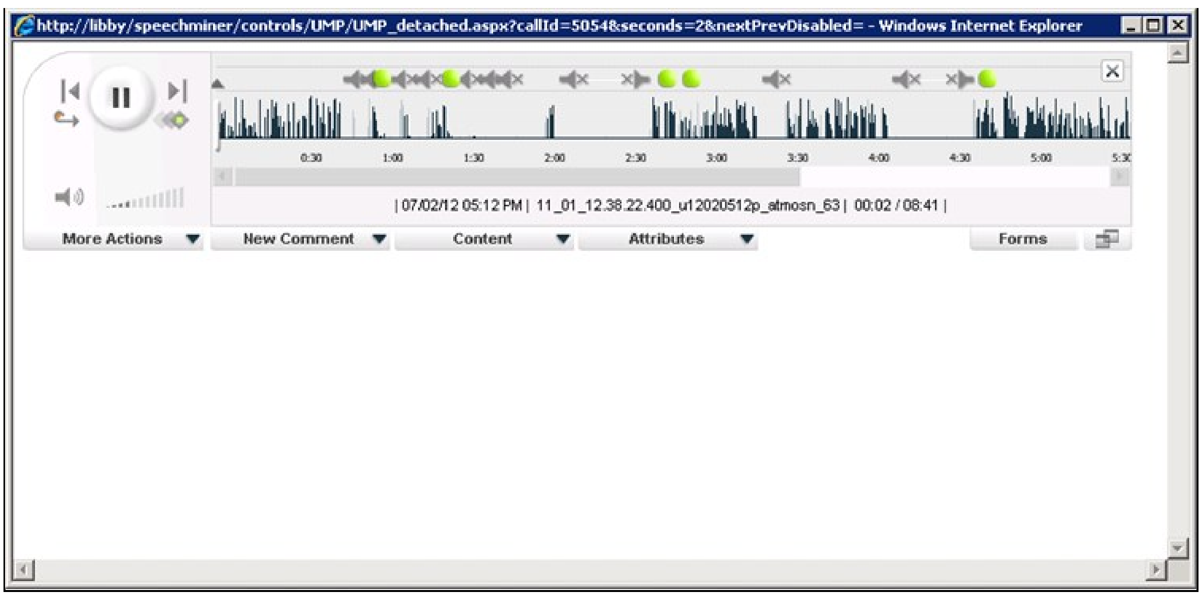
See also

Event Icons
Playing Back a Call
Viewing Call Content
Call Comments
Call Attributes
Detaching the Player
More Actions Options

Home > Using the Media Player > Detaching the Player

Detaching the Player

If you wish, you can detach the Media Player - remove it from the SpeechMiner interface and open it in a separate window. You can then move the window to any location on your screen that you find convenient.



Detached Media Player

To detach the Media Player:

- In the lower-left corner of the Media Player, click .

To reattach the Media Player:

- Click or close the Media Player window.

See also

Event Icons
Playing Back a Call
Viewing Call Content
Call Comments

Call Attributes
Filling in Forms
More Actions Options

Home > Using the Media Player > More Actions Options

More Actions Options

The Media Player provides the following additional options for the call that is currently open in it:

- **Export:** Save the call in a file.
- **Forward:** Send other users a link to the call.
- **Add To:** Add the call to a Call List.
- **Delete From List:** Remove the call from the current Call List. (This option is only available if you opened the Media Player from a Call List.)
- **Permalink:** Create a Permalink to the call.
- **Similar Calls:** Find calls that are similar to the call.
- **Reprocess Call:** Run event analysis again on the call.

These options can be accessed from the **More Actions** menu in the lower-left corner of the Player, as explained below.

Exporting the Call

If you want to save the call or send it to someone else, you can export it. Exporting the call creates a ZIP file that contains the following:

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

To export the call:

1. Under **More Actions**, select **Export**. A dialog box opens and asks if you want to include the audio files with the export.
2. Select **Yes** if you want to export the audio along with the CSV file, or **No** if you only want the CSV file.
3. A dialog box opens and asks if you want to open or save the ZIP file.
4. 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.
5. If you selected **Save**, navigate to the folder in which you want to save the file, and then click **Save**. The file is saved in the selected location.

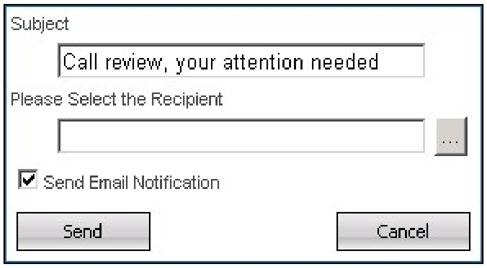
Forwarding a Link to the Call

You can send a link to the call to other users in the system. The link is sent in a *Call* message that appears in the recipient's My Messages widget in the Views page. When the recipient clicks the message, a SpeechMiner Media Player opens above the widget and plays the call.

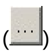
If you wish, you can also send the recipient an e-mail notification with a link to the call. When the recipient clicks the link, the Media Player opens in a new browser tab or window and plays the call. If the recipient is not already logged into SpeechMiner, they are prompted to do so before the Media Player opens.

To send a call link to another user:

1. Under **More Actions**, select **Forward**. A dialog box opens.



Forward dialog box

2. Under **Subject**, modify the subject text if you wish.
3. Under **Please Select the Recipient**, select the user you want to send the link to, in one of the following ways:
   - In the text field, type part of the name or username of the recipient. As you type, names and user names containing those letters are displayed in a dropdown list. Select the recipient from the list.
   - Click the ... button () beside the text field. In the dialog box, select the user from the list of users in the relevant workgroup.
4. If you want to send a notification to the user's e-mail address as well as to their My Messages box, select **Send Email Notification**.
5. Click **Send**. A *Call* message is sent to the recipient's My Messages box. If you chose to send the user an e-mail notification, it is also sent.

Adding the Call to a Call List

A *Call List* is a list of calls that is saved for later use. SpeechMiner supports two types of Call Lists: global Call Lists and coaching-session Call Lists. You can see existing global Call Lists in the Calls page in the Call Lists tab, under Call Lists. Coaching-session Call Lists can only be viewed within the coaching session. For additional information about coaching sessions, see Coaching.

You can add calls to an existing Call List or a new list. You can select an existing Call List from a list of global Call Lists or select a coaching-session Call List from those that are attached to the Coaching session. If you wish, you can add a new Coaching session directly from the Interaction Grid, and then add calls to a Call List that is attached to that session.

To add the call to a Call List:

- Under **More Actions**, select **Add To** and then select one of the following:

To	Select	Result
Create a new Coaching session and a new coaching Call List within that session, and add the calls to the new Call List	**Coaching** > **New**	A **New coaching session** dialog box opens. Specify the name and other settings of the Coaching session, and then click **Save**. The dialog box closes, and a new Call-List dialog box opens. In the text field, type a name for the Call List, and then click **OK**. The Coaching session and Call List are created, and the calls are added to the Call List.
Create a new coaching Call List within an existing Coaching session, and add the calls to the new Call List	**Coaching** > [existing Coaching session] > **New**	A Call-List dialog box opens. In the text field, type a name for the Call List, and then click **OK**. The new coaching Call List is created and attached to the Coaching session, and the calls are added to the Call List.
Add the calls to an existing coaching Call List that is attached to an existing Coaching session	**Coaching** > [existing Coaching session] > [existing Call List]	The calls are added to the selected coaching Call List.
Add the calls to a new Call List	**Call List** > **New**	A Call-List dialog box opens. In the text field, type a name for the Call List, and then click **OK**. The new Call List is created and the calls are added to it.

Add the calls to an existing Call List	**Call List**> [existing Call List]	The calls are added to the selected Call List.

Deleting a Call from a Call List

If you opened the current call from a Call List, you can remove it from the Call List using the Media Player.

To delete the call from a Call List:

- Under **More Actions**, select **Delete From List**. The call is removed from the Call List.

Generating a Permalink to the Call

You can generate and save a Permalink to the call, which can later be used to open the call in the Media Player. To play the call, you need only open the link in a browser.

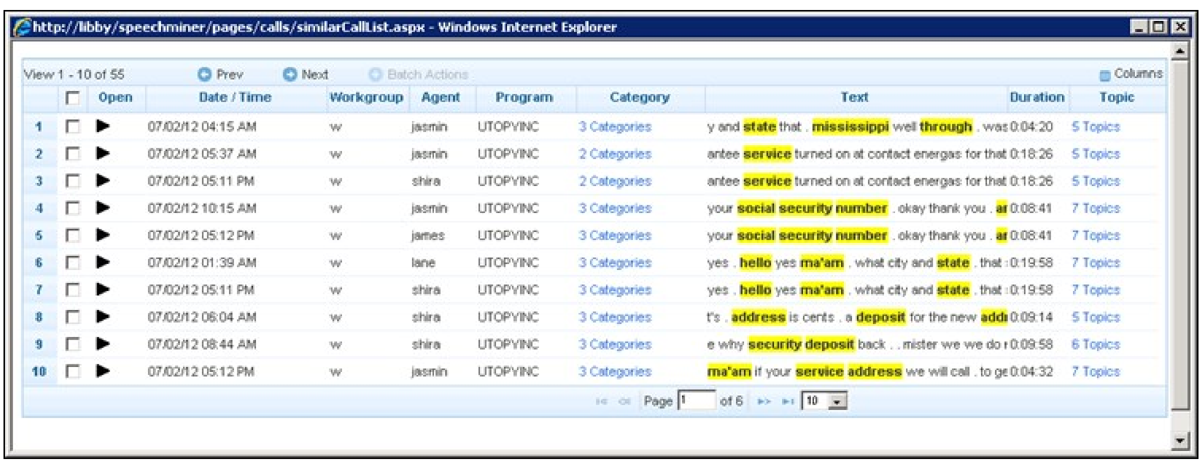
Note: For additional information, see Permalinks.

To create a Permalink to the current call:

- Under **More Actions**, select **Permalink**. A **Permalink** dialog box opens and displays the Permalink.

Finding Similar Calls

You can search for calls that are similar to the current call in terms of their subject matter and the phrases they contain. When you do, a new window opens and displays a list of the calls that were found, arranged in order of how similar they are to the original call. The terms in the calls that the system identified as being similar to terms in the current call are highlighted in the list. Calls in the list can be played in the Media Player in the window. (For additional information about playing calls in the Media Player, see Playing Back a Call.) The maximum number of calls that can be included in the list is defined in your site's system variables.



List of similar calls displayed in a new window

To find similar calls:

- Under **More Actions**, select **Similar Calls**. A new window opens and displays the list of calls.

Reprocessing the Call

You can run event analysis again on the call. The system may produce different results when you do this, if the definitions in SMART have been modified or call auditing has fine-tuned the speech analysis system since the call was originally processed.

Note: For information about reprocessing batches of calls, see Reprocessing Calls and Managing Audits.

To reprocess the call:

- Under **More Actions**, select **Reprocess Call**.

See also

Event Icons
Playing Back a Call
Viewing Call Content
Call Comments
Call Attributes
Filling in Forms
Detaching the Player

Home > Explore

Explore

The **Explore** page is designed to help managers monitor calls, identify and explore issues that arose in calls, and spot unexpected trends and problems. The page contains configurable *exploration* reports that show the distribution of terms in calls. The data is based on automated analyses of the transcripts of calls, without any input from users about what terms should be sought. For this reason, it can help you identify issues and trends that were not predicted or planned.

In the exploration analyses, a *term* is a short series of words (usually, two to six words) that were detected together in calls. SpeechMiner attempts to identify the most significant words and phrases in the terms it detects, and groups the terms into *clusters* based on these words and phrases. Thus, for example, if the terms "I lost my credit card," "my credit card was stolen," and "I can't find my credit card" were all found in calls, SpeechMiner would identify "credit card" as the significant phrase in each of the terms. It would group the terms together into a *term cluster* called "credit card."

See also

Overview of the Explore Page
Setting the Filters
Identifying Term Trends
Finding Common Terms
Using a Trend Graph
Finding Related Words

Welcome
Getting Started
Workflows
Views
Action Items
Search
Using the Media Player
Quality Monitoring
Coaching
Reports
Tools
Permalinks
Appendix A: Standard Reports

Home > Explore > Overview of the Explore Page

Overview of the Explore Page

The **Explore** page is divided into three areas: a filter area and two analysis areas. The filter area is used to specify which data to include in the reports, by selecting the time period and language. The analyses in the other two areas show information about the term clusters that were discovered by SpeechMiner in the data from the time period and language selected in the filter area:

- **Term Trends:** The data in the upper-right of the page highlights the changes in the distribution of terms in calls. It lists the clusters for which there was the greatest difference between their prevalence in the selected time period and in the previous time period.
- **Common Terms:** The bottom of the page identifies the term clusters that were most common in the selected time period.

Additional analysis of term clusters and their prevalence in the selected time period can be viewed in a Related Words report. This report graphically shows which terms are commonly found within the same or similar term clusters as a specified term, and how frequently the terms are found together in a cluster. The report enables you to explore terms and term clusters actively, by selecting and zeroing in on the terms that are of interest to you.

You can to drill down from any term cluster in the page or in the Related Words report to see additional details, such as a list of calls in which it is found.

Explore page

See also

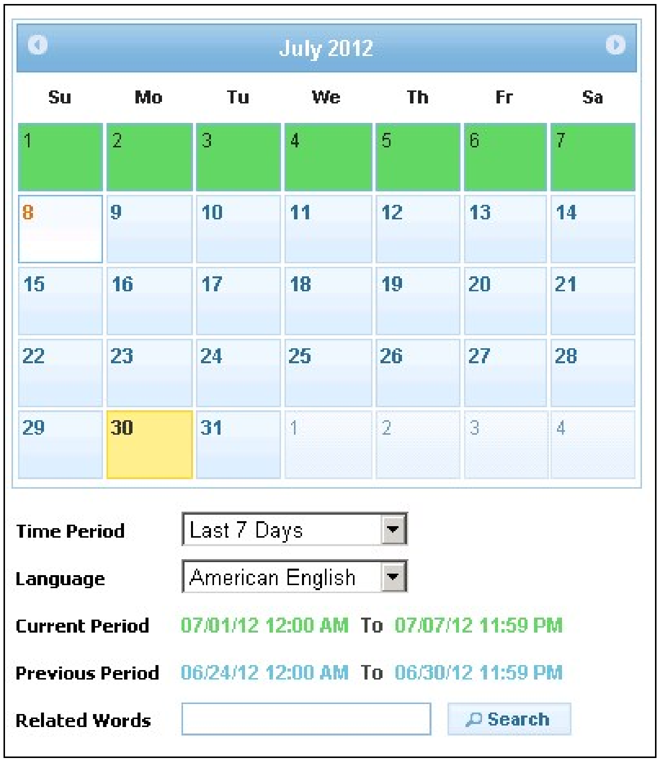
Setting the Filters
Identifying Term Trends
Finding Common Terms
Using a Trend Graph
Finding Related Words

Home > Explore > Setting the Filters

Setting the Filters

The data in all of the **Explore** page covers a single time period and language - the time period and language selected in the filter area in the upper-left part of the page. You can choose any day as the base day for the filter period, and then choose the time period relative to that day. For example, if you choose Friday, May 25th as your base day, and then choose the time period *Last week*, the common-terms data at the bottom of the page will be generated for the week preceding May 25th (May 13th-19th), and the term trends data on the right side of the page will compare those seven days with the preceding seven days (May 6th-12th).

Note: You can run a Related Words report from the filter area or from any of the term clusters on the page.



Filter area

To set the filters for the exploration analysis:

1. In the upper-left part of the **Explore** page, in the calendar, select the base date for the filter period.
2. Below the calendar, under **Time Period**, select one of the following:
   - **Last 7 Days:** Includes data from the last seven full calendar days prior to the base date - i.e., not including the base date
   - **Last Week:** Includes data from the beginning through the end of the last full week preceding the base date.
   - **Today:** Includes data from the base date
   - **Week to Date:** Includes data from Sunday of the week of the base date through the day preceding the base date
   - **Yesterday:** Includes data from the day preceding the base date
3. Under **Languages:** Select the language of the calls you want to include in the analysis.

Note: The term-cluster data on the page is updated automatically whenever you change any of the filter values.

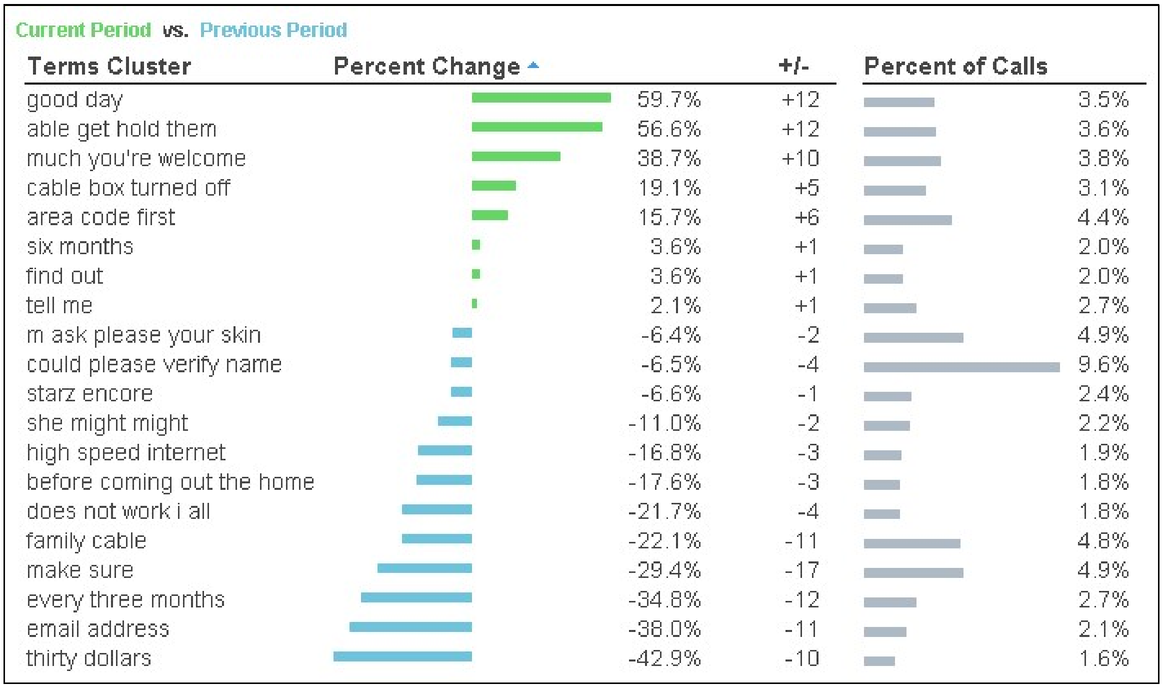
See also

Overview of the Explore Page
Identifying Term Trends
Finding Common Terms
Using a Trend Graph
Finding Related Words

Home > Explore > Identifying Term Trends

Identifying Term Trends

The right side of the **Explore** page contains a histogram that shows the term clusters whose prevalence in calls differed the most between the current time period and the baseline period. The report indicates how the percentage of calls containing each cluster changed from the baseline period to the current period. The current period is selected in the filter area, and the baseline is the preceding period of the same type. For example, if the currently selected time period is a week, the baseline would be the week preceding it.



Histogram displaying term-trend information

The following columns appear in the histogram:

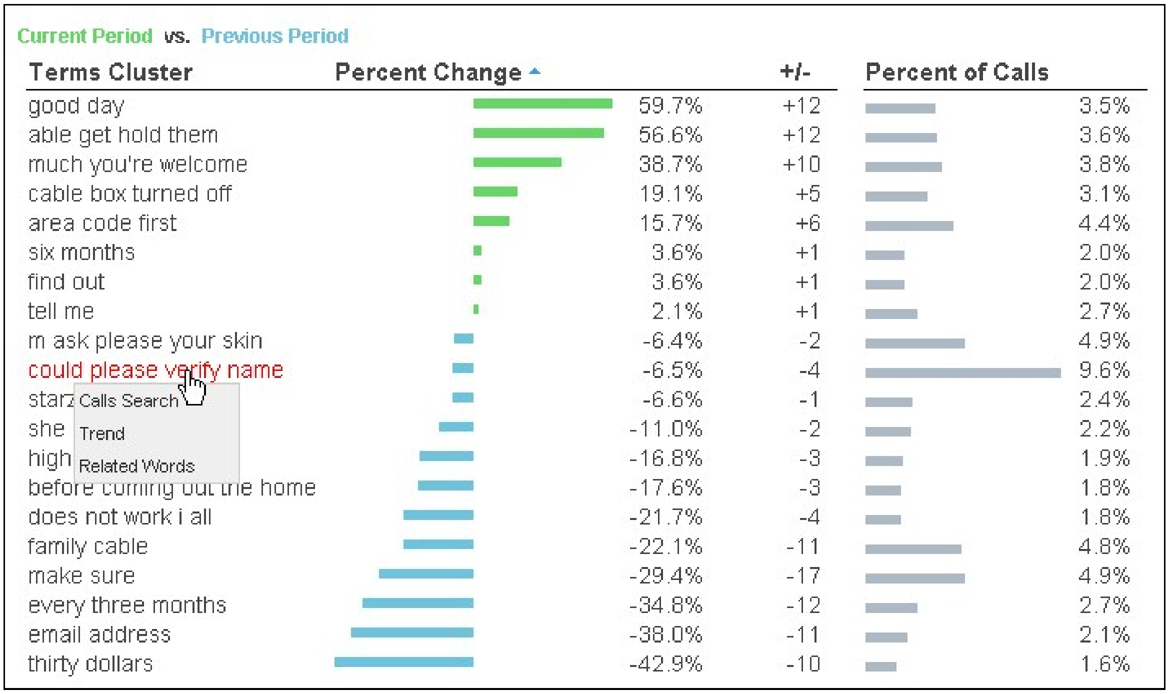
Column	Description
Terms Cluster	Term cluster
Percent Change	How much more or less common the cluster was in the current period as compared with the baseline period. Both the bar and the number represent the same value. If the cluster was more common in the current time period, the bar representing the percent change is green and the number value is positive. If the cluster was more common in the baseline period, the bar is blue and the number is negative. For example, 66.1% means the cluster appeared in 66.1% more of the calls in the current than it did in the calls of the baseline period, and -24.1% means the cluster appeared in 24.1% fewer of the calls in the current period than it did in the baseline period.
+/-	The difference between the number of calls in which the cluster was found in the current period and in the baseline period. If the number is positive, the cluster appeared more in the current period than it did in the baseline period. If the number is negative, the cluster appeared in more calls in the baseline period than it did in the current period. For example, -5 means that the cluster was found in five more calls in the baseline period than it was in the current period.
Percent of Calls	The percentage of calls in the current time period in which the term cluster was found. Both the bar and the number represent the same value.

Viewing Additional Information about a Term Cluster

You can see additional information about a term cluster that appears in the histogram.

To see additional information about a term cluster in the histogram:

1. Place your mouse on a cluster. The cluster appears in red, and a pop-up menu opens for it.



Pop-up menu

2. Click one of the following, as required:
   - **Calls Search:** Opens an Interaction Grid that lists calls containing the term cluster. The Interaction Grid opens in a separate window.
   - **Trend:** Opens a Trend Graph for the term cluster in place of the histogram.
   - **Related Words:** Opens a Related Words report for the term cluster in a separate window.

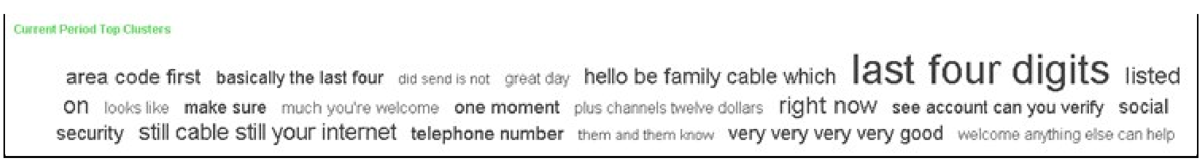
See also

Overview of the Explore Page
Setting the Filters
Finding Common Terms
Using a Trend Graph
Finding Related Words

Home > Explore > Finding Common Terms

Finding Common Terms

The bottom part of the **Explore** page contains a graphic depiction of the distribution of term clusters in the calls that are included in the analysis (as specified in the filter area). The font used to print each cluster indicates how common the term was in the calls; the more frequently a term cluster was found, the larger it appears. In addition, every cluster has a pop-up menu that provides additional options.



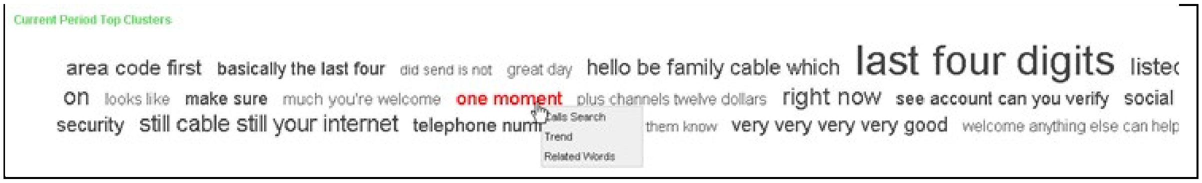
Distribution of common term clusters

Viewing Additional Information about a Term Cluster

You can see how many times each term cluster appears in the data set, and access additional information about the cluster.

To see additional information about a term cluster:

1. Place your mouse on a cluster. The cluster appears in red, and a pop-up menu opens for it.



Pop-up menu

2. Click one of the following, as required:
   - **Calls Search:** Opens an Interaction Grid that lists calls containing the term cluster. The Interaction Grid opens in a separate window.
   - **Trend:** Opens a Trend Graph for the term cluster in place of the cluster-distribution information.
   - **Related Words:** Opens a Related Words report for the term cluster in a separate window.

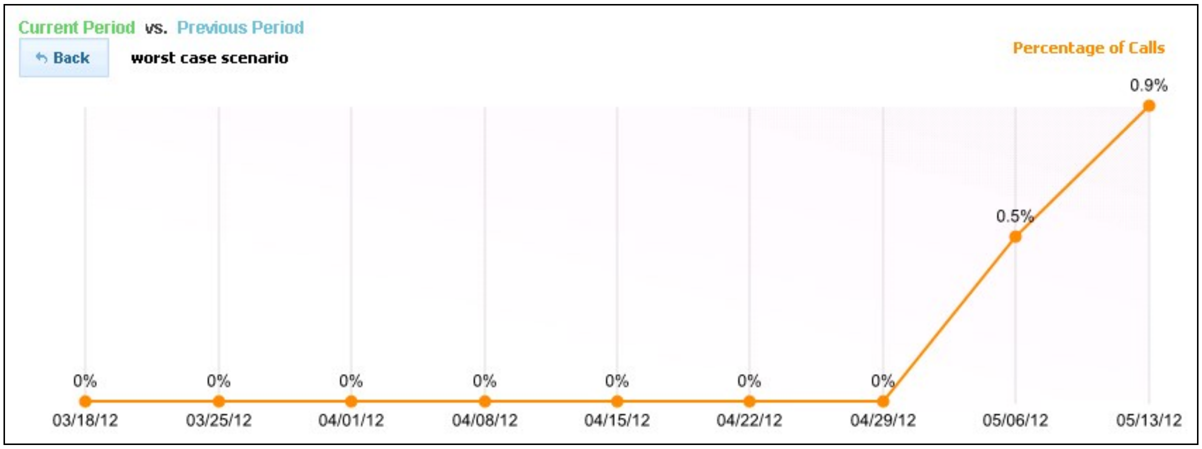
See also

Overview of the Explore Page
Setting the Filters
Identifying Term Trends
Using a Trend Graph
Finding Related Words

Home > Explore > Using a Trend Graph

Using a Trend Graph

The Trend Graph is a line graph showing changes over time in how often a term cluster was found. The graph shows the percentage of calls that contained the cluster in the current time period and in the preceding weeks. The term cluster appears in black above the graph.



Trend Graph

The Trend Graph can be opened for any term cluster that currently appears in the **Explore** page.

To open the Trend Graph for a term cluster:

- In the **Explore** page, in the pop-up menu of a term cluster (see Identifying Term Trends and Finding Common Terms), select **Trend**.

To close the Trend Graph and return to the histogram from which it was opened:

- Click **Back**.

See also

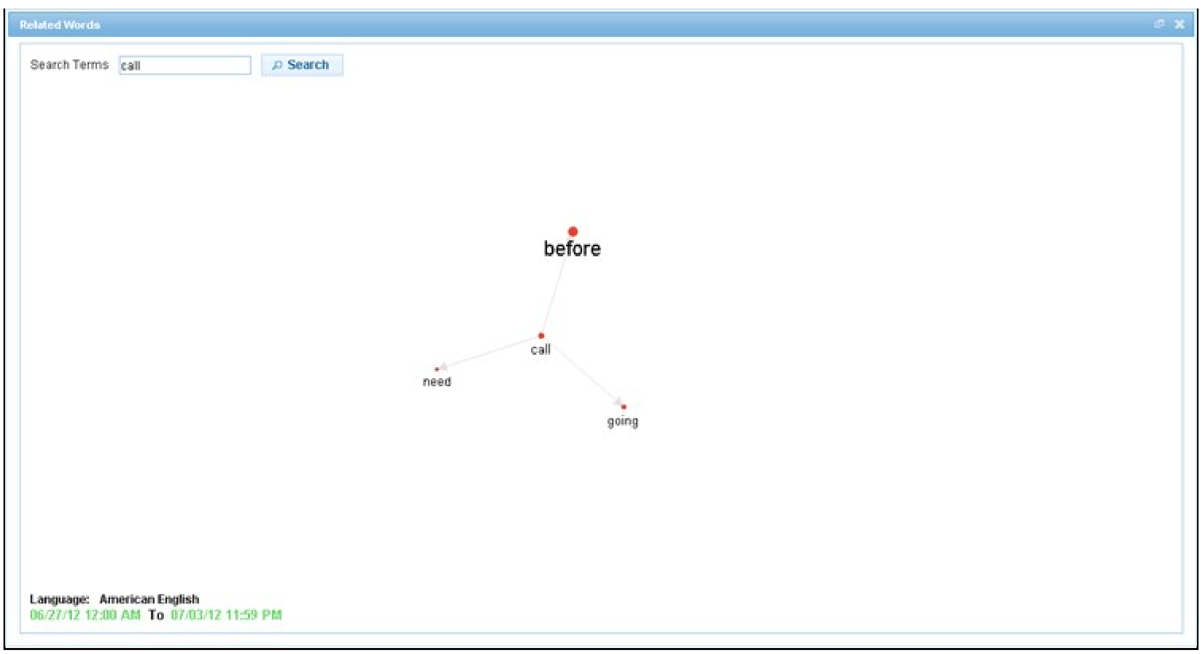
Overview of the Explore Page
Setting the Filters
Identifying Term Trends
Finding Common Terms
Finding Related Words

Home > Explore > Finding Related Words

Finding Related Words

The **Related Words** report graphically illustrates which other terms are commonly found with a specified term, and how frequently they are found together, in the current sample of calls (as specified in the filters).

Each specified term is presented as the center of a wheel whose related terms are arrayed around it along the rim. The font used to print each related term indicates how frequently the related term was found near the central term; the more frequently a term cluster was found, the larger it appears in the diagram. In addition, every term in the diagram has a pop-up menu that provides additional options.



Related Words report

Opening a Related Words Report

The Related Words report can be opened in one of three ways:

- Entering a search term manually in the **Explore** page

- Selecting **Related Words** in the pop-up menu of a term cluster in the **Explore** page (see Identifying Term Trends and Finding Common Terms)
- Selecting **Related Words** in the pop-up menu of a word in the Content panel of the Media Player

To enter a term manually in the Explore page:

1. In the filter area, in the **Related Words** field, enter one or more terms.
2. Click **Search**. The Related Words search is performed, and a diagram of the results appears in a new window.

The results window is a *modal* window - a child window of the browser window. To continue working with the parent window, you must close the report. To keep the results open, but also interact with the SpeechMiner interface in other ways, you can convert the modal window into a standalone window.

To close the report-results window:

- In the upper-right corner of the window, click .

To convert the window into a standalone window:

- In the upper-right corner of the window, click .

Moving the Diagram Around

You can move the diagram around the Related Words window as necessary. This can help you see hidden parts of the diagram, and is especially helpful if you have expanded the diagram.

To move the diagram within the Related Words window:

- Hold down either your left or right mouse button and drag the mouse cursor over the diagram.

Enlarging the Diagram

You can make the diagram larger or smaller.

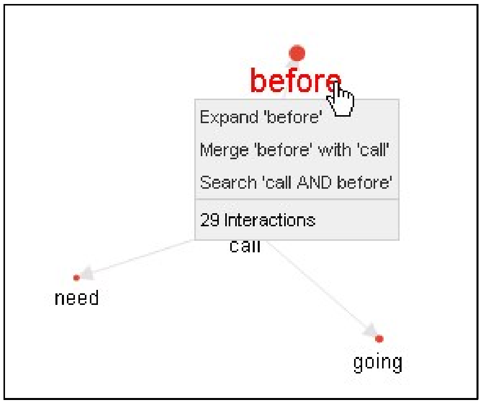
To make the diagram larger or smaller:

- Roll your mouse wheel up or down over the diagram.

Additional Options

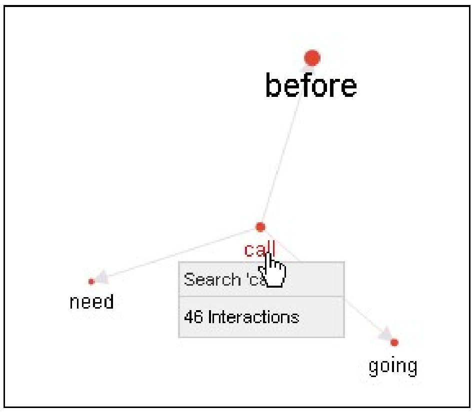
Every term in the wheel has a pop-up menu providing additional options. The pop-up menus of the related words on the rim of the wheel contain the following items:

- **Expand:** Creates an additional wheel in the Related Words window with the rim term as its center (see Expanding the Diagram below)
- **Merge:** Creates a new wheel in the Related Words window in which the central term of the existing wheel is combined with the rim term (see Merging Terms below)
- **Search:** Performs a term search for calls in which the central term and the rim term appear (see Searching for Terms below)
- **Number of Calls:** The number of calls in the sample that contained both the central term and the rim term



Related Words pop-up menu

The pop-up menu of the central term only has one option, **Search**, which performs a search for the central term, as well as information about the number of calls in the sample in which the central term was found.



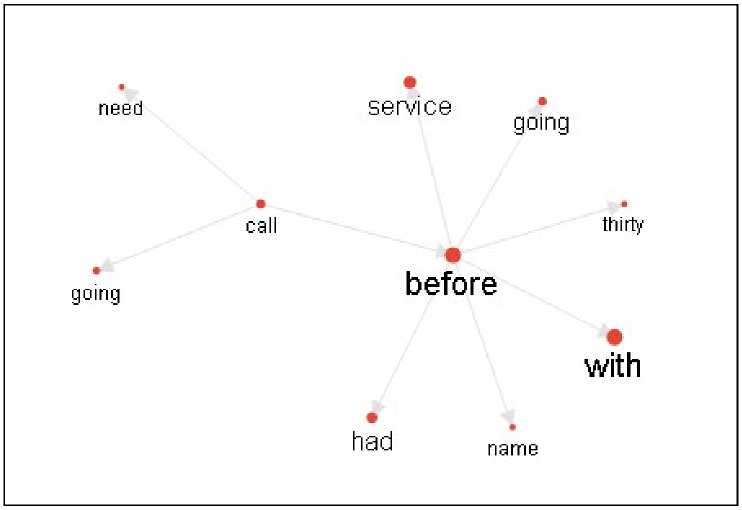
Pop-up menu for central word

To open the pop-up menu for a term:

- Place your mouse cursor on the term.

Expanding the Diagram

Additional wheels can be added to the diagram to show the terms that are related to any of the terms on the rim. This can provide additional information about important terms in the calls and their relationships. For example, the figure below shows an expanded diagram. The original diagram mapped the related words of the term "call." The diagram was expanded to also show the related words of the term "before."



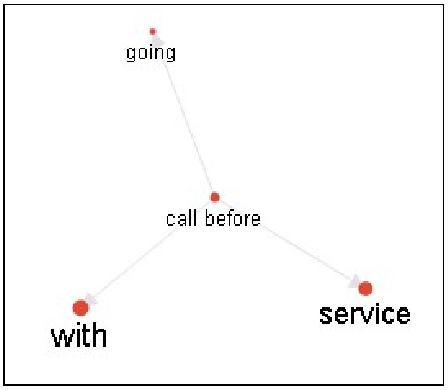
Expanded diagram

To expand the diagram for a rim term:

- In the pop-up menu of the rim term, select **Expand [*term*]**.

Merging Terms

The existing diagram can be replaced by a new diagram illustrating the related terms for a central term consisting of the original central term and one of the rim terms. For example, in the figure below, the original central term "call" was replaced by a new central term composed of the original term plus the rim term "before."



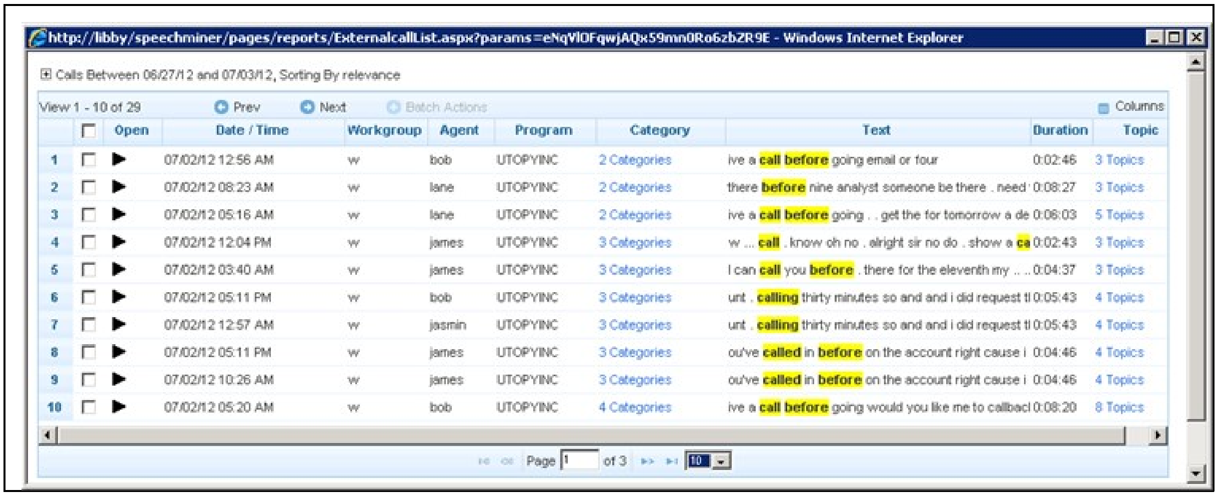
Merged terms in new diagram

To merge the central term with one of the rim terms:

- In the pop-up menu of the rim term, select **Merge '[*rim term*]' with '[*central term*]'**.

Searching for Terms

You can perform a call search for any term in the diagram. If you perform the search for the central term, SpeechMiner finds calls in the sample in which all of the words in the term are found. If you perform the search for a rim term, SpeechMiner finds calls in the sample in which all of the words in the both the central term and the rim term are found. The call search opens in a separate window.



Call Search for rim term "before" with central term "call"

See also

Overview of the Explore Page
Setting the Filters
Identifying Term Trends
Finding Common Terms
Using a Trend Graph

Quality Monitoring

The Quality Monitoring system is designed for use by supervisors, who can use it to assign tasks to their quality managers, track their progress in performing these tasks, and monitor trends. It has two modules:

- **Queues:** The **Queues** screen is used to create lists of calls for quality analysts to review. The user designs the lists by selecting types and quantities of calls; the system automatically generates lists of calls that meet the criteria.
- **Forms Manager:** The **Forms Manager** screen is used to create feedback forms for quality analysts and other users to fill in after they have listened to calls.

See also

Queues
Forms Manager

Welcome
Getting Started
Workflows
Views
Action Items
Search
Using the Media Player
Explore
Coaching
Reports
Tools
Permalinks
Appendix A: Standard Reports

Queues

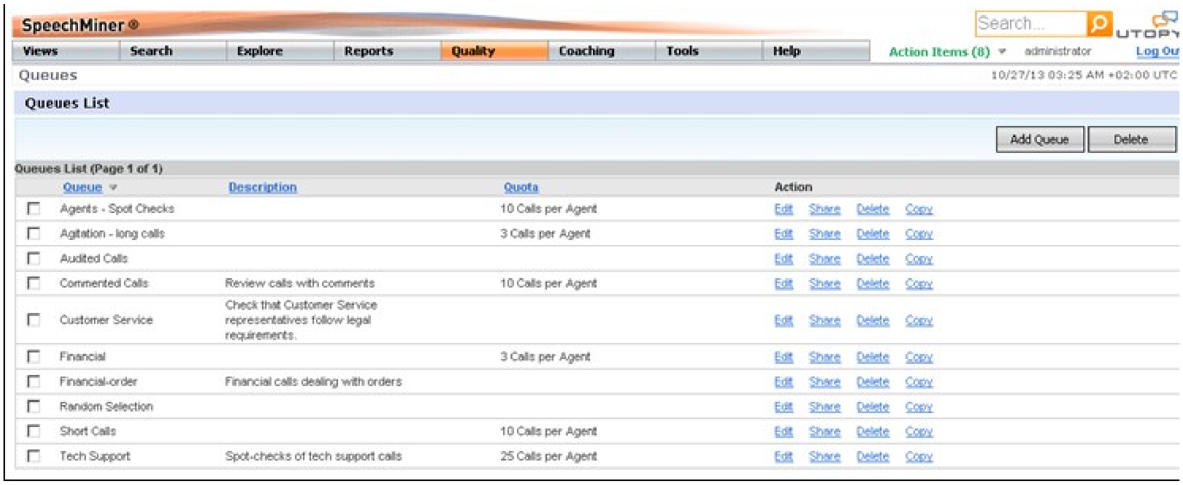
The **Queues** page is used to create and manage sets of search criteria for use by quality managers. The system automatically generates lists of calls for each set of criteria, so that the quality analyst can listen to them. The generated lists are randomized. That is, the system does not just take the first calls in the database that match the search criteria; rather, it randomly selects calls from all those calls that meet the criteria. For example, if the quality analyst needs to listen to a random selection of calls that belong to a particular program, and a random selection of calls that were handled by each agent, you would create two queues, one for the calls from the program and another for calls per agent.

The **Queues** page is designed to be used in conjunction with the My Queues and the Recently QAed widgets on the Views page. The queues are created and managed in the **Queues** page; the quality analyst works with the generated lists in the My Queues widget, and the supervisor can keep tabs on what calls have been dealt with in the Recently QAed widget.

A new queue is automatically assigned to the person who created it, and appears in that person's My Queues list. You can choose to share a queue you create with one or more other users. When you do this, the queue appears in the **Queues** page in read-only form, and in their My Queues widget. Supervisors can assign queues to quality managers by sharing the queues with them. Thus, for example, if you want Joe to handle Queue 1 and Ellen to handle Queue 2, you would share Queue 1 with Joe and Queue 2 with Ellen.

To open the Queues page:

- In the Main Menu, in the **Quality** dropdown menu, select **Queues**.



Queues page

The **Queues** page lists all of the queues that you created and that were shared with you. You can only edit, share, or delete the queues that you created. The checkbox and Action links of queues that someone else created and shared with you are not available.

Columns in the Queues List

The Queues List contains the following columns:

Column	**Description**
Queue	The name of the queue
Description	The description of the queue
Quota	The number of calls that should be reviewed, per agent in each time period specified by the queue
Reviewed\Total	The number of calls that have already been reviewed (in the current time period, if one is defined), and, if a time period is defined, followed by the total number of calls that were included in the queue for the current time period.
Action	Click one of the links to select an action (see Managing Queues).

Sorting the Columns

You can sort the rows of the Queues List by any of the columns (except the **Action** column).

To sort the list by a column:

- Click the column heading. (To reverse the sort order, click the column heading again.)

See also

Creating a New Queue
Managing Queues

Forms Manager

Home > Quality Monitoring > Queues > Creating a New Queue

Creating a New Queue

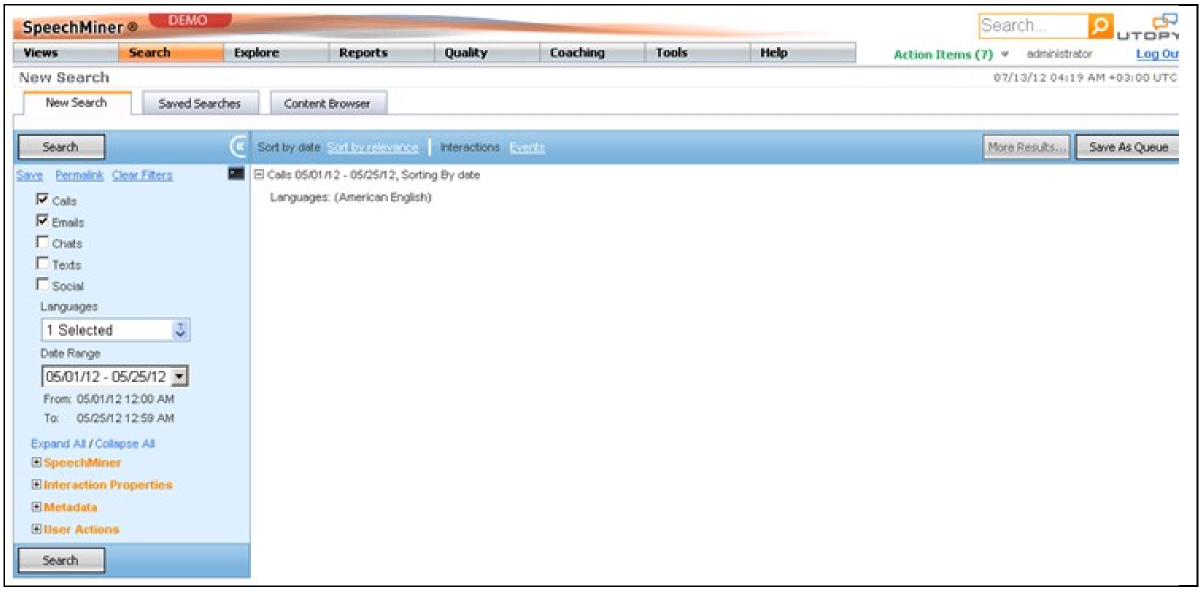
In addition to a name and optional description, each queue consists of two parts:

- Search criteria
- Quota

The search criteria are defined using a standard Search form.

To create a new queue:

1. In the **Queues** screen, click **Add Queue**. The **New Search** screen opens.

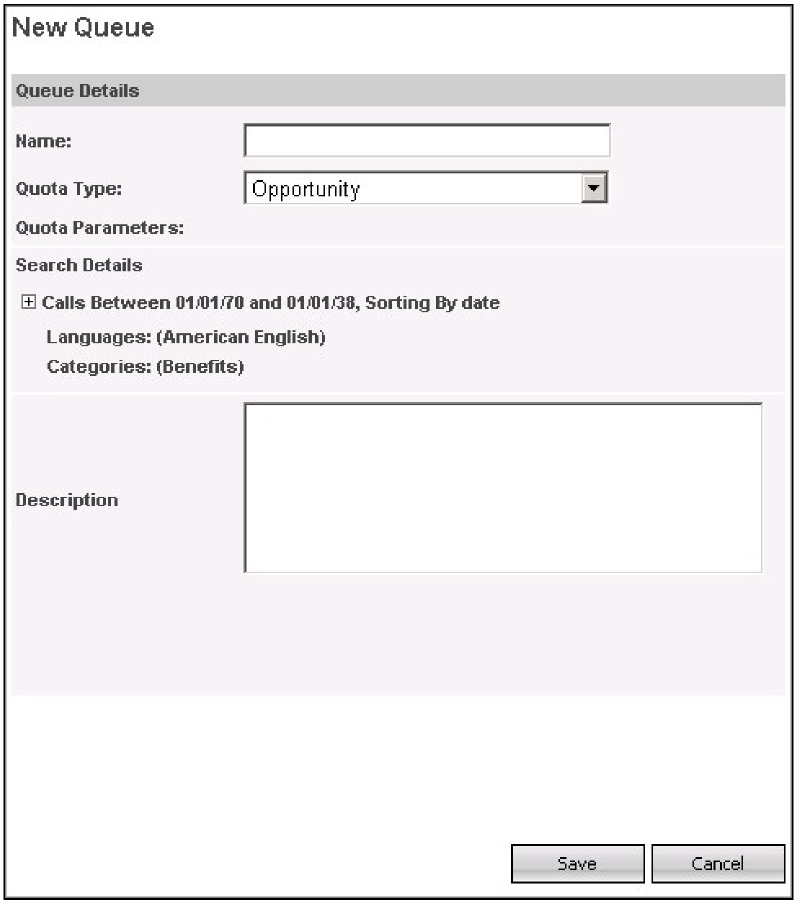


New Search screen

2. In the left column, select the search criteria for the queue. For additional information, see Defining Search Criteria.

   Note: If you specify a time period in the quota definition (see below), the date range defined in the call search criteria is overridden.

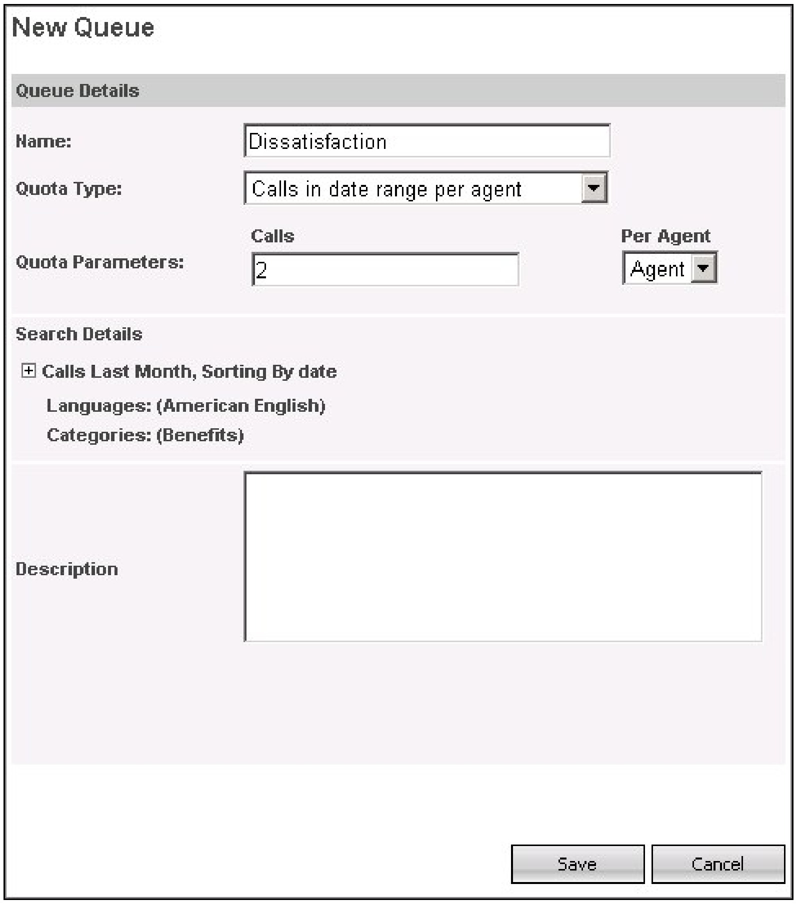
3. At the upper-right corner of the screen, click **Save As Queue**. The **New Queue** dialog box opens.



New Queue dialog box

4. Under **Name**, enter a name for the queue.
5. Under **Quota Type**, select the type of quota, as follows:

Quota Type	Description
Opportunity	No quota: When the quality analyst chooses to review a call that matches the search criteria, the system retrieves an appropriate call, but there is no specific requirement for how many calls to review.
Calls in date range per agent	For each time period, the system retrieves the required number of calls for each agent. The fields required to define the settings are added to the dialog box.



Fields added to dialog box

6. If you selected **Calls in date range per agent**, under Calls, enter the number of calls from the specified time period that should be reviewed. (This is the number *per agent*, not the total number.):

   Note: The **Per Agent** field is not currently in use.

7. Under **Description**, enter a description for the queue (optional).
8. Click **Save**. The queue is added to your list of queues in the **Queues** screen and in your My Queues widget.

   Note: If you want to assign the queue to other users, you must share it with them (see Sharing a Queue).

See also

Managing Queues

Managing Queues

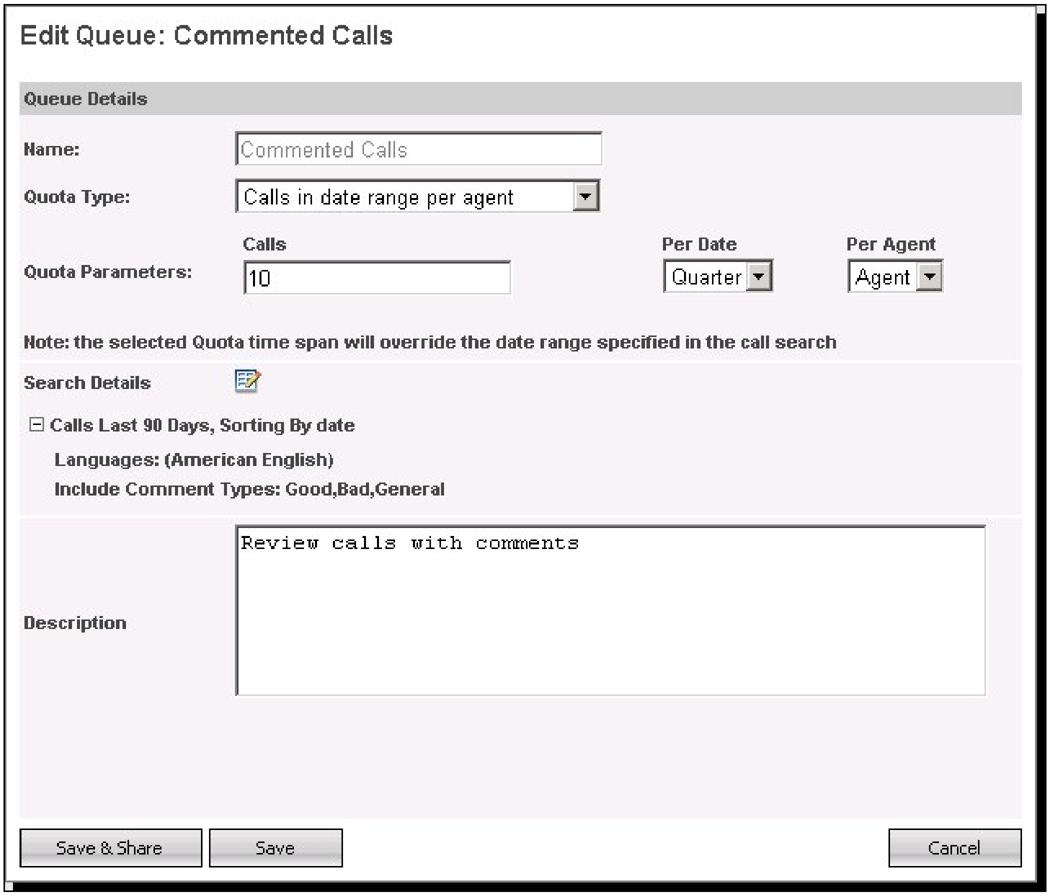
If you created a queue, you can edit it, share it with other users, delete it, or make a copy of it.

Editing a Queue

You can edit the quota settings, search criteria, and sharing settings of a queue.

To edit the quota settings of a queue:

1. In the **Queues** screen, in the Queues List, under **Action**, click **Edit**. The **Edit Queue** dialog box opens, with the name of the queue in its title and the quota and search settings displayed below:



Edit Queue dialog box

2. Modify the quota settings and description as required.
3. Click **Save** to save the changes or **Save & Share** to save the changes and open the **Sharing Queue** dialog box (see below).

   Note: If you modified the quota settings and/or the description, and you also want to change the search criteria, click **Save** to save the quota and description settings, and then open the **Edit Queue** dialog box again to modify the search criteria, as explained below.

4. If you selected **Save & Share**, modify the sharing settings as required, and then click **Save**. The settings are saved.

To modify the search criteria:

1. In the **Queues** screen, in the Queues List, under **Action**, click **Edit**. The **Edit Queue** dialog box opens.
2. In the middle of the dialog box, click . The **New Search** screen opens.
3. Modify the search criteria as necessary.
4. At the upper left in the **New Search** screen, click **Save**. The changes are saved in the queue.

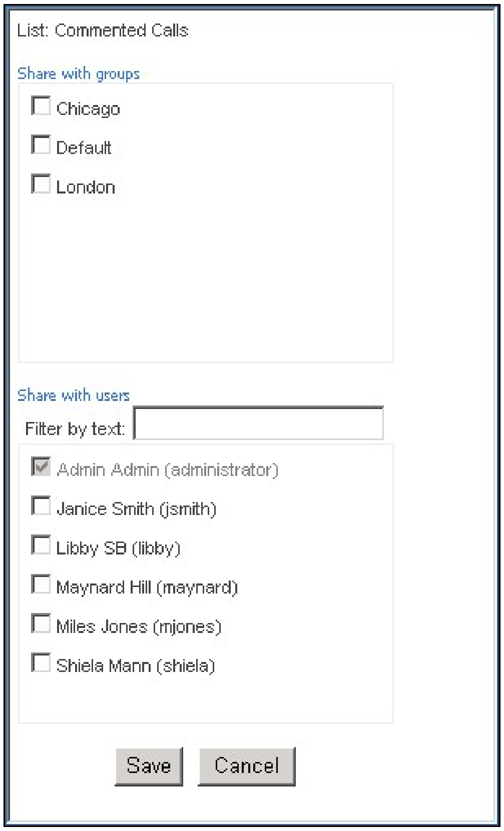
Sharing a Queue

If you want to assign responsibility for a queue to other users, you must share the queue with them. When you share a queue with someone, the queue appears in their **Queues** screen in read-only form, and in their **My Queues** widget. When anyone sharing a queue reviews a call in the queue, the queue record (calls reviewed/left) is updated for all of those sharing the queue.

To share a queue:

1. In the **Queues** screen, in the Queues List, under **Action**, click **Share**. The **Share Queue** dialog box opens, with the name of

the queue at the top:



Share Queue dialog box

2. To share the queue with one or more groups, select the groups.
3. To share the queue with one or more users, select the users. To filter the list of users, in the **Filter by text** box, type a sequence of letters that appears in the name or user name of the user, only those users whose names contain the sequence appear in the list.
4. Click **Save**. The queue is shared with the selected groups and users.

Deleting Queues

When you no longer need a queue, you can delete it. If you want to delete a number of queues at one time, you can delete them all in one action.

To delete a single queue:

1. In the **Queues** screen, in the Queues List, under **Action**, click **Delete**. You are prompted to confirm that you want to delete the queue.
2. Click **Yes**. The queue is deleted.

To delete multiple queues:

1. In the **Queues** screen, in the Queues List, select the checkbox at the left of each queue you want to delete.
2. At the top of the list, click **Delete**. You are prompted to confirm that you want to delete the queues.
3. Click **Yes**. The queues are deleted.

Copying a Queue

If you want to create a new queue that is very similar to an existing queue, you can do so quickly by copying the existing queue and modifying its settings.

To create a new queue:

1. In the **Queues** screen, in the Queues List, under **Action**, click **Copy**. You are prompted to provide a name for the new queue.
2. Enter an name and click **OK**. A copy of the queue is added to the list of queues. All of its properties are identical with the queue from which it was copied, except its name.

   Note: Once you have created a queue by copying an existing one, you can modify it as you would any other existing queue, as explained above.

See also

Creating a New Queue

Home > Quality Monitoring > Forms Manager

Forms Manager

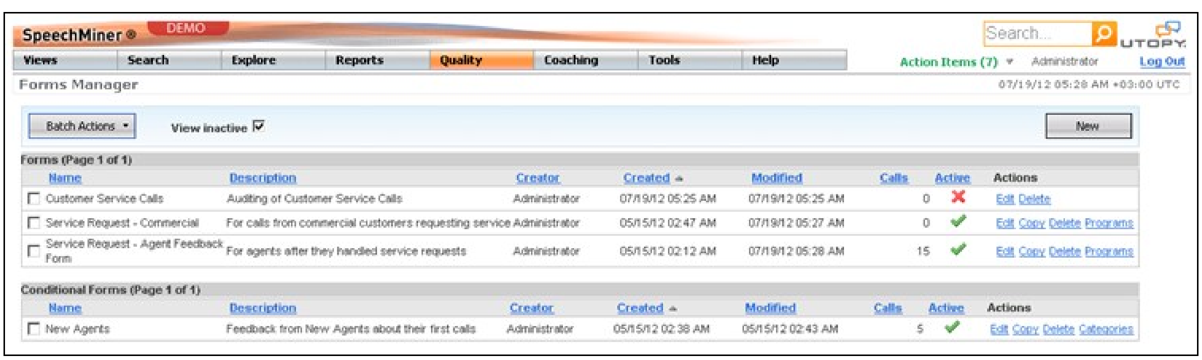
The Forms Manager is used to create forms for users to fill in after they have reviewed calls or participated in coaching sessions. After a form is filled out, SpeechMiner automatically analyzes it and extrapolates an overall score from the user's answers to the questions it contains. The system can also generate statistical analyses from collections of filled-in forms (see QM Agent Summary). For example, you can see the average score of a particular type of form.

Forms can contain multiple questions of various types, including yes-no questions, multiple-choice questions, and questions requiring free-text responses. Each question can be either required or optional, and questions can be grouped. Conditional forms, which are incorporated into other forms only when certain conditions are met, can also be defined.

The system has two Forms Managers, one for the Quality Monitoring system and one for the Coaching system. Both managers work in the same way, which is described in this section. The only exception is that the Coaching system does not support conditional forms. For information on filling in forms after listening to calls, see Filling in Forms; for information about filling in forms after taking part in coaching sessions, see Taking Part in a Session.

To open the Forms Manager:

- For the Quality-Monitoring system: In the Main Menu, in the **Quality** dropdown menu, select **Forms Manager**.
- For the Coaching system: In the Main Menu, in the **Coaching** dropdown menu, select **Forms Manager**.



Forms Manager (Quality-Monitoring system)

The Forms Manager lists all of the forms that exist in the system, divided into two groups: general forms and conditional forms.

Columns in the Forms List

The Forms List contains the following columns:

Column	Description

Name	The name of the form
Description	The description of the queue
Creator	The name of the user who created the form
Created	The date and time at which the form was created
Modified	The date and time at which the form was last modified
Calls	The number of calls for which the form has been filled in
Active	The status of the form: ✔ - Active form - available for users to fill in ✖ - Inactive form - not available for users to fill in **Note:** Inactive forms are only visible when **View Inactive** is selected at the top of the list.
Actions	Click one of the links to select an action (see Managing Forms).

Sorting the Columns

You can sort the rows of the Forms List by any of the columns (except the **Actions** column).

To sort the list by a column:

- Click the column heading. (To reverse the sort order, click the column heading again.)

See also

Creating a New Form
Managing Forms

Queues
Taking Part in a Coaching Session
Filling in Forms in the Media Player

Home > Quality Monitoring > Forms Manager > Creating a New Form

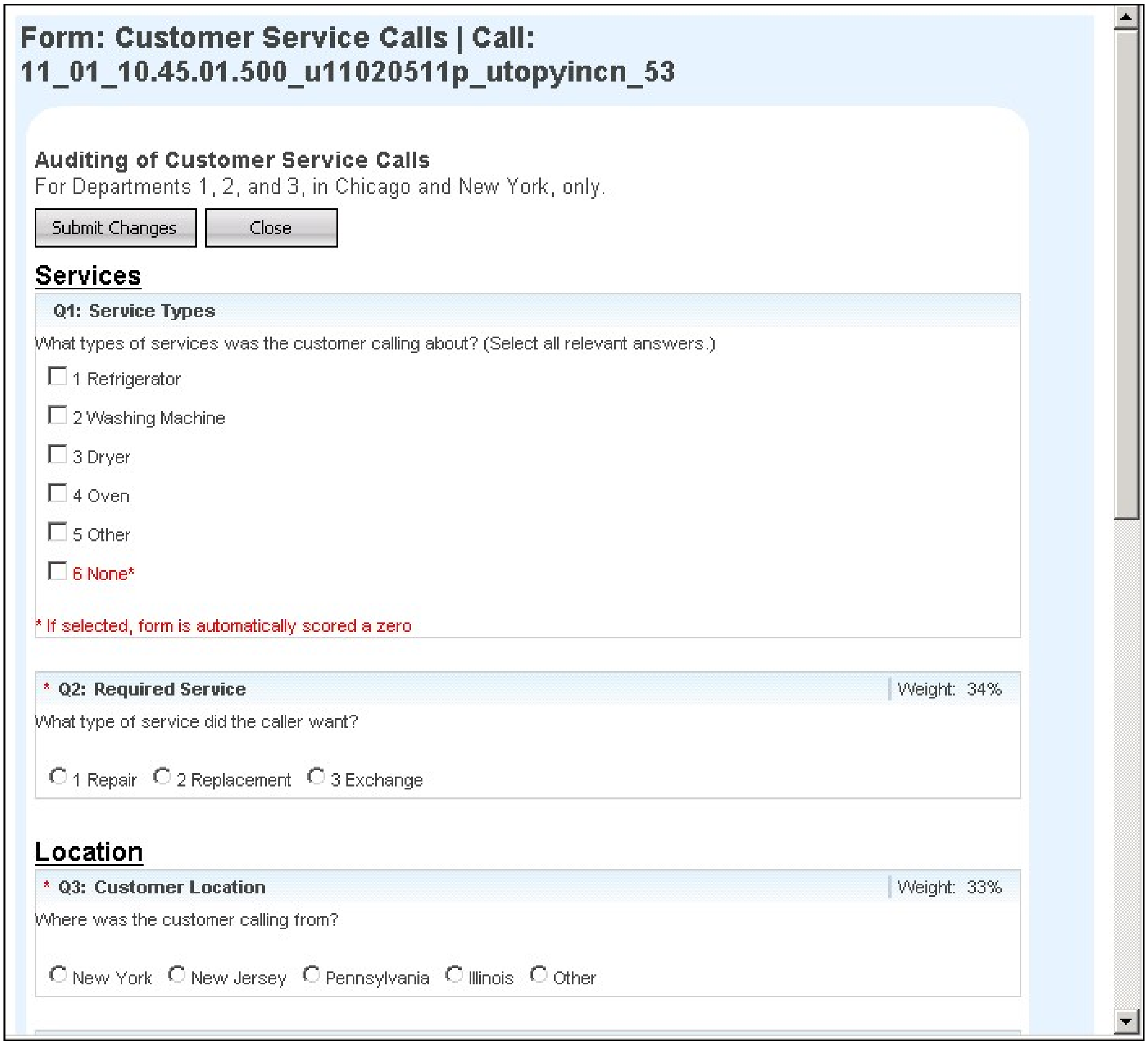
Creating a New Form

Each form has a name, optional description, notes, and a list of questions. The questions can be grouped, and multiple-choice questions can have numbered or textual answers. In addition, each question can be defined as required or optional, and Yes/No and multiple-choice questions can be assigned weights.

The weight of each question is used to calculate the overall score of the form when a user fills it in. For example, a form could contain three questions, one in which the user is asked to rate the agent's handling of the caller, a second in which the user is asked to rate how difficult the caller was to handle, and a third in which the user is asked to type comments. The first two questions could be required, while the third was optional. Users would not be able to save the form if they did not answer the first two questions, but they could leave the third blank if they chose. The first two questions could be weighted 65% and 35% respectively, and the overall score on the form would be calculated based on these weights.

Two types of multiple-choice questions are supported. Standard multiple-choice questions with 3, 5, 7 or 10 options only permit one answer to be selected; Multiple-Response questions, can offer between two and ten options, and the user can select as many of them as they wish. Multiple-Response questions cannot be assigned weights; normally, their weight is "0%." However, any or all of their answers can be marked "auto-fail." If the user selects an auto-fail answer, the weight of the question become 100%, and the score of the entire form becomes "0." That is, the auto-fail option can be used to override the scores of all the other questions on the form.

In a form, answers to standard multiple-choice questions are arranged horizontally in a row and have round checkboxes, while answers to Multiple-Response questions are arranged vertically and have square checkboxes. Auto-fail questions appear in the form in red with an asterisk (*) beside them. For example, in the form below, Q1 is a Multiple-Response question for which answer 6 is an auto-fail answer, and Q2 and Q3 are standard multiple-choice questions.



Two types of forms are supported by the system:

- **General forms:** Stand-alone forms that contain questions that are relevant to all types of calls or coaching sessions
- **Conditional forms:** Forms that contain additional questions and are automatically added to general forms when a call belongs to specified Categories (Quality-Monitoring only; not available for Coaching forms)

Forms and their contents are automatically saved in the system as you design them. New forms are inactive until you activate them. Users can only see and fill in active forms.

A form can be selected as the default for one or more Programs. When it is, and it is active, it appears at the top of the list of forms available to users when they are reviewing calls from the selected Programs. Users can still select other forms to fill out if they need to do so.

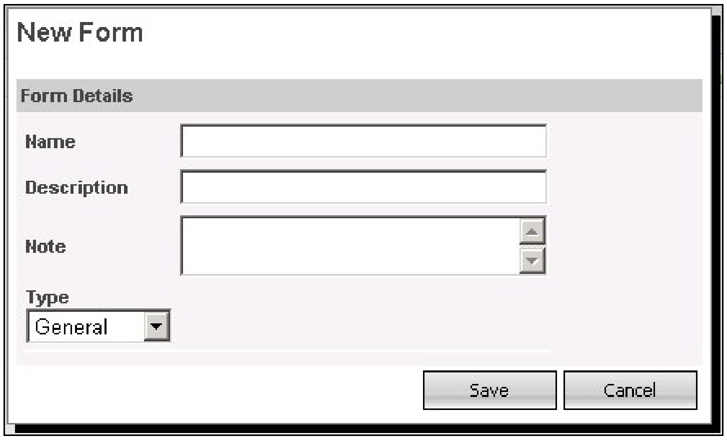
Opening a Blank Form

The first step in creating a new form is opening a blank form. When the blank form is opened, it contains no questions and is not active. However, it is automatically saved in the system. If you choose to display inactive forms in the Forms List, it will appear there, even if you do not add any questions to it.

Note: You can also create a new form by making a copy of an existing form and editing the copy as necessary.

To create a blank form:

1. In the **Forms Manager** screen, click **New**. The **New Form** dialog box opens.

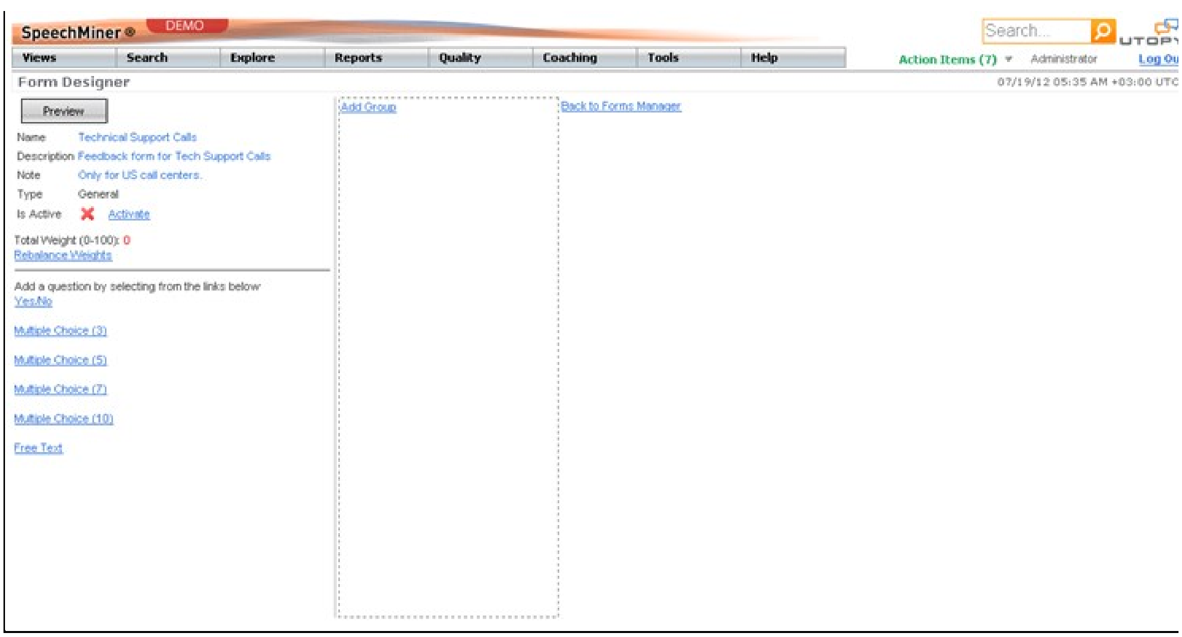


New Form dialog box

2. Fill in the fields as follows:

Field	Description
Name	Type a name for the form.
Description	Type a description for the form (optional).
Note	Add additional notes as necessary (optional).
Type	Select the type of form (**General** or **Conditional**). **Note:** This field is not available for Coaching forms, whose type is automatically set to *Coaching*.

3.
4. Click **Save**. The Form Designer opens and displays a blank form.



Blank form in the Form Designer

Adding Questions to a Form

The following types of questions can be added to a form:

- **Yes/No:** Questions that should be answered with either yes or no.
- **Multiple Choice (3):** Multiple choice questions with three possible answers (the user can select no more than one answer)
- **Multiple Choice (5):** Multiple choice questions with five possible answers (the user can select no more than one answer)
- **Multiple Choice (7):** Multiple choice questions with seven possible answers (the user can select no more than one answer)
- **Multiple Choice (10):** Multiple choice questions with ten possible answers (the user can select no more than one answer)
- **Free Text:** Questions that are answered by typing in free text
- **Multiple Response:** Multiple choice questions with between 2 and ten possible answers that allow the user to select as many answers as they wish

Each question is automatically included in a group, and has a title as well as the actual text of the question. The possible answers to multiple choice questions can be edited as required. New questions are initially added at the end of the form, but can be moved to other locations later on.

Adding a Question to a Form

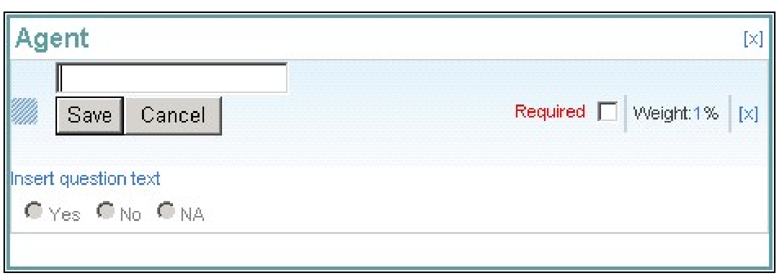
You can add questions to a form as necessary. The questions are added at the end of the form. You can move them to other locations at any time (see below).

To add a question to a form:

1. At the lower left of the Form Designer, click the type of question you want to add. A blank question of the selected type is added to the form. It is automatically added at the bottom of the form, and included in the last group in the form. The first question inserted into a blank form is included in the default group, which is initially called *New Group*. For information about changing the name of a group, see below.

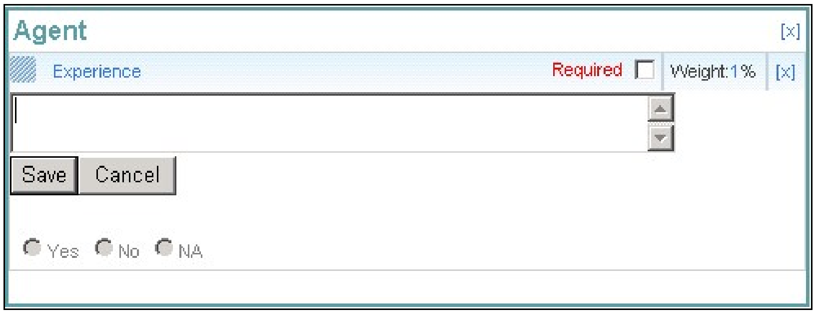
New Yes/No question

2. Click **Insert question title** to modify the question title. The title becomes a text field.



Question Title text field

3. Edit the title and then click **Save** to save the new title.
4. Click **Insert question text** to modify the question text. The text becomes a text field.



Question Text text field

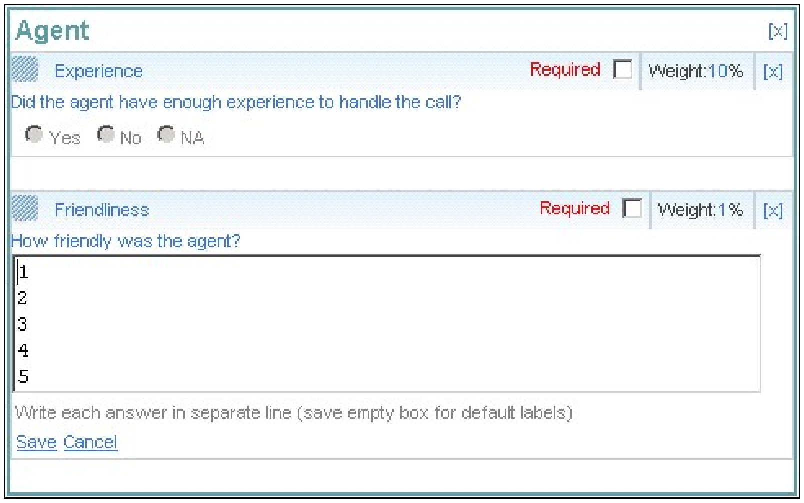
5. Edit the text and then click **Save** to save the new text.
6. If the question is required, select the **Required** checkbox.
7. For multiple-choice and Multiple-Response questions, if you want to replace the default numbers with text, edit the answers as explained below.

Editing Multiple-Choice Answers

When you add a multiple-choice or Multiple-Response question to a form, each of the possible answers is assigned a number. You can replace the numbers with text as necessary.

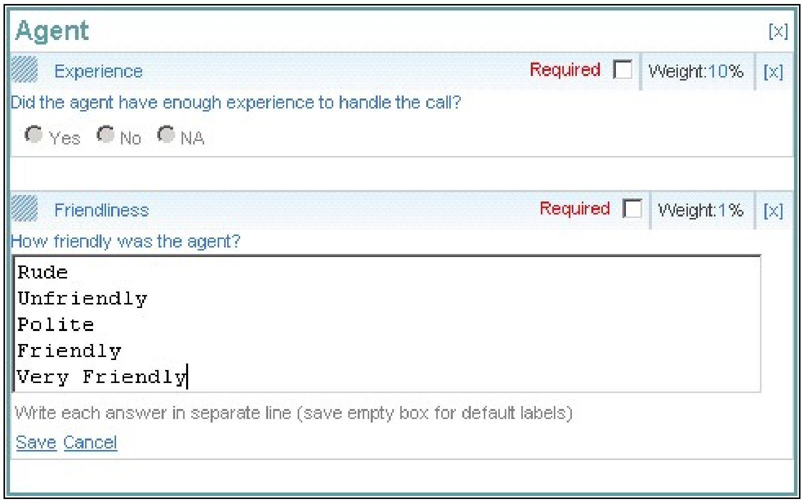
To edit multiple-choice or Multiple-Response answers:

1. Below the answers, click **Edit answers**. A text box opens, and displays each of the answers on a separate line.



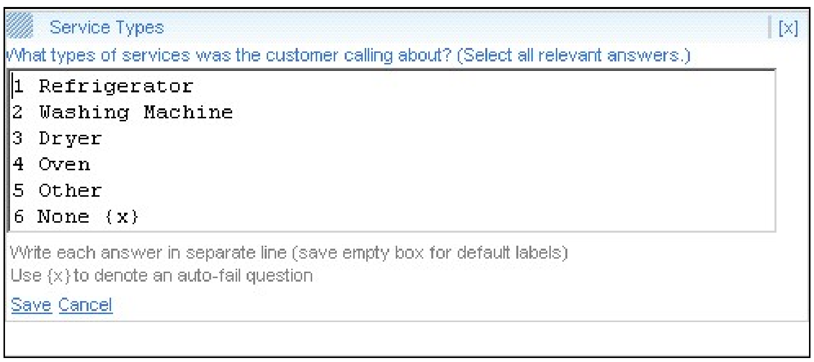
Multiple choice answers in text box

2. Edit each line as necessary.



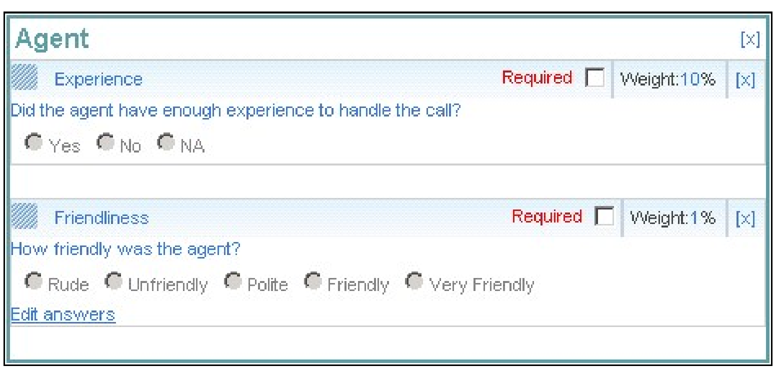
Editing multiple-choice answers

3. For Multiple-Response questions, mark all auto-fail answers with {x}. (They are displayed in the form with an asterisk after them.)



Multiple-Response question with answer #6 marked with {x} to indicate it is an auto-fail answer

4. Click **Save**. The edited answers replace the default numbers.



Edited multiple-choice answers

Moving Questions within a Form

New questions are automatically added at the end of the form. You can move them to other locations in the form as required.

To move a question to a different location:

- Drag the icon that appears to the left of the question title. The question moves up or down in the form as you drag it. Release your mouse button to drop the question when it is in its intended location.

Managing Question Groups

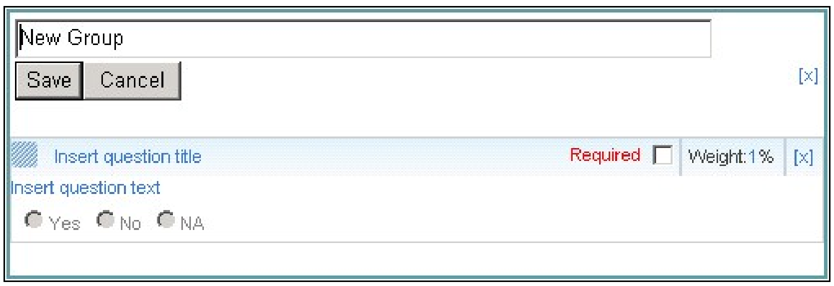
All of the questions in a form are included in question groups. When you add the first question to a form, a default group, called *New Group*, is automatically added to the form, and the question is included in it. You can change the name of a question group, add additional question groups, and rearrange existing question groups as required. The system can analyze the responses for each group separately in the QM Agent Summary report.

Changing the Name of a Question Group

You can change the name of any question group in the form.

To change the name of a question group:

1. Click the name of the group. The name becomes a text field.



Group Name text field

2. Edit the name
3. Click **Save** to save the new name.

Adding Question Groups to a Form

You can add question groups to a form as necessary. For example, you could have one group of questions call "Caller" containing questions about the caller and another group called "Agent" containing questions about how the agent handled the call. Questions can be moved from one group to another as necessary (see above).

To add a question group to a form:

- At the top of the form, click **Add group**. A new group is added at the bottom of the form.

Changing the Order of Question Groups in a Form

You can move existing question groups up or down in a form.

To move a question group up or down in a form:

- In the upper right corner of the group, click to move the group up or to move it down.

Managing Question Weights

Weights are assigned to Yes/No and multiple-choice questions in a form. The weights indicate the relative importance of each question, and are used by the system to calculate the score of the form when it is filled in by a user. The sum of all the weights in a form must be 100%.

The Forms Designer shows the current sum of the weights in the left column under **Total Weight**. A form cannot be activated if the sum of the weights is not 100%. You can modify the weights assigned to questions in one of two ways:

- Automatically, by assigning equal weights to all questions
- Manually, by editing the weights of individual questions

Automatically Assigning Weights to Questions

You can assign equal weights to all of the Yes/No and multiple-choice questions in a form.

To assign equal weights to all of the questions in a form:

1. In the left column of the Forms Designer, under **Total Weight**, click **Rebalance Weights**. You are prompted to confirm that you want to rebalance the weights.
2. Click **Yes**. The weights of all the questions are reset such that they all are equal and the total is 100%.

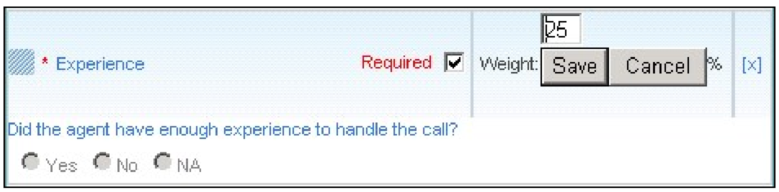
Manually Editing Weights

You can manually modify the weight of any Yes/No or multiple-choice question in a form.

Note: Make sure that the total of all of the weights is 100% before you try to activate the form.

To manually edit the weight of a question:

1. In the upper-right corner of the question area, click the weight. The weight becomes a text field.



Weight text field

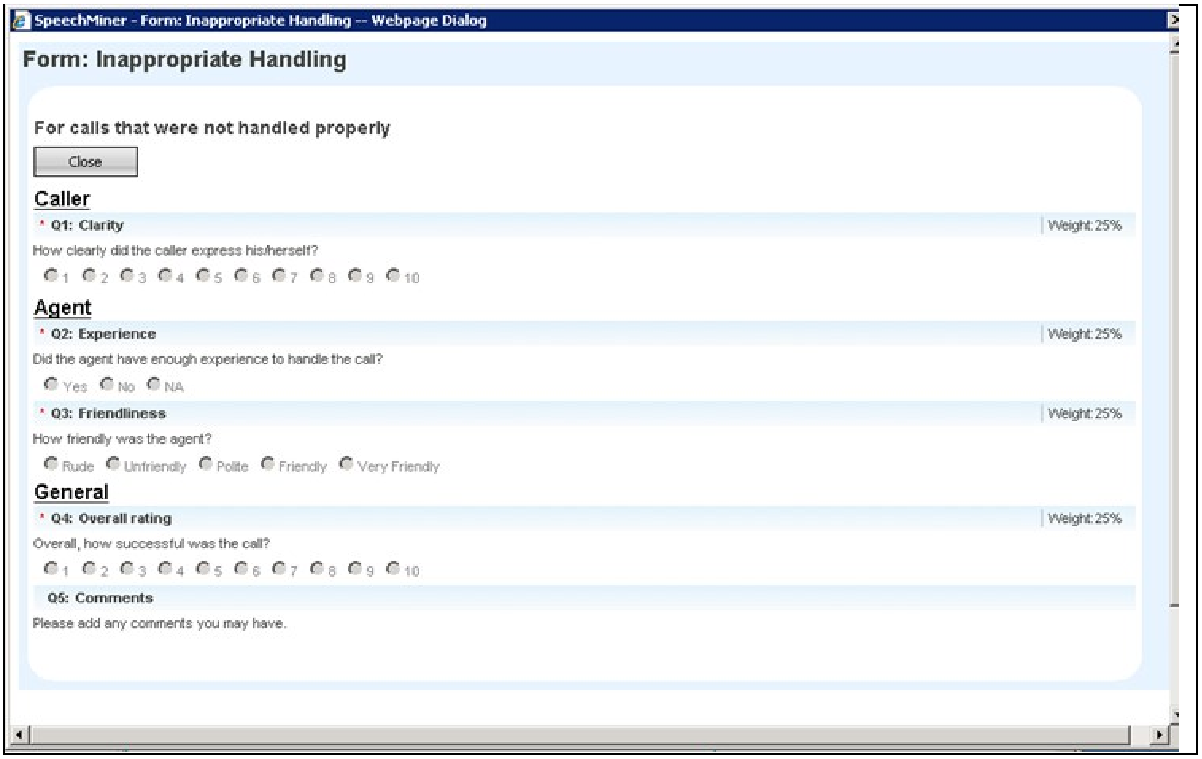
2. Edit the weight as necessary.
3. Click **Save**. The weight is updated.

Previewing a Form

As you add questions and question groups to a form, you may want to see how the form would look to users. To do this, you can open a preview of the current form in a separate window. In the preview window, you can collapse question groups if you wish.

To see a preview of the form that is open in the Form Designer:

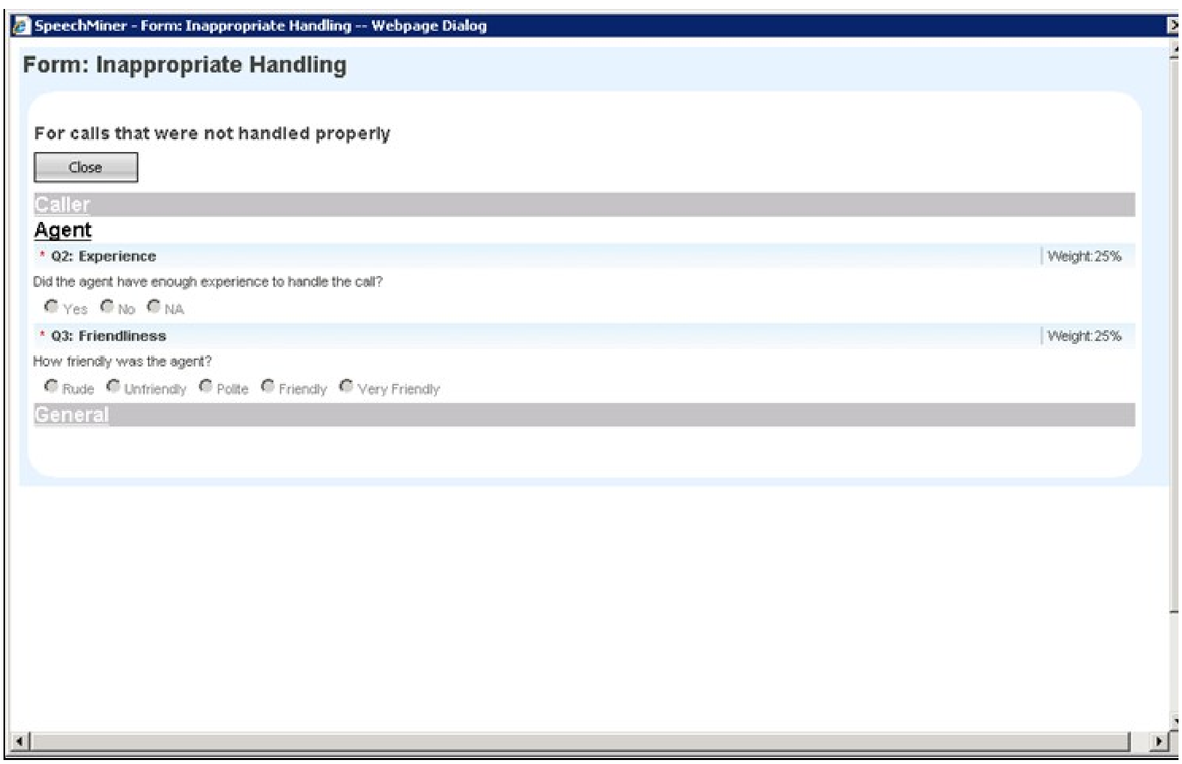
- In the upper-left corner of the Form Designer, click **Preview**. A window opens and displays the form as it would look to users.



Preview window

To collapse or expand question groups in a Preview window:

- Click the name of the group.



Collapsed question groups in a Preview window

Saving a New Form

The changes you make to a form as you design it are automatically saved in the system. During the design process, you can close the form at any time, and the changes you made to it are saved. You can edit it later to continue the design process.

While a form is being designed, it is not active, and is not available to users. When you want to make a form available to users, you must activate it. Furthermore, many form-editing features are not available when a form is active. For example, you must deactivate it to change the locations of questions and question groups.

You can select a Program default for a form. When you do so, the form appears at the top of the user's list of available forms when a call from the selected program is being reviewed.

Activating a Form

While you are designing a form, it is deactivated. When you have finished designing a form, you can activate it. Once the form is activated, it appears in the list of forms available to users. In addition, you can only choose the conditions for a Conditional form after it is activated. The activation status of a form appears on the left side of the Form Designer, under **Is Active**.

Note: Inactive forms are only listed in the Forms Manager if the **View inactive** option is selected (see Forms Manager).

To activate a form:

- On the left side of the Form Designer, under **Is Active**, click **Activate**.

Closing the Form Designer

You can close the Form Designer at any time. Changes you have made to the current form are automatically saved when you close the Form Designer.

To close the Form Designer:

- At the upper-right of the screen, click **Back to Forms Manager**.

  Note: If the form is note active, you are asked whether you want to activate the form. Click **Yes** to activate the form or **No** to leave it deactivated.

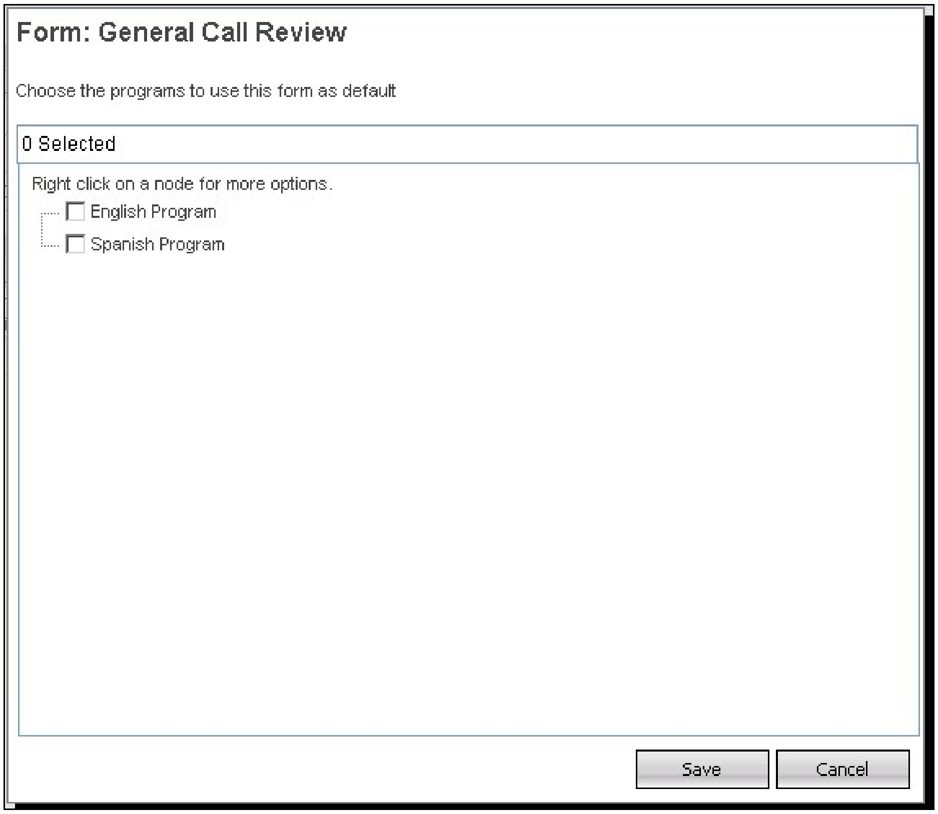
Selecting Default Programs for a Form

Once a Quality-Monitoring form is activated, you can select Programs for which it is the default form if you wish. When users open the list of forms for calls belonging to these Programs, the form appears at the top of the list of available forms.

Note: This option is not available for Coaching forms.

To select Programs for which a form is the default:

1. In the Forms Manager, under **Actions**, select **Programs**. A Program-selector dialog box opens.



Program-selector dialog box for default form

2. Select the Programs for which you want the form to be the default.
3. Click **Save**. The form becomes the default for the selected Programs.

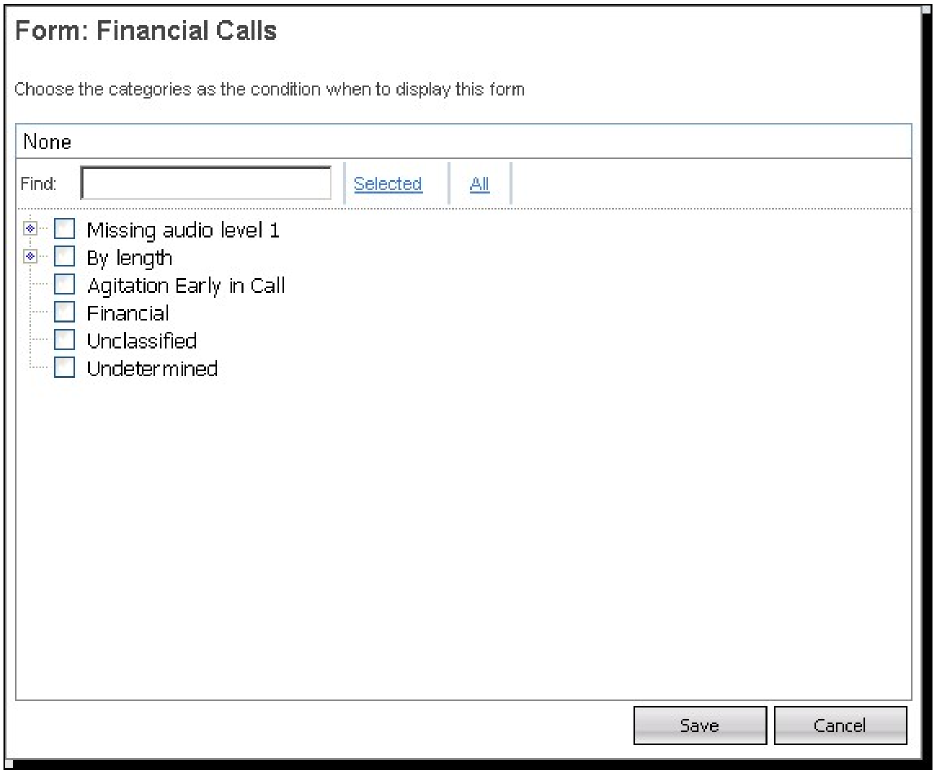
Selecting the Conditions for a Conditional Form

Once a Conditional form is activated, you can select Categories for which it is to be used. When a user opens a general form for a call that belongs to any of these Categories, the Conditional form is added to the general form.

Note: This option is not available for Coaching forms.

To select Categories for which a conditional form should be used:

1. In the Forms Manager, in the list of Conditional forms, under **Actions**, select **Categories**. A Category-selector dialog box opens.



Category-selector dialog box for Conditional form

2. Select the Categories for which you want the form to be used.
3. Click **Save**. The conditions are set.

See also

Managing Forms

Home > Quality Monitoring > Forms Manager > Managing Forms

Managing Forms

Existing forms can be edited, activated, deactivated, or deleted. In addition, in the Quality-Monitoring system, the Programs for which a form is the default, and the Categories associated with a Conditional form, can be modified.

Copies of existing forms can also be created as necessary. This can be useful when a new form is required that is similar to an existing form. The copy can be edited as necessary after it is created.

Editing a Form

You can edit any of the items in a form. Note, however, that some items can only be edited when a form is deactivated, as explained below.

To edit a form:

1. In the Forms Manager, under **Actions**, select **Edit**. The form opens in the Form Designer.
2. To modify the form's name, description, or notes, the name of a question group, the title, text, or weight of a question, click the text. The text becomes a text field. Edit the text field as required, and then click **Save**.
3. To modify the text of multiple-choice answers, click **Edit answers**. The answers open in a text box, with one answer per line. Modify the lines as required, and then click **Save**.

Note: For additional information about the Form Designer, see Creating a New Form.

Activating or Deactivating a Form

Forms are only available to users when they are activate. Many editing features are only available for deactivated forms. The following items can be edited without deactivating a form:

- Name
- Description
- Notes
- Question-group names
- Question titles
- Question text

The following items cannot be edited without deactivating a form:

- Locations of questions and question-groups
- Text of answers to multiple-choice questions
- Required status
- Weight

Forms can be activated or deactivated in the Forms Manager or in the Form Designer. If you use the Forms Manager, you can activate or deactivate a batch of forms at one time. If you use the Form Designer, you can only activate or deactivate the open form. The current activation status appears in the Forms Manager under **Active**, and in the Form Designer, on the left side, under **Is Active**.

To activate or deactivate one or more forms in the Forms Manager:

1. In the list of forms, select the checkbox to the left of each form you want to activate or deactivate.
2. At the top of the list, click **Batch Actions**, and then, in the dropdown menu, select **Activate** or **Deactivate**.

To activate or deactivate a form in the Form Designer:

- On the left side of the Form Designer, under **Is Active**, select **Activate** or **Deactivate**.

Deleting Forms

In the Forms Manager, you can delete forms individually or in a batch.

To delete a single form:

1. In the list of forms in the Forms Manager, under **Actions**, select **Delete**. You are prompted to confirm you want to delete the form.
2. Select **Yes**. The form is deleted.

To delete a batch of forms:

1. In the Forms Manager, select the checkbox to the left of each form you want to delete.
2. At the top of the list, click **Batch Actions**, and then, in the dropdown menu, select **Delete**. You are prompted to confirm that you want to delete the selected forms.
3. Click **OK**. The selected forms are deleted.

Modifying Default Program Selections

You can modify the list of Programs for which a Quality-Monitoring form is the default.

To modify the list of Programs for which a form is the default:

1. In the list of forms in the Forms Manager, under **Actions**, select **Programs**. A Program-selector dialog box opens, with the current selections selected.
2. Modify the selections as necessary.
3. Click **Save**. The changes are saved.

Modifying the Categories of Conditional Forms

You can modify the list of Categories associated with a Conditional form.

To modify the list of Categories associated with a Conditional form:

1. In the list of conditional forms in the Forms Manager, under **Actions**, select **Categories**. A Category-selector dialog box opens, with the current selections selected.
2. Modify the selections as necessary.
3. Click **Save**. The changes are saved.

Copying a Form

You can make a copy of any active form. Once you have done so, you can edit the copy as necessary to create a new form.

To copy an existing form:

1. In the list of forms in the Forms Manager, under **Actions**, select **Copy**. You are prompted to give a name to the new form.
2. Enter a name for the form, and then click **OK**. The copy is created and appears in the list. (The copy is not activated, and only appears in the list if **View inactive** is selected.)

See also

Creating a New Form

Coaching

The coaching system is designed to help managers, supervisors, quality-monitoring personnel, and agents with training processes. In the system, coaching *sessions* are created for *trainees* to take part in. The sessions consist of lists of calls that the trainee is asked to listen to, either in part or in their entirety. In addition, they may include notes, Action Items, and links to other sites. While anyone with the required permissions can open a new coaching session, it is the session's *coach* who designs the session by defining the Interaction Lists, Action Items, and links, and by adding notes to guide the trainee through the session.

Both novice and experienced personnel can benefit from taking part in a training session; new employees can be introduced to their jobs through a coaching session, and veterans can be encouraged to fine-tune their techniques by means of coaching sessions that highlight specific aspects of their jobs.

See also

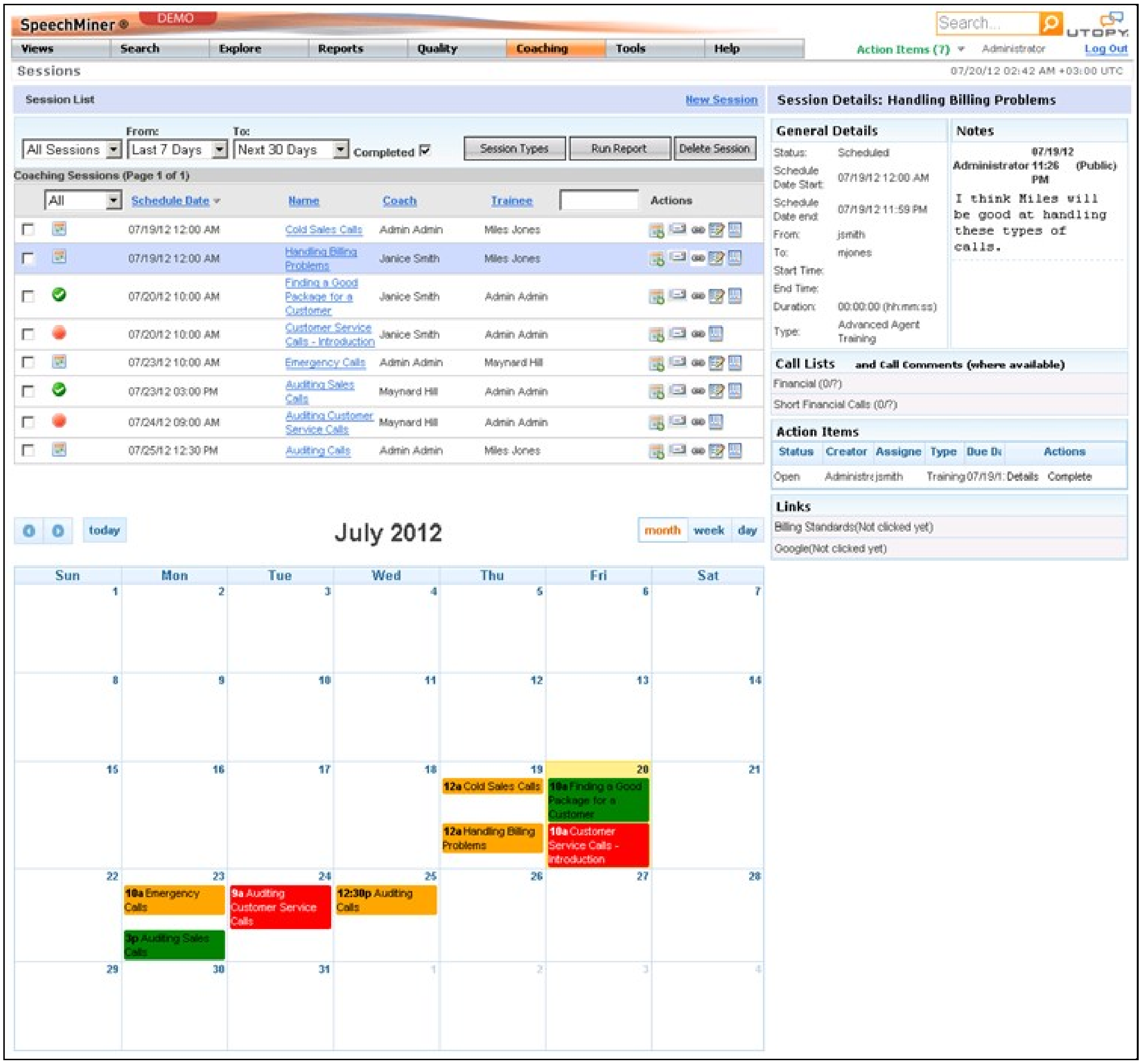
Working with the Coaching Session List
Taking Part in a Session
Creating a New Coaching Session
Coaching Session Reports
Managing Session Types

Working with the Coaching Session List

The coaching **Sessions** screen lets you see which coaching sessions exist, gives general information about each session, and enables you to access the **Session Details** screen in which you can manage or take part in individual sessions.

To open the Sessions screen:

- In the Main Menu, under **Coaching**, select **Sessions**.



Sessions screen

The left side of the **Sessions** screen contains the session list, a table that lists the existing sessions. Below the session list is a calendar that shows when the sessions are scheduled. The right side of the screen displays details about the session that is selected in the table.

Columns in the Sessions

The session list contains the following columns:

Column	Description
Status	The status of the session. (See below for a list of possible statuses.)
Schedule Date	The beginning of the time range when the trainee is meant to take part in the session
Name	The name of the session
Coach	The username of the coach
Trainee	The username of the trainee
Actions	Click one of the buttons to select an action. (See below for a list of actions.)

Session Statuses

Session statuses are indicated by icons in the Session List and by color-coding in the calendar. The following session statuses are defined:

Status	Description	Icon	Color-coding
Scheduled	The session has been created, but was not yet started.		Yellow
In Progress	The trainee is currently taking part in the session.		Yellow
On Hold	The session was paused after the trainee began taking part in it.		Red
Completed	The trainee has finished taking part in the session.		Green

Action Options

The **Actions** column contains buttons that you can use to perform an action related to a session in the list:

Button	Description
	Adds the session to the Outlook calendar on your local computer
	Resends the e-mail notification about the session to the coach and the trainee
	Creates a Permalink to the session.
	Opens the **Session Details** screen in Setup mode so that you can add content to the session or modify the session properties or content **Note:** Only available to the creator and coach; the trainee cannot open the **Session Details** in Setup mode
	Generates a report containing statistical information about all of the sessions assigned to the trainee of the selected session

Filtering the List

You can use filters to limit the sessions that are displayed in the list to those that meet criteria you specify. Two types of filters are available:

- **General filters**, which allow you to filter the list based on user and date, and let you choose whether to include completed sessions in the list.
- **Column-based filters**, which allow you to filter the list based on session status and trainee

General Filters

The general filter controls are located at the top of the session list. The following filters are available:

Filter Type	Description
User	Select **All Sessions** to display all sessions that you have permissions to see. Select **My Sessions** to include only view sessions in which you are either the creator, the coach or the trainee.
Date Range	Under **From**, select the beginning of the period to include in the list. Under **To**, select the end of the period to include in the list.
Completed	Select the **Completed** checkbox to include sessions that were completed in the list. Clear the checkbox to only include sessions that were not yet completed.

Column-Based Filters

Column-based filters are located in the column headings of the **Status** and **Trainee** columns.

To use the Status filter:

- In the heading of the **Status** column, in the dropdown list, select the status you want to include in the session list. Only sessions with the selected status are displayed in the list. To view sessions with any status, select **All**.

To activate the Trainee filter:

- In the text box to the right of the **Trainee** heading, type part of the name or username of the trainee you want to include in the list. As you type, names and user names containing those letters are displayed in a dropdown list. Select the trainee from the list. Only sessions with the selected trainee are displayed in the list.

To deactivate the Trainee filter:

- Delete the text in the text field and then press **Enter**. Sessions for all trainees are displayed in the list.

Sorting the Columns

You can choose to sort the session list by any column.

To sort the session list by a column:

- Click the title of the column.

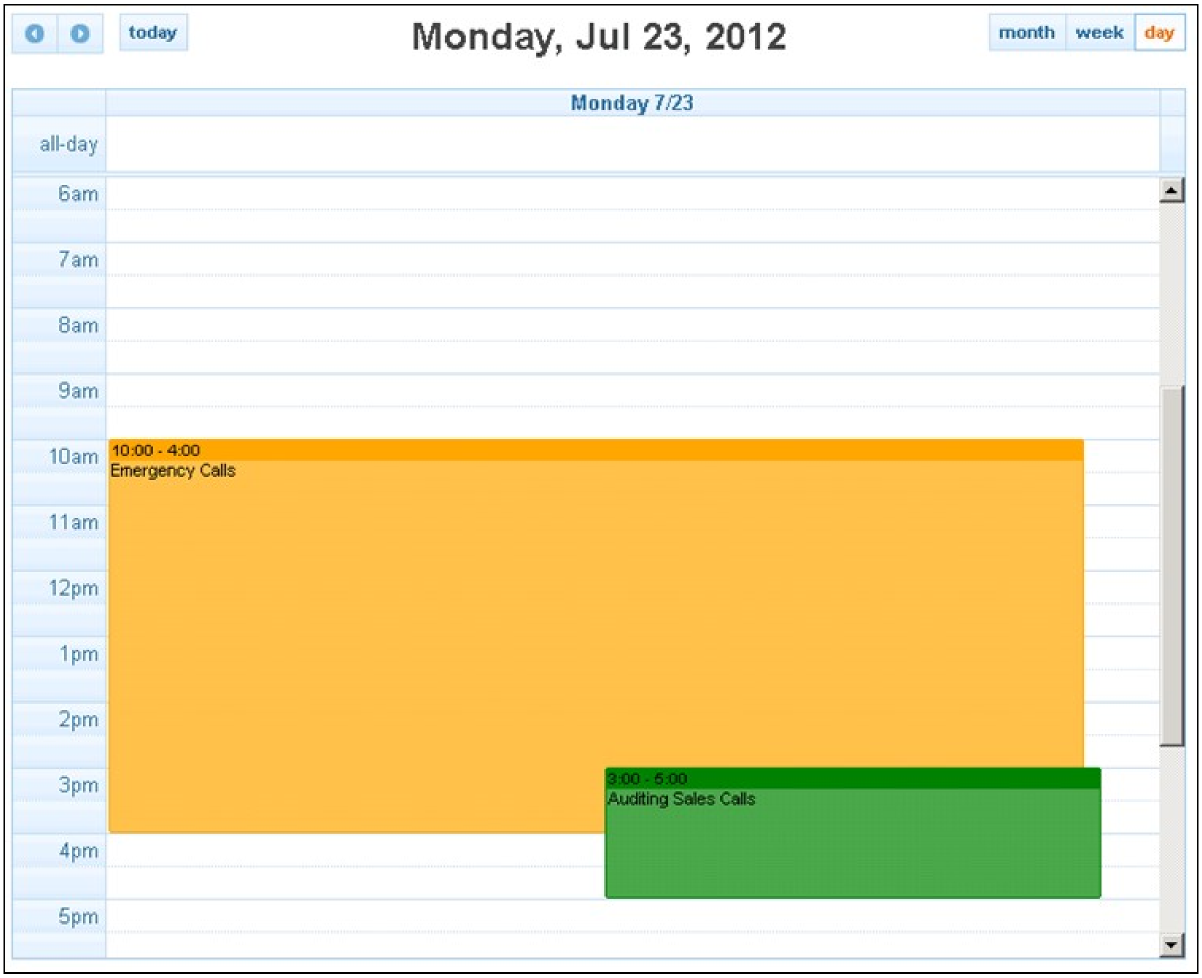
  Note: Click the title a second time to reverse the sort order.

Working with the Calendar

The lower left part of the screen contains a calendar in which you can see when the sessions that appear in the list are scheduled to take place. You can choose a monthly, weekly, or daily display. You can also open the **Session Details** screen for a session directly from the calendar.

Monthly calendar display

Weekly calendar display



Daily calendar display

To select the type of calendar display:

- At the upper-right of the calendar area, click **month**, **week**, or **day**. The calendar display changes to the selected type.

To choose the time period to display:

- In the upper-left of the calendar area, click to display the previous time period (e.g., if you are displaying a weekly calendar, the previous week), or to display the next time period.

To open the Session Details screen for a session that appears in the calendar:

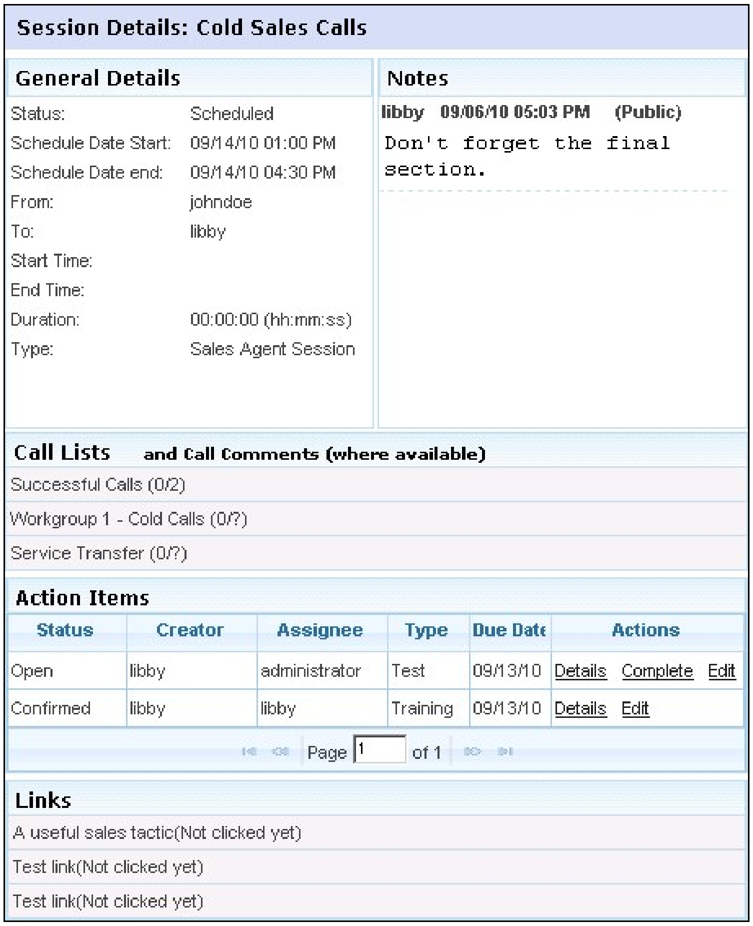
- Click the session in the calendar.

Viewing Session Details

You can view a summary of the properties and contents of a session in the **Sessions** screen.

To view session details in the Sessions screen:

- In the session row, click anywhere in the text *except* for the name of the session. The session details are displayed on the right side of the screen.



Session Details

The display includes five boxes:

Box	Description
General Details	The status and properties of the session. If the trainee has already begun to take part in the session, the start time, end time, and duration of their participation appears. Otherwise, only the Due Dates appear.
Notes	Lists all public notes that are attached to the session, and all private notes that you attached to the session.
Call Lists	Lists all Call Lists that are attached to the session. For each Call List, indicates how many calls have comments, and how many calls are in the list. For example, **(1,3)** indicates that one call in the list has comments, and the list contains three calls. If a call has comments, the comments appear below the Call Listing.
Action Items	An **Action Items** box in which all Action Items associated with the session appear
Links	Lists all links that are included in the session, and indicates whether the trainee has opened them yet

Opening the Session Details Screen

The **Session Details** screen is used by the creator or coach to manage an individual session - adding Call Lists and notes and modifying properties (see Creating a New Coaching Session) - and by the trainee to take part in the session by listening to the calls (see Taking Part in a Session).

Note: The creator or coach can also open the Session Details screen in Setup mode, as explained above.

To open a session in the Session Details screen:

- In the session list, click the name of the session.

Creating a New Session

You can create a new session from the **Sessions** screen.

To open a new session:

1. At the top of the list, click **New Session**. The **New coaching session** dialog box.
2. Follow the instructions under Creating a New Coaching Session.

Deleting Sessions

You can delete one or more coaching sessions.

To delete coaching sessions:

1. Select the checkbox to the left of each session you want to delete.
2. At the top of the list, click **Delete Session**. You are prompted to confirm that you want to delete the sessions.
3. Click **OK**. The sessions are deleted, and a confirmation message appears.

See also

Taking Part in a Session
Creating a New Coaching Session
Coaching Session Reports
Managing Session Types

Home > Coaching > Taking Part in a Session

Taking Part in a Session

Trainees take part in a coaching session by opening the session in the **Session Details** screen. In this screen, they can listen to the calls, read the notes, open the links, and manage the Action Items attached to the session. When they have completed the session, they can fill in a feedback form, as appropriate.

Accepting a Session

When you receive an invitation to a session, you can *accept* the session (available only for the trainee). When you do so, the invitation is erased from your message list.

To accept a session:

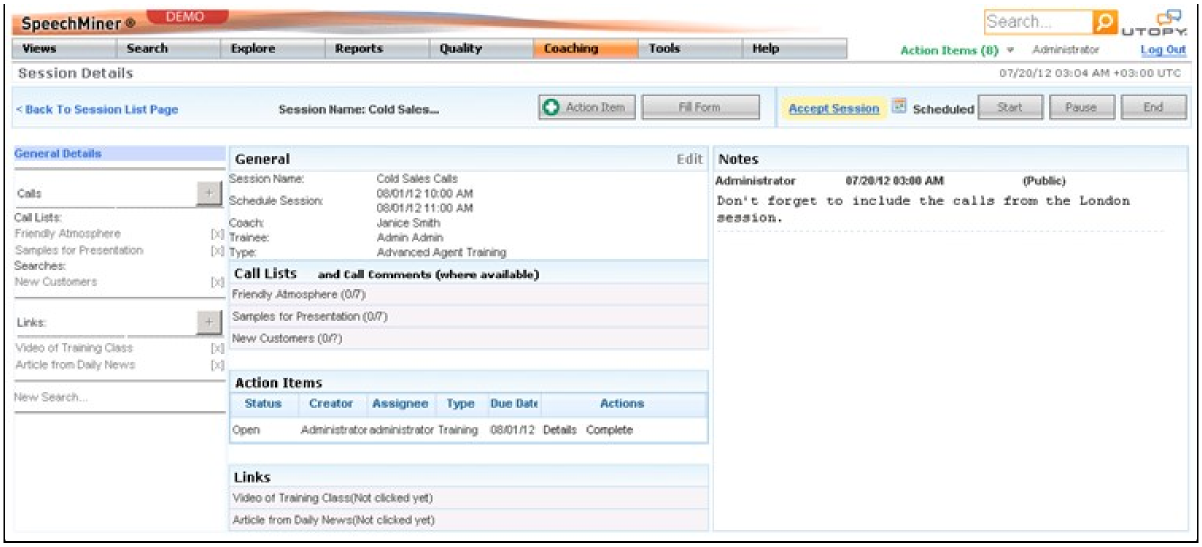
- In the **Views** page, in the **My Messages** widget, in the session-invitation line, click **Accept**.

Opening a Session

When you are ready to take part in a session, open it in the **Session Details** screen.

To open a session in the Session Details screen, do one of the following:

- In the **Views** page, in the **My Messages** widget, click the subject of the message inviting you to the session.
- In the **Sessions** screen, in the session list, click the name of the session.



Session Details screen

Overview of the Session Details Screen

When you first open it, the **Session Details** screen contains the following elements:

Element	**Description**
Session controls	Bar across the top of the screen that contains a link to the **Sessions** screen, session status information, and session controls
General Details	Call Lists and links attached to the session
General	Session properties
Call Lists	Summary information about each Call List attached to the session. For each Call List, indicates how many calls have comments, and how many calls are in the list. For example, **(1,3)** indicates that one call in the list has comments, and the list contains three calls. If a call has comments, the comments appear below the summary information.
Action Items	Action Items box listing all Action Items linked to the session. For information about using the **Action Items** box, see Managing Action Items.
Links	Summary information about the links that are attached to the session.
Notes	Lists all public notes that are attached to the session, and all private notes that you attached to the session.

Progressing Through the Session

Once the session is open, click **Start Session** to begin taking part in it. The start time of the session is recorded, and the status is changed to *In Progress*. During the session, click **Pause Session** to temporarily stop taking part. Click **End Session** when you have completed the session.

Note: The coach can also pause the session or mark it as completed.

During the session, use the session notes to guide you through the session. Listen to the calls in the Call Lists and pay special attention to those parts that are mentioned in the notes.

Listening to Calls

The Call Lists attached to the session can be opened in a Interaction Grid, and the calls can be played back in a Media Player, in the **Session Details** screen.

To view a Call List:

- On the left side of the screen, under **General Details**, click the name of the Call List. An Interaction Grid opens on the right side of the screen, in place of the **General**, **Call Lists**, and **Notes** boxes, and lists all of the calls in the list. For detailed information about Interaction Grids, see Using the Interaction Grid.

To play back a call:

- In the Interaction Grid, click the **Play** button (▶) in the call's row. The Media Player opens below the grid and begins to play the call. For detailed information about the Media Player, see Using the Media Player.

Filling in a Form

The trainee can fill in a form related to the coaching session. For example, the trainee can fill in a feedback form, or a short quiz about the session.

Only one form can be filled out for each session. If you have already filled out a form, you can edit it if you wish. If you want to fill out a different form, you must first delete the first form. If you have not yet filled out a form for the session, the **Fill Form** button appears at the top of the screen. If you have already filled out a form, the form is displayed in the **Session Details** screen below the Notes section, and the **Edit Form** button appears in place of the **Fill Form** button.

Note: For information about creating forms, see Forms.

To fill in a form:

1. At the top of the screen, click **Fill Form**. The **Select Form** dialog box opens and displays a list of available forms.
2. Click the form you want to fill out. The form opens in a new window.
3. Fill in the form and then click **Submit Changes**. The values you chose are saved in the system, and the form is displayed in the **Session Details** screen below the **Notes** section.
4. To close the form, click **Close**.

To edit a form:

1. At the top of the screen, click **Edit Form**. (Alternatively, in the title bar of the form, click **Edit**.) The form opens in a new window.
2. Modify the form as necessary, and then click **Submit Changes**. The changes are saved.
3. To close the form, click **Close**.

To delete a form:

1. At the top of the screen, click **Edit Form**. (Alternatively, in the title bar of the form, click **Edit**.) The form opens in a new window.
2. Click **Delete**. You are prompted to confirm that you want to delete the form.
3. Click **Yes**. The form is deleted and the window closes.

See also

Working with the Coaching Session List
Creating a New Coaching Session
Coaching Session Reports
Managing Session Types

Home > Coaching > Creating a New Coaching Session

Creating a New Coaching Session

This section explains how to open a new coaching session, set it up by adding Call Lists, notes, Action Items, and links to the session, and manage its contents once it is set up.

Note: New coaching sessions can be opened in a number of ways:

- In the **Coaching** page
- In the Views page, in the My Messages widget
- In a Interaction Grid or an Event Grid, from the **More Actions** menu

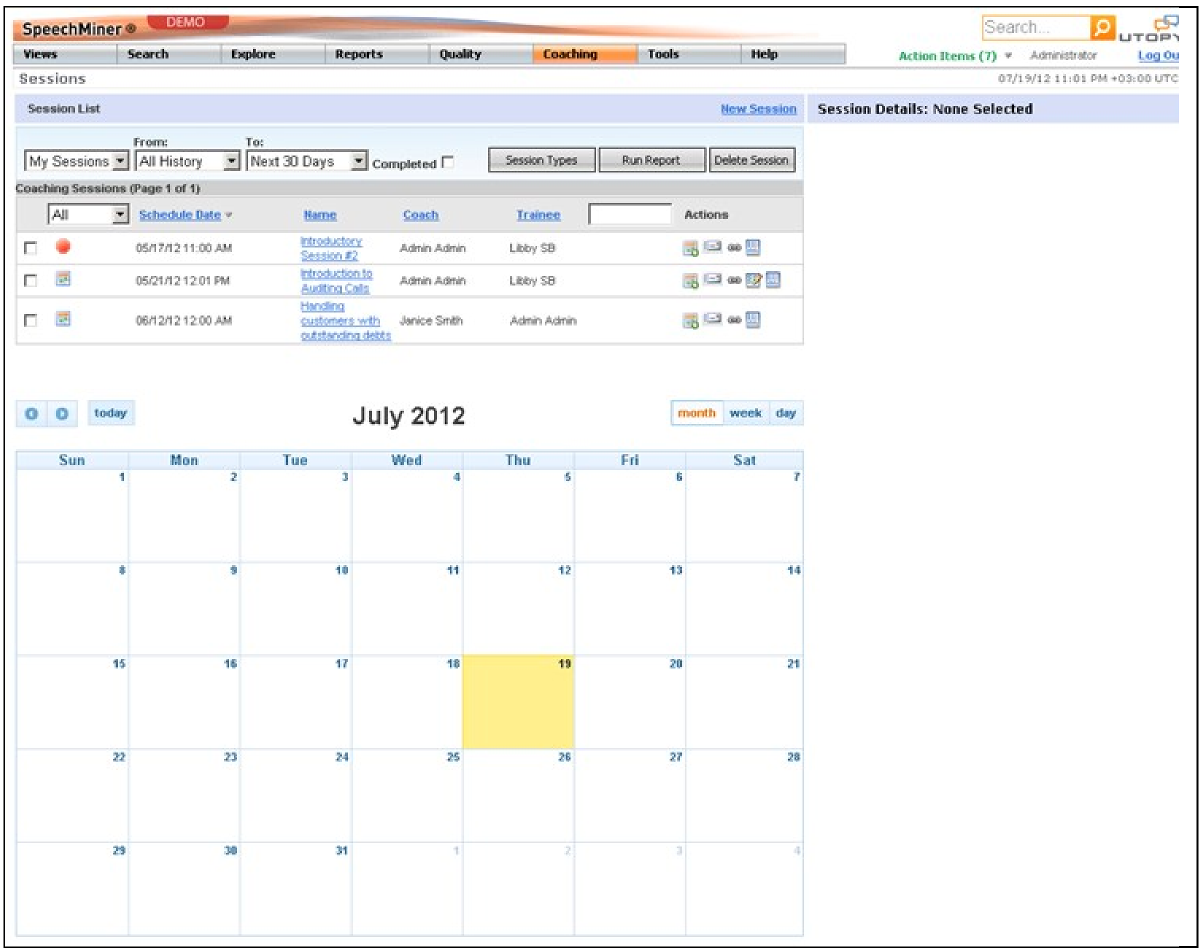
This section explains how to open a new session *in the **Coaching** page*. For information about opening a coaching session in one of the other ways, please refer to the relevant sections of this manual. Regardless of how you open the coaching session, you will most likely want to add Call Lists, notes, and other items to the session, as explained in this section.

Opening a New Session

When you open a new coaching session, you specify the name of the session, the coach, the trainee, and the date and time when the trainee should take part in the session. If you wish, you can also add either a public or private note. The session then appears in the list of sessions, but it does not have any content.

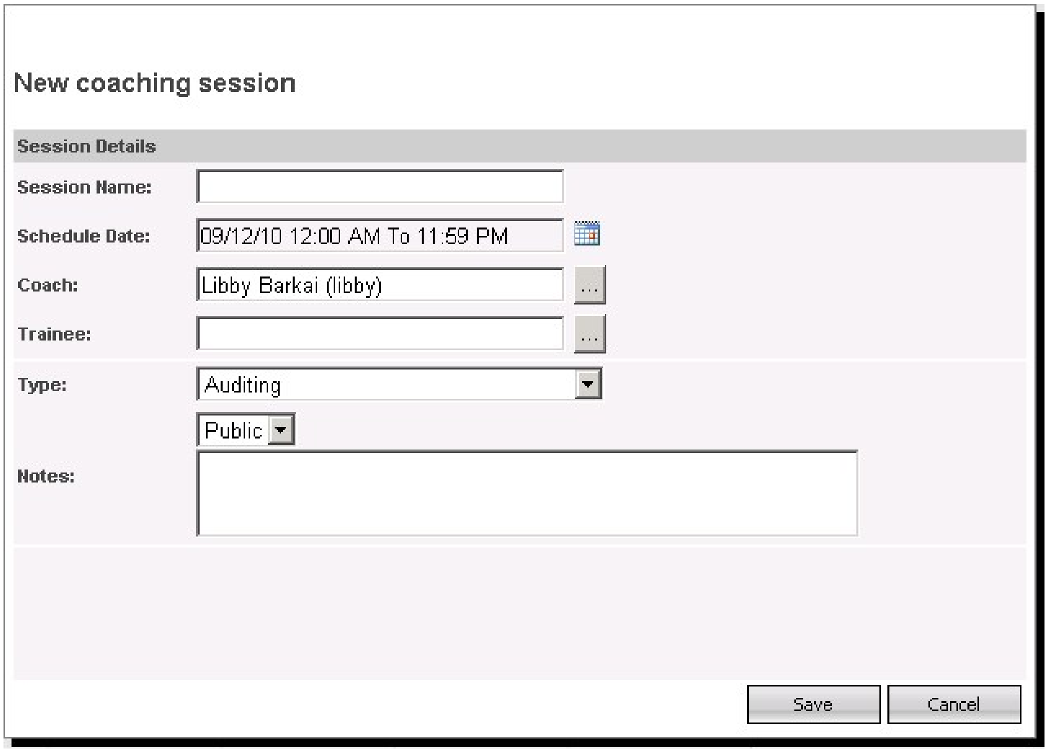
To open a new coaching session:

1. In the Main Menu, in the **Coaching** dropdown menu, select **Sessions**. The **Sessions** screen opens.



Sessions screen

2. At the top of the Sessions List, click **New Session**. The **New coaching session** dialog box opens.



***New coaching session* dialog box**

3. Fill in the fields as follows:

Field	Description
Session Name	Type a name for the session.
Schedule Date	Click the calendar icon ( ) to select the date and time period during which you want the trainee to take part in the session.
Coach	Select the coach in one of the following ways: ◦ In the text field, type part of the name or username of the coach. As you type, names and user names containing those letters are displayed in a dropdown list. Select the coach from the list. ◦ Click the ... button ( ) beside the text field. In the dialog box, select the user from the list of users in the relevant workgroup.
Trainee	Select the trainee in one of the following ways: ◦ In the text field, type part of the name or username of the trainee. As you type, names and user names containing those letters are displayed in a dropdown list. Select the trainee from the list. ◦ Click the ... button ( ) beside the text field. In the dialog box, select the user from the list of users in the relevant workgroup.
Type	Select the type of coaching session from the list.
Public/Me	If you are adding any notes in the **Notes** field, select **Public** if you want the notes to be visible to anyone who can access the session or **Me** if you only want the notes to be visible to you.
Notes	Type any notes you want to attach to the session. Public notes can be used to help the trainee and/or the coach with the session.

4. Click **Save**. The coaching session is opened; it appears in the Sessions List and in the schedule below it. It is selected in the Sessions List and its details are displayed in the **Sessions** screen, to the right of the Sessions List. An invitation message is sent to the My Messages boxes of the coach and the trainee. In addition, if their user profiles include e-mail addresses, notifications are sent to their e-mail addresses. The notification e-mails include an **iCal** file. When this attachment is opened, the session is automatically added to the user's Outlook calendar.

Adding and Managing Session Call Lists

Once a coaching session is open, you can add calls to it. Calls are added as *Call Lists*. Two types of Call Lists can be added:

- **Saved Searches:** Sets of call search criteria that can be used to retrieve lists of calls.
- **Call Lists:** Lists of calls that were created manually by adding specific calls. The calls can be added from a Call or Event grid or from a Media Player.

Note: For additional information about the two types of Call Lists, see Saved Searches.

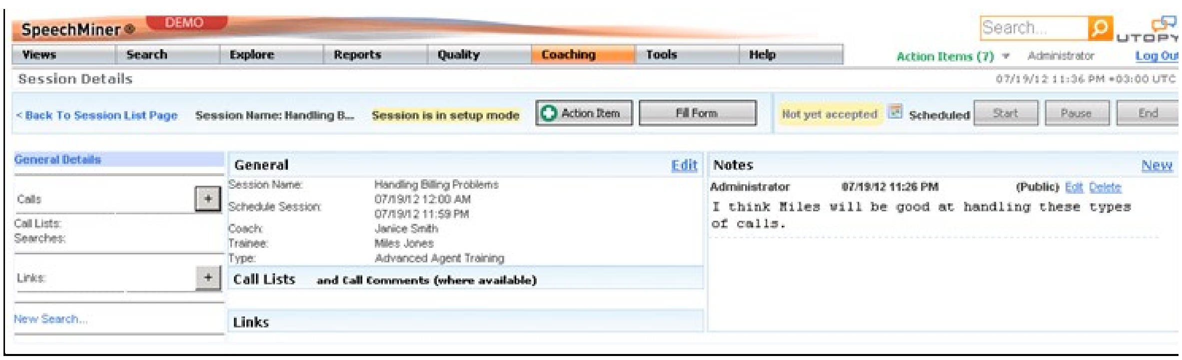
Call Lists can be added in the **Session Details** screen, in setup mode. Once they have been added, the lists can be modified by adding more calls and removing existing calls. Modifications that are made to a Call List in the Coaching page do not affect the original Call List.

To open the Session Details screen:

1. In the Main Menu, under **Coaching**, select **Sessions**. The **Sessions** screen opens.

   Note: For additional information about the **Sessions** screen, see Managing the Coaching Session List.

2. In the session list, under **Actions**, click the **Setup** button ( ) of the session. The **Session Details** screen opens for the session, and **Session is in setup mode** appears above the session-details area.



***Session Details* screen in setup mode**

Adding Existing Global Call Lists to a Session

The simplest way to add Call Lists to a coaching session is to select existing global Call Lists and copy them to the session. When a global Call List is added to a coaching session, a copy of the original list is made and attached to the session. The copy becomes a coaching-session Call List, and is not linked to the original global Call List. It can only be viewed from the coaching session. From within the coaching session, you can add or remove calls from an attached Call List and change the search criteria of a Saved Search. These modifications do not affect the original, global Call Lists or Saved Searches.

To add a Call List to a coaching session:

1. In the **Session Details** screen, on the left side of the screen, under **General Details**, click the + sign (+) beside **Calls**. A list of global Call Lists and global Saved Searches appears.
2. Select a Call List. The list closes. A copy of the Call List is created and attached to the session, and appears in the relevant section (**Call Lists** or **Searches**) under **General Details**.

   Note: You can also add existing Call Lists to a coaching session from the Saved Searches page.

Creating New Call Lists within a Session

You can create additional coaching-session Call Lists within a session. You can do this by performing a call search within the session or by opening a Call List that is already attached to the session and saving some of the calls in a new Call List.

To perform a call search:

1. In the **Session Details** screen, on the left side of the screen below the **Calls** list, select **New Search**. A Call Search form opens on the right side of the screen.
2. Fill in the search criteria. For additional information, see Creating a New Call Search.
3. Click **Search**. The search results appear to the right of the form.

To save the search criteria as a Saved Search:

1. In the upper-left of the Call Search form, click **Save**. You are prompted to provide a name for the Saved Search.
2. Fill in a name for the Saved Search and click **OK**. The search is saved in the coaching session and appears under **Searches** in the **General Details**.

To save some or all of the calls in a coaching-session Call List:

1. Select the checkbox next to each call you want to add to the Call List.
2. At the top of the list, under **Batch Actions**, select **Add To** and then select one of the following:

If you want to	Select	Result
Create a new Coaching session and a new coaching Call List within that session, and add the calls to the new Call List	**Coaching** > **New**	A **New Coaching session** dialog box opens. Specify the name and other settings of the Coaching session, and then click **Save**. The dialog box closes, and a new Call-List dialog box opens. In the text field, type a name for the Call List, and then click **OK**. The Coaching session and Call List are created, and the calls are added to the Call List.
Create a new coaching Call List within an existing Coaching session, and add the calls to the new Call List	**Coaching** > [existing Coaching session] > **New**	A Call-List dialog box opens. In the text field, type a name for the Call List, and then click **OK**. The new coaching Call List is created and attached to the Coaching session, and the calls are added to the Call List.
Add the calls to an existing coaching Call List that is attached to an existing Coaching session	**Coaching** > [existing Coaching session] > [existing Call List]	The calls are added to the selected coaching Call List.
Add the calls to a new Call List (Will not be linked to a specific coaching session)	**Call List** > **New**	A Call-List dialog box opens. In the text field, type a name for the Call List, and then click **OK**. The new Call List is created and the calls are added to it.
Add the calls to an existing Call List (Will not be linked to a specific coaching session)	**Call List**> [existing Call List]	The calls are added

Modifying Session Call Lists

Once a Call List is attached to a Coaching session, you can add calls to it or remove them as necessary. Calls can be added to a Call List from any Call or Event Grid or from the Media Player. You can also remove calls from a list. If the Call List was copied from a global list, the global list is not affected by changes you make to the coaching-session list.

To remove calls from a Call List:

1. Under **General Details**, click the name of the Call List. The list opens in an Interaction Grid on the right side of the screen.
2. Select the checkbox to the left of each call you want to remove from the Call List.
3. Under **Batch Actions**, select **Delete From List**. The selected calls are removed from the list.

Removing a Call List from a Session

You can remove Call Lists from a session.

To remove a Call List:

1. Under **General Details**, click the **x** ([x]) to the right of the name of the Call List. You are prompted to confirm that you want to remove the Call List from the session.
2. Click **OK**. The Call List is removed from the session.

Adding and Managing Session Notes

Session notes can be defined as public or private.

- **Public notes** are visible to everyone who accesses the session. They are generally intended to help trainees understand the purpose of the coaching session and draw their attention to the aspects of the calls that need to be highlighted.
- **Private notes** are only visible to the person who writes them. You can use them to add reminders or comments to yourself. For example, when you create a session, you can leave yourself a note reminding you to add a link later, when you have the URL of the link.

Notes can be added to a session when it is first opened (see above) or at any other time. The notes are displayed in the Session Details that can be viewed beside the session list in the **Session List** screen and in the **Session Details** screen. You can also edit and delete existing session notes.

To add a note to a coaching session:

1. In the **Session Details** screen (see above), in the title bar of the **Notes** box, click **New**. A blank **New Note** form opens.

   Note: If the **Notes** box is not visible, in the upper-left corner of the screen, click **General Details**.
2. Type the note in the text field.
3. In the dropdown menu, select **Public** if you want the note to be visible to anyone who can access the session or **Me** if you only want the notes to be visible to you.
4. Click **Add**. The note is added to the session.

To edit or delete a note:

- In the **Session Details** screen (see above), in the **Notes** box, select **Edit** or **Delete** as necessary.

Adding and Managing Action Items

You can add Action Items to a coaching session. For example, if you want the trainee to perform a particular task as part of a coaching session, you could open an Action Item in that coaching session to specify that task. When you open an Action Item within a coaching session, the Action Item appears in the coaching session and can be managed from there. It also appears in the general Action Items box, like other Action Items, and can be managed from there as well.

Note: For detailed information about working with Action Items, see Action Items.

To create an Action Item in a coaching session:

1. In the **Session Details** screen, click the **Action Item** button (Action Item). The **Action Item** dialog box opens.
2. Fill in the fields and then click **Save**. The Action Item is opened and appears in Action Items box in the **Session Details** screen. In addition, it is added to both your general **Action Items** box and in the assignee's general **Action Items** box.

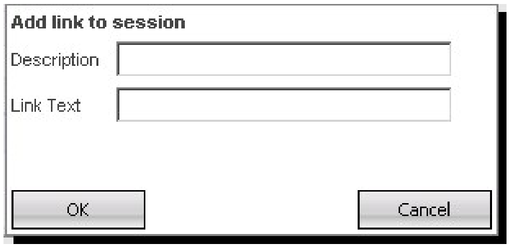
   Note: For information about the fields of the **Action Item** dialog box, see Creating a New Action Item.

Adding and Managing Links

You can add links to external files, websites, and SpeechMiner Permalinks to a coaching session. For example, if you want the trainee to look at a relevant website, you can add a link to the website. During the coaching session, when the trainee clicks the link, a new window is opened and the link is displayed. For example, if you add a link to a website, a new browser window opens and displays the website.

To add a link to a coaching session:

1. In the **Session Details** screen, on the left side of the screen, under **General Details**, click the + sign (+) beside **Links**. An **Add Link to Session** dialog box opens



Add Link to Session dialog box

2. Under **Description**, enter a description for the link.
3. Under **Link Text**, enter the location of the link. For example, to add a link to Google, type `http://www.google.com`.
4. Click **OK**. The dialog box closes, and the link is added to the list of links that appears under **General Details** under **Links**.

To edit a link:

1. Under **General Details**, under **Links**, click the beside the link you want to edit. An **Add Link to Session** dialog box opens.
2. Modify the **Description** and **Link Text** as required.
3. Click **OK**. The dialog box closes, and the link is modified.

To go to a link:

- Under **General Details**, click the link. A new browser window opens and displays the link.

To delete a link:

1. Under **General Details**, click the **x** ([x]) beside the link you want to delete. You are prompted to confirm that you want to remove the link from the session.
2. Click **Yes**. The link is deleted

Managing Session Properties

Session properties - name, schedule date, trainee, coach, session type - are defined when you open a new session (see above). You can modify these properties as necessary.

To modify session properties:

1. In the **Session Details** screen (see above), in the title bar of the **General** box, click **Edit**.

   Note: If the **General** box is not visible, in the upper-left corner of the screen, click **General Details**.
2. The properties of the session become text fields. Modify the text fields as necessary.
3. Click **Save**. The changes are saved.

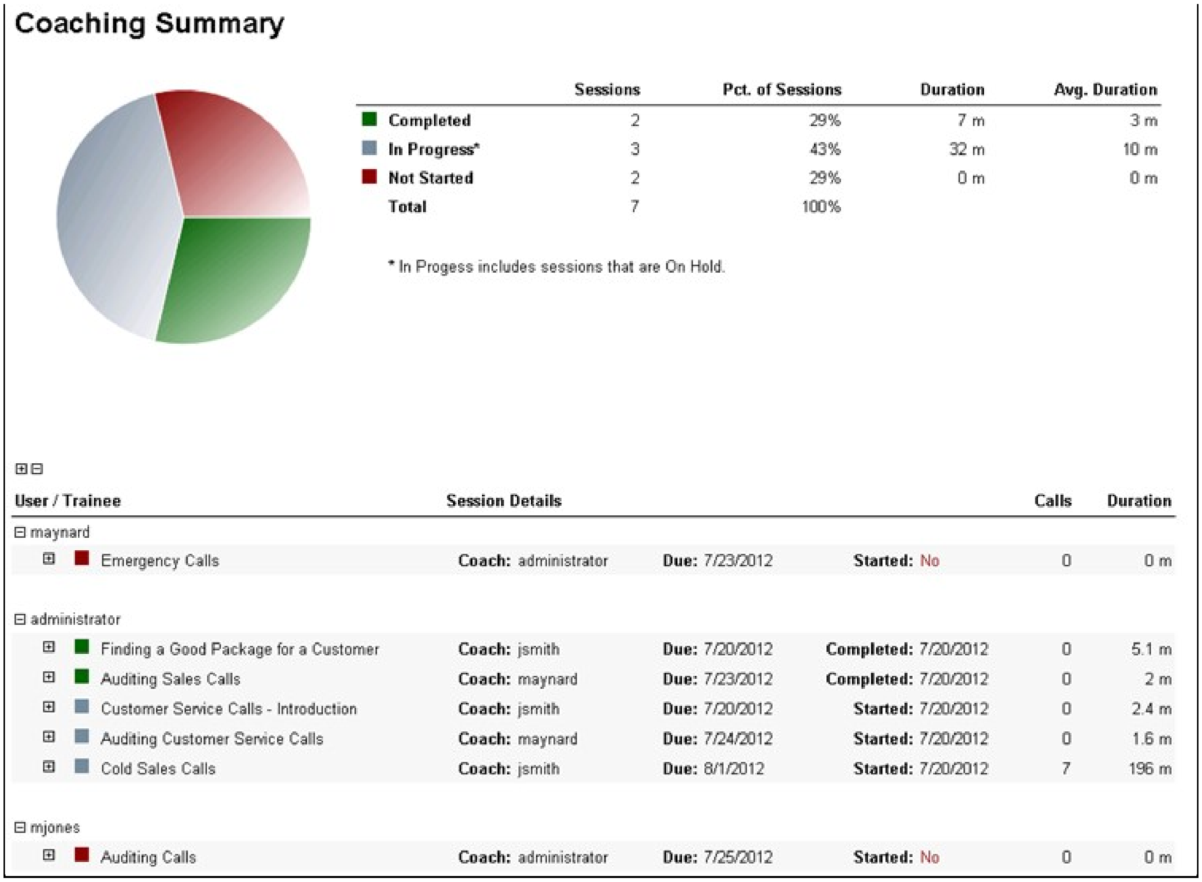
See also

Working with the Coaching Session List
Taking Part in a Session
Coaching Session Reports
Managing Session Types

Coaching Session Reports

Coaching session reports provide statistical information about the coaching sessions in the Session List. The reports break down the sessions by status and indicate how many have not yet been started by their trainees, how many are in progress, and how many have been completed. In addition, they show how long trainees already spent, on average and in total, on the sessions in each category.

Additional details about the sessions included in the report appear in the lower half of the report. The details are divided into groups by trainee. You can expand a session to see additional information about it. You can also open its **Session Details** screen directly from the report.



Coaching Summary

	Sessions	Pct. of Sessions	Duration	Avg. Duration
Completed	2	29%	7 m	3 m
In Progress*	3	43%	32 m	10 m
Not Started	2	29%	0 m	0 m
Total	7	100%		

* In Progess includes sessions that are On Hold.

User / Trainee	Session Details				Calls	Duration
maynard						
	Emergency Calls	Coach: administrator	Due: 7/23/2012	Started: No	0	0 m
administrator						
	Finding a Good Package for a Customer	Coach: jsmith	Due: 7/20/2012	Completed: 7/20/2012	0	5.1 m
	Auditing Sales Calls	Coach: maynard	Due: 7/23/2012	Completed: 7/20/2012	0	2 m
	Customer Service Calls - Introduction	Coach: jsmith	Due: 7/20/2012	Started: 7/20/2012	0	2.4 m
	Auditing Customer Service Calls	Coach: maynard	Due: 7/24/2012	Started: 7/20/2012	0	1.6 m
	Cold Sales Calls	Coach: jsmith	Due: 8/1/2012	Started: 7/20/2012	7	196 m
mjones						
	Auditing Calls	Coach: administrator	Due: 7/25/2012	Started: No	0	0 m

Coaching session report

Generating a Report

Coaching reports can be generated in the **Sessions** screen. Two forms of the report are available:

- **General report:** This report includes all coaching sessions that are included in the set defined by the Session List's general filters. For example, if the general filter specifies **My Sessions** for **Sept. 1st** through **Sept. 30th**, and included **Completed** sessions, all session that meet these criteria are included in the report. (Column filters do not affect the criteria.)
- **User report:** This report includes all sessions that are included in the set defined by the Session List's general filters and belong to a specific user. That is, if the user is either the creator, coach, or trainee of a session, the session is included in the report.

To generate a general coaching report:

- In the **Sessions** screen, at the top of the list, click the **Run Report** button. The report is generated and is displayed in a new browser window.

To generate a user coaching report:

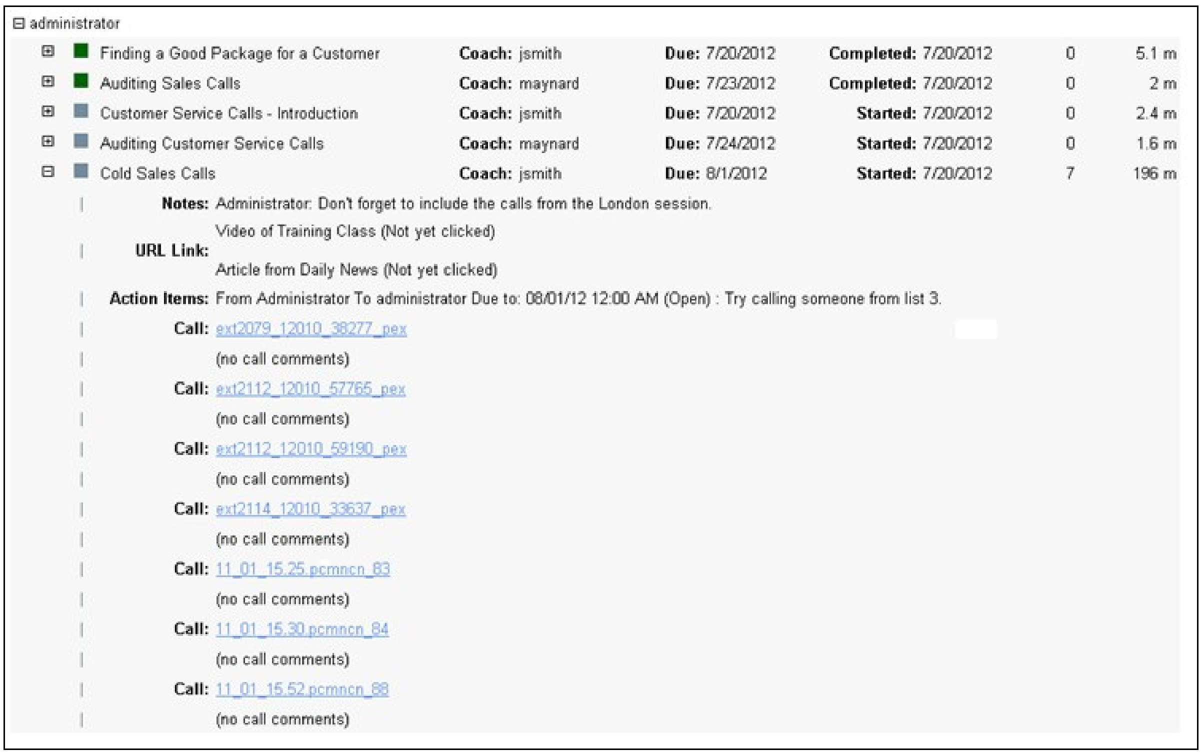
- In the **Sessions** screen, in a row in which the user is the *trainee* of the specified session, under **Actions**, click . A report for all sessions in which the trainee is either the creator, the coach, or the trainee, is generated and is displayed in a new browser window.

Viewing Report Details

The lower part of a generated report lists the sessions that were included in the report. The sessions are grouped by trainee. The name of each session, the name of the coach, the date it was scheduled to take place or the date on which its status was last changed, the status, and, if the session was already begun or completed, the amount of time the trainee spent on it so far, are displayed. You can view additional details about the session, listen to calls that the trainee listened to during the session, and open the Session Details screen for the session.

To view additional details about a session:

- Click the + beside the session name. Notes and resources (links) included in the session are displayed below the session name, as well as links to all the calls that the trainee listened to during the session.



Expanded session showing details

To play a call that appears in the expanded list:

- Click the call link. The Media Player opens in the window, and plays the call.

  Note: To return to the report, press **Backspace**.

To open a session in the Session Details screen:

- Click the name of the session. The **Session Details** screen opens in a new browser window.

See also

Working with the Coaching Session List
Taking Part in a Session
Creating a New Coaching Session
Managing Session Types

Home > Coaching > Managing Session Types

Managing Session Types

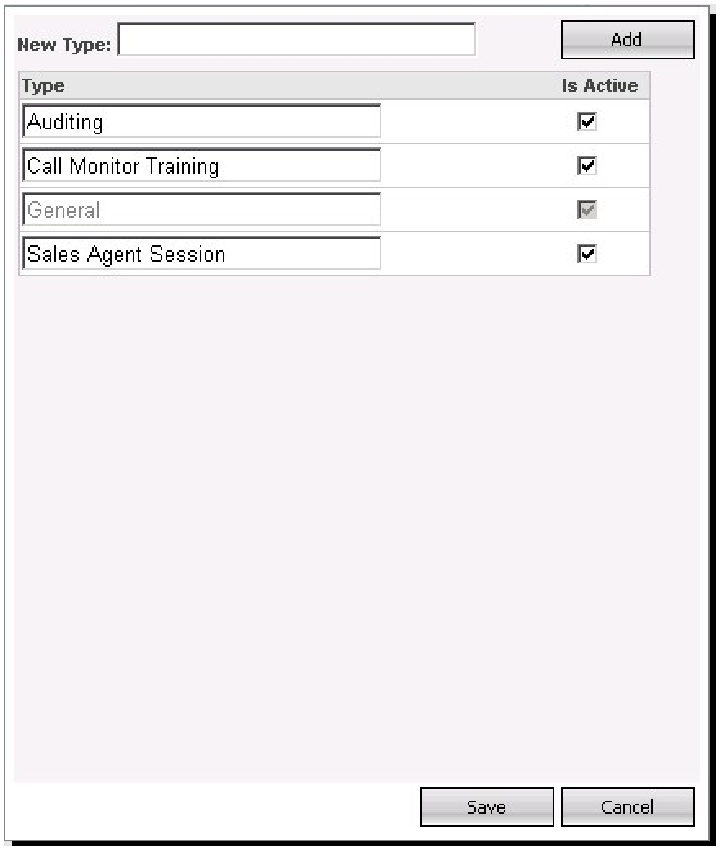
Each coaching session has a type assigned to it. The type can help identify the purpose of the session and the type of trainee it is intended for. By default, one session type, *General*, is defined. You can add additional session types as appropriate for your organization.

Once a session type is saved, you cannot delete it. However, you can *deactivate* it if you do not want it to be available at present. (The General type cannot be deactivated.) In addition, you can modify the name of an existing session type as necessary.

Note: For information about assigning session types to coaching sessions, see Creating a New Coaching Session.

To manage session types:

- In the main menu, under **Coaching**, select **Edit Session Types**. The Session Type Manager opens and displays a list of the session types that are currently defined and their statuses.



Session Type Manager

To add a new session type:

1. Under **New Type**, type the name of the new session type.
2. Click **Add**. The session type is added to the list and its status is set to Active.
3. Click **Save**. The Session Type Manager closes, and the new session type is included in the list of available session types.

To activate or deactivate a session type:

1. Under **Is Active**, click the checkbox beside the session type to select or clear it. The session type is active when a checkmark appears in the checkbox.
2. Click **Save**. The Session Type Manager closes, and the change is implemented.

To modify the name of a session type:

1. In the list of session types, modify the name as necessary.
2. Click **Save**. The Session Type Manager closes, and the change is implemented.

See also

Working with the Coaching Session List
Taking Part in a Session
Creating a New Coaching Session
Coaching Session Reports

Home > Reports

Reports

Reports are summaries and analyses of call, speech, and external metadata. You can view reports in your browser, print them, or send them via e-mail. To help you monitor your business, SpeechMiner offers a wide range of standard reports. Most reports are provided as templates that can be customized, if necessary, to better suit your needs. Depending on the type of report, the results may be presented as lists of data and/or in graphic form. In many cases, you can drill-down within a report to see additional details about a particular item.

This section explains how to use the **Reports** page to select a template, customize its settings, run reports, and manage report results. For additional information about specific parameters and a list of available report templates, see Appendix A: Standard Reports.

See also

Selecting a Template for a Report
Creating a Custom Report
Managing Saved Reports
MRS Library

Home > Reports > Selecting a Template for a Report

Selecting a Template for a Report

There are a number of ways to select a template for a report. If you do not know which template is most suitable for your purpose, you can start by doing one of the following:

- In this manual, skim over the catalog of available templates in Templates.
- In the SpeechMiner interface, in the Main Menu, under **Reports**, select **Templates**. The **Templates** tab opens and lists all of the available report templates. Place your mouse pointer over the **Preview** icon () of each template to see a sample of its results.

Once you know which template you want to use, select it in one of the following ways:

- In the Main Menu, under **Reports,** in the **Templates** tab, click the **Edit** () icon beside the template.
- In the Main Menu, under **Reports**, in the **Edit Report** tab, in the **Template** dropdown list, select the template.

The selected template opens in the **Edit Report** tab. For information about using this tab to customize and run the report, see Creating a Custom Report. For information about customizing reports for display in the Views page, see Managing Widgets.

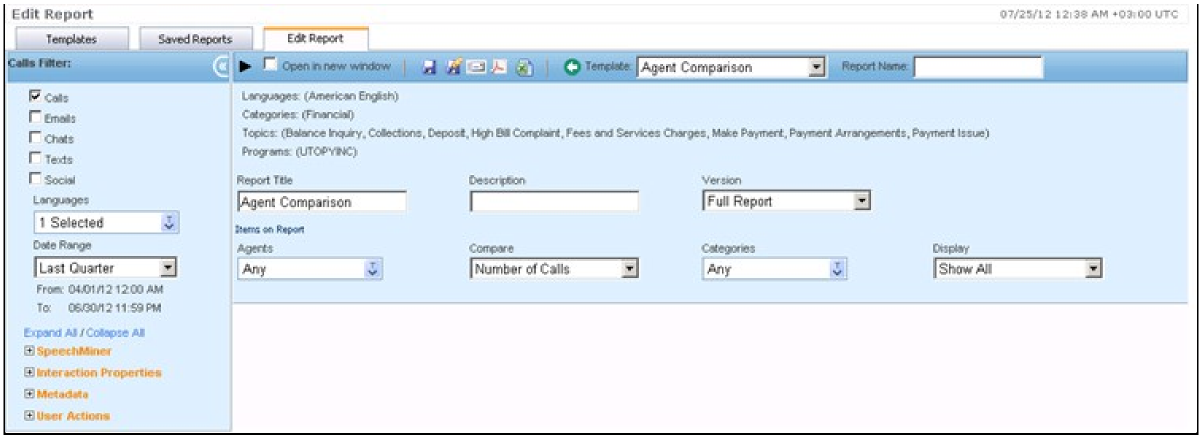
See also

Creating a Custom Report
Managing Saved Reports
MRS Library

Home > Reports > Creating a Custom Report

Creating a Custom Report

This section explains how to use the **Edit Report** tab of the **Reports** page to create and run custom reports.



Edit Report tab

Customizing the Settings of a Report

When a report template is selected in the **Edit Report** tab of the **Reports** page, the fields that can be used to customize the report are displayed. Each report template has a different set of fields.

All templates include the following fields:

Field	Description
Report Name	The name of the report in SpeechMiner. This name identifies the report in the list of saved reports.
Report Title	The title of the report, displayed above the report results

Each template includes other fields as appropriate. The fields are divided into two categories:

- **Data Set Filters:** Parameters that limit or define the body of calls that should be used as the data set for the report. For example, a data-set filter could limit the data to a specific date range or workgroup.
- **Items on Report:** Parameters that will be graphically represented in the report. For example, the items on report could be a list of agents that you select. Each agent could be represented in the report by a bar in a graph.

To customize the settings of a report:

1. In the **Edit Report** tab, under **Template**, select the required template.
2. On the left side of the screen (under **Calls Filter**), select the Data Set filters. These filters are configured in the same way that the filters of the New Search screen are configured (except that Text Mode is not available). For additional information about the filters and how to use them, see Common Parameters and Defining Search Criteria.
3. On the right side of the screen, under **Items on Report**, select the parameters you want to include in the report results.

Note: The symbol beside a field indicates that selections for the field are made using a Multi-Select dropdown menu. This kind of menu allows you to select multiple values for the field. Click the symbol to open the menu. Select the required items one by one, or right-click any item in the list to access global selection options. When you have selected all the required items, click to close the dropdown menu. The number of selected items is displayed in the text field. When no items are selected, **Any** appears. This means the parameter is not taken into account at all during report preparation. For additional information about working with Multi-Select boxes, see Defining Search Criteria.

When you are not configuring the Data Set filters, you can hide the left panel of the screen if you wish.

To hide or show the Data Set filter panel:

- In the upper-right corner of the panel, click «.

Analyzing Data from the "Current User"

Report templates that include the **Agents** Data Set filter can be configured to analyze data for the current user or workgroup rather than a specific workgroup. In this case, when the report runs, the data set it uses changes depending on which user runs it. For example, if the user is *agent 12*, the report will only include calls that were handled by *agent 12*.

This feature will only work if the user's profile includes a *mapping*. If the user is an agent, the mapping gives the name of the agent, and 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 workgroup they manage, and the reports that are filtered for the current user include data for the entire workgroup. For additional information about user profiles and mapping users to agents or workgroups, see Managing Users.

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

- In the Data Set filters on the left side of the screen, under **Agents**, select **Current User**, and then click **Add**.

Once the report is configured in this way, you can enable different users to make use of it if you save it, as explained below, and then share it with the users, as explained under Managing Saved Reports.

Running a Customized Report

Once the settings of the customized report are specified, you can run the report. Reports can be run in a number of ways:

- Run the report and view the results in the browser
- Run the report and send the results as an e-mail attachment to specified recipients. The results are sent as an MHT file. This file opens in a browser and is linked to the SpeechMiner system. As a result, the data drill-down feature can be used in the file.
- Run the report and export the results as a PDF or Excel file

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

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

1. If you want to view the results in a new browser window, at the top of the form, select the **Open in new window** checkbox. If you want to view the results in the **Customize Report** tab, below the template form, clear this checkbox.
2. Click **Run** (▶). The report runs, and the results are displayed as you requested.

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

1. At the top of the form, click **E-mail** ( ). A dialog box opens.
2. Under **To**, fill in the e-mail addresses of the recipients. Separate multiple addresses with semi-colons (;).
3. Under **Notes**, type any text you want to include in the body of the e-mail.
4. Click **Send**. The report runs, and the results are sent to the recipients you specified. A confirmation message appears when the results are sent.

To run the report and export the results:

1. At the top of the form, click to export the results to a PDF file or to export the results to an Excel file. A dialog box opens and asks you if you want to open or save the file.
2. Select the desired option. If you select **Open**, the file opens in the application that is configured to open files of the selected type on your computer. If you select **Save**, a **Save As** dialog box opens.
3. If you selected **Save**, navigate to the folder in which you want to save the file, and then click **Save**. The file is saved in the selected location.

Using Report Results

Depending on the type of report, the 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 of a report (graph bars, lines, or table headers) is based. When you do this, you will be presented with a new report which 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 a call 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 call.

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

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

Data in tables can be sorted by any column.

To sort data in a table:

- Click the heading of the column by which you want to sort the table. (To reverse the sort order, click the heading again.)

Saving a Customized Report

If you want to run a report with the same settings in the future, you can save it. In addition, if you have edited the settings of a saved report, you can either save the new settings with the original name using the **Save** option or save the new settings as a different report using the **Save as** option.

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

To save a customized report:

- At the top of the form, click **Save** ( ).

To save the current report settings under a new name:

- At the top of the form, click **Save as** ( ).

See also

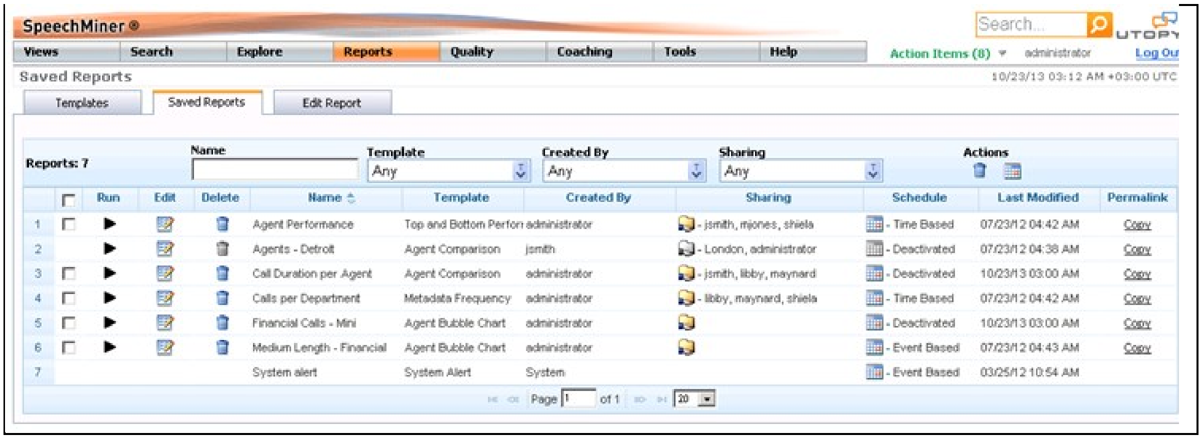
Selecting a Template for a Report
Managing Saved Reports
MRS Library

Managing Saved Reports

Saved reports are customized report templates that you can run as often as needed. They can be run on demand, or according to a schedule. You can access saved reports and configure their schedules in the **Saved Reports** tab.

To open the Saved Reports tab:

- In the Main Menu, under **Reports**, select **Saved Reports**. The **Saved Reports** tab opens.



Saved Reports tab

Note: Unlike the other saved reports in the list, the **System alert** report is automatically generated and saved by the system. For additional information, see System Alerts.

Columns in the Saved Reports Tables

The following columns appear in the Saved Reports tables:

Column	Description
Run	Click the icon to run the report and display the results at the bottom of the screen. For information about working with the results, see Creating a Custom Report.
Edit	Click the icon to open the report in the **Custom Report** tab, where you can change the parameters and settings and make use of all of the other features of the **Custom Report** tab.
Delete	Click the icon to delete the report. **Note:** You can also delete a number of reports at once, as explained below.
Name	The name of the report
Template	The template on which the report is based
Created By	The name of the user who created the report
Sharing	A icon appears for reports that you created. A icon appears for reports that other users created and shared with you. The names of the groups and users with whom the report is shared appear in the table beside the icon. Click the 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 the selected users will see the report listed in their **Saved Reports** tab and will be able to run the report. Note: You can only modify reports that you created. If you want to modify other reports, you must save them under new names.
Schedule	Indicates whether the report has a schedule defined for it, and, if so, what kind of schedule. Click the icon to activate, deactivate, create, or modify the schedule. For additional information, see Scheduling a Report below.
Last Modified	The date on which the report settings were last saved
Permalink	Click **Copy** to create a Permalink to the report. You can copy the link to your clipboard and then paste it elsewhere as needed. Later, you can use a browser to navigate to the Permalink address. When you do, the report will open in the browser. For additional information, see Permalinks.

Sorting the Columns

You can choose to sort the tables by any column that contains a report parameter.

To sort a table by a column:

- Click the title of the column.

  Note: Click the title a second time to reverse the sort order.

Selecting the Page Size

When the list of saved reports is long, it is divided into pages. The **Page** field of the page navigator at the bottom of the grid shows which page is currently being displayed.

Page navigator

You can use the page navigator to go to a particular page in the list and to select the page size - the maximum number of reports to display in a single page.

To navigate to a different page in the list of saved reports:

- In the page navigator. select one of the following:

Option	Description
	Go to the first page
	Go back one page
Page	Type the required page number in the field, and then press **Enter**.
	Go forward one page
	Go to the last page

To select the page size:

- In the page navigator. in the dropdown list on the right, select the page size. The available options are 20, 40, 60, 80, and 100.

Filtering the List

You can use filters to limit the saved reports that are displayed in the list to those that meet criteria you specify. The filter controls are located at the top of the list. The following filters are available:

Filter Type	Description
Name	Enter a sequence of characters. Only those saved reports whose names contain the sequence you enter are displayed.
Template	Click the icon to open the Multi-Select box. Select the report templates to include in the list, and then click **Close** to activate the filter. Only those saved reports that are based on the selected templates are displayed.
Created By	Click the icon to open the Multi-Select box. Select the users to include in the list, and then click **Close** to activate the filter. Only those saved reports that were created by the selected users are displayed.
Sharing	Click the icon to open the Multi-Select box. 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 **Close** to activate the filter.

Scheduling Reports

You can schedule reports to run automatically at specified times or in response to specified Events. The results are automatically sent via e-mail to the recipients you specify. The current schedule setting of each saved report is indicated in the **Schedule** column as follows:

- **Deactivated:** The report does not run on a schedule.
- **Time Based:** The report runs automatically at specified times.
- **Event Based:** The report runs automatically when specified Events are detected

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

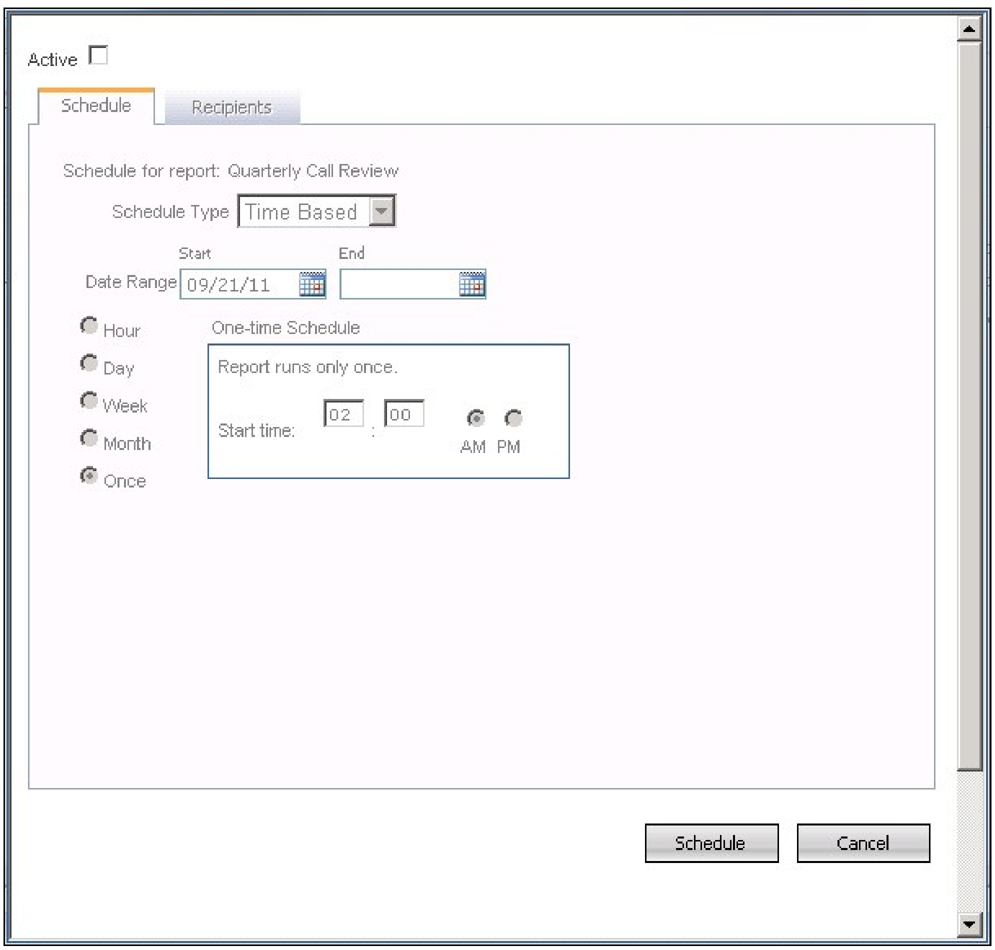
You can create reports schedules individually for specific reports or globally for a number of selected reports. You can also deactivate active schedules in either of these ways.

To configure the schedule for a single report:

- In the report table, in the report's row, click **Schedule** ( ). The scheduling dialog box opens (see below). Follow the instructions below to select the schedule options you require.

To configure the schedule of a group of reports:

1. Select the checkbox to the left of each report you want to include in the schedule. To select all of the reports in the list, select the checkbox in the column title.
2. At the top of the list, to the right of the filters, click **Schedule** ( ). The scheduling dialog box opens (see below). Follow the instructions below to select the schedule options you require.



Scheduling Dialog Box

Scheduling Reports to Run at Specified Times

If you want to see report results on a routine basis, you can schedule the reports to run at specified intervals.

To schedule the selected reports to run at specified times:

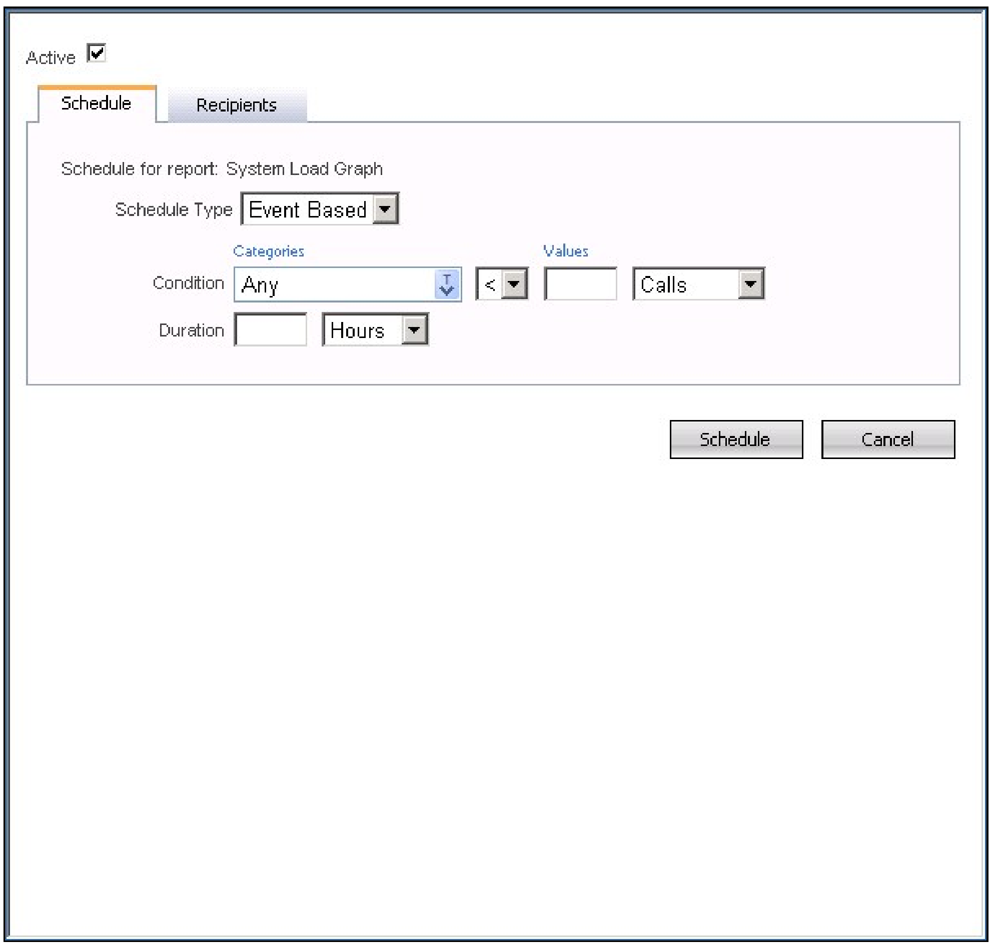
1. At the top of the scheduling dialog box, select **Active**. The scheduling settings in the dialog box become available.
2. In the **Schedule** tab, under **Schedule Type**, select **Time Based**. The options for configuring the schedule are displayed.
3. Under **Date Range**, select the start and end dates for the schedule to be implemented.
4. Select the time period - **Hour**, **Day**, **Week**, **Month**, **Once** - you want to use to schedule the reports. For example, if you want to run the reports every weekday, or on Mondays and Thursdays, select **Day**.
5. In the box beside the units, fill in the desired schedule.
6. Fill in the **Recipients** tab and save the settings as described below.

Scheduling Reports to Run in Response to Events

Event-based scheduling enables you to keep track of potentially significant trends and/or to be alerted when significant changes in agent or customer behavior occur. In this context, the term *Event* does not refer to an individual occurrence of an Event but to a specified number or percentage of calls in which the Event was detected. For example, the detection of caller agitation in more than 10% of calls could be an Event that causes a report to be generated.

To schedule the selected reports to run in response to Events:

1. At the top of the scheduling dialog box, select **Active**. The scheduling settings in the dialog box become available.
2. In the **Schedule** tab, under **Schedule Type**, select **Event Based**. The fields required to configure the schedule are displayed



Scheduling Dialog Box: Event-Based Schedule

3. In the **Condition** line, under **Categories**, click . A Category Multi-Select box opens. Select the Categories that must be identified in the calls. When you have selected the Categories, click to close the Category selector. (For additional information about using the Multi-Select box, see Defining Search Criteria.)
4. In the next field, select one of the following:
   - **Exceeds** (>) if you want the selected reports to run when the selected Categories are identified in more than a specified number or percentage of calls
   - **Equals** (=) if you want the selected reports to run when the selected Categories are identified in a specified number or percentage of calls
   - **Drops Below**(<) if you want the selected reports to run when the selected Categories are identified in fewer than a specified number or percentage of calls
5. Under **Values**, fill in the number or percentage of calls.
6. In the next field, select **Calls** if the value refers to a number of calls, or **% of calls** if the value refers to a percentage of calls.
7. Under **Duration**, fill in the number of time periods (of the unit specified in the next field) in which the condition must be met. For example, type "2" if the condition must be met within a 2-day period (and then select **Days** in the next field).
8. Select the unit of time for the duration value you entered in the previous field.
9. Fill in the **Recipients** tab and save the settings as described below.

Recipients Tab

Regardless of which type of schedule you create, you must specify the recipients of the reports.

To specify the recipients of scheduled reports:

1. In the scheduling dialog box, in the **Recipients** tab, fill in the fields as follows:

Field	**Description**
To	The e-mail addresses of the report recipients. Separate multiple addresses with semi-colons (;).
From	The sender address to use
Subject	The text that should appear in the subject line of the e-mail.
Report Format	Select **Web archive** to format the results as an MHT file (which can be opened in Internet Explorer). Select **PDF** to format the results as a PDF file.
Priority	Select the desired priority level for the e-mail message.

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

Deactivating a Schedule

If you want to stop running one or more active schedules, you can deactivate them.

To deactivate active schedules:

1. At the top of the scheduling dialog box, clear the **Active** checkbox.

   Note: If you selected a group of saved reports before you opened the scheduling dialog box, the **Active** checkbox is cleared already when the scheduling dialog box opens.
2. Click **Schedule**.

Running a Report and Working with the Results

You can run a report and view the results in the **Saved Reports** screen. Once the results are open, you can drill down to view additional details, as you would if you ran the report in the **Edit Report** screen. You can also e-mail the results or export them as PDF or Excel files.

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

- Click **Display** (). The report runs, and the results are displayed at the bottom of the screen.

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

- Click the component.

To play back a call from a drill-down list:

- Click the ▶ icon. The Media Player opens in a new browser window and begins to play back the call.

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

- At the bottom of the list of saved reports, click **Back** ( ).

To e-mail the displayed results:

1. At the bottom of the list of saved reports, click **E-mail** ( ). A dialog box opens.
2. Under **To**, fill in the e-mail addresses of the recipients. Separate multiple addresses with semi-colons (;).
3. Under **Notes**, type any text you want to include in the body of the e-mail.
4. Click **Send**. The report runs, and the results are sent to the recipients you specified. A confirmation message appears when the results are sent.

To export the displayed results:

1. At the bottom of the list of saved reports, click to export the results to a PDF file or to export the results to an Excel file. A dialog box opens and asks you if you want to open or save the file.
2. Select the desired option. If you select **Open**, the file opens in the application that is configured to open files of the selected type on your computer. If you select **Save**, a **Save As** dialog box opens.
3. If you selected **Save**, navigate to the folder in which you want to save the file, and then click **Save**. The file is saved in the selected location.

Deleting Saved Reports

You can delate reports individually for a specific report or globally for a number of selected reports.

Note: You can only delete reports you created.

To delete a single report:

- In the report table, in the report's row, click **Delete** ( ). You are prompted to confirm you want to delete the report.
- Click **Yes**. The report is deleted.

To delete a group of reports:

1. Select the checkbox to the left of each report you want to delete. To select all of the reports in the list, select the checkbox in the column title.
2. At the top of the list, to the right of the filters, click **Delete** ( ). You are prompted to confirm you want to delete the reports.
3. Click **Yes**. The reports are deleted.

See also

Selecting a Template for a Report
Creating a Custom Report
MRS Library

Home > Reports > MRS Library

MRS Library

The MRS Library is a dll that provides support for various report features. If you are having problems running reports, it is worthwhile that the correct version of the MRS Library is deployed in your system. You will not generally have to do this unless Genesys technical support asks you to.

To find out the version number of the MRS Library:

1. In a browser, navigate to the **Report Manager** page. This page is accessed on the report server at the URL **`http://[report server]/reports`**. (Replace [report server] with the name of your report server.)
2. Select the database folder. A list of the contents of the folder opens.
3. Select **MRSLibrary_Version**. The MRS version number is displayed.

MRS version (7.2.4060.0)

See also

Selecting a Template for a Report
Creating a Custom Report
Managing Saved Reports

Home > Tools

Tools

The **Tools** page provides access to an array of global SpeechMiner functions and management features. Depending on your permissions, you may be able to use these features to manage Categories, Preset Views, and user accounts and permissions; to monitor and manage the system and its servers; and view information about the definitions of Topics, Programs, and Categories that are defined in the system and used by SpeechMiner to analyze calls.

See also

Category Management
User Management
System Administration
Elements Explorer

Home > Tools > Category Management

Category Management

This section explains how to use the SpeechMiner Category Manager to manage the collection of Category definitions that exist in your system. It explains what Categories are and describes how to create new Categories, define their properties, activate and deactivate Categories, apply Categories to the system so that they are included in routine processing of calls, and modify or delete Categories.

The Category Manager can be opened either in the SpeechMiner browser-based interface or in the SMART application. Both locations provide the same functionality, and they are synchronized automatically, so it does not matter which way you open the Category Manager. Nonetheless, the interfaces are slightly different. This section explains how to use the Category Manager interface that is in the SpeechMiner web interface. For information about working with the Category Manager in SMART, please refer to the SMART user manual.

Note: The permissions for the Category Manager in the SpeechMiner web interface are set in the permissions for SMART. That is, every user has the same permissions for the Category Manager in SMART and in the web interface. Permissions for the Category Manager are configured under *Tools > User Management > Administer Roles* in the SMART tab. For additional information, see Managing Roles.

To open the Category Manager in the SpeechMiner web interface:

- In the Main Menu under **Tools**, select **Manage Categories**. The **Manage Categories** screen opens and displays a list of the Categories that are currently defined in your system.

See also

User Management
System Administration
Elements Explorer

Home > Tools > Category Management > About Categories

About Categories

Categories are used to group calls with similar characteristics so that SpeechMiner users can find calls that require their attention for particular reasons. The call characteristics that define a Category can be as simple as "calls in which the Topic of interest rates was found," but they can also be very complex, defining a very specific mix of characteristics. For example, a Category can be defined to group calls in which the Topic *Payments* was mentioned by the agent, the customer displayed signs of agitation, and the call-center supervisor was called in to deal with the customer during the last two minutes of the call.

SpeechMiner assigns calls to Categories after it has finished processing them. All the Categories in the system are global Categories that can be applied to any call. When call processing is completed for a call, SpeechMiner goes one by one through the list of Categories in the system and checks whether the call meets the conditions of the Category. If it does, the call is assigned to the Category. A single call may not belong to any Categories, but it can also belong to many Categories.

Category assignment is intended to help reviewers find calls with particular characteristics so that they can analyze them and compare them. For example, reviewers may wish to compare how different agents handled customer agitation during a particular sales campaign. It also enables SpeechMiner to perform statistical analysis on calls. For example, SpeechMiner can check the percentage of calls in September in which customers exhibited agitation.

Categories can be nested; a parent-Category can contain sub-Categories, and there can even be multi-tiered Categories, in which a Category is a sub-Category of one Category and a parent-Category to other Categories. In this case, only the lowest-level Category in the hierarchy is defined by specifying the characteristics of the calls that belong to it; the parent-Categories are defined as containers for their sub-Categories. Thus, when SpeechMiner identifies a call as belonging to a sub-Category, it automatically identifies it as belonging to the parent-Category as well. For example, a Category called *Sales Campaigns* could contain the sub-Categories *Spring Campaign* and *Summer Campaign*, and each of these sub-Categories could contain a number of their own sub-Categories, such as *Supervisor Required*, *Customer Agitated*, and *Customer Agreement*. Any call that was included in the *Supervisor Required* Category of the Spring Campaign would automatically also belong to the *Spring Campaign* Category and to the *Sales Campaigns* Category. Call reviewers could use any of these Categories to find calls belonging to the *Supervisor Required* Category of the Spring Campaign.

Another type of Category is a Manual Category. These Categories have no criteria at all; users of SpeechMiner can use them to group calls manually when they are reviewing them. For example, a manual Category could be *Weekly Review*, and a SpeechMiner user could use it to save a list of calls to review during routine weekly staff meetings.

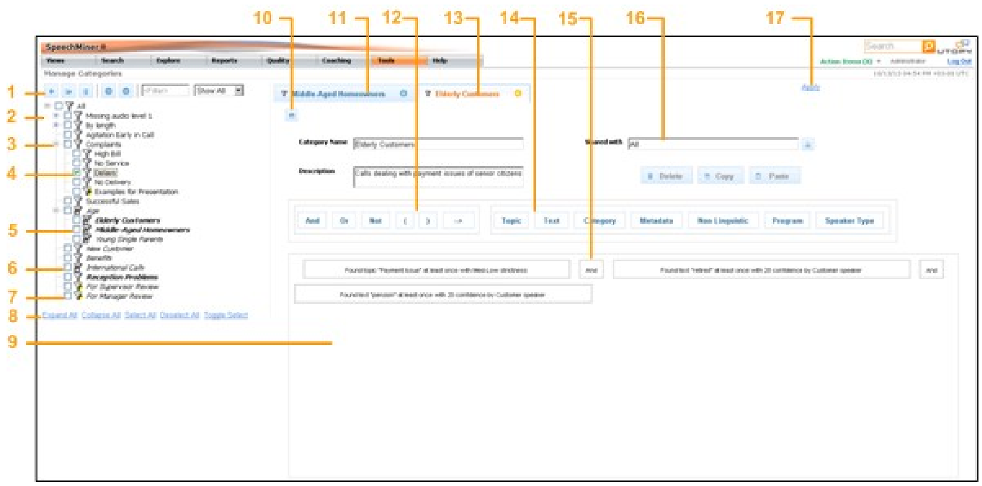
See also

Overview of the Manage Categories Screen
Creating a Blank Category
Configuring Category Conditions
Saving and Applying Changes
Modifying a Category
Deleting Categories
Managing Version History

Overview of the Manage Categories Screen

The **Manage Categories** screen is the Category Manager interface in the SpeechMiner web interface. In this screen, you can view a list of the currently defined Categories in your system, see and modify their definitions, add and delete Categories, activate and deactivate Categories, and apply Categories so that they are included in the interaction-analysis process.

The **Manage Categories** screen contains the following elements:



Element	Number in Illustration	Description
Tree-list controls	1	Controls for managing the items in the tree list and for filtering them
Tree structure	2	Expandable list of Categories
Expanded Category	3	Parent Category expanded to display its sub-Categories
Selected Category	4	Category that will be affected when one of the tree-list controls (#1 in the illustration) is used (e.g., to open it or to move it up or down in the tree list)
Open Category	5	Category whose definition is open on the right side of the screen
Locked Category	6	Category that is locked and cannot be modified Categories are automatically locked when they are opened for editing by any user (yourself or someone else). Users with the required permissions can unlock definitions that were locked by other users. **Note:** Permissions for overriding locks is configured under *Tools* > *User Management* > *Administer Roles* in the SMART tab. For additional information, see Managing Roles.
Manual Category	7	Category that includes interactions that are manually assigned to it by users
Selection options	8	Menu of global selection options for the tree list
Category definition pane	9	The right panel of the Category Manager, in which the properties of the Category, including the logical expression that defines the conditions for inclusion in the Category, are defined
Save button	10	Click to save changes that were made to the displayed Category; changes are saved but not applied (see Implementing Changes).
Open Category tab	11	Tab of a Category that is open but not currently displayed Click the tab to display the Category.
Operator elements	12	Drag an operator to insert it into the logical expression.
Displayed	13	Tab of the currently displayed Category

Category tab		Multiple windows can be open at one time in the screen. Click a tab to view the desired window.
Category elements	14	Drag an element to insert it into the logical expression.
Expression area	15	Box containing a logical expression that defines the conditions for inclusion in the Category that is open and selected in the right panel
Sharing settings	16	Displays the current sharing settings of the Category Click the button at the right of the field to open a dialog box in which you can edit the sharing settings of the Category.
Apply link	17	Click to implement changes in SpeechMiner (see Implementing Changes)

See also

Context Menu
Icons and Typefaces
Filtering the List of Categories

About Categories
Creating a Blank Category
Configuring Category Conditions
Saving and Applying Changes
Modifying a Category
Deleting Categories
Managing Version History

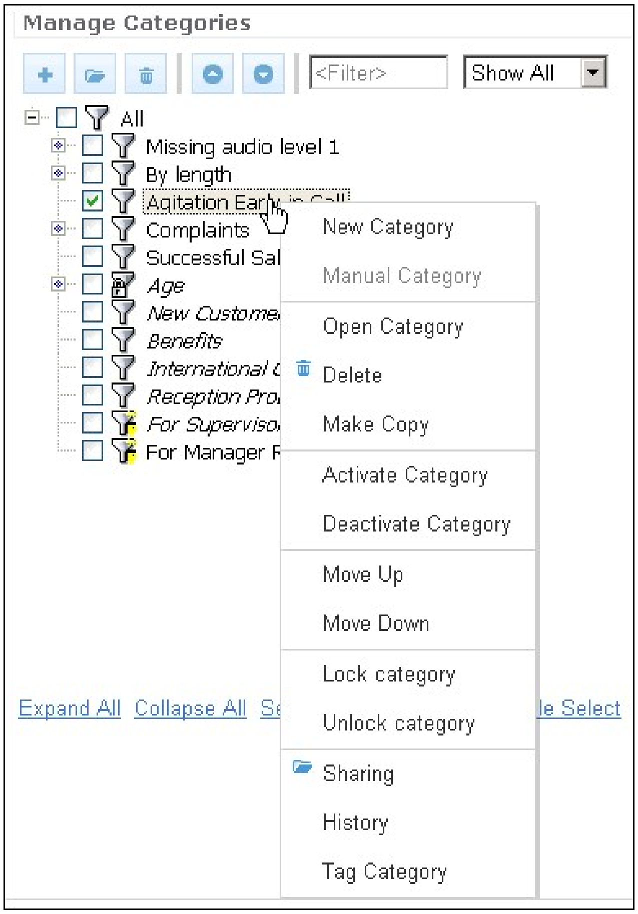
Home > Tools > Category Management > Overview of the Manage Categories Screen > Context Menu

Context Menu

A pop-up menu is available in the Category tree list on the left side of the **Manage Categories** screen. This menu includes many of the options that are available in the tree-list controls (#1 in the illustration above) as well as some additional options for working with individual Categories in the list.

To open the context menu:

- Right-click a Category in the tree list.



Context menu

See also

Icons and Typefaces
Filtering the List of Categories

Home > Tools > Category Management > Overview of the Manage Categories Screen > Icons and Typefaces

Icons and Typefaces

In the **Manage Categories** screen, icons and alternative typefaces are used to identify the type and the current status of each of the Categories, as follows:

Icon/Typeface	Description
	Normal Category (parent or regular)
	Manual Category
	Locked Category
Normal typeface	Active Category
Gray typeface	Inactive Category

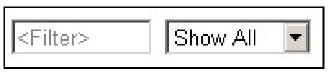
Italic typeface	Modified Category - changes not yet applied
Bold typeface	Open Category (i.e., open on the right side of the screen)

See also

Context Menu
Filtering the List of Categories

Filtering the List of Categories

Filtering the tree list enables you to hide items that are not of interest so that they are temporarily not included in the list. The filter controls are located in the tree-list controls at the top of the tree list. They consist of the **Filter** text box, in which you can type a sequence of characters, and the Filter dropdown menu, in which you can activate a filter that hides Categories based on their current status (active, inactive, or updated). You can use one or both of the filter controls at a time; only those items that contain the specified character sequence and also belong to the selected filter group are displayed.



Filter controls

To use the Filter text box:

- Type a sequence of one or more characters. Categories whose names do not contain the sequence are not displayed in the tree list.

To use the Filter dropdown menu:

- Click the arrow and select the desired filter. Categories that do not belong to the selected group are not displayed in the tree list.

See also

Context Menu
Icons and Typefaces

Creating a Blank Category

A Category definition consists of a name, a description (optional), sharing properties, and, in some cases, a logical expression that defines the types of calls to which the Category can be assigned. Three types of Categories exist in SpeechMiner:

- **Regular Categories:** Categories that have conditions defined in the form of a logical expression. When SpeechMiner processes a call, the call is automatically assigned to this type of Category if it matches the requirements that are defined in the condition. These Categories can be independent (on the top level of the Category hierarchy) or they can be sub-Categories of other, *parent* Categories.
- **Parent Categories:** Categories that contain other Categories. These Categories have a name and description, but do not include a logical expression. Calls are assigned to them when they are assigned to any of their sub-Categories. Any Category can be converted into a parent Category by adding sub-Categories to it. (When a regular Category is converted into a parent Category, the logical expression that defined the Category is deleted.)
- **Manual Categories:** Categories that have no conditions; SpeechMiner users manually assign calls to them as required.

The sharing properties of a Category define which users will see it in the SpeechMiner interface. Users with whom a Category is shared will see the Category in the lists of Categories available for selection in the Call Explorer and in Category filters. Sharing settings are intended to remove "clutter" by hiding Categories that are not relevant to particular users. For example, if a particular workgroup only deals with calls that relate to maintenance issues, you can choose not to share sales Categories with that group. In this way, members of that workgroup will not have to encounter large numbers of Categories that do not concern them. In addition, if you are creating a new Category, you may not want to share it with anyone else until you have fully tested it. Once the testing process is complete, you can change the sharing settings and apply the change to SpeechMiner.

By default, Categories are shared with all SpeechMiner users. You can change this by specifying groups, workgroups, and specific users with whom a Category should be shared.

Note: Category sharing does not affect which calls a user can see or play back.

To create a blank Category:

1. In the tree list, right-click **All** to create an independent Category, or right-click an existing Category to create the new Category as a sub-Category of the selected Category. The Context menu opens.

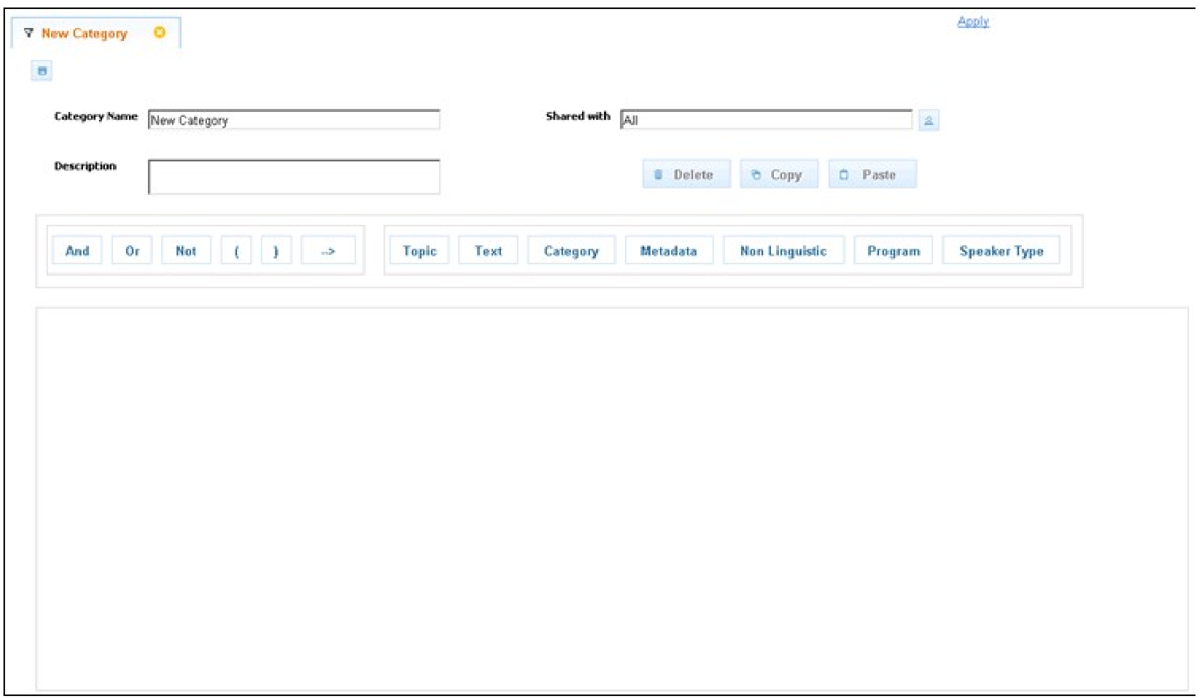
   Note: If you select an existing Category, the conditions defined for inclusion in the Category (its logical expression) are automatically erased.

   Note: If you want to create a manual Category, you must right-click **All**. Manual Categories cannot be sub-Categories of any other Category.

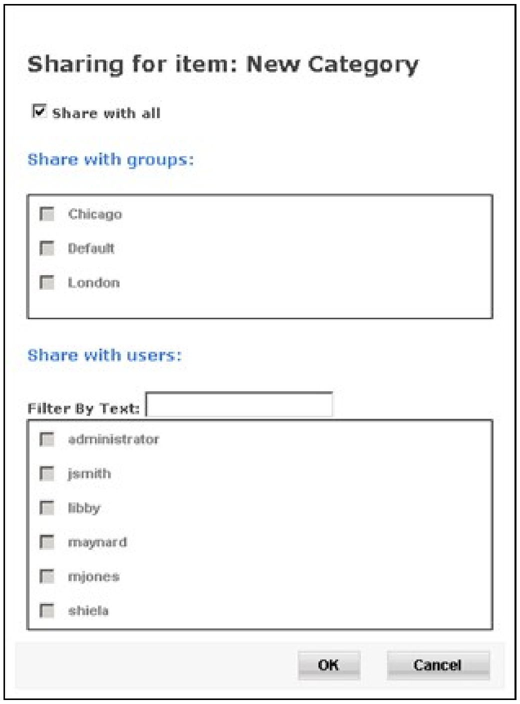
   Note: You can also move the Category to a parent Category later.

2. In the Context menu, click **New Category** to create a regular Category or **Manual Category** to create a manual Category. The blank Category opens in the right panel.

   Note: You can also create a new regular Category by selecting in the tree-list controls, but to create a manual Category, you must open the Context menu.

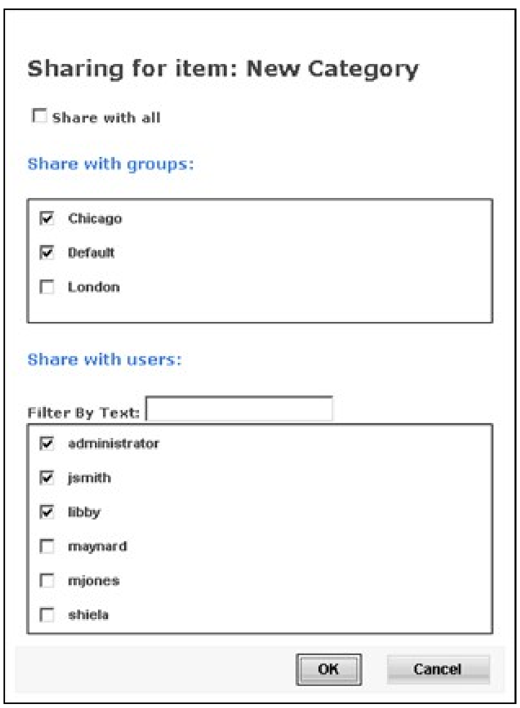


3. Under **Category Name**, enter a name for the Category.
4. If you want to limit the types of SpeechMiner users with which the Category is shared, to the right of the **Shared with** field, click (**Edit**). The **Category Sharing** dialog box opens.



Note: If you do not want to change the sharing settings, skip to step 8 below.

5. Clear the **Share with all** checkbox. The sharing options become active.
6. Select the groups, and users with which the Category should be shared.



Note: To filter the list of users, type a sequence of characters that appears in the user name you want to find. The list is filtered; only user names that contain the sequence you type are displayed.

7. Click **OK**. The sharing settings are displayed in the **Shared with** field.
8. Under **Description**, enter a description for the Category (optional).
9. On the upper-left of the right panel, click (**Save**). The Category is saved.

Note: If the Category is a regular Category, you can configure its conditions, as explained under Configuring Category

Conditions, before you save it. If the Category is a parent Category or a manual Category, it does not require any additional configuration, and must be saved at this point.

See also

About Categories
Overview of the Manage Categories Screen
Configuring Category Conditions
Saving and Applying Changes
Modifying a Category
Deleting Categories
Managing Version History

Home > Tools > Category Management > Configuring Category Conditions

Configuring Category Conditions

An interaction is assigned to a regular Category if it meets the conditions that are defined for inclusion in the Category. The conditions can include a wide variety of interaction characteristics, including the Program the interaction belongs to, Topics that were recognized in it, non-linguistic Events that were detected in it (calls only), its metadata properties, and even other Categories to which it belongs.

Logical Expressions

Configuring Category conditions is performed by defining a logical expression for SpeechMiner to evaluate. If the logical expression is evaluated as True for a particular interaction, the interaction is assigned to the Category.

Logical expressions can consist of one or more elements. Each element is a statement, such as *Date Of Interaction>1/19/2010* or *Found topic "Reduction" at least once with Low Strictness*. If a logical expression contains one element, it is True whenever the condition defined in the element is true. For example, if a logical expression contains the element *Date Of Interaction>1/19/2010*, it is True for any interaction whose metadata indicates that it took place on or after 1/19/2010.

Logical expressions can also contain multiple elements. When they do, the elements must be related to one another by logical operators, such as AND and OR. For example, *Date Of Interaction>1/19/2010* AND *Found topic "Reduction" at least once with Low Strictness* is a logical expression that indicates both conditions must be met - the Topic must be found and the interaction must have taken place in the specified time period - in order for the expression to be evaluated as True and the interaction to be assigned to the Category.

The following operators can be used in logical expressions:

Operator	Description
AND	Both conditions must be met in order for the expression to be evaluated as True
OR	At least one of the conditions must be met in order for the expression to be evaluated as True
NOT	The expression should be evaluated as True only when the condition is not met.
(	Opens a group of conditions that are evaluated as a unit
)	Closes a group of conditions that are evaluated as a unit
->	Conditional AND: Both conditions must be met, but the second condition is dependent in some way on the first (e.g., the second must occur within 30 seconds of the end of the first); this operator is used in conjunction with the **Secs Rel to Start of Prev** or the **Secs Rel to End of Prev** position setting

Logical expressions can be quite complex, containing a number of elements, various logical operators, and parentheses, if necessary. For example:

> *(Date Of Interaction>1/1/2011* AND *Date Of Interaction<1/30/2011* AND *Found topic "Payment Locations" at least once with Low Strictness) OR (Date Of Interaction>1/31/2011* AND (*Found topic "Time Frame" at least once with Low Strictness OR Found topic "Payment Locations" at least once with Medium Strictness))*

means the interaction should be assigned to the Category if it took place between Jan. 1st and Jan. 30th and the Topic "Reduction" was found, or if the interaction took place Jan. 31st or later and either the Topic "Time Frame" or the Topic "Payment Locations" was found.

Defining Logical Expressions

The logical expressions that are used as Category conditions are configured by incorporating elements and logical operators to create the conditional statement.

Inserting Elements into an Expression

Elements of the following types can be included in a logical expression:

- Interaction metadata
- Non-linguistic Event information about a call
- The Program to which the interaction belongs
- Topics that were or were not found in the interaction
- Other Categories to which the interaction belongs
- Whether or not a speaker of a particular type (e.g., agent, supervisor) participated in a call (not available in all systems)
- Text that was or was not found in the transcript of the interaction

To add an element to a logical expression:

- Drag the button of the type of element you want to add to the expression from the condition button area to the logical expression. For example, to add a Topic element to the expression, drag the **Topic** button to the logical-expression area. If there are already other elements in the logical expresson, drag the button to the position in the expression in which you want it to appear.

Dragging the Topic button to the logical-expression area

When you release the button in the logical-expression area, a dialog box opens in which can configure the element. For information about the settings and options of each type of element, see:

- Configuring Metadata Elements
- Configuring Non-Linguistic Event Elements
- Configuring Program Elements
- Configuring Topic Elements
- Configuring Category Elements
- Configuring Speaker-Type Elements
- Configuring Text Elements

Inserting Operators into an Expression

You can add logical operators (see Configuring Category Conditions) to the expression as necessary to define the relationships between the elements of the expression.

Note: There is no precedence among the logical operators in an expression. For example, NOT does not take precedence over AND, as it may in other environments. Thus, *NOT A AND NOT B* does not mean the same as *(NOT A) AND (NOT B);* rather it means the same as *NOT (A AND NOT B)*. For this reason, it is important to use parentheses to ensure that the operators define the condition as you intend them to. By contrast, the internal NOT, which is an element property, always relates just to the element that follows it. Thus, *Not A AND Not B* does mean the same as *(NOT A) AND (NOT B)*.

Inserting AND, OR, NOT, and Conditional AND Operators into an Expression

AND, OR, NOT, and Conditional AND (**->**) define the relationship between two consecutive elements in an expression. You can add these operators to an expression as required.

To insert AND, OR, NOT, or Conditional AND into an expression:

- Drag the button of the type of operator you want to add to the expression from the operator-button area to the position in the logical expression in which you want it to appear. For example, to add an And operator to the expression, drag the **And** button to the logical-expression area.

Inserting Parentheses into an Expression

Parentheses can be inserted into an expression to group elements together for evaluation as a single unit. Complex expressions often require parentheses to break them into smaller expressions so that the relationships between the expressions are clear. For example, if a Topic must be found in interactions handled by one of two agents, and you wrote

`Workgroup\Agent=workgroup 1/agent a` **OR** `Workgroup\Agent=workgroup 1/agent b` **AND** `Found topic "New Account" at least once with Low Strictness`

it would not be clear whether the Topic must be found in interactions handled by both agents or only in interactions handled by *agent b*. If you add parentheses like this

`(Workgroup\Agent=workgroup 1/agent a` **OR** `Workgroup\Agent=workgroup 1/agent b)` **AND** `Found topic "New Account" at least once with Low Strictness`

the Topic would have to be found in interactions handled by one of the agents. But if you write

`Workgroup\Agent=workgroup 1/agent a` **OR** `(Workgroup\Agent=workgroup 1/agent b` **AND** `Found topic "New Account" at least once with Low Strictness)`

the Topic would only be required in interactions handled by agent b.

Logical expression with parentheses

To insert parentheses into an expression:

- Drag the parentheses buttons from the operator-button area to the positions in the logical expression in which you want them to appear.

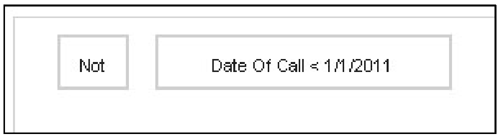
Defining a Negative Condition

A negative condition is a condition that must *not* be met if an expression is to be evaluated as True. For example, a condition that states that an interaction must not have taken place in the month of January is a negative condition. Negative conditions can be specified for a single element of an expression or a group of elements that are contained in parentheses.

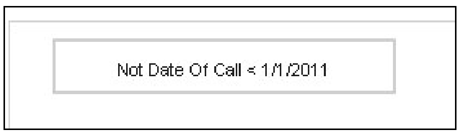
Two methods are available for creating a negative condition for a single element:

- Insert a NOT operator before the element.
- Select the **Not** or **Not found** option in the element's conditions.

In the following two examples, a negative condition is created in each of these ways. The meanings of the two conditions are identical: the condition is True as long as the date is not on or before January 1st, 2011.

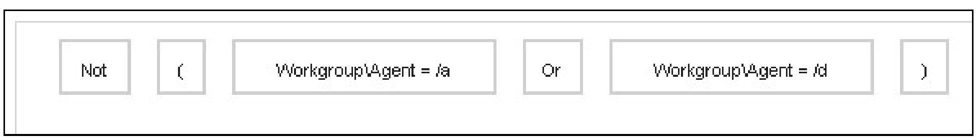


Negative condition created using the NOT operator



Negative condition created using the Not option

An expression containing multiple elements can only be marked as a negative condition using the NOT operator. For example, in the illustration below, the NOT operator is attached to a multi-element condition. The condition is True for all workgroups *except* workgroup a and workgroup d.



NOT operator used to create a negative condition with multiple elements

To insert a NOT operator before an element or expression:

1. If the condition is an expression that contains multiple elements, make sure it is contained in parentheses.
2. Drag the **Not** button from the operator-button area to the position immediately before the element or expression.

To select the Not option for an element:

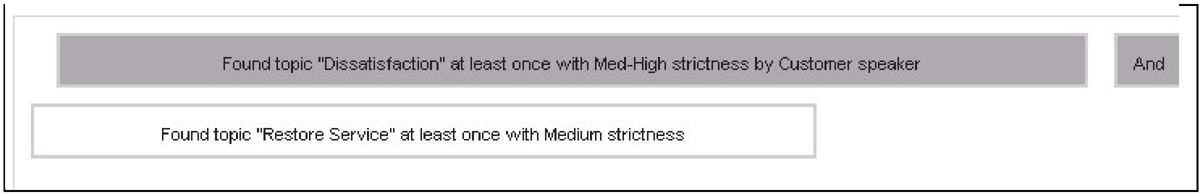
1. If the properties of the element are not displayed, in the expression area of the Category definition, double-click the element. A dialog box opens and displays the element's properties.
2. In the properties, select **Not** or **Not found**.
3. Click **OK**. The setting is implemented in the element.

Copying Elements of an Expression from One Category to Another

You can copy one or more elements of an expression from a Category and paste them into another Category. After you paste them, you can edit them as necessary, just as you would edit any other expression (see Modifying a Category).

To copy the elements of an expression from one Category to another:

1. In the source Category, select the elements of the expression that you want to copy. To select multiple elements, hold down the **Shift** or **Ctrl** keys as you select them.



Selected elements of an expression (shaded)

2. Above the logical-expression area, click **Copy**.
3. In the target Category, above the logical-expression area, click **Paste**. The selected elements of the source expression appear in the logical-expression area of the target.

See also

About Categories
Overview of the Manage Categories Screen
Creating a Blank Category
Saving and Applying Changes
Modifying a Category
Deleting Categories
Managing Version History

Home > Tools > Category Management > Configuring Category Conditions > Configuring Metadata Elements

Configuring Metadata Elements

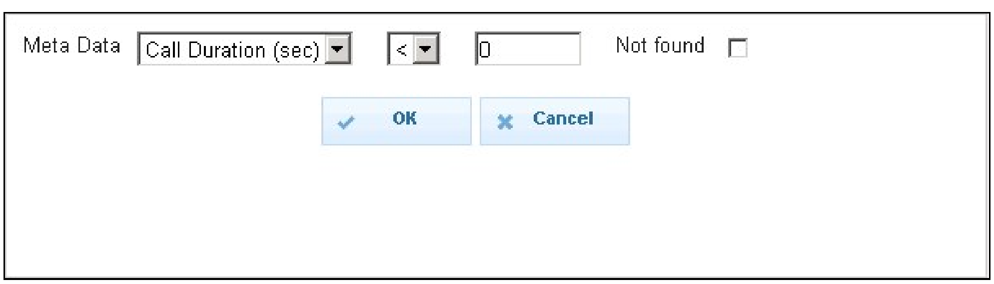
Metadata is information about interactions that is gathered by the external recording systems and relayed to SpeechMiner along with the interaction data (call audio, e-mail contents, etc.). Each system receives different sets of information about the data that is passed to it for processing. For example, metadata for calls could include the name of the agent for each call, the location of the customer, and the duration of the call.

You can define metadata conditions based on any of the metadata values available in your system. The conditions you define can be as simple as one metadata value or they can be complex expressions that specify the relationships among a number of types of metadata. Consider, for example, a sales campaign that is undertaken in Wyoming and in Texas. Certain agents in each location target senior citizens, while others target families with teenage children. To assign senior-citizen calls to a Category, you could define a condition that specifies either Agent1 or Agent2 if the customer is in Wyoming and Agent3 if the customer is in Texas.

When you add a metadata element to an expression (see Inserting Elements into an Expression), a dialog box containing the configuration settings of the element automatically opens. You can configure it as explained below. In addition, you can reopen the element's configuration settings for further modification at any time by double-clicking the element in the expression.

To configure a metadata element:

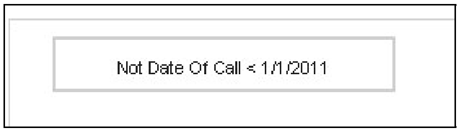
1. Under **Metadata**, select the type of metadata.



2. In the remaining fields, specify the condition. In some cases, you can select an operator (<, >, or =) in the second field and specify a value in the third; in other cases, you only specify a value (and the = operator is assumed). You can specify a value by selecting it from the list or by typing it manually into the third text field.

Note: Some of the value options may be arranged hierarchically. For example, if you select **Workgroup\Agent**, a list of workgroups is displayed. You can select a workgroup, or click the + beside the name of a workgroup to expand the list and display the names of the agents in the workgroup. If you select a workgroup, all members of the workgroup are included in the condition; if you expand a workgroup and select an agent, only that agent is included.

3. If you want the condition to include all interactions *except* those that match the condition, select **Not found**. (For additional information, see Configuring Category Conditions.)
4. Select **OK**. The dialog box closes, and the element appears in the logical-expression with the settings you configured.



Configured Metadata element

See also

Configuring Non-Linguistic Event Elements
Configuring Program Elements
Configuring Topic Elements
Configuring Category Elements
Configuring Speaker-Type Elements
Configuring Text Elements

Home > Tools > Category Management > Configuring Category Conditions > Configuring Non-Linguistic Event Elements

Configuring Non-Linguistic Event Elements

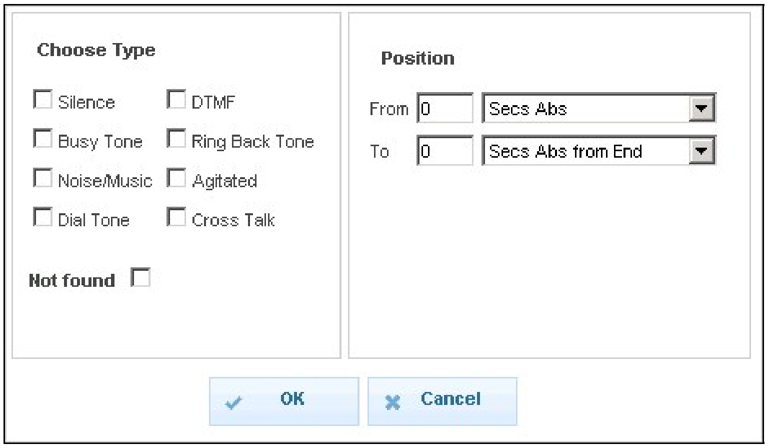
Non-linguistic Events include various sounds that SpeechMiner detects in a call, such as busy tones, key presses, and music or noise. Depending on the Program settings of the call, non-verbal indications of agitation may also be detected. In addition, the non-linguistic Event called **Cross Talk** is identified when two speakers are talking at the same time. This type of Event can only be identified in systems in which dual-channel recording is employed.

In some cases, an element can include more than one type of related Event. For example, you can select **Silence**, **Busy Tone**, and **Dial Tone** together, but you cannot select **Agitation** along with other types of Events. When you select multiple types of non-linguistic Events, if any of those Events is found in the call, it meets the condition.

When you add a non-linguistic Event element to an expression (see Inserting Elements into an Expression), a dialog box containing the configuration settings of the element automatically opens. You can use this dialog box to select the type of non-linguistic Event and specify what proportion of the call must contain this type of Event and when it must be detected in the call. You can configure these settings as explained below. In addition, you can reopen the element's configuration settings for further modification at any time by double-clicking the element in the expression.

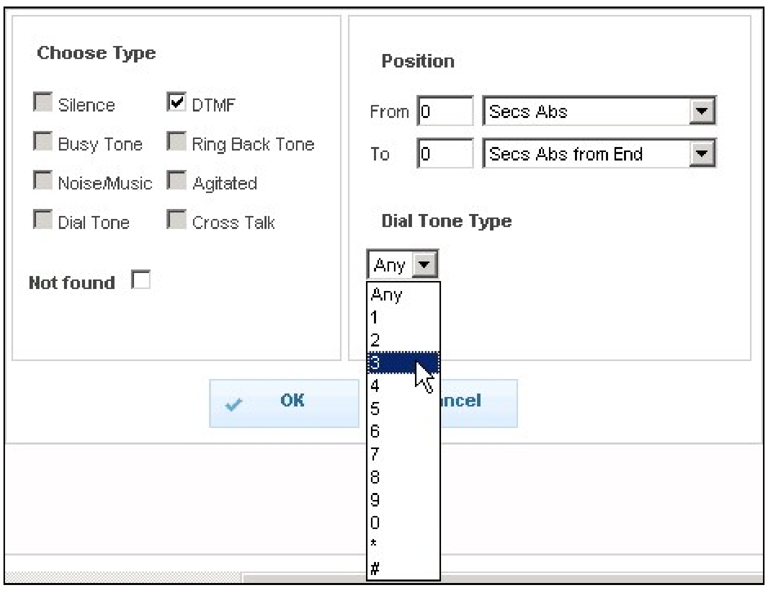
To configure a non-linguistic Event element:

1. Under **Choose Type**, select the type of non-linguistic Event. Other types of non-linguistic Events, types that cannot be selected along with the selected type, become inactive. If it is possible to select additional types, they remain active.



If you selected **DTMF**, a dropdown menu appears. If you selected **Silence**, **Busy Tone**, **Music/Noise**, **Dial Tone**, **Ring Back Tone**, or **Cross Talk**, the **Amount** area opens below the **Position** area.

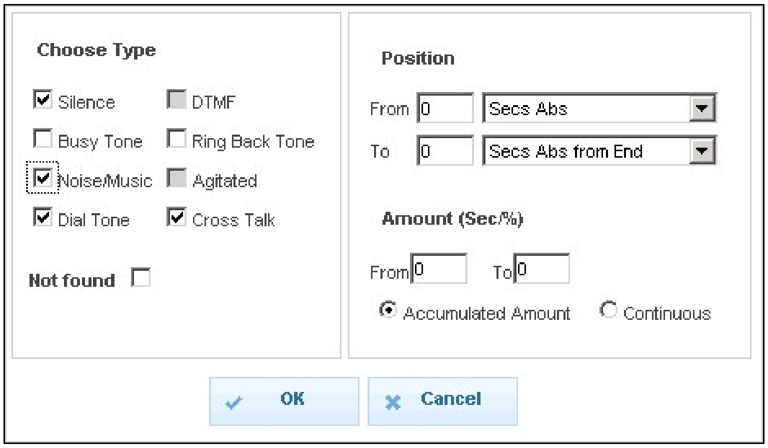
2. If additional types of Events are active, select any of the other active types, as required.
3. If you selected **DTMF**, in the dropdown menu beside the option, select **any** to accept any key press, or select a key from the list.



4. If you selected **Silence**, **Busy Tone**, **Music/Noise**, **Dial Tone**, **Ring Back Tone**, or **Cross Talk**, in the **Amount** area, define the amount of time that the selected types of non-linguistic Events must occupy in the total time of the call, as follows:

Field	Description
From	Define the minimum amount of time that the selected types of non-linguistic Events must occupy in the total time of the call in one of the following ways: ◦ **Seconds:** The minimum number of seconds in the call in which the types of Events must be found ◦ **Percentage:** The minimum proportion of the call in which the types of Events must be found, expressed as a percentage. (Insert the % character after the value to indicate it is a percentage.)
To	Define the maximum amount of time that the selected types of non-linguistic Events must occupy in the total time of the call, as explained above.
Accumulated Amount / Continuous	Select one of the following: ◦ **Accumulated Amount:** The values in the **From** and **To** fields refer to the total amount of time in the call audio in which the selected types of Events were found, even if the total consists of more than one distinct Event.

	◦ **Continuous:** The values in the **From** and **To** fields refer to individual Events in the call audio. That is, an Event only meets the condition if it lasted at least as long as the value in the **From** field and not longer than the value in the **To** field.



5. Modify the following settings as necessary:

Setting	Description
Not found	Select this option if you want the condition to include all calls *except* those in which the selected types of non-linguistic Events were found. (For additional information, see Configuring Category Conditions.)
From	Define the earliest position in the call audio at which the non-linguistic Event may be found, in seconds, and then select one of the following types of reference points: ◦ **Secs Abs:** The number of seconds is defined relative to the beginning of the call ◦ **Secs Abs from End:** The number of seconds is defined relative to the end of the call (i.e., the Event must be found no earlier in the call than this number of seconds from the end of the call) ◦ **Secs Rel to Start of Prev:** The number of seconds is defined relative to the beginning of the previous item in the expression; this option will only work if the operator connecting the two elements is Conditional AND (**->**). Otherwise, selecting this is the same as selecting **Secs Abs**. ◦ **Secs Rel to End of Prev:** The number of seconds is defined relative to the end of the parent item; this option will only work if the operator connecting the two elements is Conditional AND (**->**). Otherwise, selecting this is the same as selecting **Secs Abs from End**.
To	Define the latest position in the call audio at which the non-linguistic Event may be found, in seconds, and then select one of the types of reference points explained above.

See also

Configuring Metadata Elements
Configuring Program Elements
Configuring Topic Elements
Configuring Category Elements
Configuring Speaker-Type Elements
Configuring Text Elements

Home > Tools > Category Management > Configuring Category Conditions > Configuring Program Elements

Configuring Program Elements

A Program element specifies that an interaction must (or must not) belong to a Program in order for the interaction to be assigned to the Category.

When you add a Program element to an expression (see Inserting Elements into an Expression), a dialog box containing the configuration settings of the element automatically opens. You can use this dialog box to select the Program and indicate if the call must belong to the Program or must not belong to the Program in order to meet the requirements of the Category. You can configure these settings as explained below. In addition, you can reopen the element's configuration settings for further modification at any time by double-clicking the element in the expression.

To add a Program element:

1. Under **Program**, select the Program.

2. If you want the condition to include all interactions *except* those that belong to the Program, select **Not**. (For additional information, see Configuring Category Conditions.)

See also

Configuring Metadata Elements
Configuring Non-Linguistic Event Elements
Configuring Topic Elements
Configuring Category Elements
Configuring Speaker-Type Elements
Configuring Text Elements

Home > Tools > Category Management > Configuring Category Conditions > Configuring Topic Elements

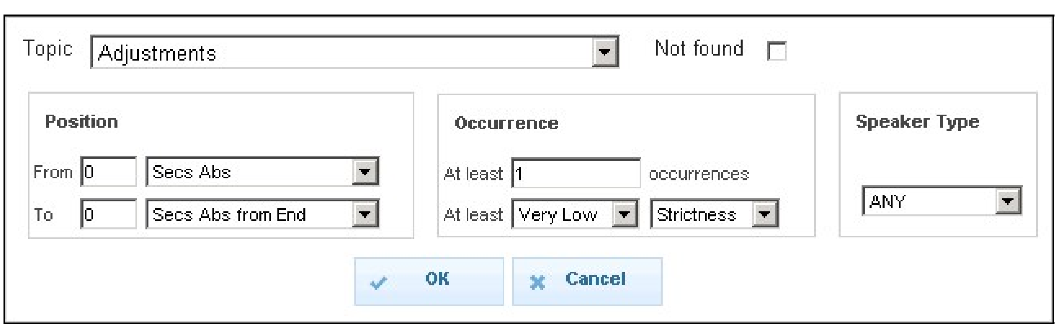
Configuring Topic Elements

A Topic element specifies that a Topic must be found (or must not be found) by SpeechMiner in an interaction in order for the interaction to be assigned to the Category.

When you add a Topic element to an expression (see Inserting Elements into an Expression), a dialog box containing the configuration settings of the element automatically opens. You can use this dialog box to select the Topic and specify its required number of occurrences in the call, its strictness level, and its timing constraints. You can configure these settings as explained below. In addition, you can reopen the element's configuration settings for further modification at any time by double-clicking the element in the expression.

To add a Topic element:

1. Under **Topic**, select the Topic.



2. Modify the following settings as necessary:

Setting	Description
Not found	Select this option if you want the condition to include all interactions *except* those in which the Topic was found. (For additional information, see Configuring Category Conditions.)
From	Define the earliest position in the audio of a call at which the Topic may be found, in seconds, and then select one of the following types of reference points: ◦ **Secs Abs:** The number of seconds is defined relative to the beginning of the call ◦ **Secs Abs from End:** The number of seconds is defined relative to the end of the call (i.e., the Topic must be found no earlier in the call than this number of seconds from the end of the call) ◦ **Secs Rel to Start of Prev:** The number of seconds is defined relative to the beginning of the previous item in the expression; this option will only work if the operator connecting the two elements is Conditional AND (**->**). Otherwise, selecting this is the same as selecting **Secs Abs**. ◦ **Secs Rel to End of Prev:** The number of seconds is defined relative to the end of the parent item; this option will only work if the operator connecting the two elements is Conditional AND (**->**). Otherwise, selecting this is the same as selecting **Secs Abs from End**. **Note:** This field is only relevant to call interactions.
To	Define the latest position in the audio of a call at which the Topic may be found, in seconds, and then select one of the types of reference points explained above. **Note:** This field is only relevant to call interactions.
At least __ occurrences	Specify the minimum number of times the Topic must have been found in the call in order for the condition to be met.
At least __ Strictness	Select the minimum level of strictness for the recognition of the Topic; if the Topic recognition does not meet this minimum, SpeechMiner proceeds as if the Topic was not found. Note that this only limits strictness beyond the Topic's defined strictness.
Speaker Type	Select a speaker type if the Topic must be found when the selected type of speaker is speaking, or ANY to include all speaker types. **Note:** This field is only relevant to call interactions.

See also

Configuring Metadata Elements
Configuring Non-Linguistic Event Elements
Configuring Program Elements
Configuring Category Elements
Configuring Speaker-Type Elements
Configuring Text Elements

Home > Tools > Category Management > Configuring Category Conditions > Configuring Category Elements

Configuring Category Elements

A Category element specifies that an interaction must (or must not) belong to another Category in order for the interaction to be assigned to the Category that is currently being configured.

When you add a Category element to an expression (see Inserting Elements into an Expression), a dialog box containing the configuration settings of the element automatically opens. You can use this dialog box to select the Category and indicate if the interaction must belong to the Category or must not belong to the Category in order to meet the requirements of the current Category. Sub-Categories appear in the list of available Categories as separate Categories, and their parent Categories are indicated. For example, a Category called *Adjustments* that is a sub-Category of a Category called *Bill Inquiry* appears in the list of Categories as *Bill Inquiry/Adjustments*. You can configure these settings as explained below. In addition, you can reopen the element's configuration settings for further modification at any time by double-clicking the element in the expression.

Although you can create circular Category references, the Categories in which they appear cannot be applied to SpeechMiner. For example, if Category A is an element of the expression that defines Category B, Category B cannot also be an element of the expression that defines Category A. If they are, the circular references are indicated in the **Apply** dialog box, in the **Message** column of each Category. For additional information about applying changes to SpeechMiner, see Saving, Activating, and Applying Categories.

Note: Including a Category element in the expression that defines a Category is not the same as making one a sub-Category of the other. For additional information about sub-Categories, see About Categories.

To add a Category element:

1. Under **Category**, select the Category.

2. If you want the condition to include all interactions *except* those that belong to the Category, select **Not**. (For additional information, see Configuring Category Conditions.)

See also

Configuring Metadata Elements
Configuring Non-Linguistic Event Elements
Configuring Program Elements
Configuring Topic Elements
Configuring Speaker-Type Elements
Configuring Text Elements

Configuring Speaker-Type Elements

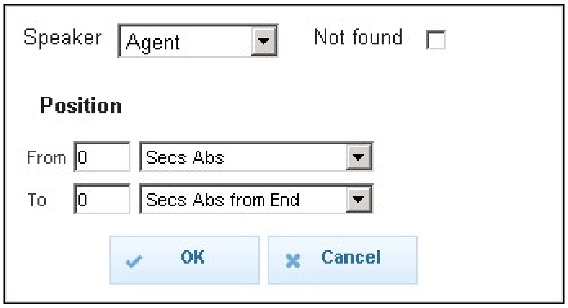
A Speaker-Type element specifies that a speaker of a particular type must have taken part (or must not have taken part) in a call in order for the call to be assigned to the Category. This information is gathered by the recording system and passed on to SpeechMiner along with the call data. The exact type of information available depends on the recording system that is employed in your company.

Some recording systems also indicate the times in the call when each speaker was heard. In these cases, you can also specify the times in the call when the type of speaker must have taken part in the call in order for the call to meet the condition. For example, you could specify that a supervisor must have taken part in the last 120 seconds of the call.

When you add a Speaker-Type element to an expression (see Inserting Elements into an Expression), a dialog box containing the configuration settings of the element automatically opens. You can use this dialog box to select the Speaker-Type and specify its timing constraints. You can configure these settings as explained below. In addition, you can reopen the element's configuration settings for further modification at any time by double-clicking the element in the expression.

To add a Speaker-Type element:

1. Under **Speaker-Type**, select the type of speaker.



1. If you want the condition to include all calls *except* those that match the condition, select **Not**. (For additional information, see Configuring Category Conditions.)
2. Modify the following settings as necessary:

Setting	Description
From	Define the earliest position in the call audio at which the speaker may be found, in seconds, and then select one of the following types of reference points: ◦ **Secs Abs:** The number of seconds is defined relative to the beginning of the call ◦ **Secs Abs from End:** The number of seconds is defined relative to the end of the call (i.e., the Script must be found no earlier in the call than this number of seconds from the end of the call) ◦ **Secs Rel to Start of Prev:** The number of seconds is defined relative to the beginning of the previous item in the expression; this option will only work if the operator connecting the two elements is Conditional AND (**->**). Otherwise, selecting this is the same as selecting **Secs Abs**. ◦ **Secs Rel to End of Prev:** The number of seconds is defined relative to the end of the parent item; this option will only work if the operator connecting the two elements is Conditional AND (**->**). Otherwise, selecting this is the same as selecting **Secs Abs from End**.
To	Define the latest position in the call audio at which the speaker may be found, in seconds, and then select one of the types of reference points explained above.

See also

Configuring Metadata Elements
Configuring Non-Linguistic Event Elements
Configuring Program Elements
Configuring Topic Elements
Configuring Category Elements
Configuring Text Elements

Home > Tools > Category Management > Configuring Category Conditions > Configuring Text Elements

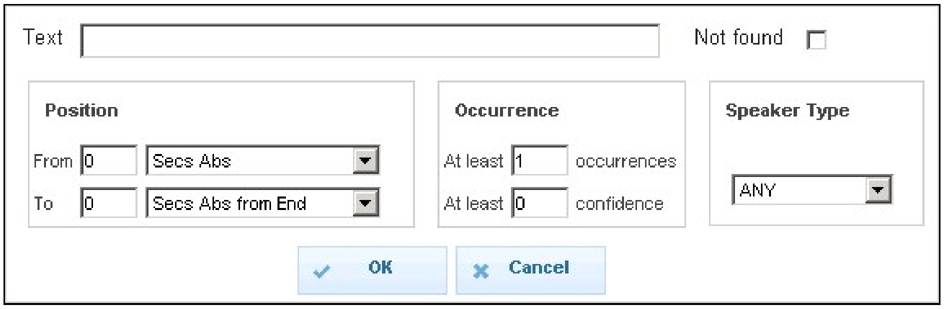
Configuring Text Elements

A Text element specifies that a phrase containing one or more words must be found (or must not be found) by SpeechMiner in the text of an interaction in order for the interaction to be assigned to the Category. The phrase must be found exactly as it is entered in the Text element definition to meet the condition, except that it is not case sensitive. For example, "i want to repay my loan" and "I want to Repay My loan" are treated as identical phrases, but "I wanted to repay my loan" and "I want you to repay my loan" are not identified as matching them.

When you add a Text element to an expression (see Inserting Elements into an Expression), a dialog box containing the configuration settings of the element automatically opens. You can use this dialog box to specify the phrase, its required number of occurrences in the call, its strictness level, and its timing constraints. You can configure these settings as explained below. In addition, you can reopen the element's configuration settings for further modification at any time by double-clicking the element in the expression.

To add a Text element:

1. Under **Text**, enter the phrase. The phrase should consist of a sequence of one or more whole words. The words should be separated by single spaces, and no punctuation or other symbols should be included in the sequence. The text is not case-sensitive.



2. Modify the following settings as necessary:

Setting	Description
Not found	Select this option if you want the condition to include all calls *except* those in which the phrase was found. (For additional information, see Configuring Category Conditions.)
From	Define the earliest position in the call audio at which the phrase may be found, in seconds, and then select one of the following types of reference points: ◦ **Secs Abs:** The number of seconds is defined relative to the beginning of the call ◦ **Secs Abs from End:** The number of seconds is defined relative to the end of the call (i.e., the phrase must be found no earlier in the call than this number of seconds from the end of the call) ◦ **Secs Rel to Start of Prev:** The number of seconds is defined relative to the beginning of the previous item in the expression; this option will only work if the operator connecting the two elements is Conditional AND (**->**). Otherwise, selecting this is the same as selecting **Secs Abs**. ◦ **Secs Rel to End of Prev:** The number of seconds is defined relative to the end of the parent item; this option will only work if the operator connecting the two elements is Conditional AND (**->**). Otherwise, selecting this is the same as selecting **Secs Abs from End**. **Note:** This field is only relevant to call interactions.
To	Define the latest position in the call audio at which the phrase may be found, in seconds, and then select one of the types of reference points explained above. **Note:** This field is only relevant to call interactions.
At least __ Occurrences	Specify the minimum number of times the phrase must have been found in the call in order for the condition to be met.
At least __ Confidence	Select the minimum level of confidence for the recognition of the phrase; if the Confidence level does not meet this minimum, SpeechMiner proceeds as if the phrase was not found.
Speaker Type	Select a speaker type if the phrase must be found when the selected type of speaker is speaking, or ANY to include all speaker types. **Note:** This field is only relevant to call interactions.

See also

Configuring Metadata Elements
Configuring Non-Linguistic Event Elements
Configuring Program Elements
Configuring Topic Elements
Configuring Category Elements
Configuring Speaker-Type Elements

Saving and Applying Changes

Implementing changes you have made in the Category Manager is a two-stage process. As you add and modify definitions, you must save your changes. When you do so, the changes are saved in the Category Manager, but they are not implemented in SpeechMiner. Changes are only implemented in SpeechMiner when you *apply* them. When changes are applied, SpeechMiner incorporates them into its list of Category definitions, and then reprocesses all the interactions in the database using the updated set of definitions.

If a Category definition has been saved in the Category Manager, but it has not yet been applied to SpeechMiner, the name of the Category appears in the tree list in *italics*.

Saving Changes

When you create a blank Category, it is saved automatically in the Category Manager. If, after you create the Category, you modify its name, description, conditional expression, or sharing settings, you must save the Category manually. Similarly, if you modify any of the properties of any Category in the system at any time, you must manually save the Category in order to save the changes in the Category Manager.

To save a Category:

1. To the upper-left of the right panel, click (**Save**). The Category is saved, and a confirmation message appears.
2. In the confirmation message, select **OK**.

Applying Changes

Applying changes is a two-stage process. When you select **Apply**, the process begins. During the first stage, the Category Manager lists all of the changes that were made since the last time changes were applied. In addition, SpeechMiner checks each of the changes in the list to ensure that it is ready to be applied, and marks all problematic items. For example, if it discovers a new regular Category that has no logical expression defining its properties, it lists the Category in its list of modified Categories, but it marks it as a problem. Some types of problems must be corrected before you can apply a Category that is marked as problematic, while others can be ignored if you choose.

During the second stage, you select the changes in the list that you want to apply to SpeechMiner, and then initiate the actual application process. When this process is completed, the changes are included in the Category definitions that are used by SpeechMiner when it assigns interactions to Categories, and the interactions that are currently in the database are reprocessed using the updated set of definitions.

In most systems, SpeechMiner allows you to save backup copies of the existing definition set in SpeechMiner before applying any changes. If you do this, you can later choose to roll back the definition set to an older set, if necessary. (For additional information, see Managing Version History.)

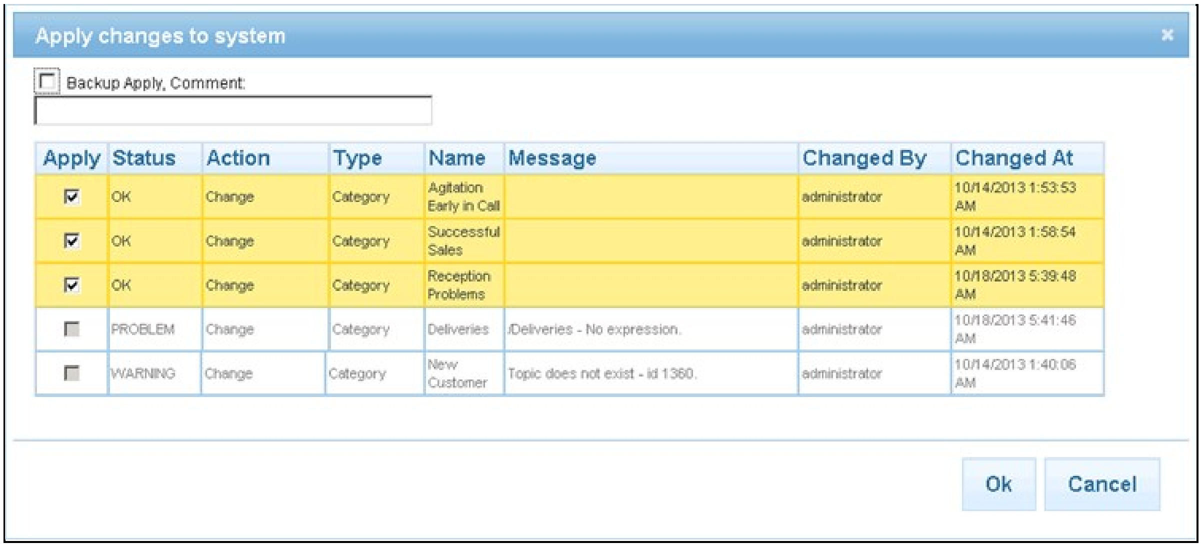
Before you apply a new Category to SpeechMiner, make sure it is active and unlocked. Active Categories appear in the tree list in normal type; inactive Categories appear in gray type. Locked Categories have an icon with a padlock beside their names (). Inactive Categories can be applied, but interactions are not assigned to them. Locked Categories cannot be applied, so they are not included in the list of modified Categories. If you want to apply a Category that is locked, unlock it before you select **Apply**. (If the Category was locked by another user, you may have to ask them to unlock it; some users have permissions to unlock Categories that were locked by other users, but others do not.)

Applying changes to Categories does not affect manual Categories; any items that SpeechMiner users assigned to a manual Category remain assigned to it even after changes to Categories are applied.

To apply changes to SpeechMiner:

1. In the upper-right corner of the right panel, click **Apply**. The **Apply changes to system** dialog box opens and displays a list of changes that were saved in the Category Manager but were not yet applied to SpeechMiner.

   The checkbox in the **Apply** column (indicating that they will be applied) is selected by default for all changes with the status **OK** (indicating that they can be applied).



Apply	Status	Action	Type	Name	Message	Changed By	Changed At
☑	OK	Change	Category	Agitation Early in Call		administrator	10/14/2013 1:53:53 AM
☑	OK	Change	Category	Successful Sales		administrator	10/14/2013 1:58:54 AM
☑	OK	Change	Category	Reception Problems		administrator	10/18/2013 5:39:48 AM
☐	PROBLEM	Change	Category	Deliveries	/Deliveries - No expression.	administrator	10/18/2013 5:41:46 AM
☐	WARNING	Change	Category	New Customer	Topic does not exist - id 1360.	administrator	10/14/2013 1:40:06 AM

2. If there are problems that require correction before you apply the changes, close the dialog box and correct the problems. Then, open the dialog box again, as described above.
3. If you want to save a backup copy of the existing set of definitions in SpeechMiner (all Category, Program, and Topic definitions) before the new set is applied, select **Backup Apply, Comment**. (In some systems, this option is always implemented, or not available.) Modify the text field below the option as required, to specify the comment that will be attached to the backup.
4. If you do not want to apply a particular item, in the **Apply** column, clear the checkbox. (The checkbox is not available for items that cannot be applied.)
5. Click **OK**. The process of applying the changes begins. The process may take a few minutes. When it is completed, an "Apply succeeded" message appears.

See also

About Categories
Overview of the Manage Categories Screen
Creating a Blank Category
Configuring Category Conditions
Modifying a Category
Deleting Categories
Managing Version History

Home > Tools > Category Management > Modifying a Category

Modifying a Category

Modifying an existing Category includes the following tasks:

- Modifying the definition of the Category:
  - Changing the logical expression that defines the conditions of the Category, by adding, modifying, or removing elements or operators
  - Changing the sharing settings of the Category
  - Changing the name or description of the Category

- Activating or deactivating the Category
- Moving the Category within the tree list

Modifying the Definition of a Category

You can modify all parts of the definition of a Category - its name, description, and the logical expression that defines the conditions for assigning an interaction to a Category. To modify any aspect of a Category, you must open the Category in the right panel. When you have finished making changes to the Category, you must save the Category (see Saving and Applying Changes).

To open a Category:

- In the Manage Categories screen, in the list of existing Categories is displayed in the left panel, double-click the Category, or select the Category and then click (**Open Category**). The Category opens in a tab in the right panel.

Changing the Sharing Settings of the Category

You can change the sharing settings of the Category as necessary.

To change the sharing settings of the Category:

1. To the right of the **Share with** field, click (**Edit Sharing**). The **Category Sharing** dialog box opens.
2. Modify the settings as necessary. For additional information, see Creating a Blank Category.
3. Click **OK**. The **Share with** field is updated.

Changing the Name and Description of the Category

You can change the name and description of the Category as necessary.

To change the name or description of the Category:

- Modify the **Name** and **Description** fields as necessary.

Adding Elements and Operators to the Expression

For information about adding elements to the expression, see Inserting Elements into an Expression. For information about adding operators, see Inserting Operators into an Expression.

Modifying the Properties of an Element

You can change the properties of any of the elements that are already included in the expression. For additional information about logical expressions, see Configuring the Category.

To modify the properties of an existing element:

1. In the text area, click the element. Its properties open below the text area.
2. Change the properties as required. For additional information about the properties of each type of element, see:
    - Configuring Metadata Elements
    - Configuring Non-Linguistic Event Elements
    - Configuring Program Elements
    - Configuring Topic Elements
    - Configuring Speaker-Type Elements
    - Configuring Text Elements
3. Click **Update**. The properties are modified.

Removing Elements and Operators from the Expression

You can remove any element or operator from the expression.

To remove elements or operators from an expression:

1. Select the elements and operators you want to delete. (To select multiple items, hold down the **Shift** or **Ctrl** keys as you select each of the items.)
2. At the top of the right panel, on the right side, click **Delete**. The selected items are deleted from the expression.

Saving Changes

Whenever you modify a Category, you must save the changes in order for them to be implemented in the Category Manager. For additional information about saving changes in the Category Manager and implementing them in SpeechMiner, see Saving and Applying Changes.

To save changes to the Category:

- To the upper-left of the right panel, click (**Save**).

Activating or Deactivating a Category

A saved Category can be *active* or *inactive*. When an active Category is applied to SpeechMiner, interactions can be assigned to it. When an inactive Category is applied, it is saved in SpeechMiner but interactions cannot be assigned to it.

This feature allows you to temporarily stop using a Category when it is not relevant. When SpeechMiner processes an interaction, it checks every active Category to see if it should be assigned to the interaction. Because of this, it is a good idea to deactivate Categories that are not needed because it makes interaction processing faster and more efficient. For example, if you only use a particular Program during certain sales campaigns, you can deactivate Categories that require the Program when no sales campaigns that use it are underway.

Activating or deactivating a parent Category causes all of its sub-Categories to be activated or deactivated along with it.

When you deactivate a Category that has been applied to SpeechMiner previously, you have to apply it to SpeechMiner in order to deactivate it in SpeechMiner.

Active Categories appear in the tree list in normal type; inactive Categories appear in gray type.

To activate (or deactivate) a Category:

1. In the left panel, right-click the Category, and then select **Activate** (or **Deactivate**). The Category is activated (or deactivated) in the Category Manager.
2. If you want to deactivate the Category in SpeechMiner, apply the Category. For additional information, see Saving and Applying Changes.

Moving a Category Within the Tree List

The list of Categories appears in SpeechMiner in the same order and with the same structure as it does in the Category Manager. It is therefore a good idea to organize the list in a way that is convenient for SpeechMiner users. You can do this by moving Categories up or down in the tree list, and by changing the nesting of Categories.

Categories can be moved up and down within the tree list in one of two ways: by dragging them to the desired locations, or by selecting them and then selecting **Move Up** or **Move Down** to move them up or down one position in the list.

The nesting of Categories can be modified by dragging Categories within the tree list. In this way, you can change any regular Category into a parent Category or a sub-Category, or move a sub-Category from one parent Category to another.

Dragging a Category to Reposition it in the Tree List

When you drag a Category, you can drop it between two other Categories or on top of a single Category. If you drop it between other Categories, it is placed between those Categories. If you drop it on top of another Category, it is converted into a sub-Category of the Category on which it is dropped. As you drag the Category, an arrow indicates where it will be placed if you release it in its current location: if the arrow points *between* two Categories, the Category you are dragging will be placed between the two Categories; if the arrow points *at* a Category, the Category you are dragging will be inserted as a sub-Category of the Category identified by the arrow.

Dragging a Category to a position between two other Categories

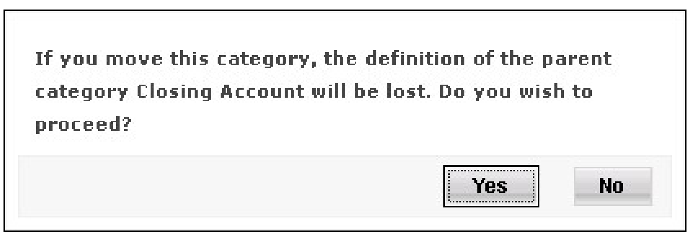
Dragging a Category to a position as a sub-Category of an existing Category

Bear in mind that if you drop a Category onto a regular Category - a Category that is defined by a logical expression - the logical expression will be deleted from the Category's definition, and the Category will be converted into a parent Category.

To move a Category in the tree list by dragging it:

- In the tree list, drag the Category to the desired location. As you drag the Category, an arrow indicates where the Category will be placed in the list if you drop it in its current location.

  Note: If you drop the Category on an existing Category that was not previously a parent Category, a warning message appears, indicating that any conditions that were defined for the regular Category are deleted when it becomes a parent Category. Select **Yes** to delete those conditions and convert the Category into a parent Category.



Warning message

Moving a Category Up or Down in the Tree List

You can move a Category up or down in the tree list one row at a time using the **Move Up** and **Move Down** options that are available both in the context menu of the Category and in the tree-list controls at the top of the list.

To move a Category up or down in the tree list using the Move Up and Move Down options in the tree-list controls:

1. In the tree list, select the Category.
2. In the tree controls above the tree structure, click  (**Move Up**) or  (**Move Down**) as many times as necessary to move the Category to the desired location in the tree list.

To move a Category up or down in the tree list using the context menu:

- In the tree list, right-click the Category, and then select either **Move Up** or **Move Down**. Repeat this process as many times as necessary to move the Category to the desired location in the tree list.

See also

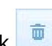
About Categories
Overview of the Manage Categories Screen
Creating a Blank Category
Configuring Category Conditions
Saving and Applying Changes
Deleting Categories
Managing Version History

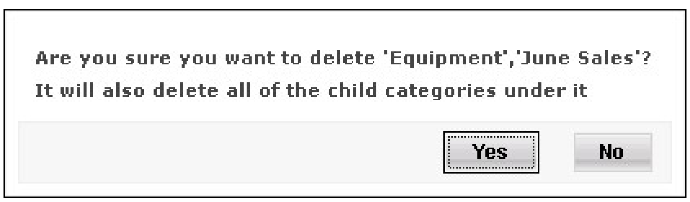
Home > Tools > Category Management > Deleting Categories

Deleting Categories

You can delete Categories that are not required. When you apply the changes to SpeechMiner, the Categories you deleted from the Category Manager are removed from SpeechMiner as well, and the Category assignments of all of the calls in the SpeechMiner database are redone (see Saving and Applying Changes).

To delete one or more Categories:

1. In the left panel, in the tree structure, select the checkboxes beside each of the Categories you want to delete.
2. In the tree controls above the tree structure, click  (**Delete**). You are prompted to confirm that you want to delete the selected Categories and any sub-Categories they may have.



Category Deletion message

3. Click **Yes**. The Categories are deleted.

See also

About Categories
Overview of the Manage Categories Screen
Creating a Blank Category
Configuring Category Conditions
Saving and Applying Changes
Modifying a Category
Managing Version History

Home > Tools > Category Management > Managing Version History

Managing Version History

The version-management system is used to back up and restore previous definitions of individual Categories or of the entire set of Category definitions. Two types of back ups are supported:

- **Item tags:** Backups of the definitions of individual Categories
- **Definition sets:** Backups of the entire set of Category, Topic, and Program definitions before an updated set is applied

Item tags can be created in three ways:

- **Manually:** You can manually create a tag for an item at any time.
- **On closing SMART:** When SMART is closed, the system automatically creates a tag for each item definition that has been changed and has not yet been applied.
- **On applying changes:** When you apply changes to SpeechMiner, if you choose to create a backup, the system automatically creates a tag for every item in the system; this tag contains the definition as it appears in SpeechMiner immediately before the changes are applied

Each item tag includes the current definition of the item, the date and time the tag was created, your user name, and a comment. When you manually create a tag, you can enter the comment text you want to attach to it. When you apply changes, if you added a comment to the backup settings, the comment is attached to the tag of every item in the system. When SMART generates tags automatically before it closes, the tags have blank comment fields.

This section explains how to manually create item tags and how to work with item tags and definition sets. For information about creating definition sets, see Saving and Applying Changes. For information about managing definition sets, please refer to the *SMART User Guide*.

Manually Creating Item Tags

You can create item tags for a Category at any time.

To create a tag for an item:

1. In the left panel, in the tree structure, right-click the item you want to tag, and then select **Tag Category**. A **Comment for tagging** dialog box opens.

Comment for tagging dialog box for the "Benefits" Category

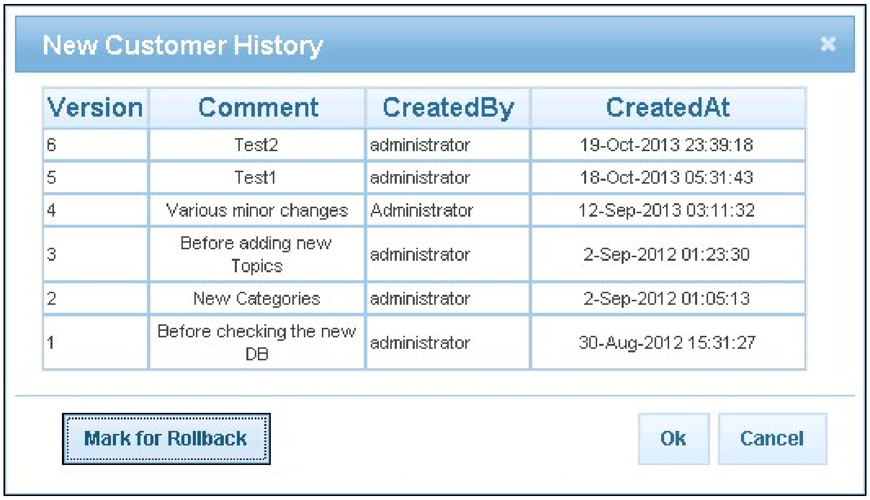
2. In the text field, enter a comment to attach to the tag.
3. Click **OK**. The tag is created.

Restoring a Tagged Definition

Any definition of an item that is stored in a tag can be restored to the Category Manager by *rolling back* the definition to the selected tag. Note that this rollback process only restores the definitions within the Category Manager. If you want to restore the definitions to SpeechMiner, you must apply them after they are restored in the Category Manager.

To restore a tagged definition:

1. In the tree structure, right-click the item, and then select **History**. The **History** dialog box opens and displays a list of available tags for the item.

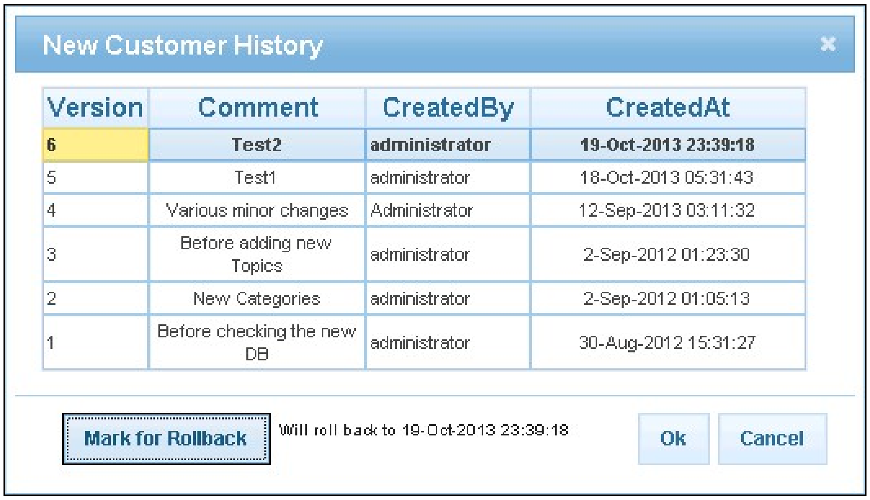


History dialog box for "New Customer" Category

2. In the list, select the tag you want to restore.

Tag selected

3. Click **Mark for Rollback**. A rollback message appears at the bottom of the dialog box indicating that the item definition will be restored in accordance with the selected tag.



Rollback message

4. Click **OK**. The definition of the item in the Category Manager is restored to match the tagged definition.

Managing Tags

You can change the comment text of any tag that you created or have permissions to change, as well as for any tag that was created when the SMART application was closed.

Note: Tags that were generated as a set during an apply process cannot be modified individually as described below. They can, however, be modified or deleted globally, but only in the SMART application. For additional information, please refer to *Rolling Back the Definition Set* in the *SMART User Guide*.

To change the comment of a tag:

1. In the tree structure, right-click the item whose comment you want to change, and then select **History**. The **History** dialog box opens.
2. Click the comment text that you want to change. The text becomes an editable text field.
3. Modify the text as necessary and then click outside the text field to close it.
4. Click **OK**. The change is saved.

See also

About Categories
Overview of the Manage Categories Screen
Creating a Blank Category
Configuring Category Conditions
Saving and Applying Changes
Modifying a Category
Deleting Categories

Home > Tools > User Management

User Management

All users in the SpeechMiner system are associated with groupings of various types. These groupings control which call and system data the user can see and which permissions the user has to see and activate system features. The following user groupings are in use in the system:

User Category	Description
Role	A set of permissions that define what features the user can access and use in the SpeechMiner system

Workgroup	The call center or department of a call center to which the user belongs
Partition	Call data from a particular call center or department of a call center
Group	A set of workgroups and/or partitions that identify the call data to which the user has access

Individual users can have multiple roles and belong to multiple workgroups, partitions, and groups. User profiles specify the roles, groups, and partitions associated with each user.

Depending on your role, you may be able to modify some or all elements of your own profile. You may also be able to manage other user accounts: creating new users, managing their profiles, managing groups, roles, and permissions. This section explains how to manage user accounts if you have the required permissions.

Note: The user-management functions in the **Tools** page relate to users of the SpeechMiner browser-based interface, in which call-data is accessed, as well as the SpeechMiner Administration Tool (SMART), in which the call analysis features are set up and configured.

See also

Editing Your User Profile
Managing Users
Managing Groups
Managing Roles

Category Management
System Administration
Elements Explorer

Home > Tools > User Management > Editing Your User Profile

Editing Your User Profile

Your user profile includes your user name and password, your roles, workgroups, and partitions, and other personal information such as your name, phone number, and e-mail address. Depending on your permissions, you may be able to view your user profile and edit some or all of its properties.

To edit your user profile:

1. In the Main Menu under **Tools**, select **User Management** and then select **Edit Profile**. The **Edit Profile** screen opens and displays your user profile.
2. Modify the settings and information as necessary. For detailed information about the fields, see Managing Users.
3. Click **Save Changes**. The changes are saved.

See also

Managing Users
Managing Groups
Managing Roles

Home > Tools > User Management > Managing Users

Managing Users

Managing users includes creating new user accounts, assigning roles, groups, and partitions to users, managing user passwords, maintaining additional user information, and deactivating or deleting existing accounts.

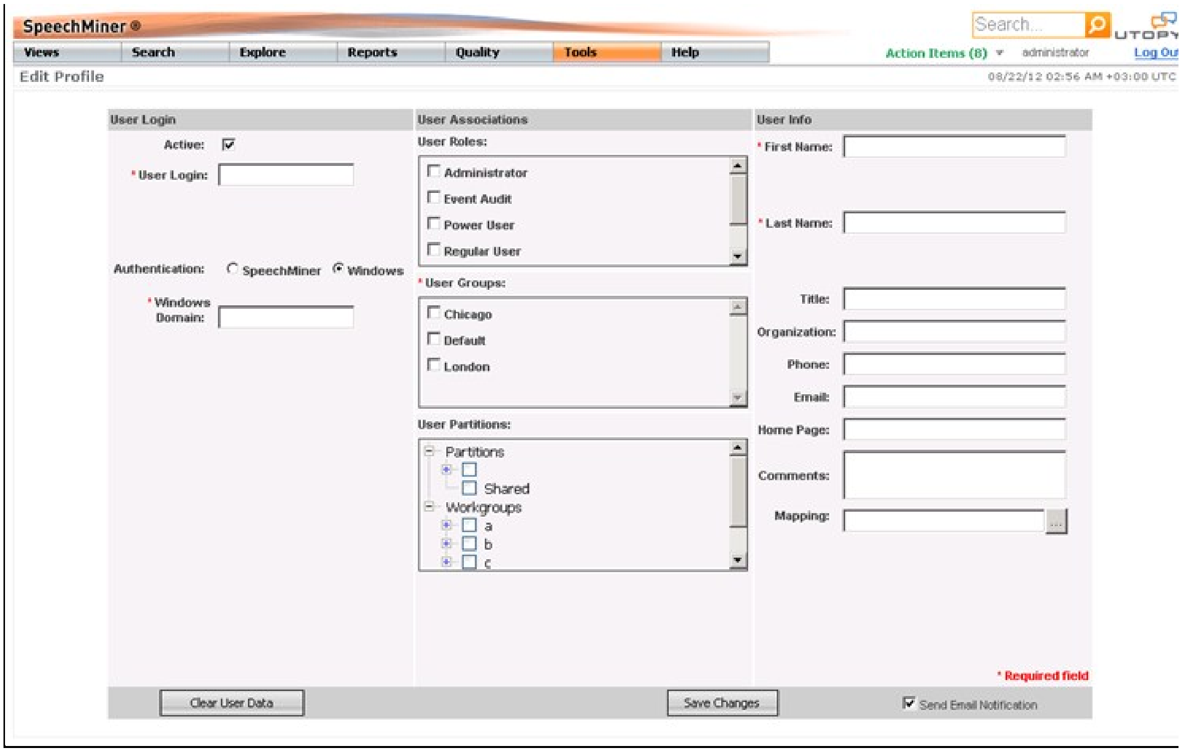
The collection of information and group associations assigned to a user is called a *user profile*. This section explains how to create user accounts and manage user profiles.

Creating a New User Account

You can open an account for a new user and configure the user's group associations and permissions.

To open a new user account:

1. In the Main Menu, under **Tools**, select **System Admin** and then select **Administer Users**. The **Administer Users** screen opens and displays a list of the existing user accounts.
2. Click **New** (). A blank **Edit Profile** screen opens.



Edit Profile Screen

3. Fill in the fields as follows:

Field	Description
Active	Select this checkbox to make the account active. An account must be active for the user to log into it.
User Login	Enter a username for the user.
Authentication	Select **SpeechMiner** if you want to the username and password to be managed by SpeechMiner and stored in SpeechMiner's database. Select **Windows** if the user will log into SpeechMiner using the same username and password they use to log into Windows. The fields required to configure the selected option are displayed.
Old Password	This field is not relevant to new accounts. **Note:** This field only appears if **SpeechMiner** is selected under **Authentication**.
New Password	Type a password for the account. **Note:** This field only appears if **SpeechMiner** is selected under **Authentication**.
Verify Password	Type the password for the account again to ensure it was typed correctly. **Note:** This field only appears if **SpeechMiner** is selected under **Authentication**.
User must	Select this option to require the user to change their password the next time they log into SpeechMiner.

change password at next logon	**Note:** This field only appears if **SpeechMiner** is selected under **Authentication**.
Windows Domain	Type the name of the Windows domain in which the user's account is managed. **Note:** This field only appears if **Windows** is selected under **Authentication**.
User Roles	Select the user roles to associate with the account. These roles define the permissions the user will have in SpeechMiner. For additional information, see Managing Roles. **Note:** If roles appear in the list but are not active, you do not have the permissions required to assign these roles to users.
User Groups	Select the groups to associate with the account. Each group represents a set of workgroups and/or partitions that identify which call data the user will be able to access. For additional information, see Managing Groups.
User Partitions	If you want to enable the user to access call data from additional workgroups and/or partitions that are not included in their groups, select them here.
First Name	Enter the user's first name.
Last Name	Enter the user's last name.
Title	Enter the user's title.
Organization	Enter the organization the user works for.
Phone	Enter the user's phone number.
Email	Enter the user's e-mail address.
Home Page	Enter the address of any page in the SpeechMiner web interface to make that page the user's homepage. Enter the address in the following format: ***/pages/[page location]*** You can copy the page address from the end of the **Address** field of the browser when the page is open. For example, if you want to use the **New Search** page as the homepage, and the address of the **New Search** page is **`http://myserver/speechminer/pages/speechminer/pages/calls/querySettings.aspx`**, you would remove the base of the address (enter **`http://myserver/speechminer`**) and enter **`pages/calls/querySettings.aspx`**. **Note:** If this field is left blank, the last View the user had open in their Views page is opened when they log in.
Comments	Enter any additional comments.
Mapping	If the user is a call-center agent, select the user's name in the call center's recording system. If the user is a call-center manager, select the name of the workgroup they manage. You can select the name or workgroup in one of the following ways: ◦ In the text field, begin typing the name of the agent or workgroup. A dropdown list of names that contain the combination of letters you type appears. Keep typing until you see the name, and then click it to select it. ◦ Click . A list of workgroups opens. Click a workgroup to select it, or expand the relevant workgroup and then click the name of the agent to select it. **Note:** Mapping SpeechMiner users to call-center agents makes it possible to create a Saved Report for the "current user." This means that a single Saved Report can be run by different users to retrieve report data about themselves, or their subordinates. For additional information, see Creating a Custom Report.
Send Email Notification	If you want to send the new user an e-mail message telling them that their account is open and explaining how to access it, select this checkbox. The e-mail message is sent to the address specified in the **Email** field.

4. Click **Save Changes**. The new account is created. The **Edit Profile** screen closes and the **Administer Users** screen is

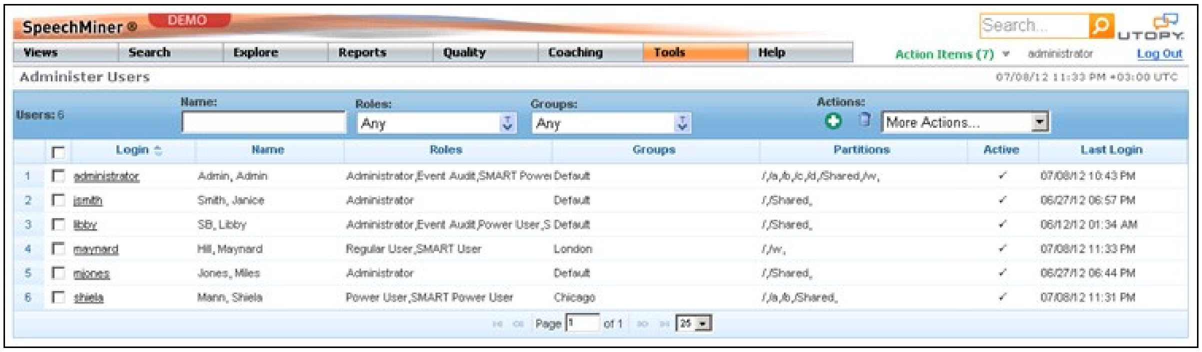
displayed. If you chose to send the user an e-mail notification, the e-mail is sent.

Managing Existing User Accounts

You can filter the list of existing users in a number of ways to help you find the accounts that interest you. You can also modify user profiles and activate, deactivate, or delete user accounts.

To see the list of existing user accounts:

- In the Main Menu, under **Tools**, select **System Admin** and then select **Administer Users**. The **Administer Users** screen opens and displays the list. The list includes a summary of each user's profile: username, personal name, assigned roles, groups, and partitions, account status, and last login date and time.



***Administer Users* Screen**

Filtering The List of User Accounts

You can filter the list of user accounts by any combination of user name, role, and group. The filter controls are located above the list.

To filter the list of user accounts:

1. If you want to filter by user name, in the **Name** field, type a letter or combination of letters. When the filter is activated (see step 4), user accounts that do not include the specified combination of letters will be hidden from the list.
2. If you want to filter by role, click the beside the **Roles** field to open the **Roles** Multi-Select box. In the box, select the role or roles you want to include in the list. (For additional information about using the Multi-Select box, see Defining Search Criteria.)
3. If you want to filter by group, click the beside the **Groups** field to open the **Groups** Multi-Select box. In the box, select the group or groups you want to include in the list. (For additional information about using the Multi-Select box, see Defining Search Criteria.)
4. Click the **OK** button to the right of the **Groups** field. The filter is activated; accounts that do not match the filter settings are not displayed.

Modifying User Profiles

You can modify user profiles in one of two ways:

- Open an individual user's profile and modify it. For example, you could change a user's password.
- Make global changes to selected profiles using the **More Actions** menu. For example, you could add a role to a number of users' accounts.

To modify an individual user profile:

1. In the **Administer Users** screen, in the **Login** column, click the user's name. The **Edit Profile** screen opens and displays the user's current profile.
2. Modify the profile as required. For information about the various fields in the screen, see Creating a New User above.

   Note: The **User Login** and **Authentication** fields cannot be modified. You may not be able to modify other fields if you do not have permissions to do so.

3. Click **Save Changes**. The profile is updated. The **Edit Profile** screen closes and the **Administer Users** screen is displayed.

To make global changes to selected profiles:

1. In the **Administer Users** screen, select the checkbox in the left column of each user profile you want to modify.

   Note: To select all of the user profiles, select the checkbox at the top of the column.

2. Above the list, click **More Actions**. The **More Actions** dropdown menu opens.
3. Select the desired option, as follows:

Option	Description
Mark as Active	Activates the selected accounts.
Mark as Inactive	Deactivates the selected accounts. The users will not be able to log into their accounts. **Note:** Inactive accounts can be reactivated later as necessary. When you click **OK** (see the next step), you will be able to choose whether to delete all the user's saved searches, reports, and scheduled reports, or just to stop all scheduled reports.
Add to Role(s)	Opens a list of the roles that exist in the system. Select the roles you want to add to the users' profiles, and then click to close the list.
Add to Group(s)	Opens a list of the groups that exist in the system. Select the groups you want to add to the users' profiles, and then click to close the list.
Remove from Role(s)	Opens a list of the roles that exist in the system. Select the roles you want to remove from the users' profiles, and then click to close the list.
Remove from Group(s)	Opens a list of the groups that exist in the system. Select the groups you want to remove from the users' profiles, and then click to close the list.

4. Click the **OK** button to the right of the **More Actions** field. The changes are implemented.

   Note: If you selected **Mark as Inactive**, when you click **OK**, you are prompted to choose whether to delete all the user's saved searches, reports, and scheduled reports, or just to stop all scheduled reports. Select the desired action, and then click **OK**.

Deleting Users

You can delete existing user accounts as necessary. When an account is deleted, all saved searches, reports, and scheduled reports created by the user are deleted. If you want to keep these items, but you do not want the user account to be accessible, you can deactivate the account (see Modifying User Profiles above). When an account is deactivated, the user cannot log into it, but the profile is saved and saved searches and reports can be retained. The account can be reactivated later on as necessary.

To delete user accounts:

1. In the **Administer Users** screen, select the checkbox in the left column of each user account you want to delete.
2. Above the list, click **Delete** (). You are prompted to confirm that you want to delete the selected accounts.
3. Click **OK**. The accounts are deleted.

See also

Editing Your User Profile
Managing Groups
Managing Roles

Home > Tools > User Management > Managing Groups

Managing Groups

Groups identify the call data that is associated with specific users. When a user belongs to a particular group, they have access to the call data that is assigned to that group. All Interaction Lists, searches, and reports they access will only include data about the calls in their group. For information about assigning groups to users, see Managing Users.

Each group is defined as a list of partitions and workgroups. Partitions identify call data using the identification system that was used by the recording system. For example, a partition might include calls to *phone number x, extension y*. Workgroups are based on the structure of the call center and identify the user's place in the enterprise's hierarchy. For example, a workgroup might be *Denver Center, ABC Bank*. In most cases, certain partitions are associated with specific workgroups, so it is sufficient to select workgroups and the partitions are automatically included. At times, it may be necessary to add partitions as well.

This section explains how to create and manage groups. Groups are managed in the **Administer Groups** screen.

To open the Administer Groups screen:

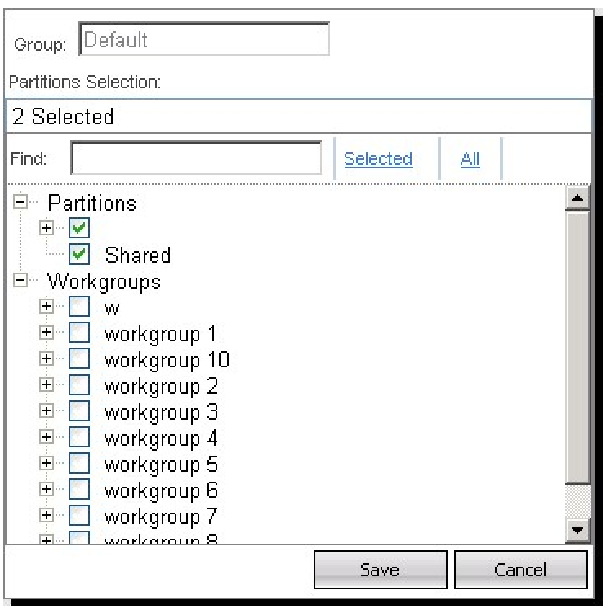
- In the Main Menu, under **Tools**, select **User Management**, and then select **Administer Groups**. The **Administer Groups** screen opens and displays a list of the groups that are already defined in the system. For each group, the workgroups and partitions associated with the group are listed under **Partitions**.

Creating a New Group

You can create new groups as necessary.

To create a new group:

1. In the **Administer Groups** screen, below the list of groups, click the **New** button. A group-definition dialog box opens.



Group-definition dialog box

2. Under **Group**, type a name for the group.
3. In the tree area below the group name, select the partitions and workgroups to associate with the group. Click the plus sign ( ) beside a node to expand a node or the minus sign ( ) to collapse it.
4. Click **Save**. The dialog box closes, and the group is created and added to the list.

Modifying Groups

You can modify the list of partitions and workgroups associated with a group.

To modify a group:

1. In the **Administer Groups** screen, click the name of the group. A group-definition dialog box opens. The partitions and workgroups that are currently associated with the group are selected.
2. In the tree area below the group name, modify the selection of partitions and workgroups necessary. Click the plus sign (⊞) beside a node to expand the node or the minus sign (⊟) to collapse it.
3. Click **Save**. The dialog box closes, and the group definition is modified.

Deleting Groups

You can delete groups from the system if no users are associated with them.

To delete selected groups:

1. In the **Administer Groups** screen, in the list of groups, under **Delete**, select the checkbox of each group you want to delete.
2. Below the list of groups, click the **Delete** button. You are prompted to confirm that you want to delete the groups.
3. Select **OK**. The groups are deleted.

See also

Editing Your User Profile
Managing Users
Managing Roles

Home > Tools > User Management > Managing Roles

Managing Roles

Roles are used to create sets of permissions that are appropriate for different types of users. For example, the role of Administrator is a set of permissions that enables a user to access most system features, including user and system management and SMART functionality. By contrast, the role of Regular User is a much more limited set of permissions that is designed to enable agents to see call data that is relevant to them, to take part in coaching sessions, and to see the results of certain reports, but blocks access to many system functions.

Users with different roles see different elements of the SpeechMiner interface. For example, a Regular User may not have permissions to see the **Tools** page at all. In this case, **Tools** will not even appear in the Main Menu of a user who has this role. By contrast, a user with an Administrator role will see all the pages and all the tabs and screens that belong to each page.

One or more roles can be assigned to each user. The user's permissions in the SpeechMiner system include all the permissions of all their roles.

Seven default roles are defined in the system. The default permission sets of these roles are designed to be appropriate for the majority of SpeechMiner users.

Default Role	Description
Regular User	A standard set of permissions suitable for most users, this role permits viewing of most pages, playing back calls, and adding comments to calls. It does not permit any access to SMART.
Power User	An expanded set of permissions that includes the standard set of permissions assigned to Regular Users plus permissions for user management.
SMART User	A standard set of permissions suitable for most users of SMART.
SMART Power User	An expanded set of permissions for SMART users that includes the standard set of permissions assigned to SMART Users plus permission to release a program that is locked by another user, edit global variables and directives, update program processing priority, activate and deactivate programs, and export and import programs.
Event Audit	This Role is aimed at the auditing tasks required to check for the system's quality during the implementation of new Topics.
Administrator	Aimed at allowing for administrative tasks such as user and permissions management.

Managing Roles

If you have the necessary permissions, you can modify the lists of permissions defined for each existing role, delete any role except the Administrator role, and create new roles.

Roles are managed in the **Administer Roles** screen.

To open the Administer Roles screen:

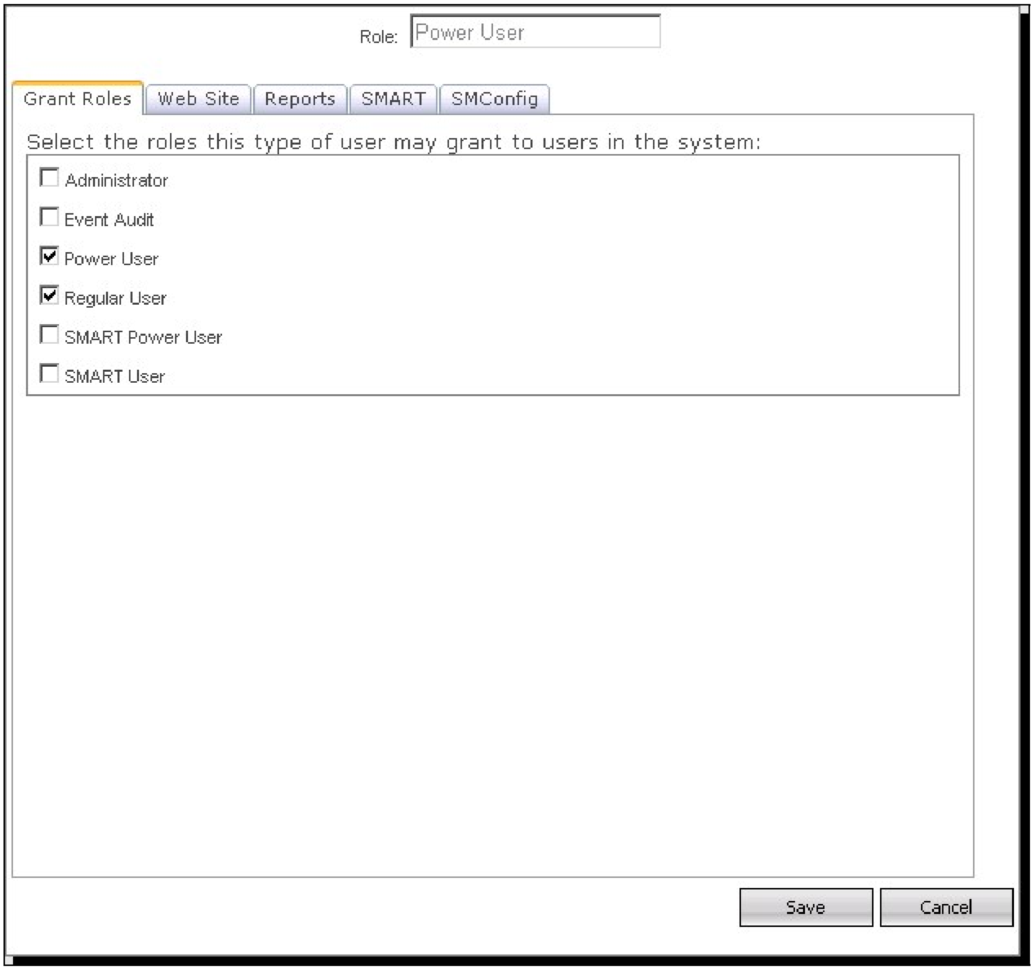
- In the Main Menu, under **Tools**, select **User Management** and then select **Administer Roles**. The **Administer Roles** screen opens and displays a list of existing roles.

Modifying a Role

You can modify the permissions that are assigned to any role.

To modify a role:

1. In the **Administer Roles** screen, click the name of the role. The role-configuration dialog box opens.



Role-configuration dialog box

2. In the **Grant Roles** tab, select the roles that users with the current role can assign to other users.

   For example, if you are configuring the Administrator role, you would probably choose all of the roles, but if you are configuring the Power User role, you would probably not choose Administrator, SMART User, or SMART Power User, because Power Users do not configure SMART user accounts and only an Administrator should be able to grant an Administrator role.

3. In the **Web Site**, **Reports**, **SMART**, and **SMConfig** tabs, select the permissions the role should have.

   In each tab, the permissions are divided into groups. To collapse a group, click the **> >** in the title bar of the group. Click the **< <** again to expand a collapsed group.

   If you wish, you can filter the list of permissions in a tab. To do so, in the **Filter by text** field, type a character or sequence of characters that are included in the names or values of the permissions you want to see. Permissions that do not include the sequence of characters are hidden from the display as you type.

4. When you have finished modifying the permissions for the role, click **Save**. The modifications are saved and the dialog box closes.

Adding a New Role

You can add new roles to the system as necessary. New roles can be added in one of two ways: by adding a new role and configuring it directly, or by copying and existing role and then modifying the configuration of the copy as necessary.

To add a role:

1. In the **Administer Roles** screen, click the **New** button. The role-configuration dialog box opens.
2. Under **Role**, type a name for the role.
3. In the tabs, select the required permissions as described above.

4. When you have finished selecting the permissions for the role, click **Save**. The role is saved and the dialog box closes.

To copy a role and modify it:

1. In the **Administer Roles** screen, in the line containing the role you want to copy, click **Copy**. You are prompted to enter a name for the new role.
2. Enter a name for the role, and then click **OK**. The new role, with the attributes of the role from which it was copied, is added top the list of roles.
3. Click the name of the role. The role-configuration dialog box opens.
4. Modify the permissions as required (see above).
5. When you have finished modifying the permissions for the role, click **Save**. The role is saved and the dialog box closes.

Deleting Selected Roles

You can delete roles as necessary.

To delete selected roles:

1. In the **Administer Roles** screen, in the list of groups, under **Delete**, select the checkbox of each role you want to delete.
2. Below the list of roles, click the **Delete** button. You are prompted to confirm that you want to delete the roles.
3. Select **OK**. The roles are deleted.

See also

Editing Your User Profile
Managing Users
Managing Groups

Home > Tools > System Administration

System Administration

The System Administration tools are used to monitor and manage the system and its servers as well as some of its global features, such as Preset Views and alerts.

See also

Managing Preset Views
Monitoring the System
Managing the Call Queue
Purging the System
Managing the Cache
Reprocessing Interactions and Managing Audits
System Configuration
Managing Alerts
System Alerts

Category Management
User Management
Elements Explorer

Home > Tools > System Administration > Managing Preset Views

Managing Preset Views

Views are sets of widgets in a particular layout that are visible in the Views page. *Preset Views* are Views that are designed by administrators or managers for use by other users. They are designed in the **Tools** page and then *published* to the **Views** pages of specified users.

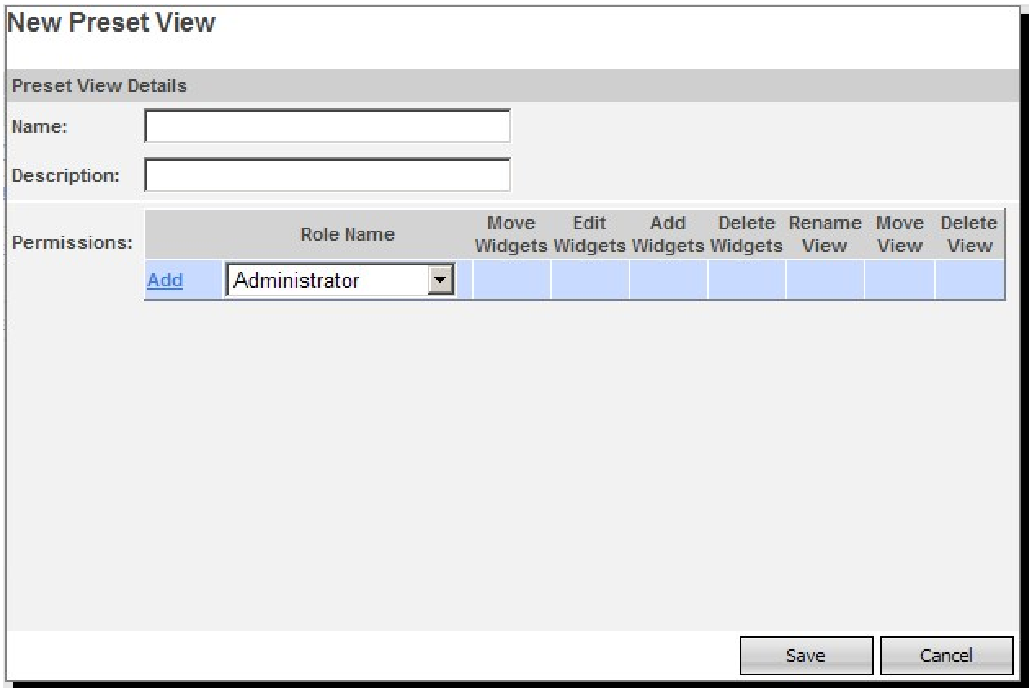
If you have the necessary permissions, you can create, publish, and manage Preset Views, as explained in this section. For an overview of Views and the **Views** page, see Views.

Creating a New Preset View

You create a new Preset View by designing a layout for the View and publishing it to the Views pages of users with specified roles. For each role you select, you also specify the permissions for the Preset View - whether a user with that role can modify or delete the View in their **Views** page.

To design a new Preset View:

1. In the Main Menu, under **Tools**, select **System Admin** and then select **Preset Views**. The **Preset Views** screen opens.
2. Click **New**. A **New Preset View** dialog box opens.



New Preset View Dialog Box

3. Under **Name**, type a name for the Preset View.
4. Under **Description**, type a description for the Preset View.

   Note: Although you can add roles to the Preset View at this time, it is recommended that you design the view (add widgets and set the layout) before adding the roles. When you have finalized the design, add the roles and publish the Preset View as described below.

5. Click **Save**. A blank Preset View appears.
6. Use the **Add Widgets** and **Change Settings** options to create the View, and edit the settings of the widgets as necessary. For detailed information about how to do this, see Managing Views and Managing Widgets.
7. When you have finished designing the Preset View, in the upper-right corner of the screen, click **Back to Preset Views**. The Preset View closes, and the **Preset Views** screen is displayed. The new Preset View appears in the list of Preset Views in the screen.

Once you have designed the Preset View, you can set the user roles to which you want to publish the Preset View and the permissions each type of user will have to modify the Preset View.

1. In the **Preset Views** screen, in the list of Preset Views, click the name of the Preset View, or click **Edit**. The **Edit Preset View** dialog box opens.
2. Under **Permissions**, under **Role Name**, select one of the user roles to which you want to publish the Preset View.
3. To the left of the selected role, click **Add**. A permissions row is added for the selected role. Checkboxes appear in the row for each type of permission.
4. Select the checkbox of each permission you want to grant to users of the selected role.

5. Repeat the previous three steps for each role to which you want to publish the Preset View.
6. Publish the Preset View as described below.

Publishing Preset Views

After you create a new Preset View or modify an existing one, you must *publish* the View in order for it to appear in users' **Views** pages in its current form. Published Preset Views appear in the pages of all users whose roles appear in the View's permission settings. If you republish a Preset View that was already published before, the new version overwrites the existing version in all users' **Views** pages.

Note: When you republish a Preset View, all local changes to the View that were made by individual users are removed; the new version of the View replaces all existing versions.

To publish Preset Views:

1. In the **Preset Views** screen, in the list of Preset Views, select the checkbox beside each Preset View you want to publish.
2. At the upper-left of the screen, click the **Reset** button. You are prompted to confirm that you want this version of each selected Preset View to overwrite any previous versions of the same Views that may already be on users' **Views** pages.
3. Click **OK**. The new Preset View is published to the Views pages of all users with the roles you specified.

Editing Preset-View Settings

You can edit the name, description, and permissions of any of the Preset Views you created. The changes are implemented as soon as you save them; you do not have to republish the Views after you change their settings.

To edit the permissions of an existing Preset View:

1. In the **Preset Views** screen, in the list of Preset Views, click the name of the View, or click **Edit**. The **Edit Preset View** dialog box opens.
2. Modify the name, description, and permissions as required.
3. Click **Save**. The changes are saved and published to user's **Views** pages. If you removed a user's role from the list of permissions, the View is removed from the user's **Views** page.

Editing Preset-View Layout

You can modify the layout and widget set of any of the Preset Views you created. Once you do this, you must publish the View again to implement the changes on users' **Views** pages.

Note: When you republish a Preset View, all local changes to the View that were made by individual users are removed; the new version of the View replaces all existing versions.

To modify the layout of an existing Preset View:

1. In the **Preset Views** screen, in the list of Preset Views, under **Layout**, click the icon. The current Preset View is displayed.
2. Modify the layout and selection of widgets as required. For detailed information about working with the layout and widgets, see Managing Views and Managing Widgets.
3. When you have finished designing the Preset View, in the upper-right corner of the screen, click **Back to Preset Views**. The Preset View closes, and the Preset Views screen is displayed.
4. To publish the changes to user's **Views** pages, follow the instructions above.

Deleting a Preset View

You can delete a Preset View. When you do so, the View is removed from the **Views** pages of all users and from the list of Preset Views in the **Tools** page.

To delete a Preset View:

1. In the **Preset Views** screen, in the list of Preset Views, select the checkbox beside each Preset View you want to delete.
2. At the upper-left of the screen, click the **Delete** button. You are prompted to confirm that you want to delete the selected Preset Views.
3. Click **OK**. The selected Preset Views are removed from all users **Views** pages and from the list of Preset Views.

See also

Monitoring the System
Managing the Call Queue
Purging the System
Managing the Cache
Reprocessing Interactions and Managing Audits
System Configuration
Managing Alerts
System Alerts

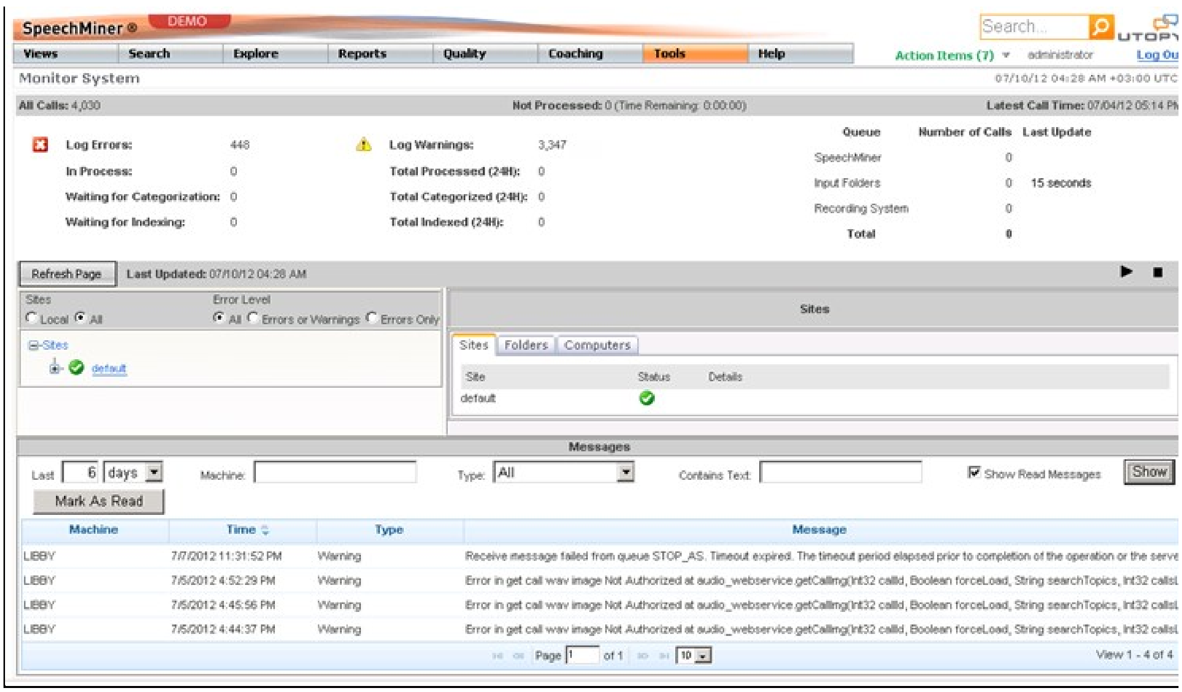
Home > Tools > System Administration > Monitoring the System

Monitoring the System

The **Monitor System** screen provides information on the status of the different SpeechMiner modules and allows the user to stop or run (restart) the system as necessary. In addition, the bottom of the screen can be used to view system messages.

To open the Monitor System screen:

- In the Main Menu, under **Tools**, select **System Admin** and then select **Monitor System**.



Monitor System Screen

Monitoring Module Status

The Monitor System screen presents a system status information, including:

- **All Calls** - Calls currently in the SpeechMiner database
- **Not Processed** - Number of calls waiting to be processed. These calls have been added to the system by the fetcher, but have not gone through recognition yet.
- **Latest Call Time** - The time of the latest call that was added to the system.
- **Log Errors, Log Warnings** - Number of errors and warnings that haven't been handled yet. When there are errors, the administrator can investigate using the information in this screen as well as by running the Monitor System report or using the

ULogger utility directly on a server.

Note: The system can be configured to send reports of errors via e-mail to specified recipients whenever errors arise. For additional information, see System Alerts.

- **In Process** - Number of calls currently being processed. These calls have started the recognition process and haven't been completed yet.
- **Total Processed (24H)** - Number of calls that were processed in the last 24 hours. This is an indicator of how well the processing system is functioning
- **Waiting for Categorization** - This number includes calls that are waiting to processed (**Not Processed**) and calls that are done processing but that are waiting to be picked up by the categorizer.
- **Total Categorized (24H)** - Number of calls that were categorized in the last 24 hours. This is an indicator of how well the categorization system is functioning.
- Number of calls in queue waiting to be processed, broken down into the various phases
  - **SpeechMiner** - Calls already picked up by the fetcher and added to the system, waiting to be processed.
  - **Input Folders** - Calls in the input folders, waiting to be picked up by the fetcher.
  - **Recording System** - Calls in the recording system, waiting to be picked up by the UConnector (This information is only available on certain systems, depending on the integration with the recording system).
  - **Total** - Summary of all numbers above. Reflects the known amount of processing ("backlog") to be done, in order to catch up with current recording. A small total number is a healthy state. A total of 0 might indicate an idle system, where UConnector has no remaining calls to pick up or UConnector is down.
    On a system with high fluctuation in call volumes over the course of a day or a week, the total number will grow during the peak volume period, and will gradually get smaller during the rest of the cycle. An ever growing total indicates a problem.

    Note: The UConnector can buffer a relatively large amount of calls (calls that are between the Recording System and the Input Folders state). Such calls will be temporarily missing from the total count.
- Status of the various sites
- Folder status (Input, Filter, and Store): If available space is low, a warning or error is generated.

Starting or Stopping Machines

You can start of stop some or all of the machines in the system from the **Monitor System** screen.

To start or stop all the machines in the system:

- Use the **Start** () and **Stop** () buttons on the right.

  Note: Stopping the system does not turn off the UPlatform.exe service. To do that, you must run the SMConfig tool.

To start or stop a single machine in the system:

- In the left panel, select the machine. Two new buttons appear under the system's **Start** () and **Stop** () buttons: **Start Machine** () and **Stop Machine** (). Use these buttons to start or stop the selected machine.

Viewing System Messages

The bottom of the screen can be used to display system messages.

Note: You can also see system messages, as well as additional system-status information, by running the Monitor System report.

To view system messages:

1. At the bottom of the screen, in the **Messages** area, set the filters you want to apply to the message list.
2. Click **Show**. The messages are displayed below the filters.

To see the full text of a message:

- Place your mouse cursor on the message text.

To mark all the messages that were retrieved as "read":

- Click **Mark as Read**.

See also

Managing Preset Views
Managing the Call Queue
Purging the System
Managing the Cache
Reprocessing Interactions and Managing Audits
System Configuration
Managing Alerts
System Alerts

Managing the Call Queue

When SpeechMiner retrieves calls from the shared file system, it adds them to a queue of calls that are waiting to be processed. The calls in the queue are processed in accordance with the priority levels of their Programs or, if the Program priorities are equal, in accordance with the selected process order (older calls first or newer calls first).

Program priority levels are initially set in SMART, but they can be changed from within the SpeechMiner interface, either on a permanent or a temporary basis. Changing the priority level permanently changes it for calls that are currently in the queue and for calls that are added to the queue later. Changing it temporarily only affects those calls that are already in the queue. When new calls are added to the queue, they are assigned the normal priority level of the Program to which they belong. In this way, calls that are already in the queue can be moved up or down in priority without influencing how SpeechMiner will treat the next group of calls it adds to the queue.

Only batches of calls belonging to a particular Program can be moved in the queue; individual calls cannot be moved.

The call queue settings are set in the **Manage Call Queue** screen.

Manage Call Queue screen

To open the Manage Call Queue dialog box:

- In the Main Menu, under **Tools**, select **System Admin** and then select **Manage Call Queue**.

To change the process order:

- Under **Process Order**, select the required process order.

To permanently change the priority of a Program:

- In the **Program** column, click **Edit**. In the dialog box, select the required priority level, and then click **OK**.

To temporarily change the priority of a Program:

- In the **Calls in Queue** column, click **Set Priority**. In the dialog box, select the required priority level, and then click **OK**.

To sort the table by a particular column:

- Click the heading of the column. (Click it a second time to reverse the order.)

See also

Managing Preset Views
Monitoring the System
Purging the System
Managing the Cache
Reprocessing Interactions and Managing Audits
System Configuration
Managing Alerts
System Alerts

Home > Tools > System Administration > Purging the System

Purging the System

When old calls are no longer required, it is possible to safely remove them from the system. This will reduce the database size and will result in better performance overall.

You can choose to delete all calls in the database or select a specific group of calls to delete. If you choose to delete a specific group, you define the group in one of the following ways:

- Date range
- One or more Programs

Note: Calls that belong to static Interaction Lists or manual Categories are not deleted during a purge.

Note: It is possible to set up an automated purging job. For additional information, contact Genesys Telecommunications Laboratories support.

To purge calls from the system:

1. In the Main Menu, under **Tools**, select **System Admin** and then select **Purge System**.
2. Select the desired options.
3. Click **Delete**.

See also

Managing Preset Views
Monitoring the System
Managing the Call Queue
Managing the Cache
Reprocessing Interactions and Managing Audits
System Configuration
Managing Alerts
System Alerts

Home > Tools > System Administration > Managing the Cache

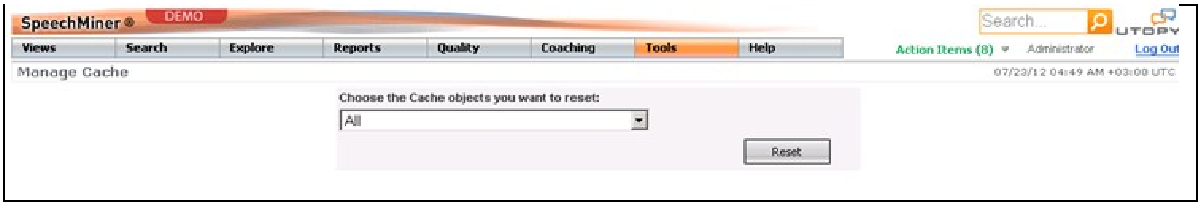
Managing the Cache

For performance reasons, many of the fixed elements of the interface, such as the names of Categories and Topics, or the list of metadata types, are stored in a cache. The contents of this cache is automatically reset from time to time, and is also normally reset whenever changes made in SMART are applied in SpeechMiner. Nonetheless, at times you may find it necessary to reset the cache manually. For example, you may wish to do this when a new agent has begun working, so that the agent's name will appear in the system.

You can reset the entire cache or select specific parts of the cache to reset.

To reset part or all of the cache:

1. In the Main Menu, under **Tools**, select **System Admin** and then select **Manage Cache**. The **Manage Cache** screen opens.



Manage Cache screen

2. In the dropdown list, select the part of the cache you want to reset.
3. Click **Reset**. The selected part of the cache is reset, and a confirmation message appears.
4. Click **OK** to close the confirmation message.

See also

Managing Preset Views
Monitoring the System
Managing the Call Queue
Purging the System
Reprocessing Interactions and Managing Audits
System Configuration
Managing Alerts
System Alerts

Home > Tools > System Administration > Reprocessing Interactions and Managing Audits

Reprocessing Interactions and Managing Audits

The **Interactions Admin** screen is used to perform a number of interactions- and audit-management tasks: deleting audits, reprocessing interactions, and cleaning the database of information about terms that were removed from Topics. These tasks may be necessary, for example, when Topic terms have undergone significant changes.

Interactions Admin screen

To open the Interactions Admin screen:

- In the Main Menu, under **Tools**, select **System Admin** and then select **Interactions Admin**.

Deleting Audits

You can delete all the audits for a particular Topic or for all Topics.

To delete audits:

1. In the **Interactions Admin** screen, in the **Delete Audits** tab, click the arrow ( ) to the right of the **Audits** field. A dropdown list of Topics appears.
2. Select the Topics for which you want to delete the audits.
3. Click **Delete**. The audits are deleted for the selected Topics.

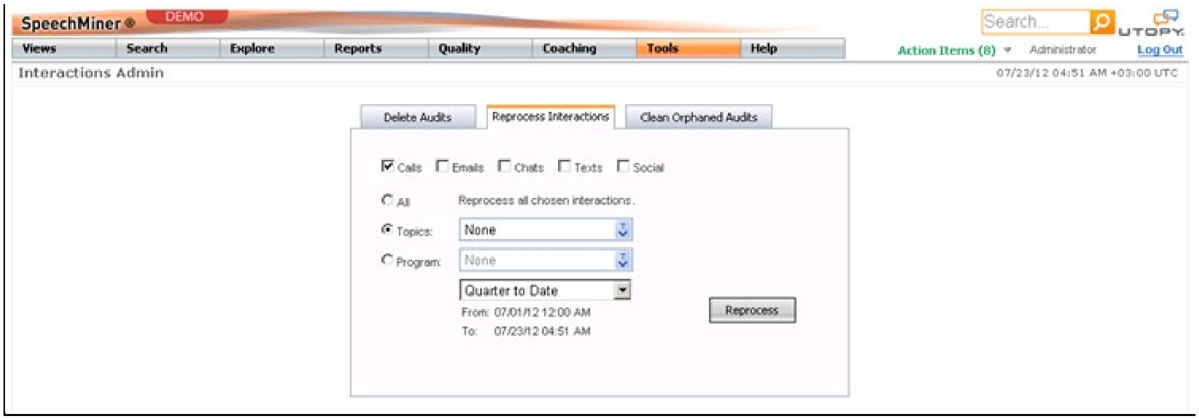
Reprocessing Interactions

You can run event analysis again on all interactions or for specified Topics or Programs. You can also specify the date range for which you want to apply the reprocessing.

To reprocess interactions:

1. In the **Interactions Admin** screen, in the **Reprocess Interactions** tab, select the types of interactions you want to reprocess.
2. Select a reprocessing option, as follows:

Option	Description
All	Reprocess all interactions.
Topics	Reprocess the selected Topics.
Programs	Reprocess the selected Programs



Reprocess Interactions tab

3. If you selected **Topics** or **Programs**, click the arrow ( ) beside your selection, and then, in the Multi-Select box, select the items you want to reprocess. (For additional information about using the Multi-Select box, see Defining Search Criteria.)
4. In the last field, click the arrow to open the dropdown list, and then select the range of dates for which you want to reprocess the items.
5. Click **Reprocess**. The items are reprocessed.

Cleaning Orphaned Audits

If terms were deleted from Topics during the auditing and fine-tuning process, they should also be removed from the lists of terms that are tracked in reports and in the Interaction and Event grids.

To remove deleted terms from the lists of tracked terms:

- In the **Interactions Admin** screen, in the **Clean Orphaned Audits** tab, click **Clean**. The terms are deleted.

See also

Managing Preset Views
Monitoring the System
Managing the Call Queue
Purging the System
Managing the Cache
System Configuration
Managing Alerts
System Alerts

Home > Tools > System Administration > System Configuration

System Configuration

The System Configuration page displays system configuration and security information. The configuration information is for viewing only, but some of the security settings can be changed.

See also

Viewing System Information
Managing Security Settings

Managing Preset Views
Monitoring the System
Managing the Call Queue
Purging the System
Managing the Cache
Reprocessing Interactions and Managing Audits
Managing Alerts
System Alerts

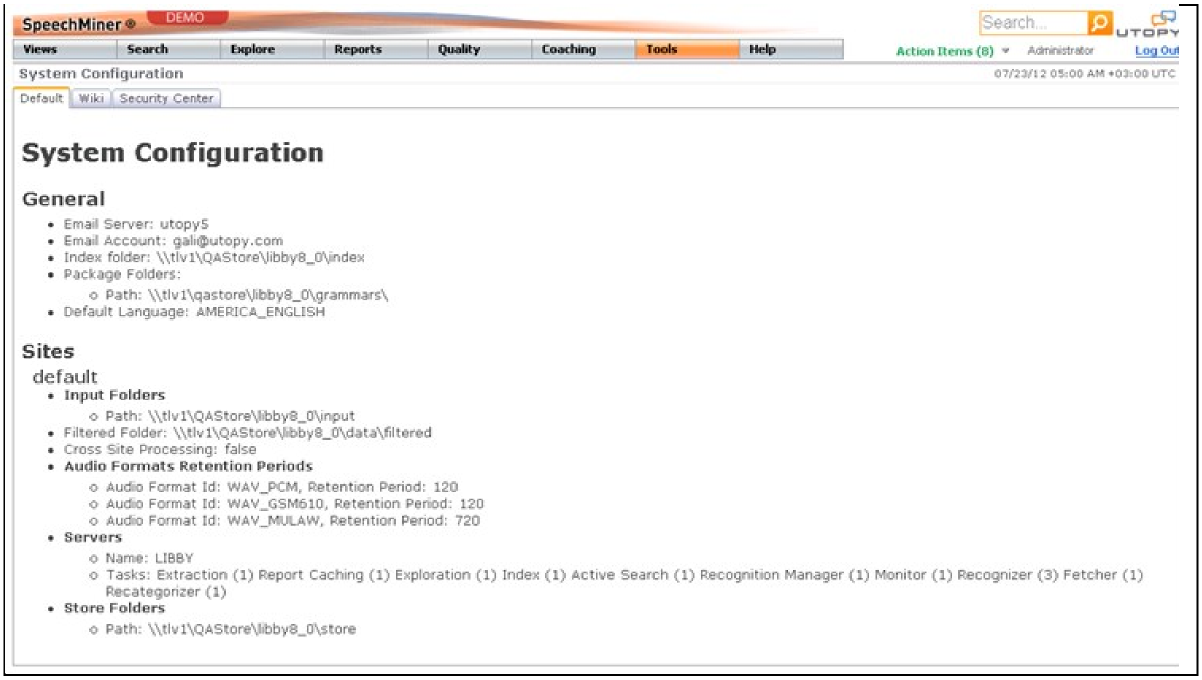
Home > Tools > System Administration > System Configuration > Viewing System Information

Viewing System Information

You can see a summary of information about the different components of the system. If you wish, you can embed this summary in intranet sites that use wiki markup.

To view system-configuration information:

- In the Main Menu, under **Tools**, select **System Admin** and then select **System Configuration**. The **System Configuration** screen opens and displays the Default tab, in which the system-configuration information is displayed.



Default tab

To embed the system-configuration information in an intranet site:

1. In the **System Configuration** screen, in the **Wiki** tab, select and copy the text.
2. In the intranet site, paste the text in the desired Wiki location.

See also

Managing Security Settings

Home > Tools > System Administration > System Configuration > Managing Security Settings

Managing 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 calls that are stored in the database. Some of the options that must be implemented in SpeechMiner in order for it to conform to the PCI-DSS standard are:

- Call export is disabled for all users.
- Anonymous Permalinks are disabled for all users.
- Numbers are filtered out of all call playback.
- 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 only available using Windows authentication; SpeechMiner authentication is disabled.
- 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.
- All user events are logged.
- 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; 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.

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. For comprehensive information about securing your SpeechMiner environment, please follow the guidelines in the *SpeechMiner PCI Implementation Guide*.

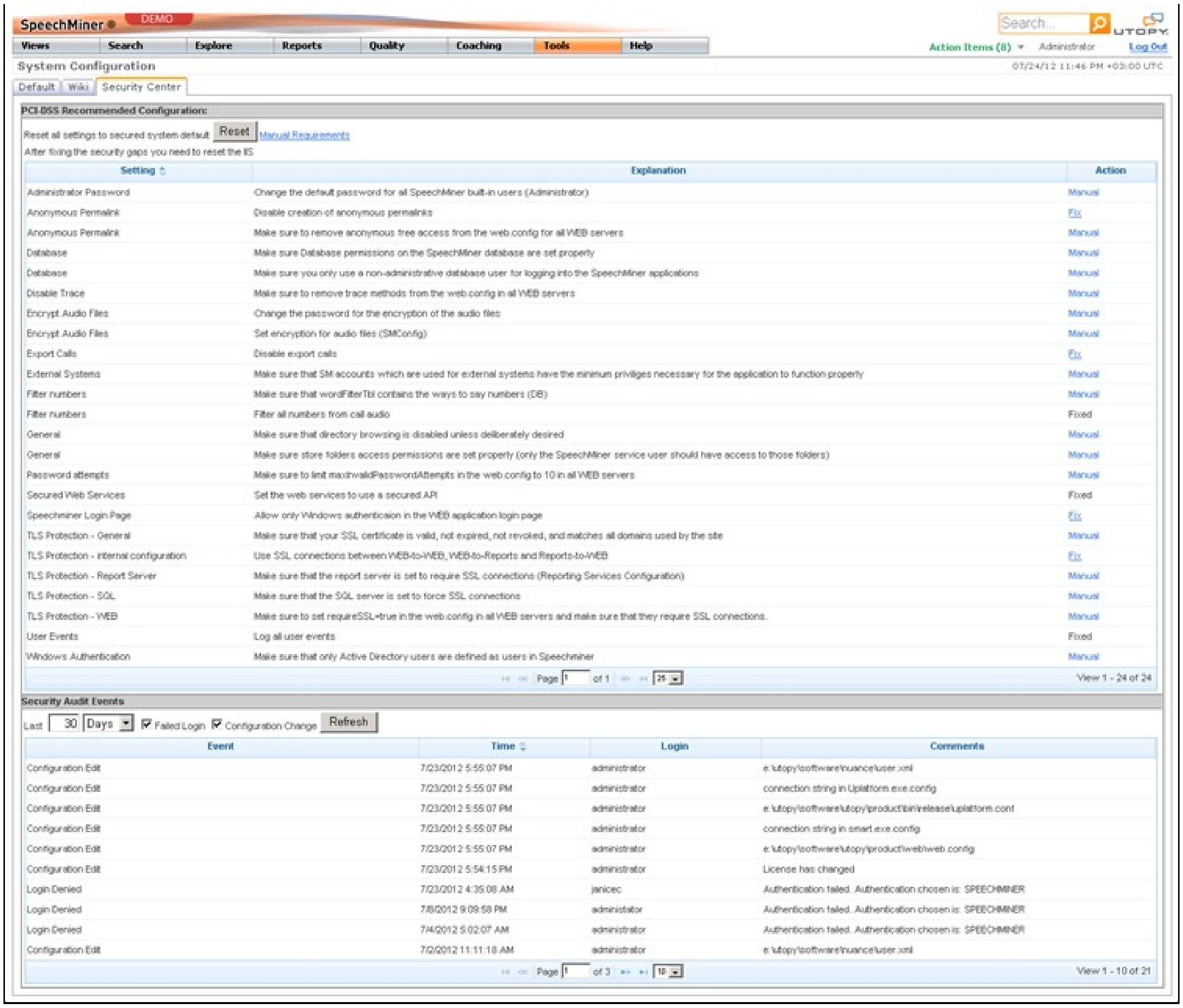
Note: Following these guidelines does not ensure that your entire system is PCI-DSS compliant, or guarantee the confidentiality of your data. It is your company's responsibility to work with your IT department to ensure that your hardware and network systems are secure from internal as well as external intrusions. Genesys Telecommunications Laboratories makes no claims about the security of your network or the extent to which it is PCI-DSS compliant.

Opening the Security Center

The Security Center is accessed from the **System Configuration** screen.

To open the Security Center:

- In the **System Configuration** screen, click the Security Center tab.



Security Center tab

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.

To sort a list by a column:

- Click the title of the column. (Click it a second time to reverse the order.)

Managing PCI-Related Settings

The **PCI-DSS Recommended Configuration** section contains a table that lists all of the PCI-related settings. The table has three columns:

Column	Description
Setting	Name of the setting
Explanation	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	The current status of the setting, and/or the type of action required to correct it: • **Fixed:** The setting conforms to the PCI requirements. • **Fix:** The setting does not conform, but the system can correct it.

	• **Manual:** 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. Under **Action**, click **Fix**. You are prompted to confirm that you want to change the setting.
2. Click **Yes**. The system corrects the setting and changes its Action status to **Fixed**.

To correct a setting manually:

- Follow the instructions under **Explanation** to manually correct the problem. For additional information, please refer to the *SpeechMiner PCI Implementation Guide*.

To correct all the settings that can be fixed automatically:

1. At the top of the list, click **Reset**. You are prompted to confirm that you want to change the settings.
2. Click **Yes**. The system corrects the settings and changes their Action status to **Fixed**.

   Note: Settings that require manual correction are not changed when **Reset** is selected.

Monitoring the Security Log

The lower table in the Security Center lists system configuration changes and failed logins that occurred in a specified time period. (System configuration changes are changes that are implemented using SMConfig, the SpeechMiner system configuration tool.)

To configure the display in the table:

1. At the top of the table, select the display options as follows:

Option	Description
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 this option to include failed logins in the list
Configuration Change	Select this option to include configuration changes in the list

2. Click **Refresh**. The display in the table is updated to match the options you chose.

See also

Viewing System Information

Home > Tools > System Administration > Managing Alerts

Managing Alerts

You can configure SpeechMiner to send email alerts to specified people when groups of calls have certain unusual or significant characteristics. For example, you can check for changes in the number of calls containing caller agitation, or how many calls each agent handled per week.

The following types of alerts are available:

- **Change Alert:** This type of alert is designed to tell you when the number of calls that meet a certain condition has changed significantly from one time period to the next. For example, you could define a Change Alert to notify you when the number of calls dealing with a particular Topic is more than ten percent higher that it was the previous week.
- **Threshold Alert:** This type of alert is designed to tell you when a significant number of calls meet a certain condition. For example, you could define a Threshold Alert to notify you when the number of calls handled by an agent falls below 1000 in a given week.

- **Trend Alert:** This type of alert is designed to find significant changes over time in the numbers of calls that meet a certain condition. For example, you could define a Trend Alert to notify you when the number of calls dealing with new accounts decreases significantly for four weeks straight.
- **On Event Alert:** This type of alert is designed to tell you when a particular type of event takes place in a specific number of calls. For example, you could define an On Event Alert to notify you when your competitors are mentioned in more than ten calls.

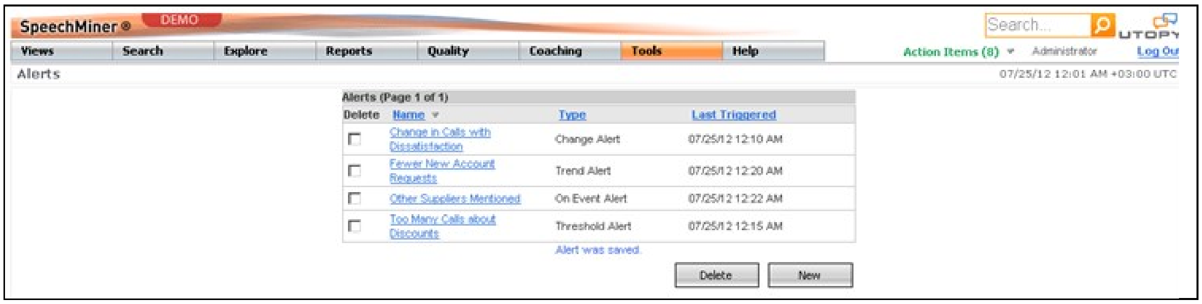
Change, Threshold, and Trend alerts are generated by the system once a day. That is, at a set time every day, the system checks the preceding day's data to see which of the alert conditions were met, and sends notifications for those alerts that were generated. On Event Alerts are generated whenever their conditions are met. The same On Event alert could be generated multiple times in the same day, if the conditions were met multiple times.

Creating a New Alert

You can create new alerts as required.

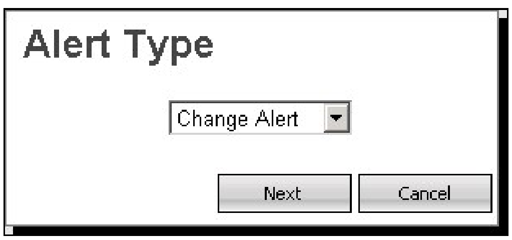
To create a new alert:

1. In the Main Menu, under **Tools**, select **System Admin** and then select **Alerts**. The **Alerts** screen opens and displays a list of the currently defined alerts.



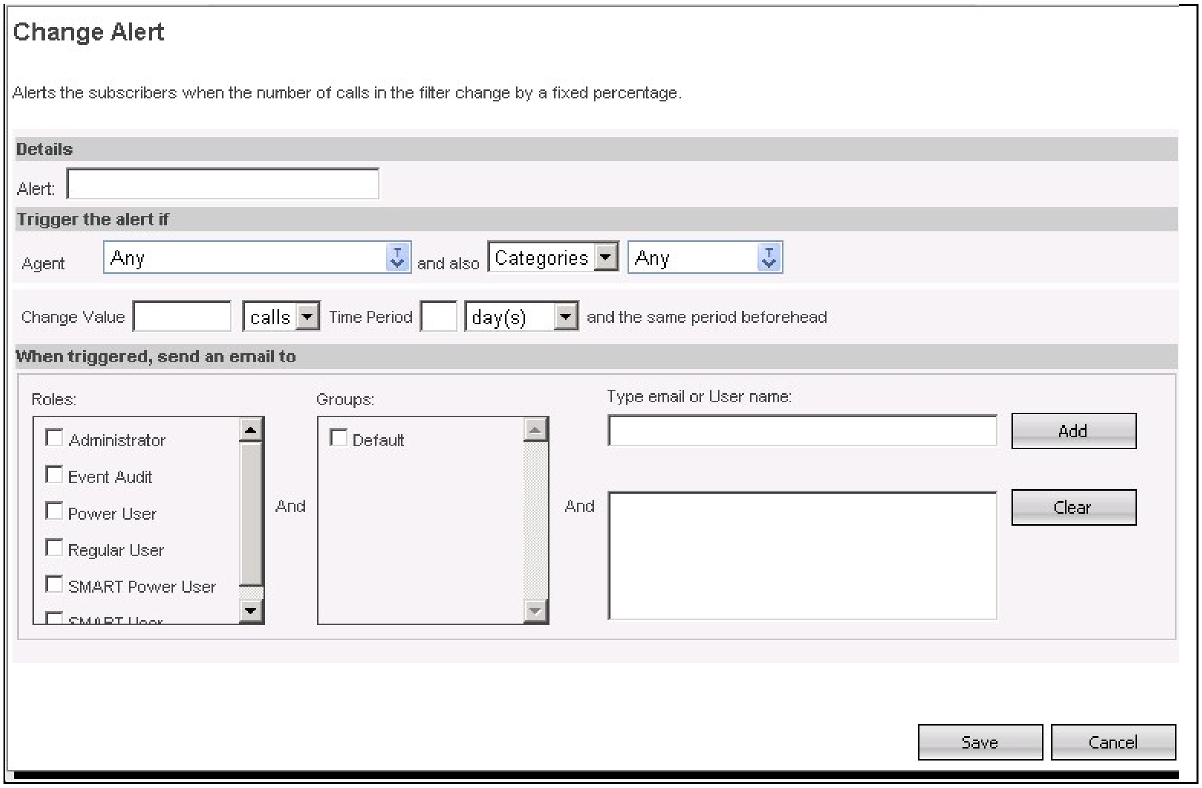
Alerts screen

2. Below the list of alerts, click **New**. The **Alert Type** dialog box opens.



Alert Type dialog box

3. Select the type of alert you want to create, and then click **Next**. An Alert Parameters window opens. The fields vary slightly depending on the type of alert you selected.



Alert Parameters window for a Change Alert

4. Under **Details**, in the **Alert** field, type a name for the alert.
5. Under **Trigger the alert if**, select the call-property conditions, as follows:

Field	Description
Agent (Not available in Threshold Alerts)	If you want to limit the alert to calls that were handled by particular work groups or agents, click the beside this field to open the Multi-Select box. Add the work groups and/or agents to the list of selected agents, and then close the Multi-Select box. For additional information about using the Agent Multi-Select box, see Defining Search Criteria.
Categories/Topics	If you wish, you can limit the alert to calls that belong to particular Categories or that contain particular Topics. To do this, in the dropdown list, select either Categories or Topics, and then, click the beside the next field to open the Multi-Select box and select the Categories or Topics. For additional information about using the Multi-Select box, see Defining Search Criteria.

6. Fill in the fields on the next line as follows. (Note that the fields vary depending on the type of alert.)

Change Alert:

Field	Description
Change Value	Enter the percentage of calls or the number of calls that should activate the alert. For example, if you want the alerts to be sent out when the number of calls that match the conditions during the current time period is 20% lower this week than it was last week, enter **20**. Alternatively, if you want the alerts to be sent out if the number of calls matching the conditions during the current time period is lower by 100 this week than it was last week, enter **100**.
calls/%	If the **Change Value** is a number of calls, select **calls**. If it is a percent change, select **%**.
Time Period	In the first field, enter the quantity of days, weeks, or months to include in each time period. For example, if the time period is two weeks, enter **2**.

	In the second field, select the type of time period: **day(s)**, **week(s)**, or **month(s)**.

Threshold Alert:

Field	Description
Threshold Position	In the first field, select **Above** if the threshold you want to define is above a specified value, or **Below** if it is below a specified value. For example, if you want the alerts to be sent out if the percentage of calls matching the conditions during the current time period is greater than 20%, select **Above**. Similarly, if you want the alerts to be sent out if the number of calls matching the conditions during the current time period is greater than 100, select **Above**. In the second field, enter the threshold value (e.g., **20** for 20% or **100** for 100 calls).
calls/%	If the **Threshold Position** is a number of calls, select **calls**. If it is a percent change, select **%**.
Time Period	In the first field, enter the quantity of days, weeks, or months to include in the current time period. For example, if the time period is two weeks, enter **2**. In the second field, select the type of time period: **day(s)**, **week(s)**, or **month(s)**.

Trend Alert:

Field	Description
Trend Direction	Select **Up** if you want the alerts to be sent out when an upward trend is identified, or **Down** if you want to find downward trends. For example, if you want to be notified of an increasing number of calls involving agitated callers, select **Up**. Alternatively, if you want to be notified when there is an apparent decrease in calls about a particular Topic, select **Down**.
Time Period	Enter the quantity of days, weeks, or months to include in the trend test. For example, if you want to test for monthly trends over the past six-months, enter **6**.
consecutive	Select the type of time period: **day(s)**, **week(s)**, or **month(s)**. For example, if you want to see trends over the past six months, comparing month to month, select **month(s)**.

On Event Alert:

Field	Description
Send alert when	Enter the number of calls in which the event must occur before an alert is sent.

7. Under **When triggered, send an email to**, specify the recipients of the alert by selecting any combination of roles and groups, and adding individual users and email addresses, as follows:
    - Under **Roles**, select the roles that should receive the email alerts. For example, if you select **Administrator** and **Power User**, any user with either of these roles will receive the alert.
    - Under **Groups**, select the groups that should receive the email alerts. Any user who belongs to one or more of the selected groups will receive the alert.
    - Under **Type email or User name**, enter the email address or user name of the person that should receive the email alerts. As you type, the system automatically displays a list of all usernames that contain the entire sequence of characters you have typed thus far. If the user name you want to add appears in the list, select it and it is automatically entered into the field. When the email address or user name appears in its entirety in the field, click **Add** to add it to the list of recipients. The email address or user name is added to the list of recipients that appears below the field.
8. Click **Save**. The alert is created and is added to the list of alerts. When groups of calls matching the conditions you set are identified by the system, email alerts are sent to the recipients you specified.

Sorting the List of Alerts

You can sort the list of alerts by any of the columns.

To sort the list of alerts by a column:

- Click the heading of the column. The selected column is identified by a ▾ beside the heading.

  Note: To change the sort order from ascending to descending, or vice-versa, click the heading a second time.

Editing an Existing Alert

You can edit the settings of an alert as necessary.

To edit the settings of an alert:

1. In the **Alerts** screen, in the list of alerts, click the name of the alert. The alert parameters window opens.
2. Modify the settings as necessary.

   Note: To remove an individual user name or email address from the list of recipients, select it in the list and then click **Clear**.

3. Click **Save**. The changes are implemented.

Deleting Alerts

You can delete alerts from the list when they are no longer needed.

To delete alerts from the list:

1. In the **Alerts** screen, in the **Delete** column, select the checkbox of each alert you want to delete.
2. Below the list, click **Delete**. You are prompted to confirm that you want to delete the selected alerts.
3. Click **Yes**. The selected alerts are deleted.

See also

Managing Preset Views
Monitoring the System
Managing the Call Queue
Purging the System
Managing the Cache
Reprocessing Interactions and Managing Audits
System Configuration
System Alerts

Home > Tools > System Administration > System Alerts

System Alerts

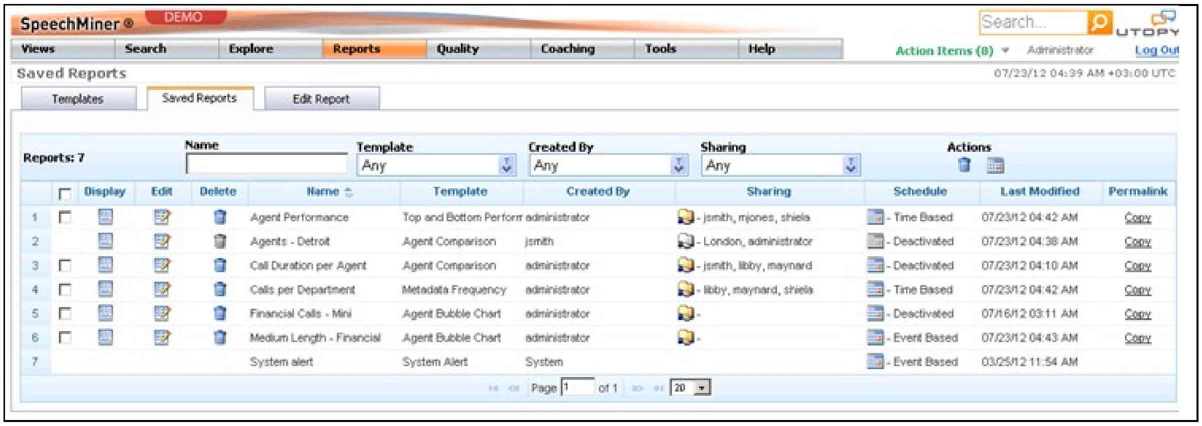
A monitoring process runs on every platform computer in the system. The current state of the platform computers in the system is displayed in the Monitor System page. The system can be configured to send out e-mail notification messages to specified recipients whenever a monitoring process discovers an error, such as a full disk, on one of the monitored computers. Whenever a new error is discovered, a notification is sent. The notification lists all errors that are detected in the system at the time it is sent (even if notifications about them have already been sent).

Note: New notifications are only sent out when new errors are discovered. Even if an error has remained uncorrected for a long period of time, no new notifications are sent out about it unless additional errors are detected.

System alert notifications are configured using a Saved Report called **System alert**. This saved report appears automatically in the **Saved Reports** page and cannot be deleted. It is configured using the Scheduling feature.

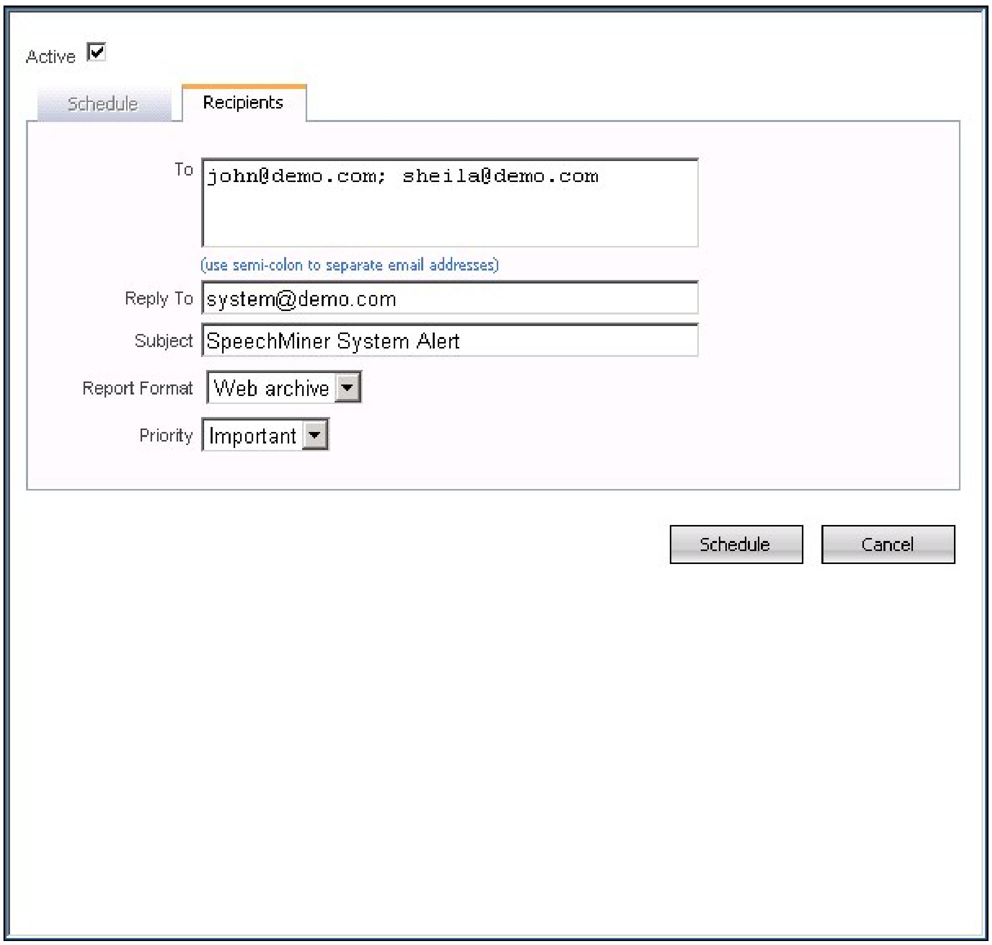
To configure System Alert notifications:

1. In the Main Menu, under **Reports**, select **Saved Reports**. The **Saved Reports** tab opens.



Saved Reports tab

2. Locate the row of the **System alert** report, and click **Schedule** (). The scheduling dialog box opens, and the Recipients tab is displayed. (The Schedule tab is not available for this report, because it is configured automatically.)



Scheduling dialog box

3. Fill in the fields as follows:

Field	Description

To	The e-mail addresses of the report recipients. Separate multiple addresses with semi-colons (;).
From	The sender address to use
Subject	The text that should appear in the subject line of the e-mail.
Report Format	Select **Web archive** to format the results as an MHT file (which can be opened in Internet Explorer). Select **PDF** to format the results as a PDF file.
Priority	Select the desired priority level for the e-mail message.

4. Click **Schedule**. The recipients of system alerts are set as specified.

See also

Managing Preset Views
Monitoring the System
Managing the Call Queue
Purging the System
Managing the Cache
Reprocessing Interactions and Managing Audits
System Configuration
Managing Alerts

Home > Tools > Elements Explorer

Elements Explorer

The **Elements Explorer** allows you to browse the elements (Topics, Programs, and Categories) available in your version of SpeechMiner.

See also

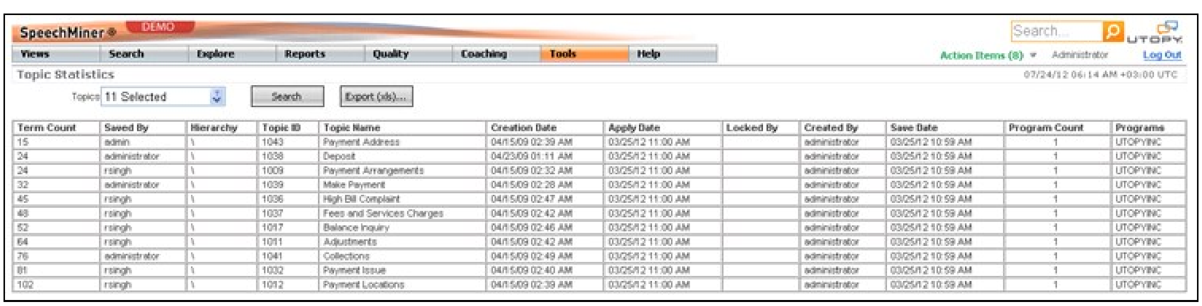
Topic Statistics
Program Statistics
Category Statistics

Category Management
User Management
System Administration

Home > Tools > Elements Explorer > Topic Statistics

Topic Statistics

The **Topic Statistics** screen displays the properties of selected Topics, such as the Topics' Term Count (the number of terms the Topic contains) and Program Count (how many Programs use the Topic).



Term Count	Saved By	Hierarchy	Topic ID	Topic Name	Creation Date	Apply Date	Locked By	Created By	Save Date	Program Count	Programs
15	admin	\	1043	Payment Address	04/15/09 02:39 AM	03/25/12 11:00 AM		administrator	03/25/12 10:59 AM	1	UTOPYINC
24	administrator	\	1038	Deposit	04/23/09 01:11 AM	03/25/12 11:00 AM		administrator	03/25/12 10:59 AM	1	UTOPYINC
24	rsingh	\	1009	Payment Arrangements	04/15/09 02:32 AM	03/25/12 11:00 AM		administrator	03/25/12 10:59 AM	1	UTOPYINC
32	administrator	\	1039	Make Payment	04/15/09 02:28 AM	03/25/12 11:00 AM		administrator	03/25/12 10:59 AM	1	UTOPYINC
45	rsingh	\	1036	High Bill Complaint	04/15/09 02:47 AM	03/25/12 11:00 AM		administrator	03/25/12 10:59 AM	1	UTOPYINC
48	rsingh	\	1037	Fees and Services Charges	04/15/09 02:42 AM	03/25/12 11:00 AM		administrator	03/25/12 10:59 AM	1	UTOPYINC
52	rsingh	\	1017	Balance Inquiry	04/15/09 02:46 AM	03/25/12 11:00 AM		administrator	03/25/12 10:59 AM	1	UTOPYINC
64	rsingh	\	1011	Adjustments	04/15/09 02:42 AM	03/25/12 11:00 AM		administrator	03/25/12 10:59 AM	1	UTOPYINC
76	administrator	\	1041	Collections	04/15/09 02:49 AM	03/25/12 11:00 AM		administrator	03/25/12 10:59 AM	1	UTOPYINC
81	rsingh	\	1032	Payment Issue	04/15/09 02:40 AM	03/25/12 11:00 AM		administrator	03/25/12 10:59 AM	1	UTOPYINC
102	rsingh	\	1012	Payment Locations	04/15/09 02:39 AM	03/25/12 11:00 AM		administrator	03/25/12 10:59 AM	1	UTOPYINC

Topic Statistics page

To open the Topic Statistics screen:

- In the Main Menu, under **Tools**, select **Elements Explorer** and then select **Topic Statistics**.

To view the properties of one or more Topics:

1. In the **Topics** Multi-Select box, select the Topics whose properties you want to see. (For additional information about using the Multi-Select box, see Defining Search Criteria.)
2. Click **Search**. The properties of the selected Topics are displayed.

Exporting to XLS:

You can export the table of Topic properties to an XLS file for offline use. This may be especially useful during the implementation phase.

To export the list of Topics:

- Click **Export**.

See also

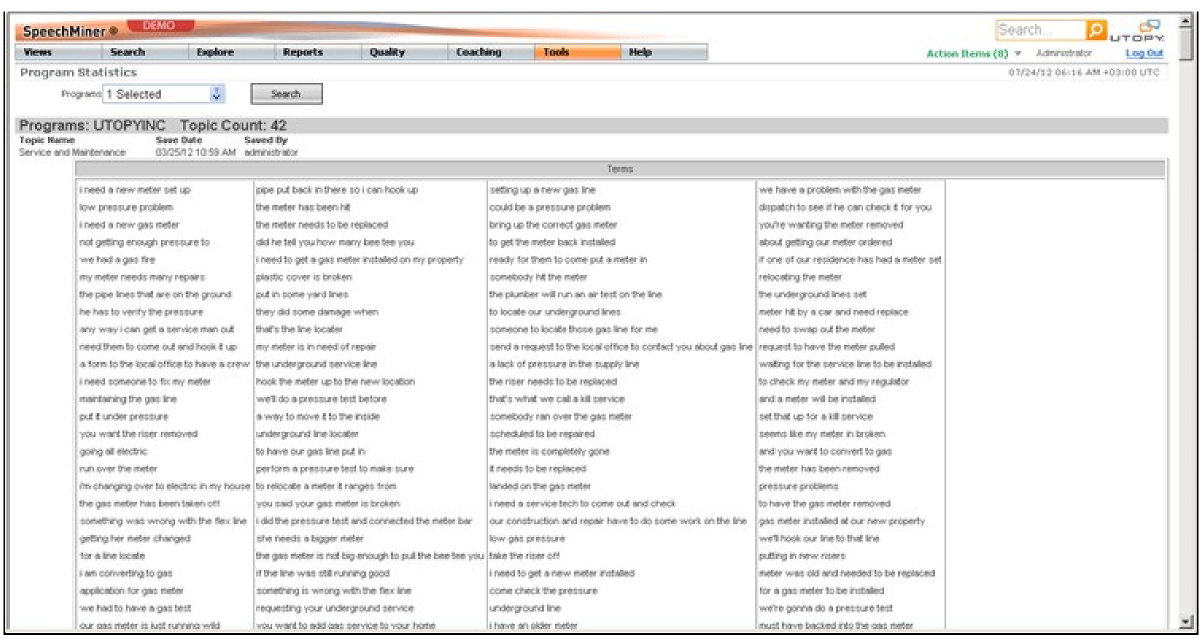
Program Statistics
Category Statistics

Home > Tools > Elements Explorer > Program Statistics

Program Statistics

The **Program Statistics** screen shows the following information for selected Programs:

- The number of Topics in the Program. This information can help you identify empty Programs.
- List of Topics in the Program, including the name of the Topic, its save date, the name of the user who saved it, and the list of Terms in the Topic



Program Statistics page

To open the Program Statistics screen:

- In the Main Menu, under **Tools**, select **Elements Explorer** and then select **Program Statistics**.

To view information about one or more Programs:

1. In the **Programs** Multi-Select box, select the Programs whose properties you want to see. (For additional information about using the Multi-Select box, see Defining Search Criteria.)
2. Click **Search**. The information about the selected Programs is displayed.

See also

Topic Statistics
Category Statistics

Home > Tools > Elements Explorer > Category Statistics

Category Statistics

The **Category Statistics** screen contains a complete list of the Categories defined in your system. The screen displays data about each Category, including the following:

- **Name:** The name of the Category and its place in the hierarchy of Categories. This information is displayed in a similar fashion in the Category Explorer (see Exploring Calls).
- **Description:** Description of the Category
- **Locked By:** Lock status. Indicates whether the Category is locked, and, if it is, which user locked it
- **Expression**: Summary of the Category definition. This provides a quick way to review the definition and check that it is correct.
- **Active:** Active status. Indicates whether the Category is active or inactive

To open the Topic Statistics screen:

- In the Main Menu, under **Tools**, select **Elements Explorer** and then select **Category Statistics**.

See also

Topic Statistics
Program Statistics

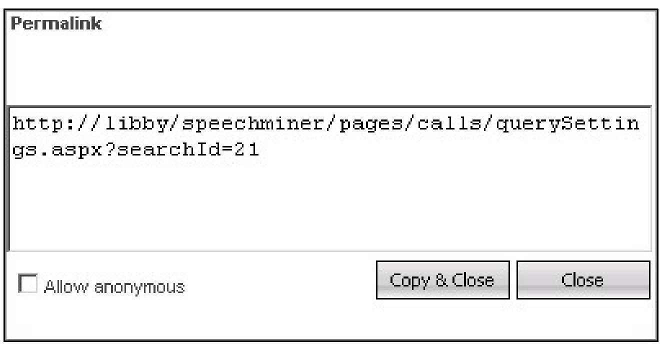
Home > Permalinks

Permalinks

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. For example, after you select search criteria for a new call search, you can generate and save a Permalink to the query. Later, you can paste 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. Then, 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 is 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 types of items, including specific calls, call searches, reports, and coaching sessions. When you choose to generate a Permalink for one of these items, a **Permalink** dialog box opens and displays the Permalink URL. For information about how to use this dialog box, see below. For information about how to open the dialog box in a particular screen, see the section of this manual that describes the screen.



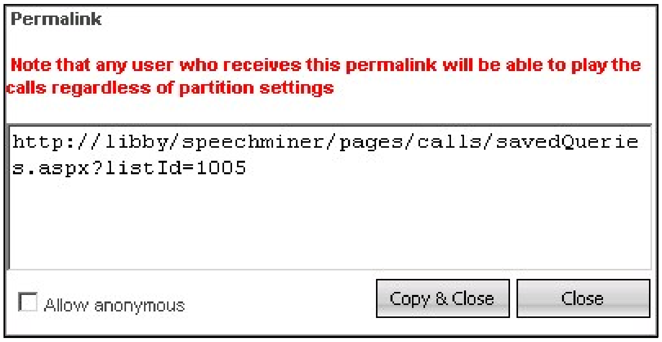
Permalink dialog box

To save a generated Permalink:

1. At the bottom of the **Permalink** dialog box, select **Allow anonymous** if you want to permit users to open the link without a username and password. If you do not select this option, a username and password for a user account with permissions for the linked item is required in order for a user to access the link.

   Note: This option is not available for all types of Permalinks, and users must log in in order to open the link.
2. Click **Copy & Close**. The link is copied to your clipboard and the dialog box closes. Paste the link in a text file, the **Address** field of your browser, an e-mail message, etc., as required.

Most Permalinks only enable users to open interactions that belong to partitions for which they have permissions. Some Permalinks allow users to open interactions from partitions for which they don't have permissions. When this is the case, a warning message appears in the **Permaling** dialog box:



Warning in Permalink dialog box

See also

Welcome
Getting Started
Workflows
Views
Action Items
Search
Using the Media Player
Explore
Quality Monitoring
Coaching
Reports
Tools
Appendix A: Standard Reports

Creating a New Call Search
Saved Searches
Media Player: More Actions Options
Managing Saved Reports
Managing the Coaching Session List

Home > Appendix A: Standard Reports

Appendix A: Standard Reports

SpeechMiner comes with a number of standard report templates. These report templates are described in this appendix. For information about configuring and generating reports from templates, see Reports.

Note:

- Some reports may not be available to all users. As such, you may not see them in your system.
- You may have access to reports that are not documented here because they were custom made for your organization.

See also

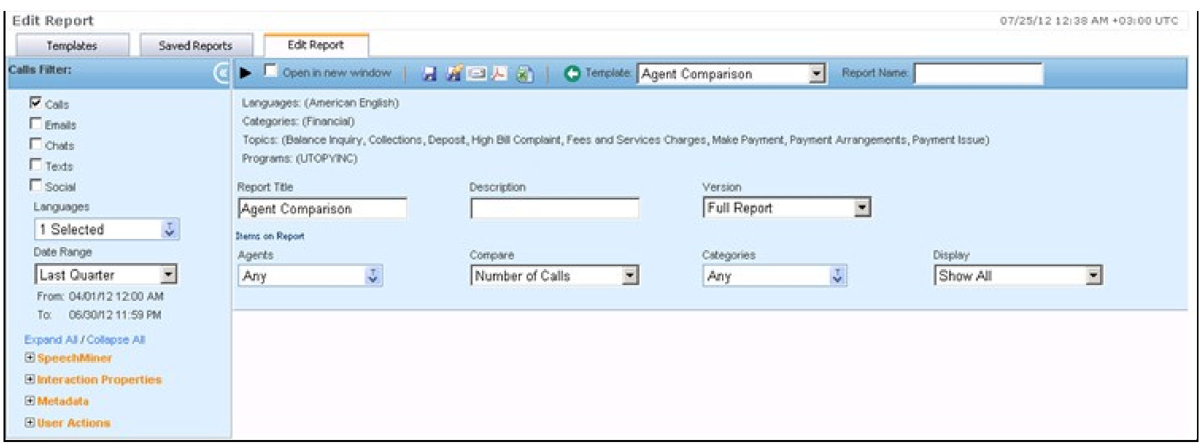
Template Layout
Common Parameters
Templates

Home > Appendix A: Standard Reports > Template Layout

Template Layout

This section explains the general layout of report templates. The next section, Common Parameters, describes parameters that appear in many report templates. These sections are followed by the Templates section, a catalogue of all of the report templates, with descriptions of each report and additional information about the reports. When specific templates use significantly different layouts and parameters from the most common ones explained below and in the Common Parameters section, they are explained in the Templates section in the description of the relevant report template.

The report templates in SpeechMiner have a maximum of three rows of parameters, each row dealing with different functions in the report. In addition, most report templates have a Data Set filter section on the left side of the screen. The layouts of most templates are similar to the Agent Comparison template shown below.



Agent Comparison template

In this section, we will explain the layout of report templates using the Agent Comparison template as an example, since it has the most common layout of parameters you will encounter.

Template Rows

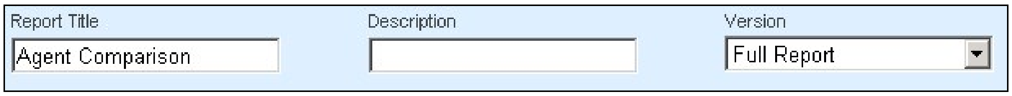
The following rows appear on the right side of the template:

First Row

Contains controls for working with report results (see Creating a Custom Report), followed by the **Template** field, in which you can select the type of report, and the **Report Name** field, which you can use to name the report. If you choose to save the report parameters as a *saved report* (see Managing Saved Reports), the Report Name is used to identify it in the system.

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, but you can modify it as necessary. Some templates also have a **Version** parameter in this row. If so, you can use this parameter to select the size or format of the report output.

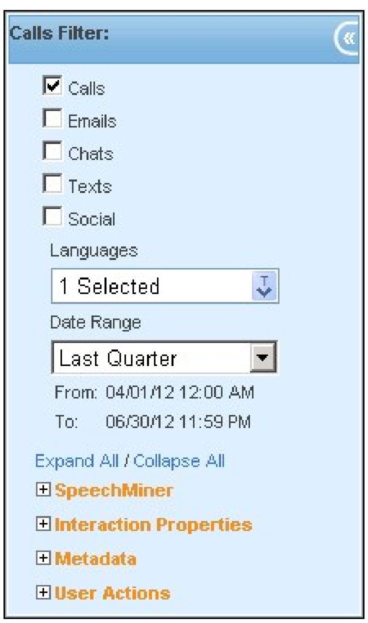


Third row

Contains the **Items on Report** parameters - 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 Set 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 information about the filters and how to configure them, see Common Parameters.



Data Set filters

When you are not configuring the Data Set filters, you can hide the left panel of the screen if you wish.

To hide or show the Data Set filter panel:

- In the upper-right corner of the panel, click « or ».

The current filter settings are displayed on the right side of the template below the first row:

Languages: (American English)
Categories: (Financial)
Topics: (Balance Inquiry, Collections, Deposit, High Bill Complaint, Fees and Services Charges, Make Payment, Payment Arrangements, Payment Issue)
Programs: (UTOPYINC)

Current filter settings

See also

Common Parameters
Templates
Creating a Custom Report

Home > Appendix A: Standard Reports > Common Parameters

Common Parameters

The following parameters are the most common ones you will encounter. Most of them have the same function no matter which template you use. Exceptions will be briefly explained in this section, and dealt with in detail in the documentation on individual reports in the Templates section.

General Settings

Template

You can choose or switch to any of the report templates available.

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* - different sizes or formats In this field, select the desired output version from the dropdown list. The available options vary depending on the template. The following options may be available:

- **Full Report:** 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. In either case, the items can be expanded or collapsed by the user after the report is generated.
- **Mini:** Small output for display in the Views page (480px wide x 288px high)
- **Wide:** Wide-width output for display in the wider columns of the Views page (768px wide x 288px high)
- **Table Only:** 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:** For bubble charts; when this option is selected, the report output is 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:** For bubble charts; when this option is selected, the report output is 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 Filters allow you to narrow down the data from the entire database in order to base your report on a subset of the available data.

All of the Data Set Filters have an "AND" relationship, which means each filter further restricts the options available, and all call events and topics represented in your final data set satisfy all Data Set Filters. Should you choose options from two different filters that mutually exclude each other (e.g., a Program designated as "Customer Service France" with calls only in French and the Language option "Dutch"), you will have zero data in your report.

Note that the parameters that appear under **Items on Report** (i.e., the third row of parameters; see description below) allow you to select specific information from the base of data that is selected under Data Set Filters. Distributional information presented in the report is calculated for the items selected under **Items on Report**, 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 other groups of filters can be expanded or collapsed. The following groups of filters are available:

Filter Group	Description
Basic filters	Filters for selecting interaction types, languages, and the 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, Quarter to Date, Last 90 Days) include calls until the exact time and date the report is generated. The times given are for the time zone where your Web server is deployed, and therefore are not necessarily the same as the times where you are physically located.
SpeechMiner	Filters for selecting the Categories and Programs of calls, and the Topics that must be found in them For each option, select one or more values. Only calls in which at least one of the selected values for each option was identified are included in the data set. For example, if you select three Categories and two Programs, only calls belonging to at least one of the Categories and one of the Programs are included. You can add lines to the Categories and Topics. The logical relationship between each line is AND. For example, if one line under Categories specifies one Category and another line specifies another Category, a call must be in both Categories to be included. To add a line, click [+]. To create a negative filter, click the Not button beside the field. For example, to include all Categories except *Category A*, select *Category A* and select the Not button beside the Category field.
Call Properties	Filters that allow you to select agents, call length, and external call ID properties • **Agents:** Select any combination of agents and workgroups. If you select a workgroup, all the agents in the workgroup are included in the data set. You can also choose to search for the "current user" rather than a specific agent or workgroup. In this case, the condition changes depending on which user runs the report. • **Call Length:** Select the range of call durations 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. If you selected **Less Than**, only calls that are shorter than the value you specified are included. If you selected **Between**, calls whose durations are more than the first value and less than the second value are included. If you selected **More Than**, only calls that are longer than the value you specified are included. • **Call External ID:** Type any portion of a call's external ID; any calls whose external IDs include the characters you specify are included in the data set. You can use the * character as a wildcard. Place it at the beginning or end of a sequence of characters to indicate that at least one other character must be in that position in the sequence. For example, type ***123** to specify external IDs that begin with any sequence, but end with 123, or type **123*** to specify external IDs that begin with 123 and end with any other sequence of characters.
Metadata	Filters for selecting metadata values Metadata is collected by the recording system and relayed by it to SpeechMiner. The types of available metadata vary from system to system. You can select any type of metadata available in your system and, if you wish, you can specify a value for it. The search results will only include calls for which the selected type of metadata has a value defined, and, if you specify a value, for which the defined value equals the specified value.

User Actions	Filters for finding calls that have user comments, were played back by users, about which forms were filled out, or quality checking was performed Under **Call Comment Text**, specify text that must appear in a comment that a user added to a call. In the other fields, select the users who must have performed the specified actions.

For additional information about the filters and about working with the Data Set Filter interface, see Defining Search Criteria.

Items on Report

The parameters in this section allow you to select specific information from—and calculate distributional information on—the data in the data set that was specified using the Data Set Filters. If no selections are made under **Items on Report**, default values will determine how the data you have narrowed down through the Data Set Filters appear in the report.

Since the parameters in **Items on Report** differ from report to report, only the most common ones are explained in this section, listed alphabetically. Less common parameters will be explained in their respective templates.

Agents

You can select the specific Agents or Workgroups to be analyzed and displayed in your report. The default value ("Any") includes all agents. Your selections here must match up with your selections in the Data Set Filters (e.g., the same Workgroups or Agents, belonging to the same Languages and Programs), if the latter are not all set to default ("Any"). 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.

Categories

You can select specific Categories of calls to limit the data set analyzed for your report. Your data set will include calls belonging to any of the Categories selected. Use the default value ("Any") to include all available Categories. Note that if a single call belongs to multiple Categories, it will be counted as one call for each Category selected under this parameter. Also, bear in mind that the report output will only include calls in Categories that were selected here and were not excluded from the data set in the Data Set Filters. Thus, if you selected certain Categories in the Data Set Filters section, only Categories that are selected both there and here will appear.

When used with *Percentage of Calls* in the Data Type parameter, the report will display the ratio of {the number of calls from the selected Categories in Items on Report} to {the number of calls from the Categories selected for analysis in Data Set Filters}, as a percentage. Note that if one or more calls belong to multiple Categories, the sum of the percentages of calls for all Categories may add up to more than 100%.

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 Calls:** Displays the number of calls per each report item. Data may vary depending on the other filters selected.
- **Percentage of Calls:** Displays the percentage of calls per report item in your data set. For additional information, see Categories (in this Items on Report section).
- **Average Call Duration:** Displays the average length, in minutes, of all calls for each report item. The entire conversation for the call recording session is considered, excluding the wrap time after the call.
- **Total Resources:** Displays the total amount of time, in hours, of all the calls per report item. It is essentially the sum of all call durations.

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 Calls" and the Period Type is "Day," the number of calls 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.

See also

Template Layout
Templates

Home > Appendix A: Standard Reports > Templates

Templates

This section contains detailed information regarding each report template, including a general description, an overview explaining how to customize the report (how the parameters function), and a sample report. For some templates, additional information on common usages and actions you can perform on the reports is provided.

Most reports are interactive: you can drill down within a report to view additional details about any graphic component (graph bars, lines, or table headers) by clicking on it. In addition, you can play a call in the Media Player directly from an Interaction List in the report results. These interactive options are called *actions*. In some cases, report results offer additional action options. In these cases, the description of the report includes as *Actions* section describing the additional actions that are available. For more information about using the standard report actions, see Creating a Custom Report.

In some cases, reports have a number of available versions, such as a Full version, a MINI version, and a Wide version. In these cases, a single template is used to generate all of the versions, and a **Version** parameter is used to select the desired version. (For additional information about the **Version** parameter, see Common Parameters.)

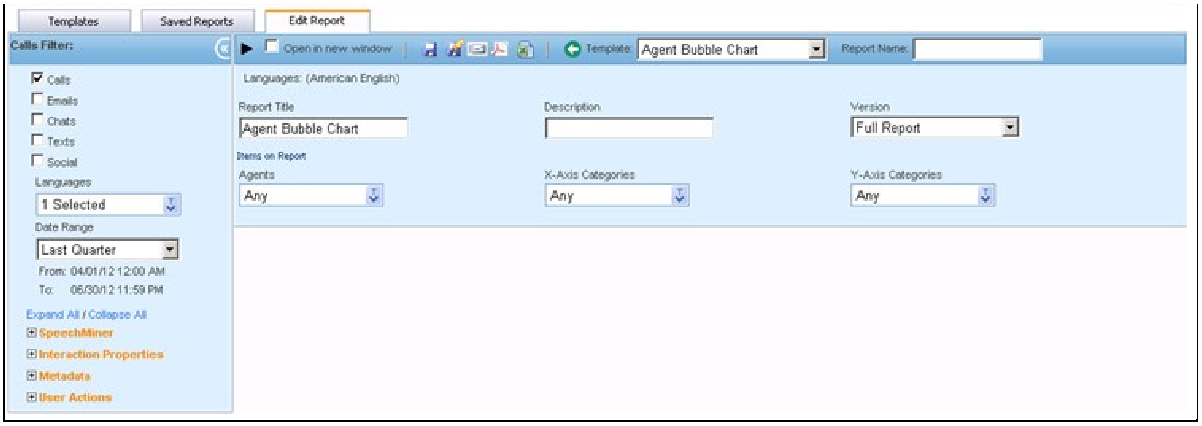
Note: The information you see in reports is limited to the data to which you have access.

The following standard report templates are available:

Agent Bubble Chart
Agent Comparison
Agent Trend
Audit Analysis
Call List
Capacity Trend
Category Bubble Chart
Category Distribution
Category Trend
Coaching Summary
First Topic Distribution
Metadata Frequency
MINI_System Load
Monitor System
Performance Profile
Predictive Elements
Program Distribution
QM Agent Summary
System Load
Team Comparison
Top and Bottom Performers
Topic Analysis - Audits
Topic Analysis - Trends
Topic Call List
Topic Correlation
Usage Tracking
User Management

Home > Appendix A: Standard Reports > Templates > Agent Bubble Chart

Agent Bubble Chart



Description

The Agent Bubble Chart report compares Agents and/or Workgroups by plotting them on a graph according to the percentage of calls in the horizontal (x-axis) and vertical (y-axis) Categories. Each Agent is represented on the graph by a bubble. The size of each bubble represents the average call duration.

The X-Axis Only and Y-Axis Only versions present the data as a histogram indicating percentage of calls per Agent and/or Workgroup, rather than a bubble chart.

Common Usages

- Plot Agents showing average call duration plus two customer-experience Categories (e.g., Dissatisfaction and Escalation)
- Plot Agents showing average call duration plus two agent-efficiency Categories (e.g., Transfer Rate and Hold Rate)
- Plot Agents showing average call duration plus two Categories that represent metadata (e.g., Customer Satisfaction and Issue Resolution)

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 Common Parameters.

For all other parameters, see Common Parameters.

Data Set Filters

See Common Parameters.

Items on Report

- **X-Axis Categories:** Select one or more Categories to include in the x-axis of the bubble chart. Note that only Categories that were not excluded from the data set by means of the **Categories** parameter of the Data Set Filters section are included in the report.
- **Y-Axis Categories:** Select one or more Categories to include in the y-axis of the bubble chart. Note that only Categories that were not excluded from the data set by means of the **Categories** parameter of the Data Set Filters section are included in the report.

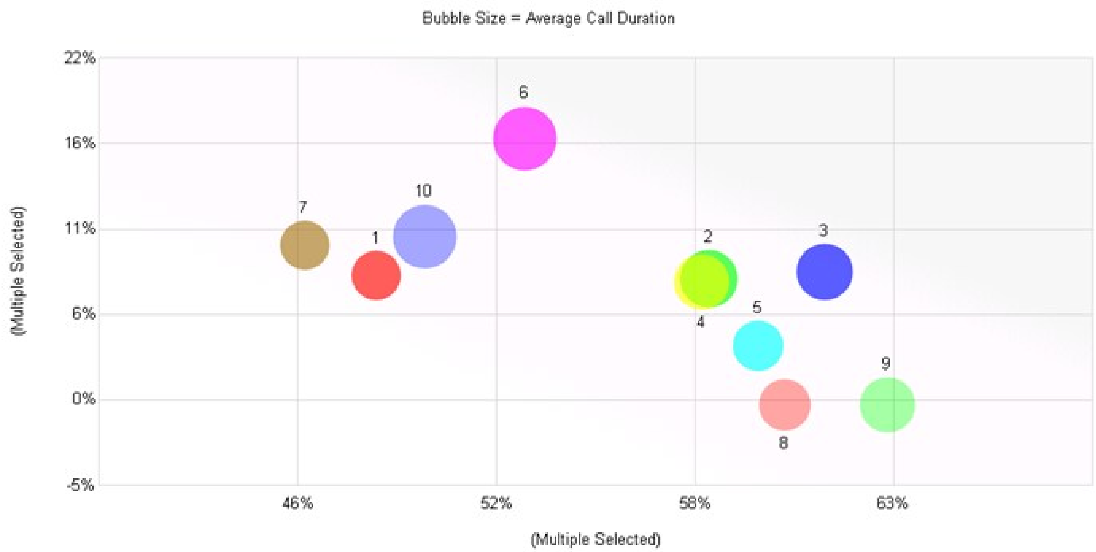
For all other parameters, see Common Parameters.

Actions

- Click a bubble in a chart, a bar in a graph, or an item in a table to open a list of calls included in the item.
- In X-Axis Only and Y-Axis Only versions, click to drill down to a Category Trend report.

Sample Reports

Agent Bubble Chart



Team / Agent Name		Total Calls	Avg. Duration	(Multiple	Percent	(Multiple	Percent
1	agent b	37	06:20	18	48.6%	3	8.1%
2	agent c	38	07:42	22	57.9%	3	7.9%
3	agent d	36	07:32	22	61.1%	3	8.3%
4	agent e	26	07:14	15	57.7%	2	7.7%
5	agent f	27	06:33	16	59.3%	1	3.7%
6	agent g	36	08:41	19	52.8%	6	16.7%
7	agent h	30	06:18	14	46.7%	3	10.0%
8	agent i	25	06:43	15	60.0%	0	0.0%
9	agent j	35	07:15	22	62.9%	0	0.0%
10	agent k	38	08:40	19	50.0%	4	10.5%
Summary*		**328**	**07:22**	**182**	**55.5%**	**25**	**7.6%**
DataSetSummary**		**364**	**07:26**	**200**	**54.9%**	**29**	**8.0%**

* Summary of calls belonging to one or more of the selected Categories (defined in Items on Report section)

** Summary of all calls that meet the Data Set criteria (defined in Data Set Filters section)

SpeechMiner® by UTOPY

Agent Bubble Chart v4 executed 5/29/2011 3:04:43 PM by libby

Calls have the following constraints:

Language: American English
Topics: (Adjustments,Called Previously,Balance Inquiry,Call Transfer,Callback,Deposit,Customer Identification)

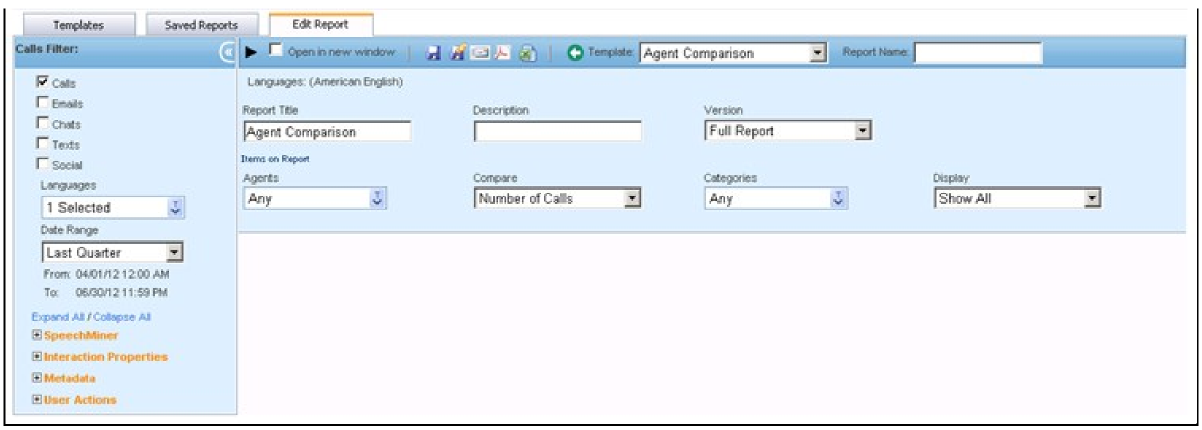
Full Report Version

Team / Agent Name	(Multiple Selected)	Calls	Total Calls
agent f	19.4%	13	67
agent h	19.4%	12	62
agent e	16.7%	11	66
agent b	16.4%	11	67
agent g	15.3%	9	59
agent d	13.7%	10	73
agent k	13.6%	8	59
agent i	10.2%	5	49
agent c	7.6%	5	66
agent j	5.1%	3	59
Summary	**13.9%**	**87**	**627**

X-Axis Only Version

Home > Appendix A: Standard Reports > Templates > Agent Comparison

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 Agents represented.

Common Usages

- Plot Agent performance statistics to see who performs above and below the benchmark (the average of a group determined by the filter selections)
- Drill down on specific Agents to play their calls and find examples of effective agent behavior or of areas needing 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, and Table Only versions. For additional information, see Common Parameters.

For all other parameters, see Common Parameters.

Data Set Filters

See Common Parameters.

Items on Report

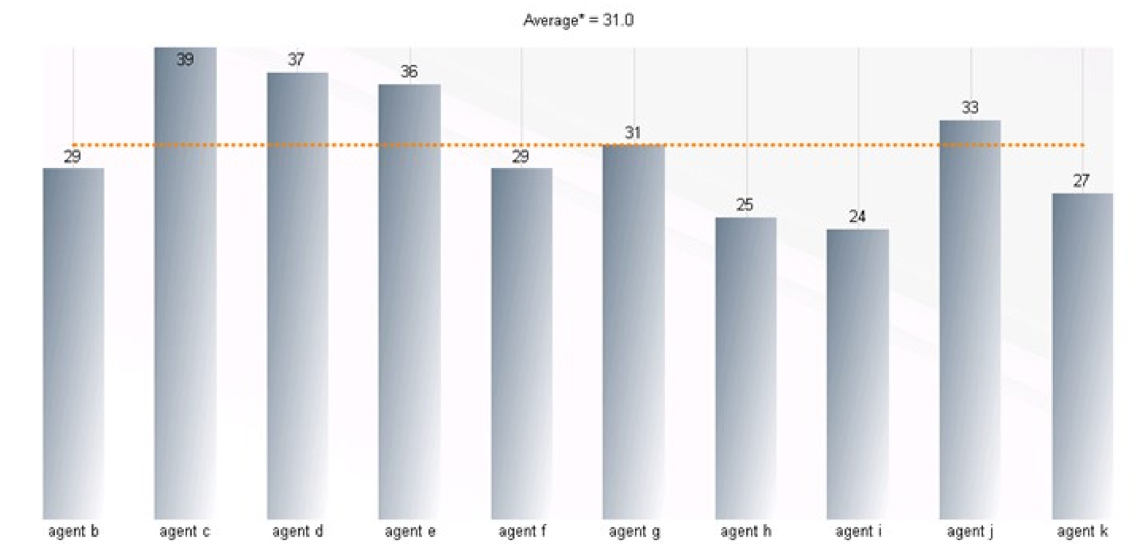
See Common Parameters.

Actions

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

Sample Report

Agent Comparison



Agent Name	Number of Calls	Percent of Calls	Avg. Duration	Total Resources	Pct. of Resources
agent b	29	43.3%	07:00	03:23:00	58.3%
agent c	39	59.1%	07:06	04:36:41	68.6%
agent d	37	50.7%	07:44	04:46:11	64.0%
agent e	36	54.5%	07:26	04:27:33	72.6%
agent f	29	43.3%	06:27	03:07:03	57.9%
agent g	31	52.5%	09:00	04:38:47	69.3%
agent h	25	40.3%	06:10	02:34:14	48.8%
agent i	24	49.0%	06:47	02:42:58	64.2%
agent j	33	55.9%	07:01	03:51:35	64.9%
agent k	27	45.8%	08:48	03:57:47	54.0%
Summary**	**310**	**49.4%**	**07:22**	**38:05:49**	**62.5%**
Data Set Summary***	**690**	**100.0%**	**05:54**	**67:55:03**	**100.0%**

* Unweighted average Number of Calls for the selected agents (defined in Items on Report section)

** Summary of calls handled by the selected agents and belonging to one or more of the selected categories (defined in Items on Report section)

*** Summary of all calls that meet the Data Set criteria (defined in Data Set Filters section)

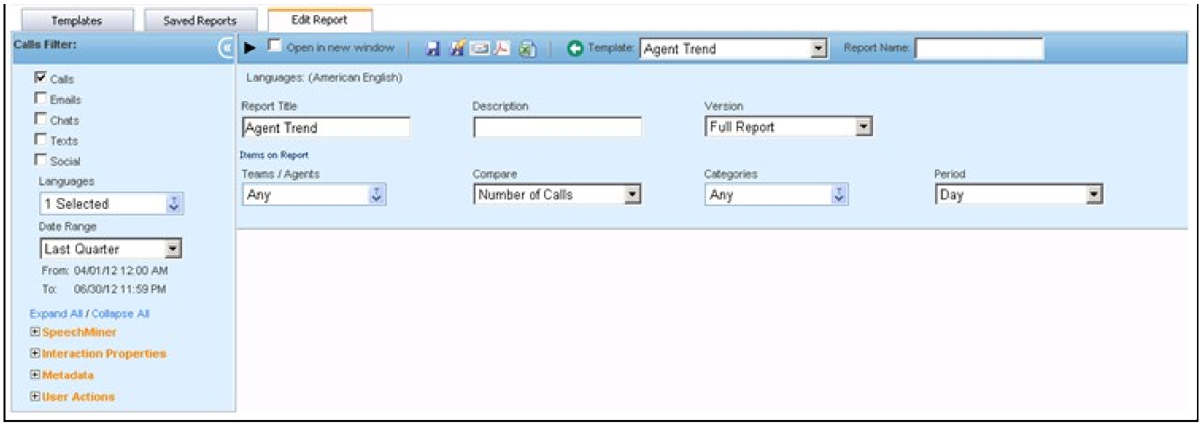
SpeechMiner® by UTOPY

Agent Comparison v4 executed 5/29/2011 3:45:19 PM by libby

Calls have the following constraints:

Language: American English
Make Payment,Account Maintenance,Bill Inquiry,Collections,Payment Information,Service Activation/Transfer,Service Deactivation,Standard Service Issues,System Issue,Discount

Agent Trend



Description

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

Common Usages

- Track progress of agent performance over time to monitor effectiveness of training programs.
- Use 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, and Table Only versions. For additional information, see Common Parameters.

For all other parameters, see Common Parameters.

Data Set Filters

See Common Parameters.

Items on Report

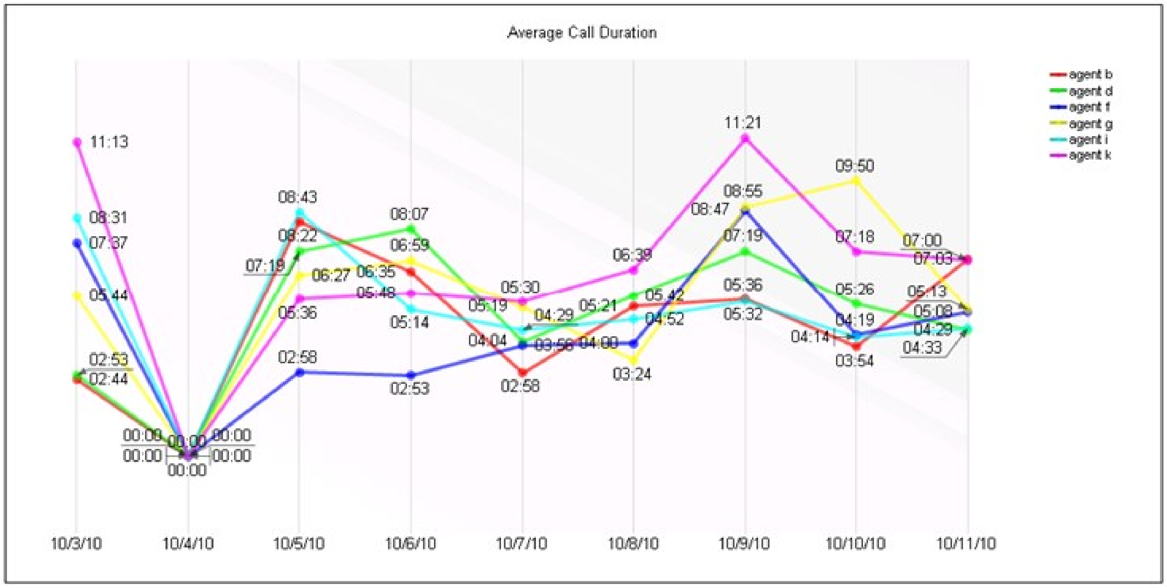
See Common Parameters.

Actions

- Click a line in a graph or an item in a table to open a list of calls included in the item.

Sample Report

Call Duration - Sales Group



Team / Agent Name	Average*	Minimum	Maximum	Std. Deviation	Change
agent b	04:44	00:00	08:22	02:35	04:19
agent d	05:02	00:00	08:07	02:33	01:36
agent f	04:24	00:00	08:47	02:36	-02:29
agent g	05:46	00:00	09:50	02:55	-00:30
agent i	05:08	00:00	08:43	02:34	-03:58
agent k	06:43	00:00	11:21	03:22	-04:13

* Unweighted average Average Call Duration for the selected agents (defined in Items on Report section)

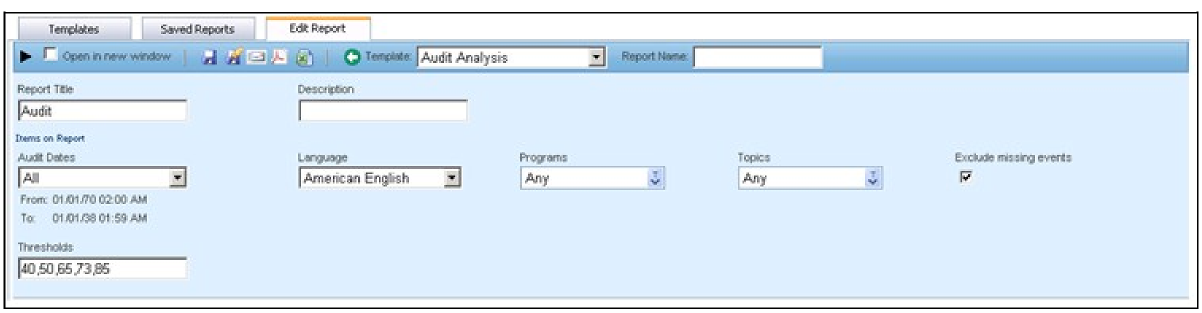
SpeechMiner® by UTOPY

Agent Trend v4 executed 5/29/2011 4:32:54 PM by libby

Calls have the following constraints:
From 10/3/2010 12:00 AM To 10/11/2010 11:59 PM
Language: American English

Home > Appendix A: Standard Reports > Templates > Audit Analysis

Audit Analysis



Description

The Audit Analysis report is a table that shows the precision with which each Topic was identified by SpeechMiner. The precision value is given for one or more confidence levels, specified in the report parameters, and is determined by the TP/FP/SFP (True Positive/False Positive/Sense False Positive) selections made by the auditor as part of the call-auditing process.

This report is instrumental to implementers, as it allows them to fine-tune the system to the right accuracy level. After learning about Topic-identification performance, the implementer can adjust confidence levels as necessary.

Common Usage

- Monitor the quality of the different Topics in the system based on audit information.

Customizing the Report

General Settings

See Common Parameters.

Items on Report

- **Audit Dates:** The same as *Date Range* (see Common Parameters). The dates, however, refer to when the calls were audited rather than when the calls were processed in the system.
- **Language:** See Common Parameters.
- **Programs:** See Common Parameters.
- **Topics:** Choose the Topics whose audits you want to examine.
- **Exclude missing events:** If checked, all orphaned audits will be excluded. For more information on orphaned audits, contact your SpeechMiner administrator.
- **Thresholds:** Type in the confidence levels for which you wish to see precision values. Separate multiple values with commas. For each Topic included in the report, precision values will be displayed as percentages for each confidence level. In addition, the report also shows the total number of TPs/FPs/SFPs for each Threshold.

  Note: Confidence levels are assigned by the system to each term it identifies. They indicate how closely the term defined in the Topic matches the term that was discovered in the audio segment. "Precision" in the report means the percentage of TPs for all the audits in the Topic whose confidence levels were equal to or above the given Thresholds. This means that each of the Thresholds includes all of the audits in the Threshold levels above it. Thus, in the example below, the 40-Threshold column includes all audits with precision values of 40 or higher, the 50-Threshold column includes all audits with confidence levels of 50 or higher, and so on.

Actions

- Click a Topic to drill down to the audit information for each of the terms in the Topic (shown in the Sample Reports section below).
- Click the TP/FP/SFP numbers to drill down to an **Audit Interaction List** (shown in the Sample Reports section below), which lists the calls that were audited.

Sample Reports

Auditing Summary

Summary of Audit Results

Low - 0% | Med-Low - 51% | Medium - 69% | High - 76%

Topic\Threshold		40	50	65	73	85
Total	Precision	57.14 %	57.14 %	61.54 %	61.54 %	66.67 %
	TP/FP/SFP	8 / 6 / 3	8 / 6 / 3	8 / 5 / 3	8 / 5 / 3	6 / 3 / 2

Topic\Threshold		40	50	65	73	85
Make Payment	Precision	0.00 %	0.00 %	0.00 %	0.00 %	0.00 %
	TP/FP/SFP	0 / 1 / 0	0 / 1 / 0	0 / 1 / 0	0 / 1 / 0	0 / 1 / 0
Payment Locations	Precision	50.00 %	50.00 %	50.00 %	50.00 %	100.00 %
	TP/FP/SFP	2 / 2 / 1	2 / 2 / 1	2 / 2 / 1	2 / 2 / 1	1 / 0 / 0
Deposit	Precision	50.00 %	50.00 %	100.00 %	100.00 %	100.00 %
	TP/FP/SFP	1 / 1 / 0	1 / 1 / 0	1 / 0 / 0	1 / 0 / 0	1 / 0 / 0
Payment Arrangements	Precision	60.00 %	60.00 %	60.00 %	60.00 %	60.00 %
	TP/FP/SFP	3 / 2 / 1	3 / 2 / 1	3 / 2 / 1	3 / 2 / 1	3 / 2 / 1
Balance Inquiry	Precision	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %
	TP/FP/SFP	1 / 0 / 0	1 / 0 / 0	1 / 0 / 0	1 / 0 / 0	1 / 0 / 0
Payment Issue	Precision	0.00%	0.00%	0.00%	0.00%	0.00%
	TP/FP/SFP	0 / 0 / 1	0 / 0 / 1	0 / 0 / 1	0 / 0 / 1	0 / 0 / 1
Customer Identification	Precision	100.00 %	100.00 %	100.00 %	100.00 %	N/A
	TP/FP/SFP	1 / 0 / 0	1 / 0 / 0	1 / 0 / 0	1 / 0 / 0	0 / 0 / 0

SpeechMiner® by UTOPY

Audit Analysis v4 executed 12/28/10 03:00 AM +02:00 UTC by libby_ps

Language is American English

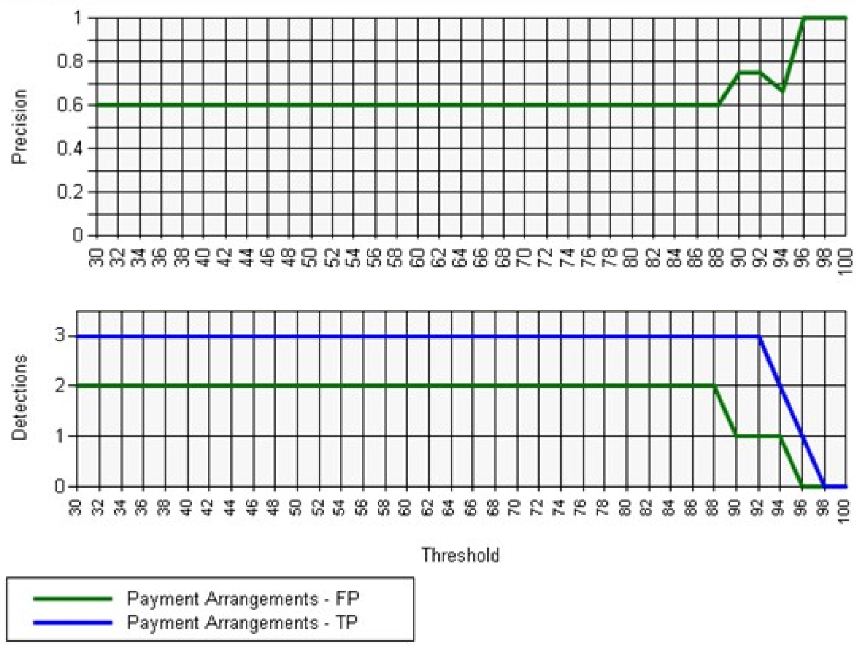
Audit Analysis report

Payment Arrangements

Selected Thresholds: 40,50,65,73,85

Topic: Payment Arrangements
Language is American English

Accuracy Graphs



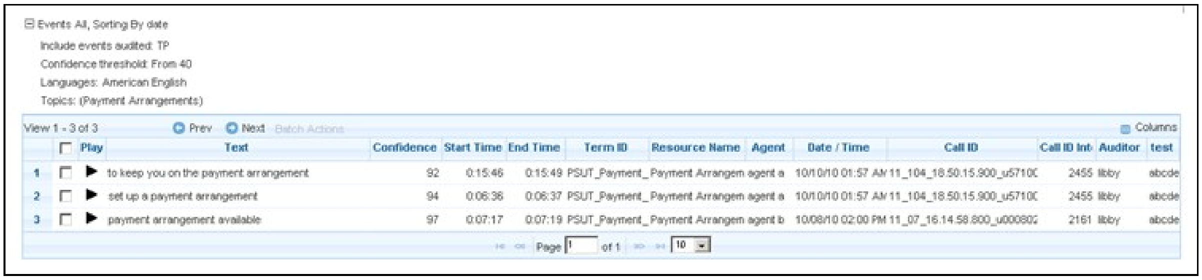
Low - 0% Med-Low - 51% Medium - 69% High - 76%

Topic\Threshold		40	50	65	73	85
PSUT_Payment_Arrangements_26 and make payment arrangement	Precision	0.00 %	0.00 %	0.00 %	0.00 %	0.00 %
	TP/FP/SFP	0 / 1 / 0	0 / 1 / 0	0 / 1 / 0	0 / 1 / 0	0 / 1 / 0
PSUT_Payment_Arrangements_31 per your payment arrangement	Precision	0.00 %	0.00 %	0.00 %	0.00 %	0.00 %
	TP/FP/SFP	0 / 1 / 0	0 / 1 / 0	0 / 1 / 0	0 / 1 / 0	0 / 1 / 0
PSUT_Payment_Arrangements_34 to keep you on the payment arrangement	Precision	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %
	TP/FP/SFP	1 / 0 / 0	1 / 0 / 0	1 / 0 / 0	1 / 0 / 0	1 / 0 / 0
PSUT_Payment_Arrangements_7 set up a payment arrangement	Precision	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %
	TP/FP/SFP	1 / 0 / 0	1 / 0 / 0	1 / 0 / 0	1 / 0 / 0	1 / 0 / 0
PSUT_Payment_Arrangements_30 payment arrangement available	Precision	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %
	TP/FP/SFP	1 / 0 / 1	1 / 0 / 1	1 / 0 / 1	1 / 0 / 1	1 / 0 / 1

SpeechMiner® by UTOPY

Audit Analysis v4 executed 12/28/10 03:03 AM +02:00 UTC by libby_ps

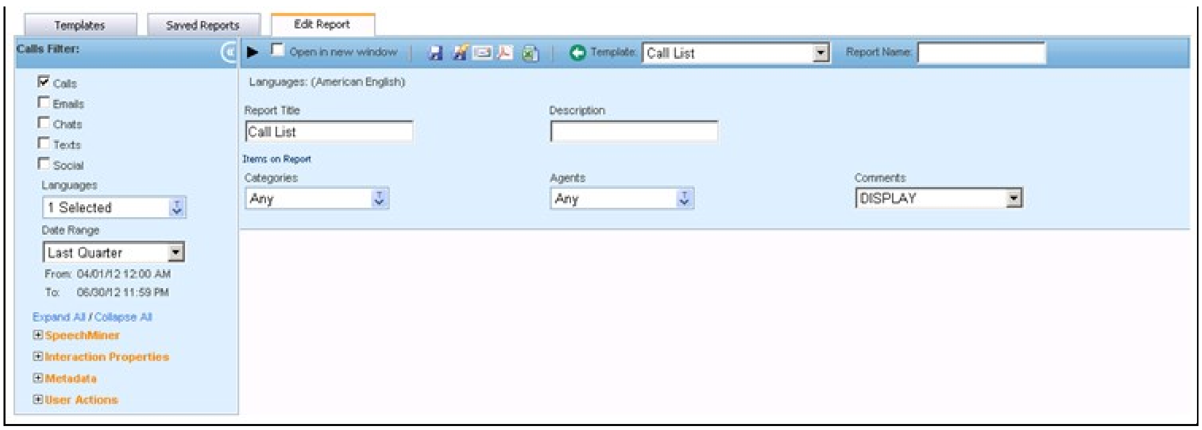
Topic analysis of selected term



Audit Interaction List

Home > Appendix A: Standard Reports > Templates > Call List

Call List



Description

The Call List report is a table that lists calls that match specified filters and settings. It is an easy way to track down calls by using filters. Results for each call include the external call ID, the Call Time (the start time of the call), the call's Program, the Agent handling the call, the call Duration, and, optionally, any comments that were added to the call by users.

Common Usage

- Retrieve calls based on specified search parameters.
- Listen to call audio of interest for quality assurance purposes.

Customizing the Report

General Settings

See Common Parameters.

Data Set Filters

See Common Parameters.

Items on Report

- **Comments:** Select **DISPLAY** to show any comments that were added to a call when the call was opened in the audio player. Select **HIDE** if you do not want the comments to be visible to the report recipient.

For all other parameters, see Common Parameters.

Actions

- Click a call in the table to open the Media Player and play the call.

Sample Report

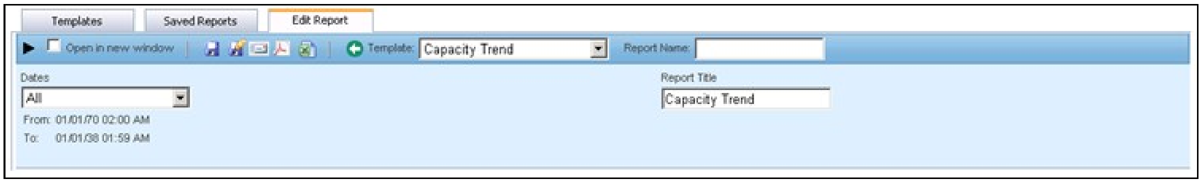
Call List

List of calls is limited to 1000. 1000 returned

Call ID	Call Time	Program	Agent	Duration	Comment
dutch (20)_u48021248p_dutchn_32456	2/1/2010 4:48:49 PM	dutch	dutcho	02:11	
dutch (2)_u34021234p_dutchn_32455	2/1/2010 4:34:47 PM	dutch	dutcho	03:36	
dutch (198)_u34021234p_dutchn_32454	2/1/2010 4:34:45 PM	dutch	dutcho	02:24	
dutch (196)_u34021234p_dutchn_32453	2/1/2010 4:34:44 PM	dutch	dutcho	03:10	
dutch (194)_u20021220p_dutchn_32452	2/1/2010 4:20:39 PM	dutch	dutcho	11:18	
dutch (192)_u20021220p_dutchn_32451	2/1/2010 4:20:34 PM	dutch	dutcho	05:38	
dutch (190)_u06021206p_dutchn_32450	2/1/2010 4:06:31 PM	dutch	dutcho	08:05	
dutch (188)_u06021206p_dutchn_32449	2/1/2010 4:06:29 PM	dutch	dutcho	09:19	
dutch (186)_u06021206p_dutchn_32448	2/1/2010 4:06:25 PM	dutch	dutcho	12:16	
dutch (184)_u06021206p_dutchn_32447	2/1/2010 4:06:23 PM	dutch	dutcho	05:24	
dutch (182)_u52011152p_dutchn_32446	2/1/2010 3:52:16 PM	dutch	dutcho	02:16	
dutch (180)_u52011152p_dutchn_32445	2/1/2010 3:52:15 PM	dutch	dutcho	04:31	
dutch (18)_u38011138p_dutchn_32444	2/1/2010 3:38:14 PM	dutch	dutcho	05:01	
dutch (178)_u38011138p_dutchn_32443	2/1/2010 3:38:12 PM	dutch	dutcho	05:47	
dutch (176)_u38011138p_dutchn_32442	2/1/2010 3:38:05 PM	dutch	dutcho	05:54	

Home > Appendix A: Standard Reports > Templates > Capacity Trend

Capacity Trend



Description

The Capacity Trend report contains information that can be used by the system administrator to monitor the system load and see the extent to which the system can handle new incoming calls. It has two parts:

- A bar graph that shows the number of hours of loaded calls and accumulated calls for each day in the selected time period.
- A table listing the maximum number of channels (i.e., the maximum number of agents taking calls concurrently at any one time in the day) and the maximum number of seats available (i.e., the maximum number of agents who could use the system) each day

Common Usages

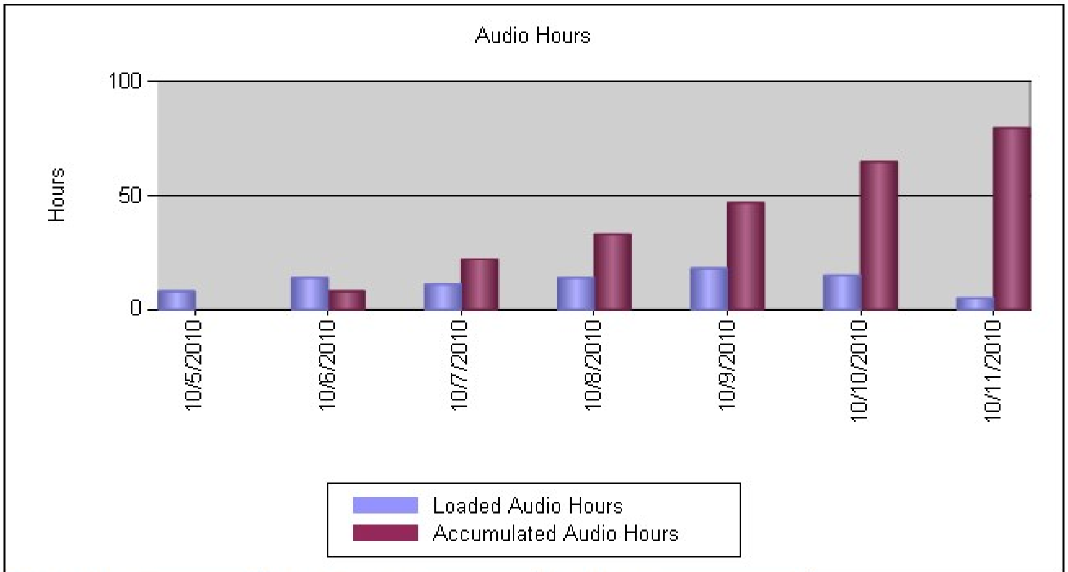
- Analyze the number of recent calls in the system to determine if current hardware resources meet the required capacity
- Forecast future hardware needs and allocate resources accordingly

Customizing the Report

See Common Parameters.

Sample Report

Capacity Trend

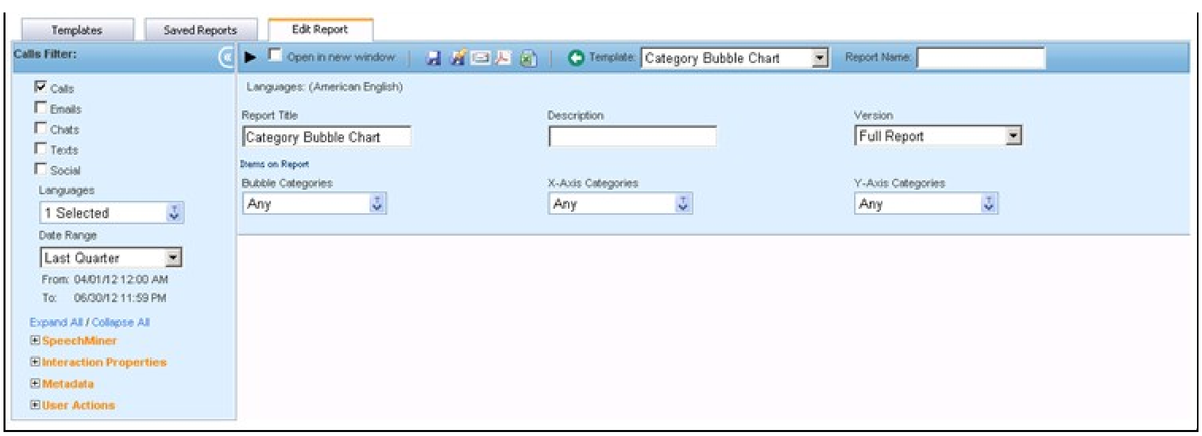


Day in Month	Max Channels	Max Seats
10/5/2010	3	8
10/6/2010	3	8
10/7/2010	2	7
10/8/2010	3	8
10/9/2010	3	7
10/10/2010	3	8
10/11/2010	2	8

Capacity Trend executed 5/29/2011 8:44:54 PM by libby

Home > Appendix A: Standard Reports > Templates > Category Bubble Chart

Category Bubble Chart



Description

The Category Bubble Chart report compares Categories by plotting them on a graph according to the percentage of calls in the horizontal (x-axis) and vertical (y-axis) Categories. Each Bubble Category is represented on the graph by a bubble. The size of each bubble represents the average call duration. The x-axis value indicates the percentage of calls that were in both the Bubble Category and any of the selected x-axis Categories. The y-axis value indicates the percentage of calls that were in both the Bubble Category and any of the selected y-axis Categories.

The X-Axis Only and Y-Axis Only versions present the data as a bar graph indicating percentage of calls per Category, rather than a bubble chart.

Common Usages

- Plot call-reason Categories showing average call duration plus two customer-experience Categories (e.g., Dissatisfaction and Escalation)
- Plot call-reason Categories showing average call duration plus two agent-efficiency Categories (e.g., Transfer Rate and Hold Rate)
- Plot call-reason Categories showing average call duration plus two Categories that represent metadata (e.g., Customer Satisfaction and Issue Resolution)

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 Common Parameters.

For all other parameters, see Common Parameters.

Data Set Filters

See Common Parameters.

Items on Report

- **Bubble Categories:** Select the Categories to represent as bubbles in the chart.
- **X-Axis Categories:** Select one or more Categories to include in the x-axis of the bubble chart.
- **Y-Axis Categories:** Select one or more Categories to include in the y-axis of the bubble chart.

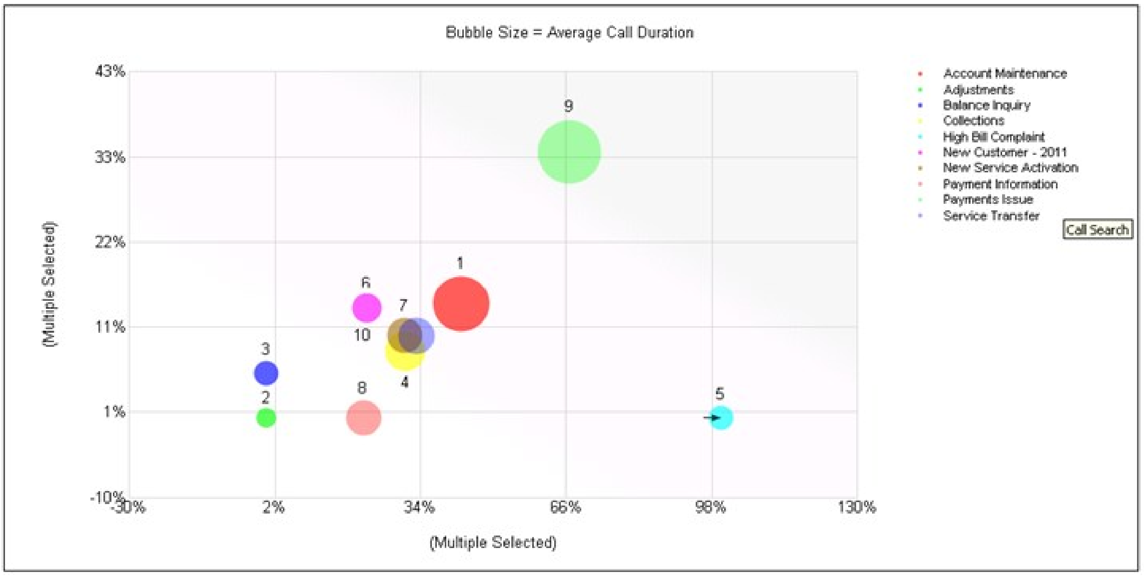
Note: For all of these parameters, only Categories that were not excluded from the data set by means of the **Categories** parameter of the Data Set Filters section are included in the report. Thus, if you selected specific Categories in the Data Set Filters section, only Categories that are selected both there and here will be included in the report.

Actions

- Click a bubble in a chart, a bar in a graph, or an item in a table to open a list of calls included in the item.
- In X-Axis Only and Y-Axis Only versions, click to drill down to a Category Trend report.

Sample Reports

Category Bubble Chart



Category	Total Calls	Avg. Duration	(Multiple	Percent	(Multiple	Percent
1 Account Maintenance	7	15:37	3	42.9%	1	14.3%
2 Adjustments	1	02:52	0	0.0%	0	0.0%
3 Balance Inquiry	18	04:21	0	0.0%	1	5.6%
4 Collections	36	09:51	11	30.6%	3	8.3%
5 High Bill Complaint	1	04:29	1	100.0%	0	0.0%
6 New Customer - 2011	547	05:55	121	22.1%	75	13.7%
7 New Service Activation	243	08:15	74	30.5%	25	10.3%
8 Payment Information	14	08:13	3	21.4%	0	0.0%
9 Payments Issue	3	18:01	2	66.7%	1	33.3%
10 Service Transfer	215	08:24	71	33.0%	22	10.2%
Summary*	**608**	**06:06**	**135**	**22.2%**	**85**	**14.0%**
DataSetSummary**	**690**	**05:54**	**146**	**21.2%**	**102**	**14.8%**

* Summary of calls belonging to one or more of the selected Categories (defined in Items on Report section)

** Summary of all calls that meet the Data Set criteria (defined in Data Set Filters section)

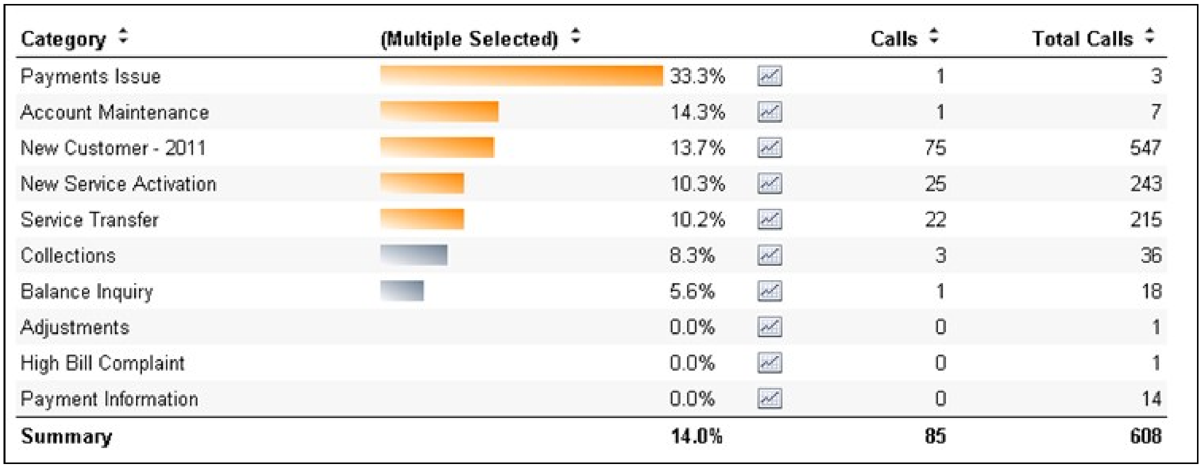
SpeechMiner® by UTOPY

Category Bubble Chart v4 executed 5/30/2011 12:16:19 AM by libby

Calls have the following constraints:

Language: American English
Account Maintenance,Fees and Service Charges,Adjustments,Balance Inquiry,High Bill Complaint,Payments Issue,Meter Reading and Gas Usage,Collections,Payment Information,New Service Activation,Service Transfer,New Customer - 2011

Full Report Version

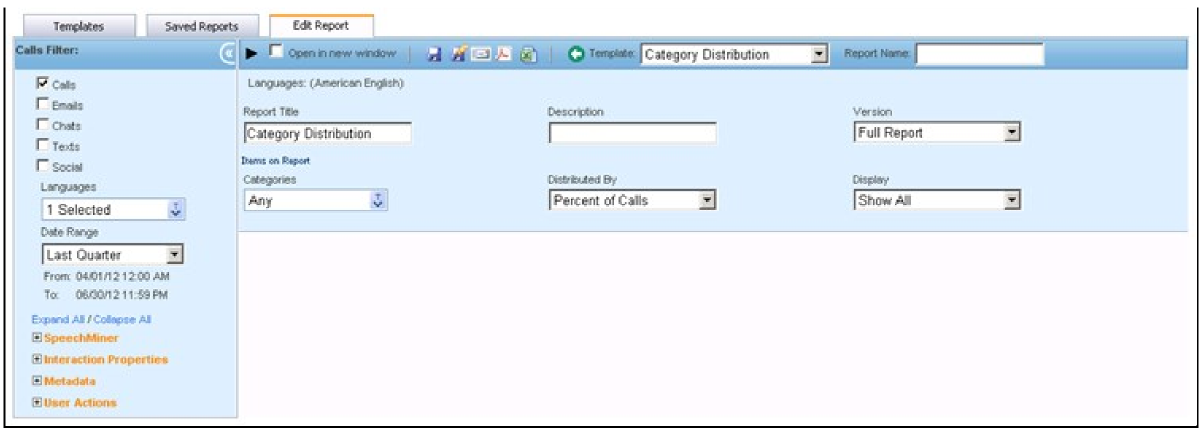


Category	(Multiple Selected)		Calls	Total Calls
Payments Issue	33.3%		1	3
Account Maintenance	14.3%		1	7
New Customer - 2011	13.7%		75	547
New Service Activation	10.3%		25	243
Service Transfer	10.2%		22	215
Collections	8.3%		3	36
Balance Inquiry	5.6%		1	18
Adjustments	0.0%		0	1
High Bill Complaint	0.0%		0	1
Payment Information	0.0%		0	14
Summary	**14.0%**		**85**	**608**

X-Axis Only Version

Home > Appendix A: Standard Reports > Templates > Category Distribution

Category Distribution



Description

The Category Distribution report is a graph or chart that shows the distribution of calls by Category for a specified domain. The distribution can be calculated by percentage of calls or by percentage of resources (total duration of all calls included in the analysis).

Common Usages

- Plot the proportion of calls in specified Categories to analyze business trends and customer issues
- Compare the distribution of multiple Categories—such as call or cancellation reasons, product popularity, or competitor mentions—across your body of calls
- Utilize the comparative data obtained from the report to identify the optimal ways to target customer issues

Customizing the Report

General Settings

- **Version:** Available in Full Report (standard size), Mini, Wide, Columns, and Summary versions:
  - **Full Report, Mini, Wide:** Bar graphs listing the selected Categories and showing their proportion in the data set. For additional information about these versions, see Common Parameters.
  - **Columns:** A chart that shows the average call duration for each Category. These values are displayed above the total

number of calls in the Category.

- **Summary (Pie):** A pie chart indicating the proportion of calls or resources in the entire data set that are in or used by the selected Categories. (Whether to base the calculations on the number of calls or on the total resources is selected under Distributed By; see *Items on Report* below.)

For all other parameters, see Common Parameters.

Data Set Filters

See Common Parameters.

Items on Report

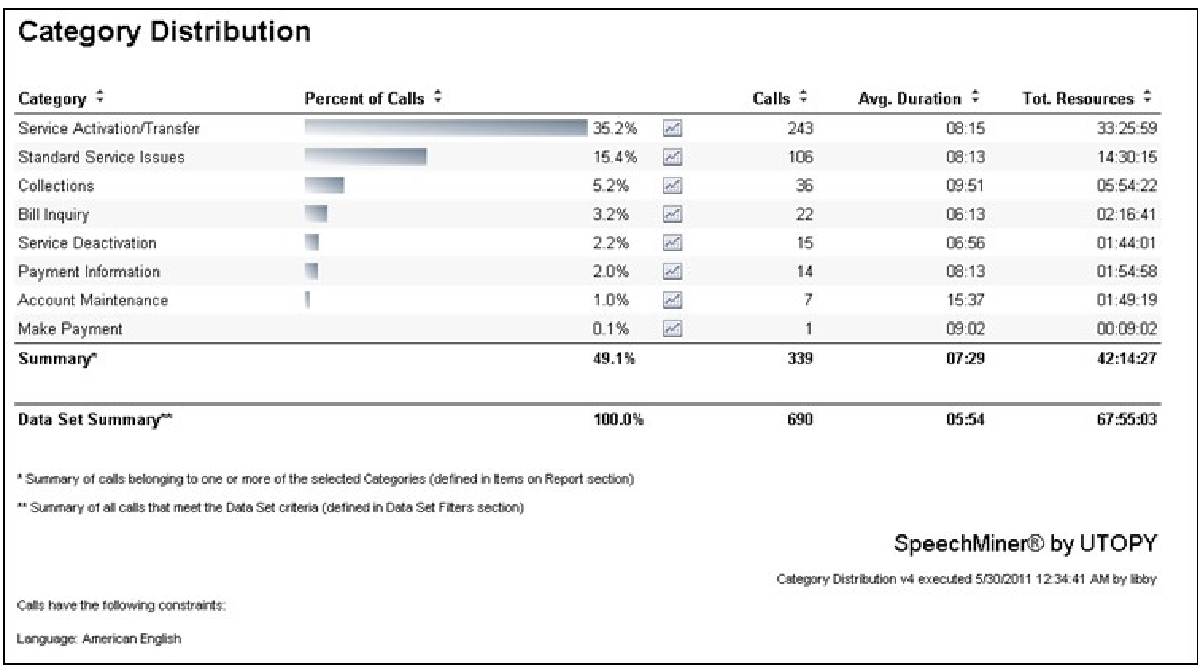
- **Distributed By:** Select whether the distribution should be calculated based on *percentage of calls* (the total number of calls) or *percentage of resources* (the total duration of all calls).

For all other parameters, see Common Parameters.

Actions

- In Full, Mini, Wide, or Columns versions, click a Category or bar to open a list of calls in the Category.
- In the Full version, click **Trend** ( ) to drill down to the distribution of calls for a Category. If the distribution of the items on the report (see Items on Report above) was by percentage of calls, the distribution of calls is by percentage of calls; if it was by percentage of resources, the distribution of calls is by average call duration.

Sample Reports



Category Distribution

Category	Percent of Calls	Calls	Avg. Duration	Tot. Resources
Service Activation/Transfer	35.2%	243	08:15	33:25:59
Standard Service Issues	15.4%	106	08:13	14:30:15
Collections	5.2%	36	09:51	05:54:22
Bill Inquiry	3.2%	22	06:13	02:16:41
Service Deactivation	2.2%	15	06:56	01:44:01
Payment Information	2.0%	14	08:13	01:54:58
Account Maintenance	1.0%	7	15:37	01:49:19
Make Payment	0.1%	1	09:02	00:09:02
Summary*	**49.1%**	**339**	**07:29**	**42:14:27**
Data Set Summary**	**100.0%**	**690**	**05:54**	**67:55:03**

* Summary of calls belonging to one or more of the selected Categories (defined in Items on Report section)

** Summary of all calls that meet the Data Set criteria (defined in Data Set Filters section)

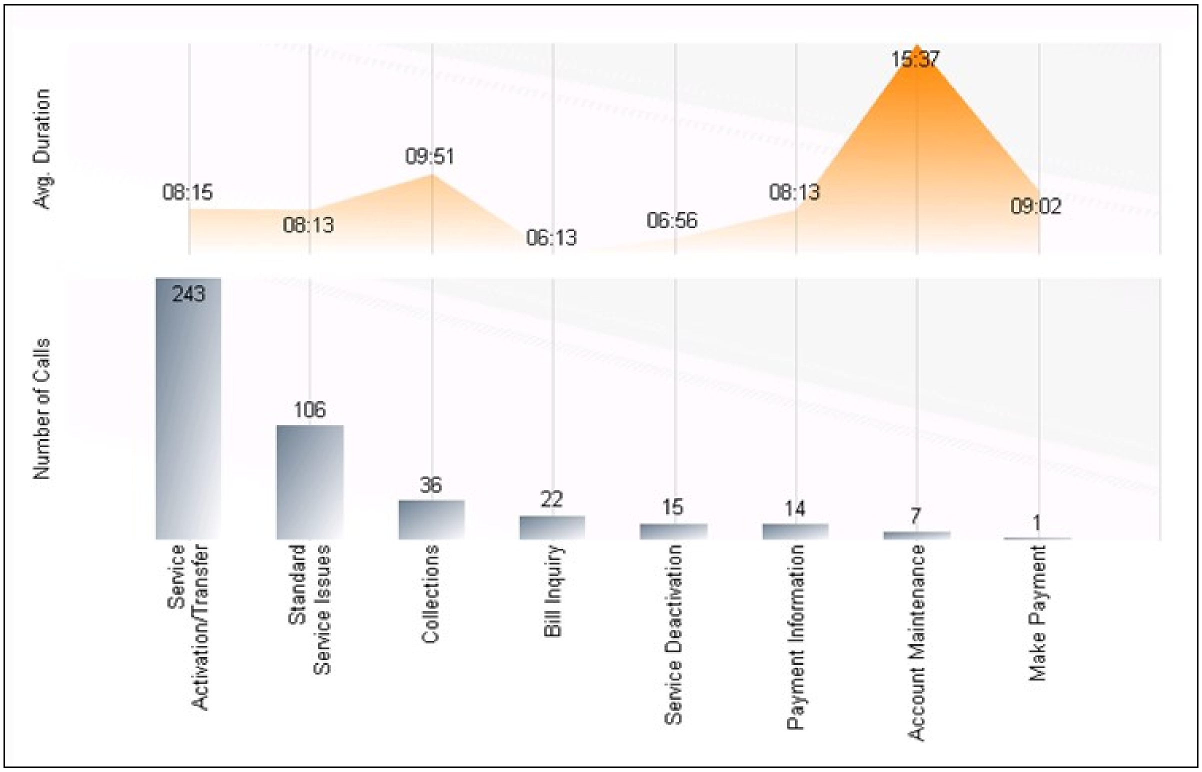
SpeechMiner® by UTOPY

Category Distribution v4 executed 5/30/2011 12:34:41 AM by libby

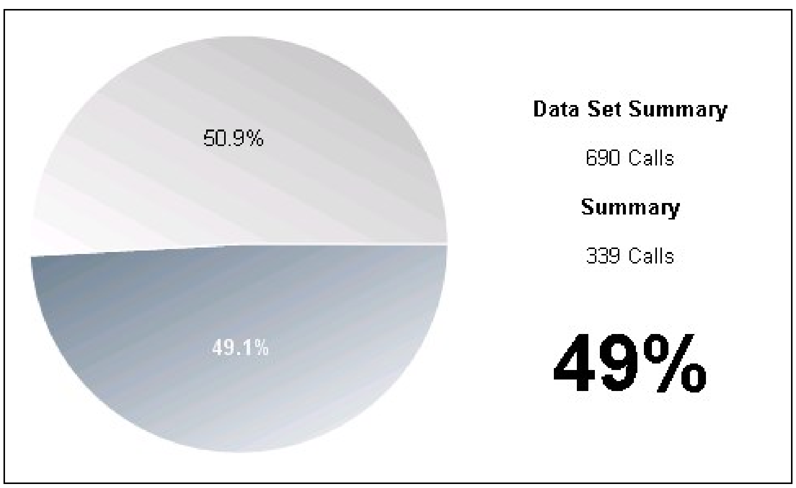
Calls have the following constraints:

Language: American English

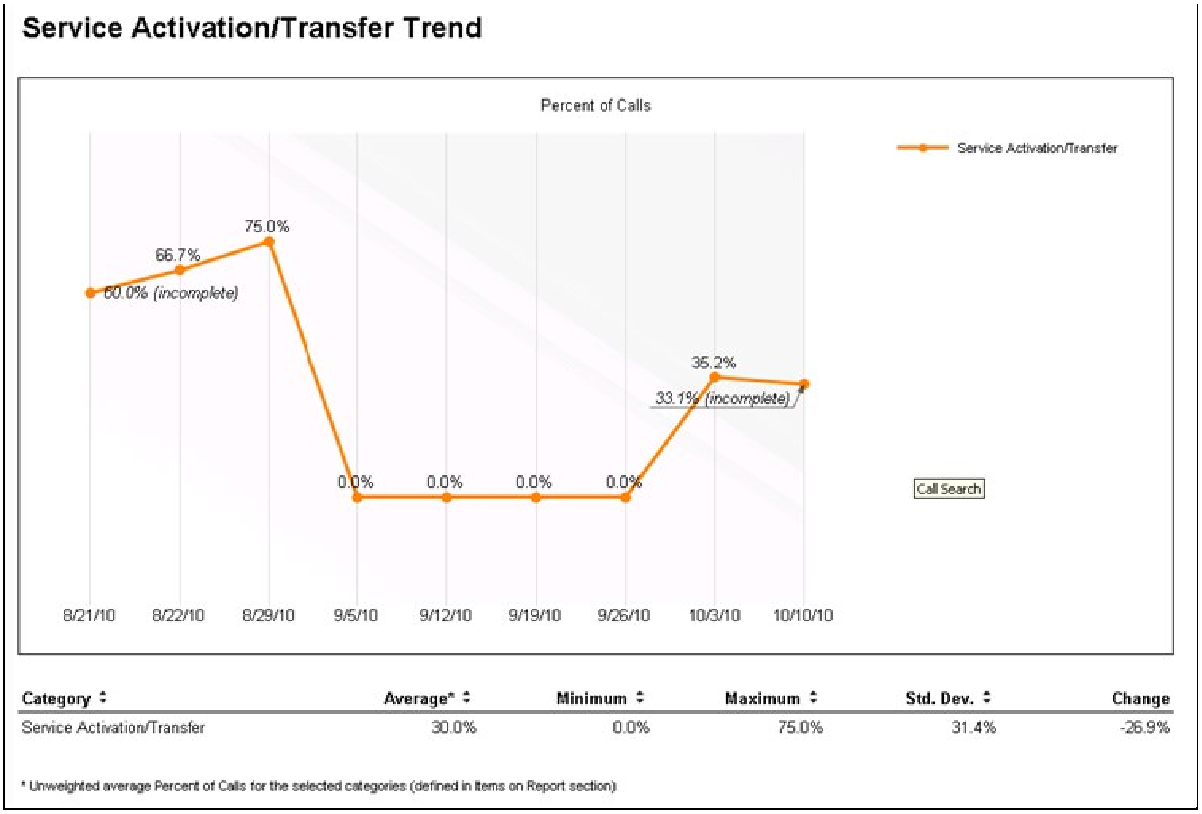
Full report



Columns report



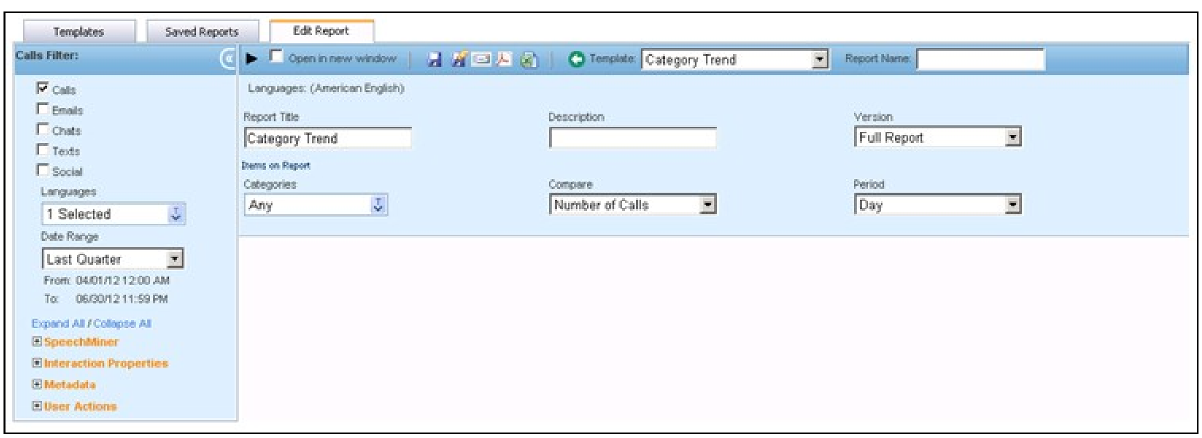
Summary (Pie) report



Category Distribution per week (drill-down from Full report)

Home > Appendix A: Standard Reports > Templates > Category Trend

Category Trend



Description

The Category Trend report shows changes in Categories over a period of time. The trend line can represent number of calls, percentage of calls, average call duration, or total resources. There is one line per selected Category.

Common Usages

- Plot the trends in a particular Category or multiple Categories chronologically

- Identify peak periods to make informed scheduling and staffing decisions
- Measure the response to new product releases
- Evaluate the effectiveness of recent business changes and agent training

Customizing the Report

General Settings

- **Version:** Available in Full Report (standard size), Mini, Wide, and Table Only versions. For additional information, see Common Parameters.

For all other parameters, see Common Parameters.

Data Set Filters

See Common Parameters.

Items on Report

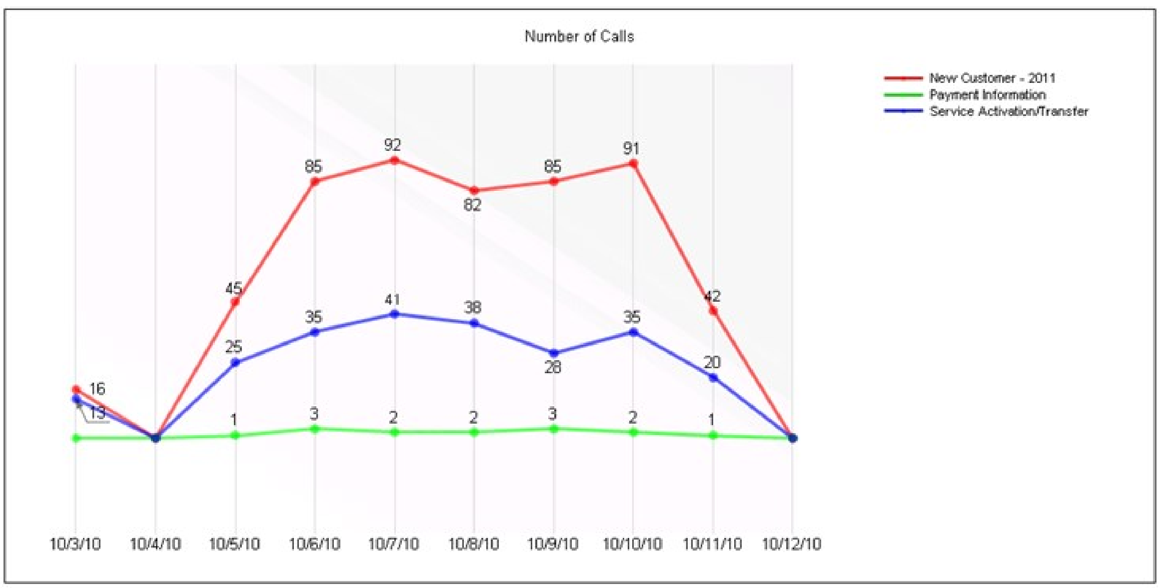
See Common Parameters.

Actions

- Click a point in a graph or an item in a table to open a list of calls included in the item.

Sample Report

Category Trend

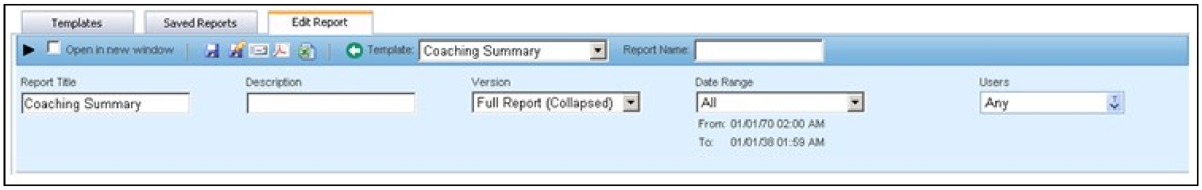


Category	Average*	Minimum	Maximum	Std. Dev.	Change
New Customer - 2011	53.8	0	92	38.0	-16
Payment Information	1.4	0	3	1.2	0
Service Activation/Transfer	23.5	0	41	15.0	-13

* Unweighted average Number of Calls for the selected categories (defined in Items on Report section)

Home > Appendix A: Standard Reports > Templates > Coaching Summary

Coaching Summary



Description

The Coaching Summary report summarizes the current status of coaching sessions in a pie chart and table, and lists active coaching sessions by user. Items in the list can be expanded to display details about coaching sessions.

Common Usage

- Monitor personnel training.

Customizing the Report

General Settings

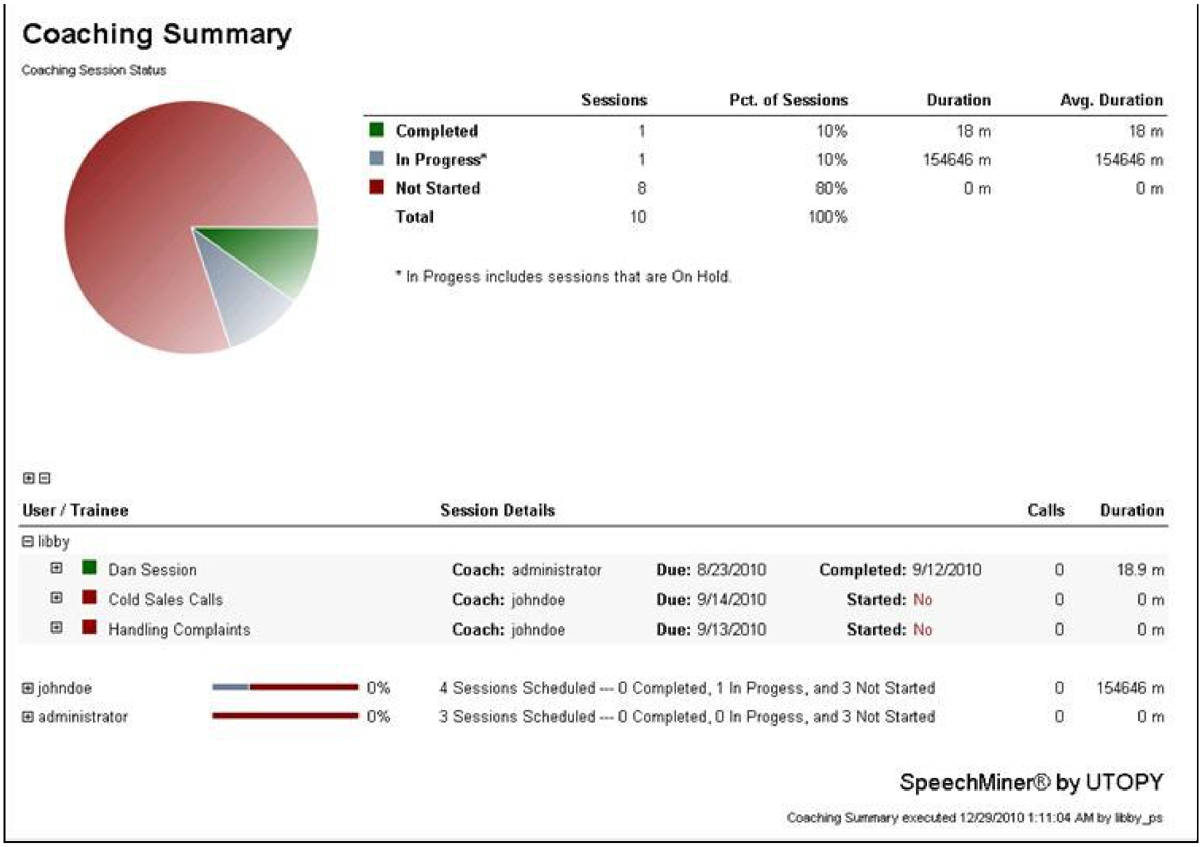
- **Version:** Available in Full Report (Expanded) and Full Report (Collapsed) versions. For additional information, see Common Parameters.

For all other settings, see Common Parameters.

Actions

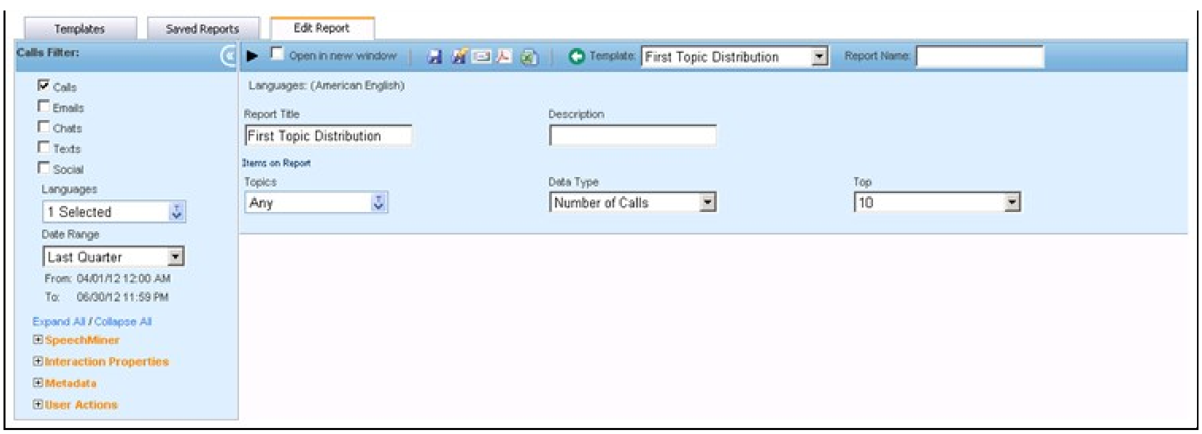
- Click ⊞ beside a user/trainee to expand it and view a list of coaching sessions assigned to the user/trainee, or ⊟ to collapse an expanded user/trainee.
- Click ⊞ beside a coaching session to expand it and view details about the session, or ⊟ to collapse an expanded session.
- Click ⊞ or ⊟ at the top of the table to expand or collapse all of the items in the table.

Sample Report



Home > Appendix A: Standard Reports > Templates > First Topic Distribution

First Topic Distribution



Description

The First Topic Distribution report is a bar graph that shows the first Topics that were detected in each of the selected calls. The Topics are ranked by the Data Type chosen (Number of Calls, Percentage of Calls, or Average Call Duration).

Common Usages

- Classify and quantify calls according to the first-occurring topic that was recognized in the calls.
- Compare the first topic distribution to assess why customers call.

- Utilize the comparative data obtained from the report to identify optimal ways to target customer issues.

Customizing the Report

General Settings

See Common Parameters.

Data Set Filters

See Common Parameters.

Items on Report

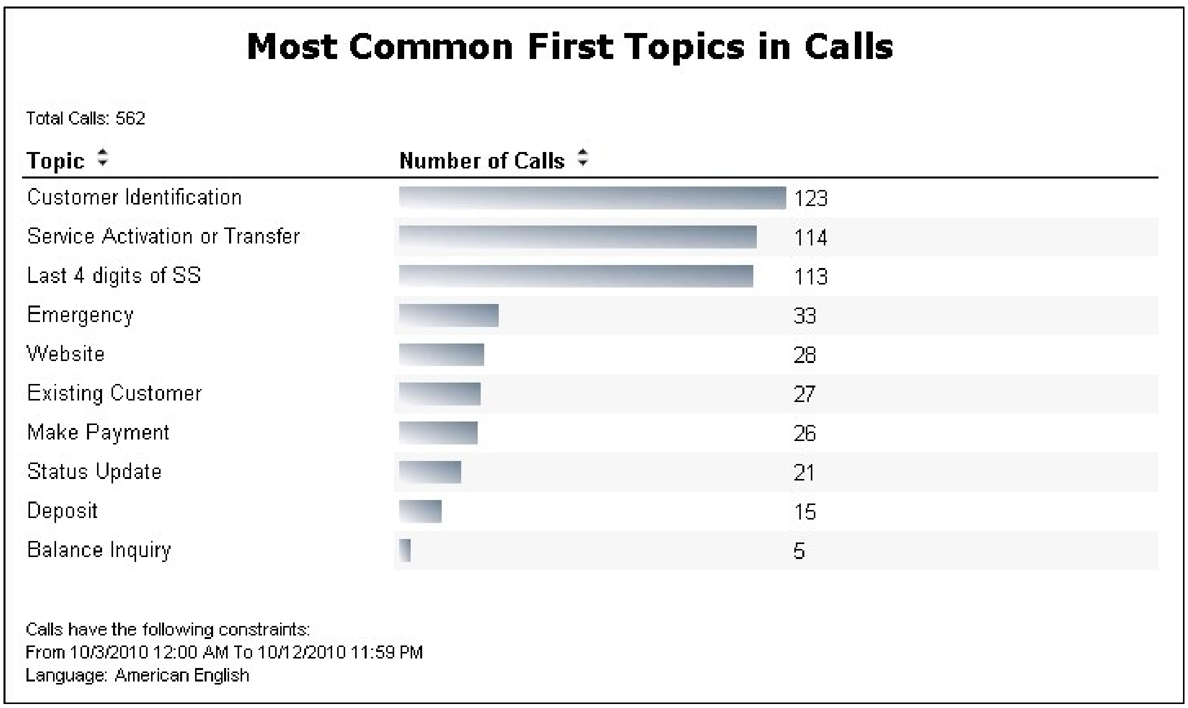
- **Topics:** Select the Topics you want to include in the report. Note that the Topics selected here must be within the range selected in the Data Set Filters or they will not appear in the report.

For all other parameters, see Common Parameters.

Actions

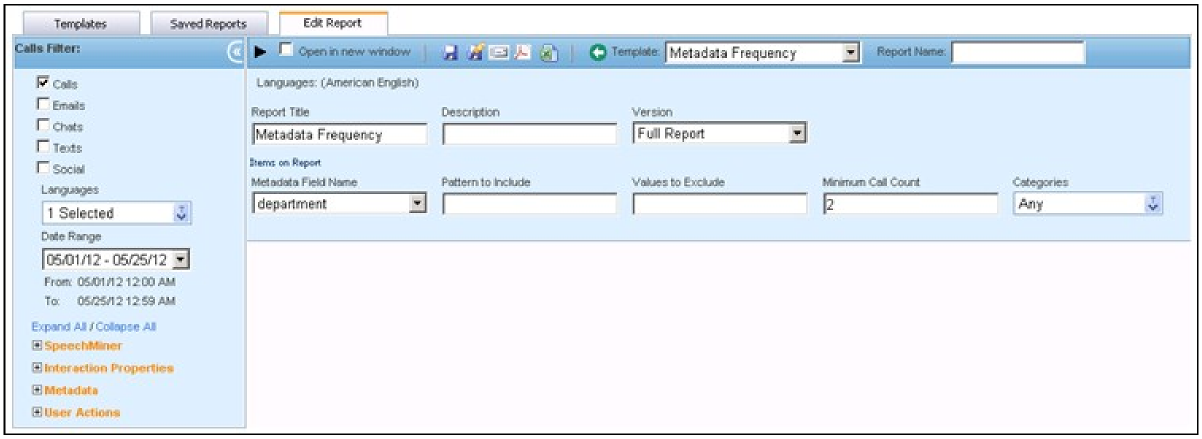
- Click a bar in the graph to open a list of calls included in the item.

Sample Report



Home > Appendix A: Standard Reports > Templates > Metadata Frequency

Metadata Frequency



Description

The Metadata Frequency report is a histogram that shows, for a selected metadata field, how many calls in the data set had each of the values of the field. The report has two levels. The top level is a summary that shows how many calls they belonged to each value and the percentage of all the calls 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 calls they had. The lower level gives details for one of the groups in the top level, listing the values that had at least the number of calls represented by the group, and indicating how many calls they had. The Wide version of the report also shows the most common Category of those calls.

In the sample reports below, the top-level report contains a bar graph that indicates there were three departments ("3" at the top of the first bar) for which there were three calls (3x at the bottom of the bar), one department for which there were four calls, and one department for which there were five calls. Above this, the report shows that 14.8% of the calls in the entire data set were in the first group, 21.3% of the calls were in either the first or second group, and 29.5% of the calls were in the first, second, or third group. The Mini version of the report does not include the percentage data. The lower-level report was opened by drilling down on the first bar of the graph in the top-level report. It shows the breakdown of calls for all the values.

Common Usages

- Classify and quantify calls 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, and Wide versions. For additional information, see Common Parameters.

For all other parameters, see Common Parameters.

Data Set Filters

See Common Parameters.

Items on Report

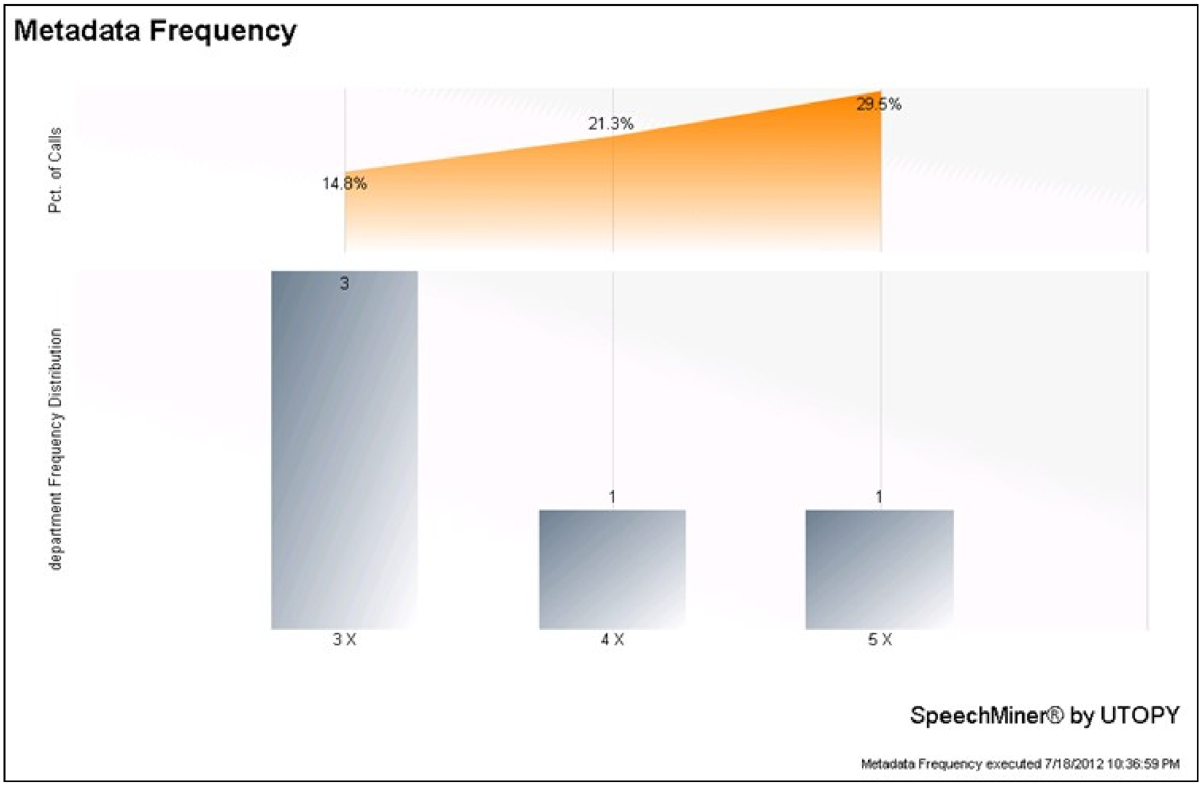
- **Metadata Field name:** Select the metadata field for which you want to run the report. Note that the field selected here must be within the range selected in the Data Set Filters or no data will appear in the report.
- **Pattern to Include:** Enter a series of one or more characters that must be 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. Separate multiple values with commas; do not leave a space after the comma (optional; leave the field blank to include all values).
- **Minimum Call Count:** The minimum number of calls that must be found for a value in order for the value to be included in the report

For all other parameters, see Common Parameters.

Actions

- In the top level:
  - Click a bar in the graph to drill down to the lower level
- In the lower-level:
  - Click a bar in the graph to search for calls that have the field value represented by the bar.
  - Click to drill down to a Category Distribution report.

Sample Reports

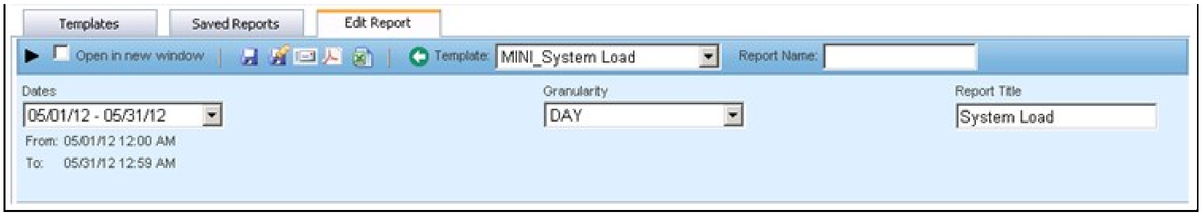


Top level

department	Number of Calls	Top Category
sales	5	
technical support	4	
customer service	3	
human resources	3	
marketing	3	

Lower level

MINI_System Load



Description

The MINI_System Load report is a line graph that shows the amount of audio hours processed per day or hour. On the line graph, two lines are displayed, one for processed calls and one for loaded calls.

Note: A larger version of this template, System Load, is also available. The smaller version is intended for use in the Views page.

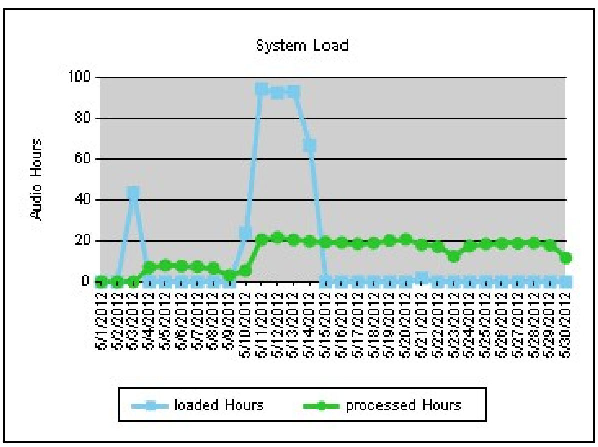
Common Usage

- Monitor the processing load of the system.

Customizing the Report

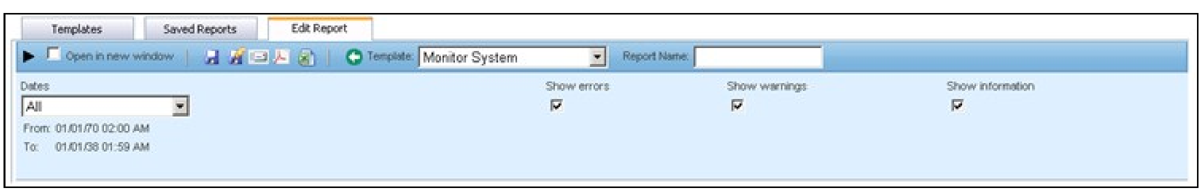
- **Dates:** The same as **Date Range** in Data Set Filters (See Common Parameters)
- **Granularity:** Choose either **HOUR** or **DAY** for the scale on the horizontal axis. Make sure your selection is reasonable for the dates you selected.
- **Report Title:** See Common Parameters.

Sample Report



Home > Appendix A: Standard Reports > Templates > Monitor System

Monitor System



Description

The Monitor System report provides an overview of the SpeechMiner system status. The report consists of three components:

1. The first chart displays the system load over the specified period. It indicates how many audio hours were loaded and processed on each day in the period.
2. The second chart displays how many hours of audio were processed at a each given speed in real-time performance.
3. The third chart lists errors and warnings from all machines. It shows the time each error was recorded and the type of error, and provides additional information about the error.

Common Usage

- View and analyze several aspects of system data at once in order to make informed system-administration and resource-allocation decisions.

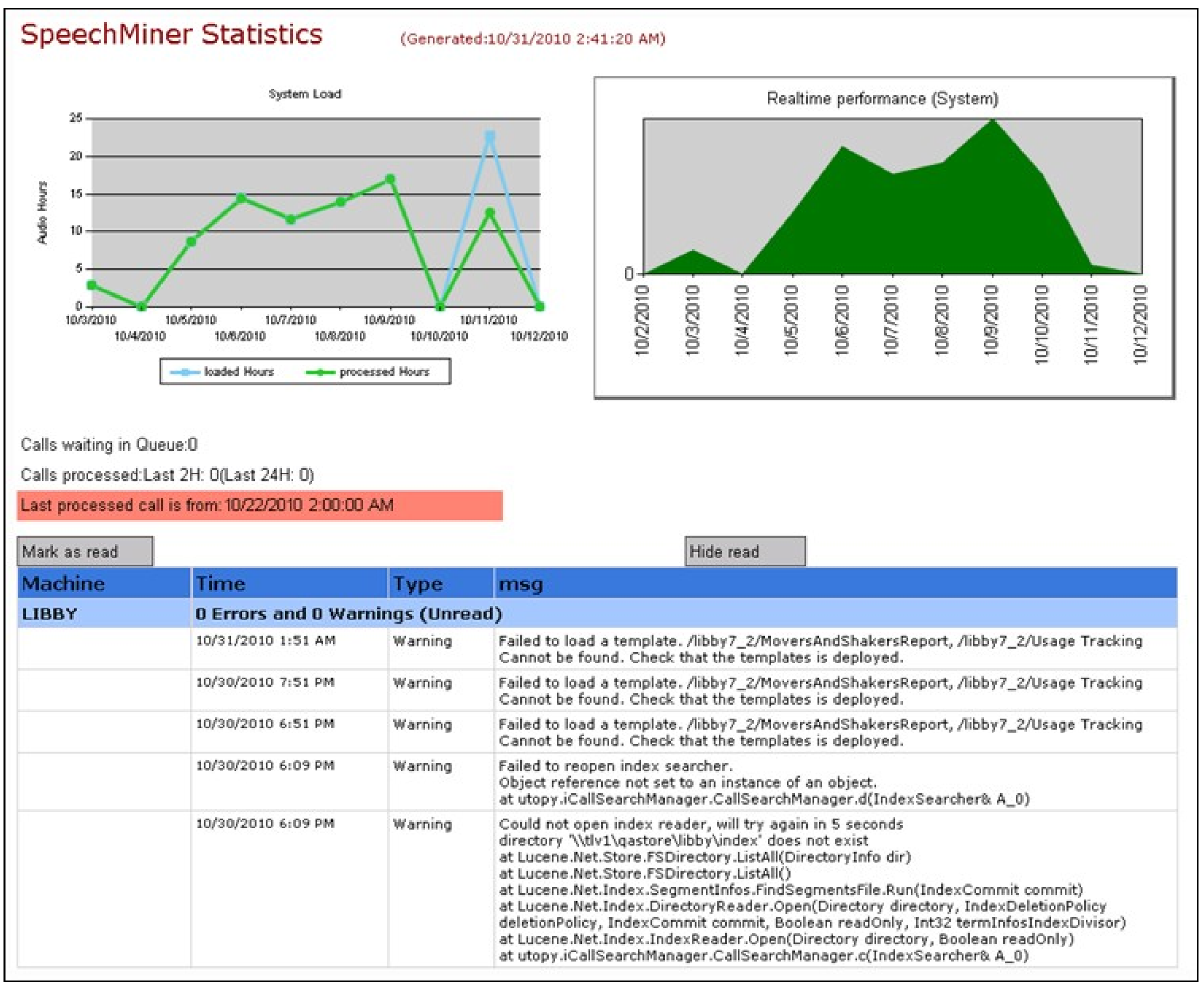
Customizing the Report

- **Dates:** Select the time period to include in the report
- **Show errors:** Check this option to include error messages in the list of messages in the third chart.
- **Show warnings:** Check this option to include warning messages in the list of messages in the third chart.
- **Show information:** Check this option to include information messages in the list of messages in the third chart.

Actions

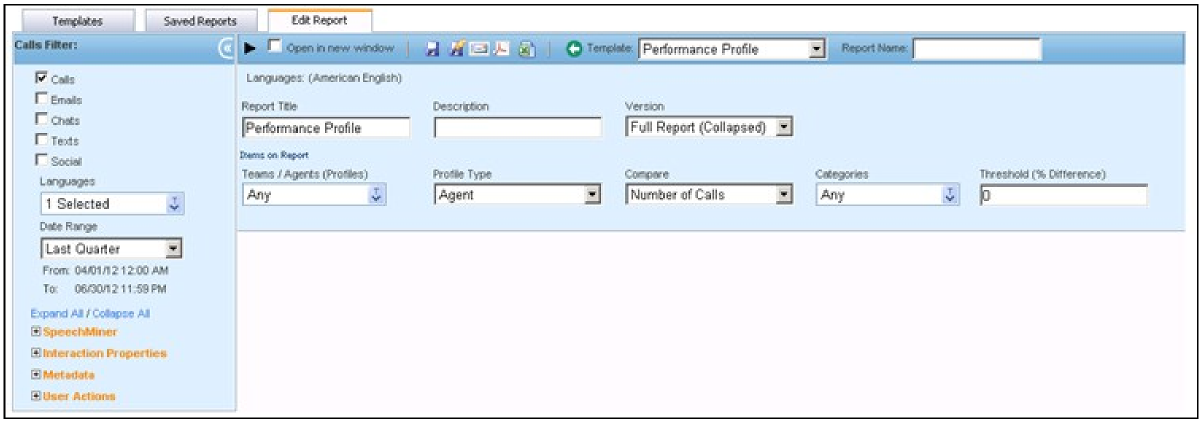
- Click **Mark as Read** to mark all displayed messages as read.
- Click **Hide read** to hide all messages that were already read (available when read messages are displayed).
- Click **Show read** to display all hidden messages (available when read messages are hidden).

Sample Report



Home > Appendix A: Standard Reports > Templates > Performance Profile

Performance Profile



Description

The Performance Profile report is a bar graph and table that compares Workgroup or Agent performance in a specified Category or group of Categories to the benchmark (the Workgroup's or Agent's average). You can choose to analyze performance based on the number of calls, the percentage of calls, average call duration, or total resources. The table includes data about the number of calls, the difference from the benchmark, and the percentage above or below the benchmark.

Common Usages

- Visualize and compare agent performance for training and feedback.
- Utilize the data obtained from the report to increase the efficiency of team and operations management.
- Assess the efficacy of training programs by plotting performance before and after the program's implementation.

Customizing the Report

General Settings

- **Version:** Available in Full Report (Expanded), Full Report (Collapsed), Mini, and Wide versions. For additional information, see Common Parameters.

For all other parameters, see Common Parameters.

Data Set Filters

See Common Parameters.

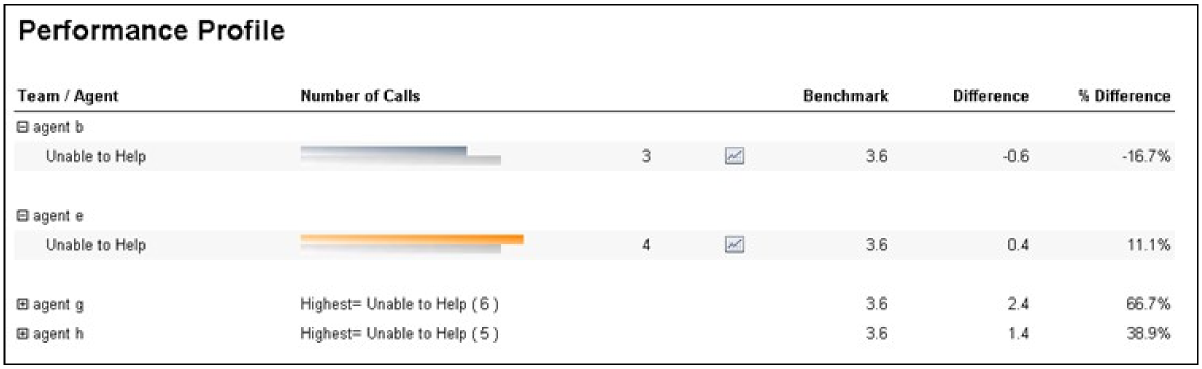
Items on Report

- **Profile:** Select the Agents or Workgroups you would like to compare to the average (the benchmark) for specific Categories. Your selection must match the *Benchmark Type*, but it does not have to match the *Workgroup* or *Agent* parameters in the Data Set Filters.
- **Benchmark Type:** Select the type of benchmark to use: **Agent** or **Team (Workgroup)**. The selection here must correspond with those in the Data Set Filters. If you selected Workgroups in the Data Set Filters (rather than individual Agents in the expanded Workgroups), you must select **Team** for the Benchmark Type in order to return results. The Benchmark Type must also match the *Profile* selected; if **Agent** is selected as the benchmark type, Agents must also be selected in the *Profile* parameter.
- **Compare**: See Common Parameters.
- **Categories:** See Common Parameters.
- **Threshold:** Specify the minimum percent deviation from the benchmark required for an item to be included in the report. For example, "40" means only values that are greater or less than the benchmark by at least 40% are included in the report.

Actions

- Click ⊞ beside an agent or team to expand it and view a list of Categories.
- Click ⊟ to collapse an expanded item.
- When an item is expanded, click **Trend** ( ) to drill down to a Category Trend report.

Sample Report

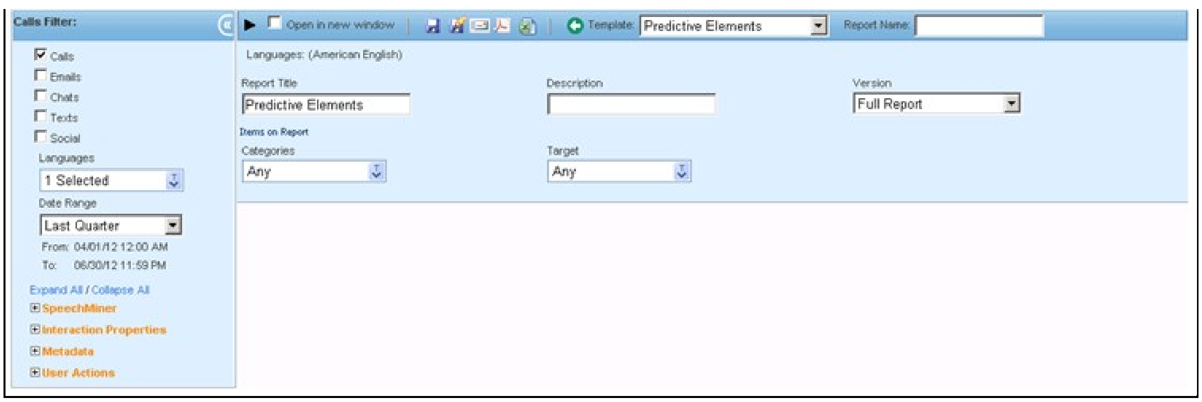


Performance Profile

Team / Agent	Number of Calls			Benchmark	Difference	% Difference
⊟ agent b						
Unable to Help		3		3.6	-0.6	-16.7%
⊟ agent e						
Unable to Help		4		3.6	0.4	11.1%
⊞ agent g	Highest= Unable to Help (6)			3.6	2.4	66.7%
⊞ agent h	Highest= Unable to Help (5)			3.6	1.4	38.9%

Home > Appendix A: Standard Reports > Templates > Predictive Elements

Predictive Elements



Description

The Predictive Elements report is composed of two bar graphs that show the relationship between selected Categories and *Target* Categories. The first graph has nested pairs—the first bar of the pair is the number of calls that fall into the selected Categories, while the second bar of the pair is the number of calls that fall into both the selected Categories and the Target Categories (Success Factor). The second graph shows the ratio of the two bars in each pair. By examining the ratios, you can see how each Category affects the Target and make changes based on those findings.

Common Usages

- Plot the relationship between one or more Categories and the Target Categories to better understand cause-effect trends in customer behavior
- Determine which factors increase the likelihood of reaching the desired Target (for example, which of the several potential Scripts more reliably leads to a closed sale)
- Determine which business practices and agent behaviors contribute to an undesired outcome (such as cancellation)
- Utilize the data obtained from the report to optimize agent training
- Analyze the report data to make informed decisions about business practices

Customizing the Report

General Settings

- **Version:** Available in Full Report (standard size), Mini, Wide, and Columns versions. The Columns version presents the data in graphs alone, without printing the values in table format. For additional information, see Common Parameters.

For all other parameters, see Common Parameters.

Data Set Filters

See Common Parameters.

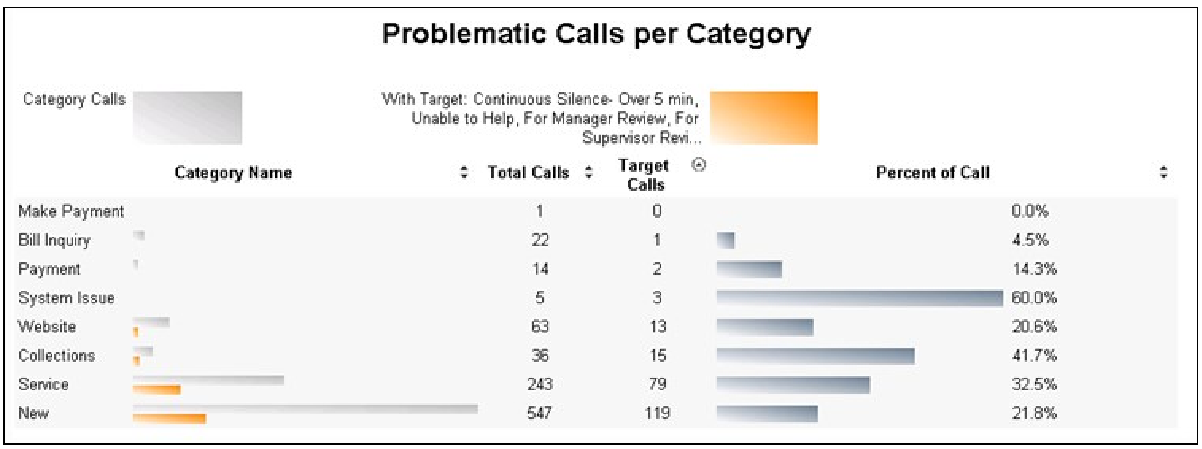
Items on Report

- **Categories:** See Common Parameters.
- **Target:** Select Categories that you would like to include in the Target. Categories selected must match or be contained within the Categories previously selected in the Data Set Filters.

Actions

- Click an item to open a list of calls in the specified Category (or the specified Category and Target Categories).

Sample Reports

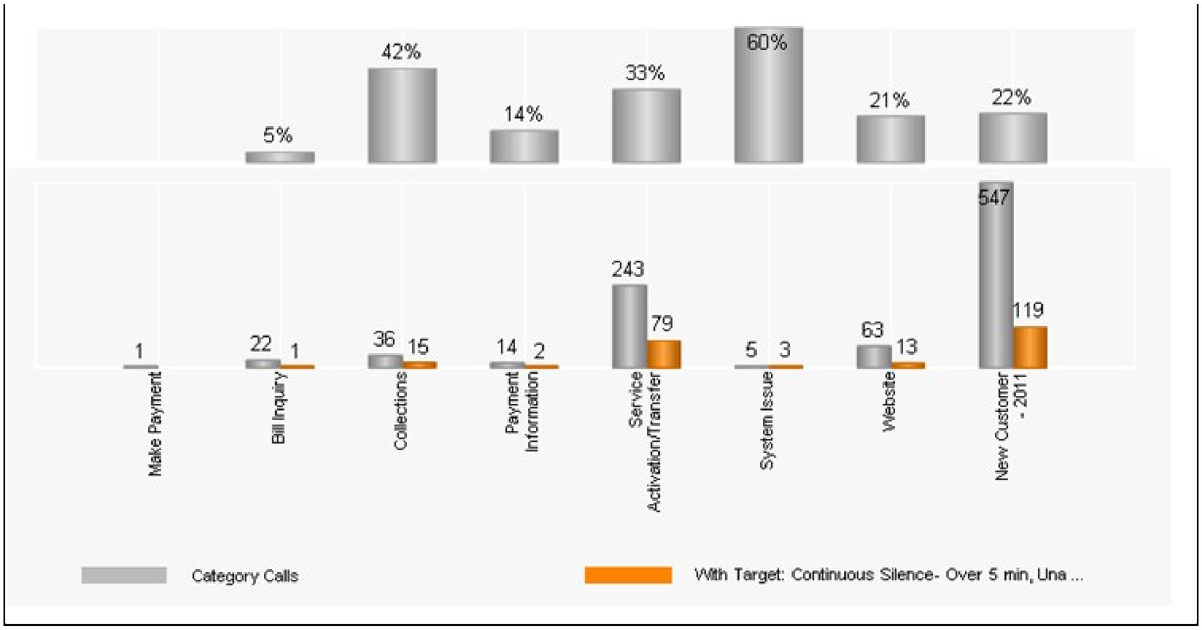

Problematic Calls per Category

Category Calls

With Target: Continuous Silence- Over 5 min, Unable to Help, For Manager Review, For Supervisor Revi...

Category Name	Total Calls	Target Calls	Percent of Call
Make Payment	1	0	0.0%
Bill Inquiry	22	1	4.5%
Payment	14	2	14.3%
System Issue	5	3	60.0%
Website	63	13	20.6%
Collections	36	15	41.7%
Service	243	79	32.5%
New	547	119	21.8%

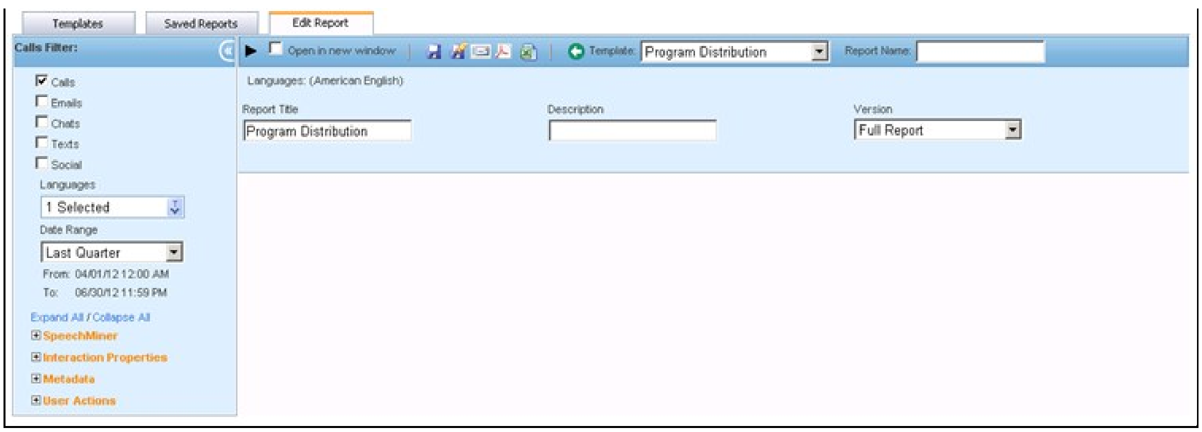
Full version



Columns version

Home > Appendix A: Standard Reports > Templates > Program Distribution

Program Distribution



Description

The Program Distribution report graphs the call volume for each Program.

Common Usage

- Visualize and monitor comparative call-volume data by Program.

Customizing the Report

General Settings

See Common Parameters.

Data Set Filters

See Common Parameters.

Actions

- Click an item to open a list of calls included in the item.

Sample Report

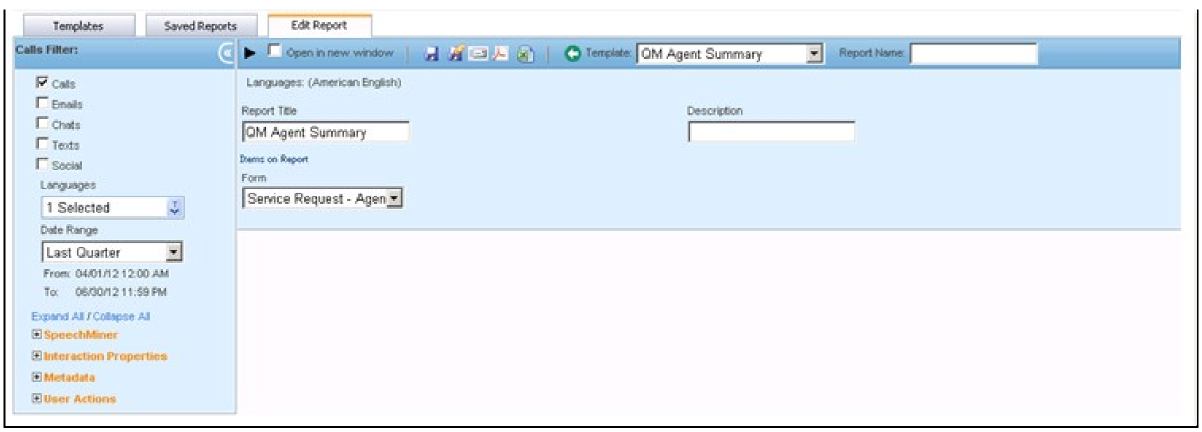
Program Distribution

Program Name	Percent of Calls	Calls	Avg. Duration	Tot. Resources
Seniors ADSL Campaign	50.0%	30	09:31	04:45:30
Winter 2011 Sales Campaign	33.3%	20	12:19	04:06:33
Summer Sales Campaign	16.7%	10	04:47	00:47:49
Data Set Summary*		**60**	**08:52**	**09:38:52**

* Summary of all calls that meet the Data Set criteria (defined in Data Set Filters section)

Home > Appendix A: Standard Reports > Templates > QM Agent Summary

QM Agent Summary



Description

The QM Agent Summary report summarizes the responses on forms that were filled out by quality monitoring staff after they reviewed calls.

Common Usage

- Visualize and monitor comparative call-quality data by agent, for an entire form and for question groups within the form.

Customizing the Report

General Settings

- **Form:** The name of the form

For all other settings, see Common Parameters.

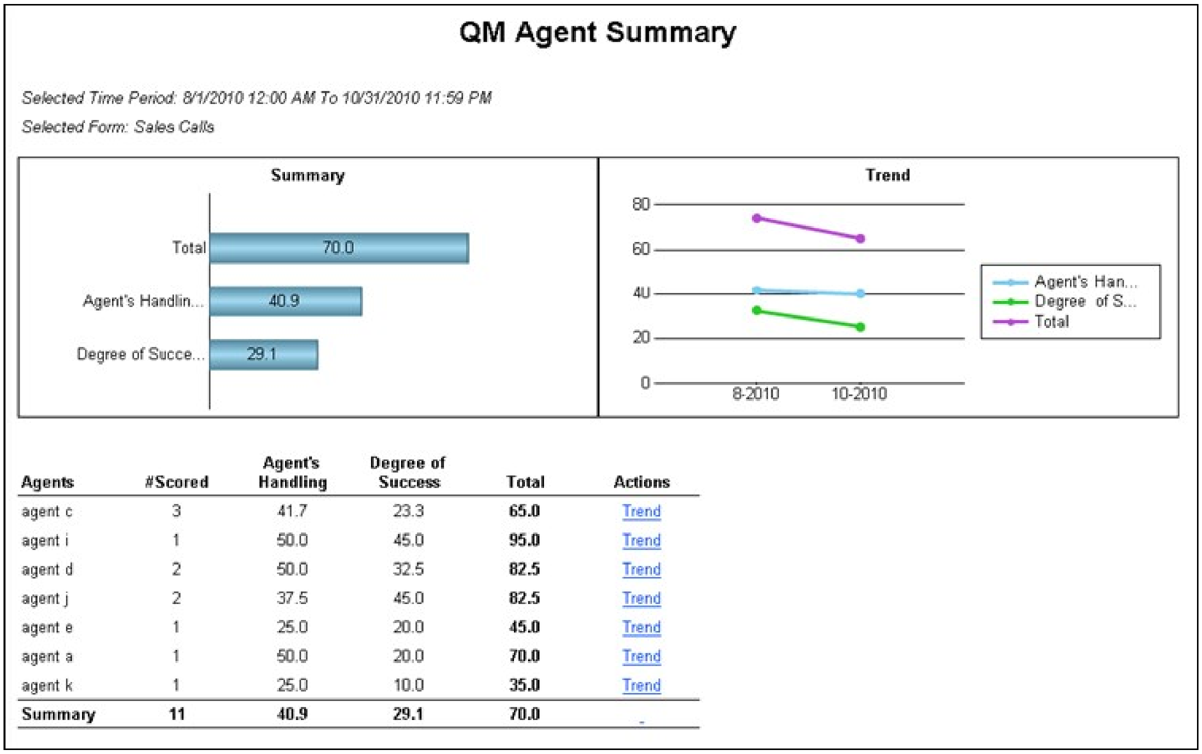
Data Set Filters

See Common Parameters.

Actions

- In the table, under **Actions**, click **Trend** to view a graph summarizing the scores returned by the agent in the past (normally, over the past three months, but this value may vary from one organization to another).

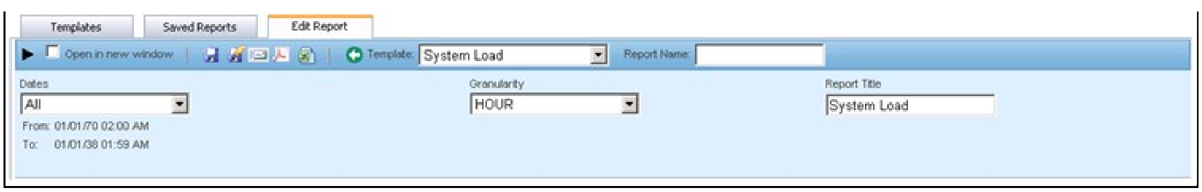
Sample Report



Agents	#Scored	Agent's Handling	Degree of Success	Total	Actions
agent c	3	41.7	23.3	**65.0**	Trend
agent i	1	50.0	45.0	**95.0**	Trend
agent d	2	50.0	32.5	**82.5**	Trend
agent j	2	37.5	45.0	**82.5**	Trend
agent e	1	25.0	20.0	**45.0**	Trend
agent a	1	50.0	20.0	**70.0**	Trend
agent k	1	25.0	10.0	**35.0**	Trend
Summary	**11**	**40.9**	**29.1**	**70.0**	

Home > Appendix A: Standard Reports > Templates > System Load

System Load



Description

The System Load report includes a line graph and a grid displaying the amount of audio hours processed per day or hour. On the line graph, two lines are displayed, one for processed calls and one for loaded calls. The grid below the graph shows each point (either a date or time) that appears in the line graph, with its corresponding loaded and processed hours.

Note: A smaller version of this template, MINI_System Load, is also available. It is intended for use in the Views page.

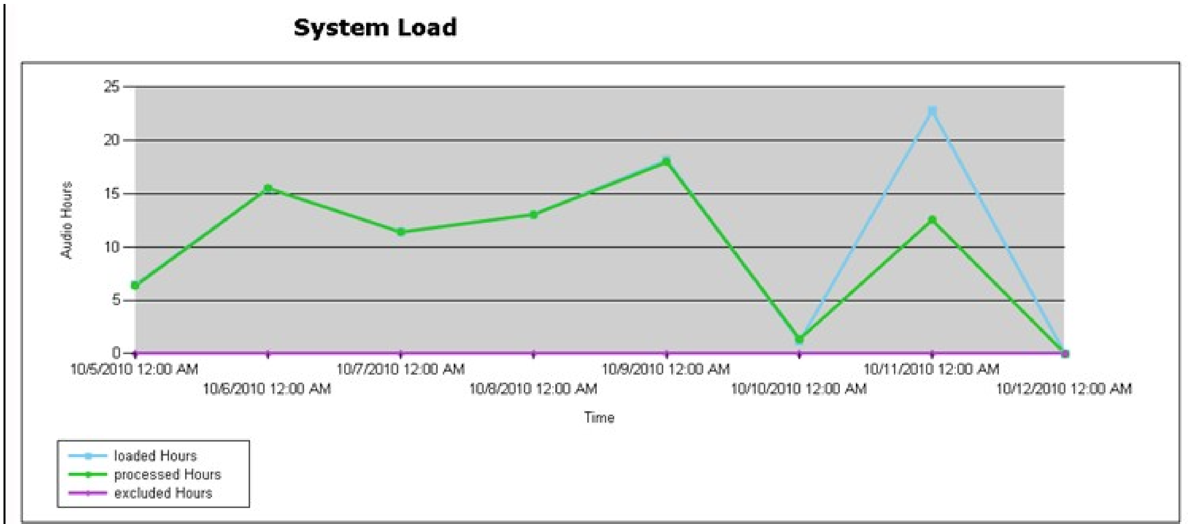
Common Usage

- Monitor the processing load of the system.

Customizing the Report

- **Dates:** The same as **Date Range** in Data Set Filters (See Common Parameters)
- **Granularity:** Choose either **HOUR** or **DAY** for the scale on the horizontal axis. Make sure your selection is reasonable for the dates you selected.
- **Report Title:** See Common Parameters.

Sample Report

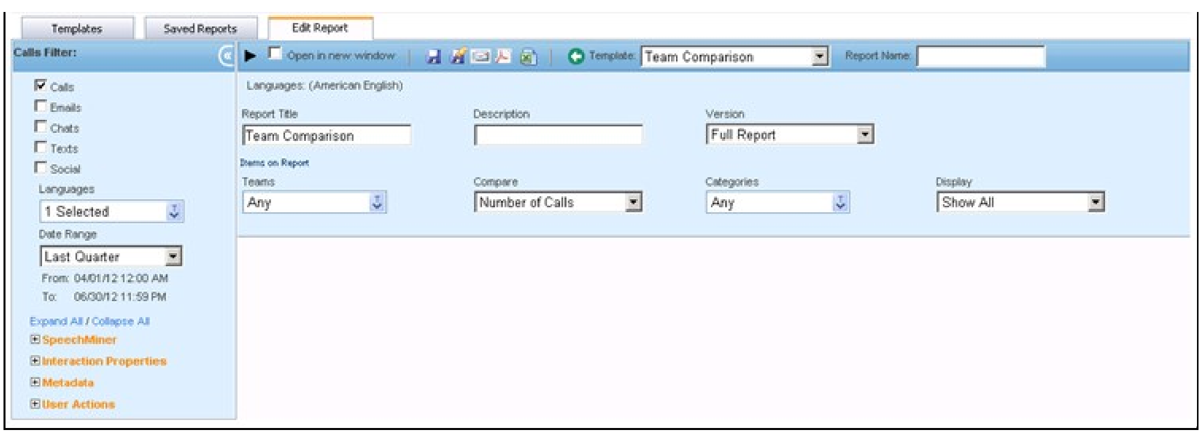


From 10/4/2010 10:00 PM To 10/12/2010 9:59 PM

Date/Time	Loaded Hours	Processed Hours	Excluded Hours	Processed Calls
10/5/2010 12:00 AM	6.47	6.41	0	80
10/6/2010 12:00 AM	15.47	15.53	0	194
10/7/2010 12:00 AM	11.44	11.44	0	196
10/8/2010 12:00 AM	13.04	13.04	0	197
10/9/2010 12:00 AM	18.22	18.02	0	194
10/10/2010 12:00 AM	1.18	1.38	0	14
10/11/2010 12:00 AM	22.79	12.58	0	119
10/12/2010 12:00 AM	0	0	0	0

Home > Appendix A: Standard Reports > Templates > Team Comparison

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, and Wide versions. For additional information, see Common Parameters.

For all other parameters, see Common Parameters.

Data Set Filters

See Common Parameters.

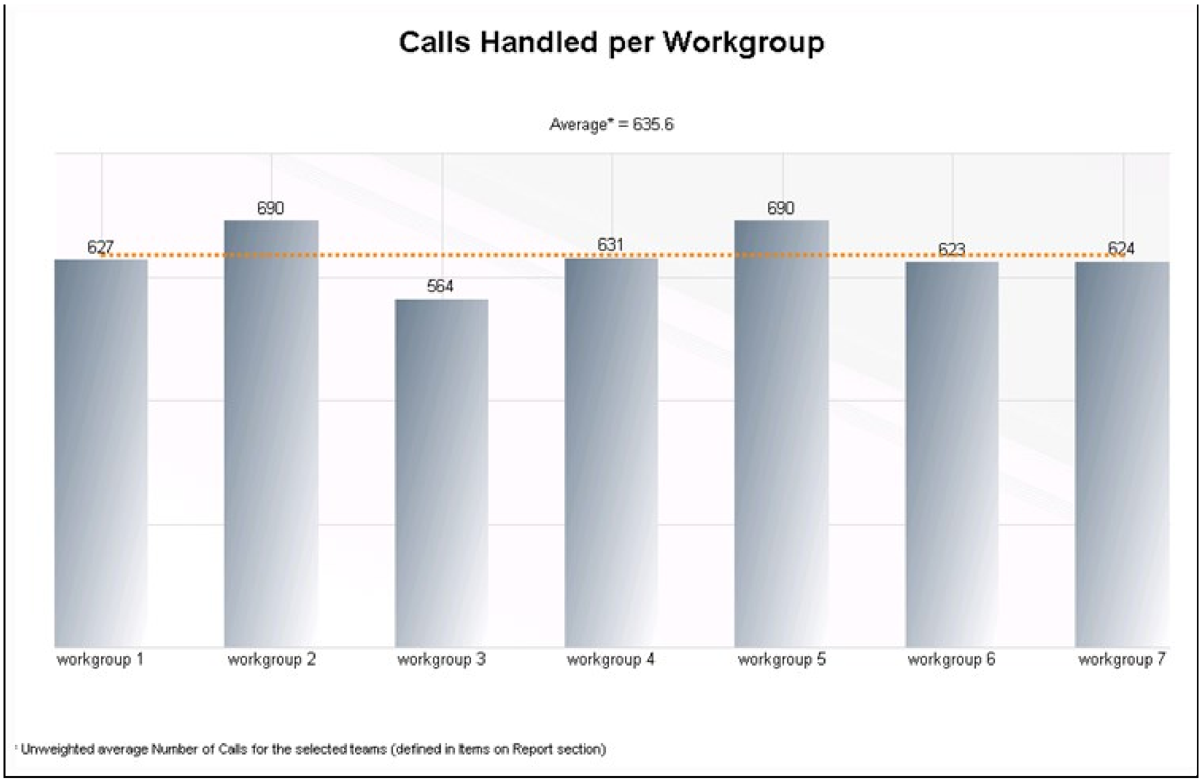
Items on Report

- **Teams:** Select specific Workgroups to be analyzed and displayed on your report. The default value ("Any") includes all Workgroups. You must also make the appropriate selections on the Workgroup or Agent, Language, and Program filters in the Data Set Filters. If, in the Data Set Filters, individual Agents were selected instead of Workgroups, you must select the Team that contains those Agents, or no results will be returned.
- **Compare:** See Common Parameters.
- **Categories:** See Common Parameters.

Actions

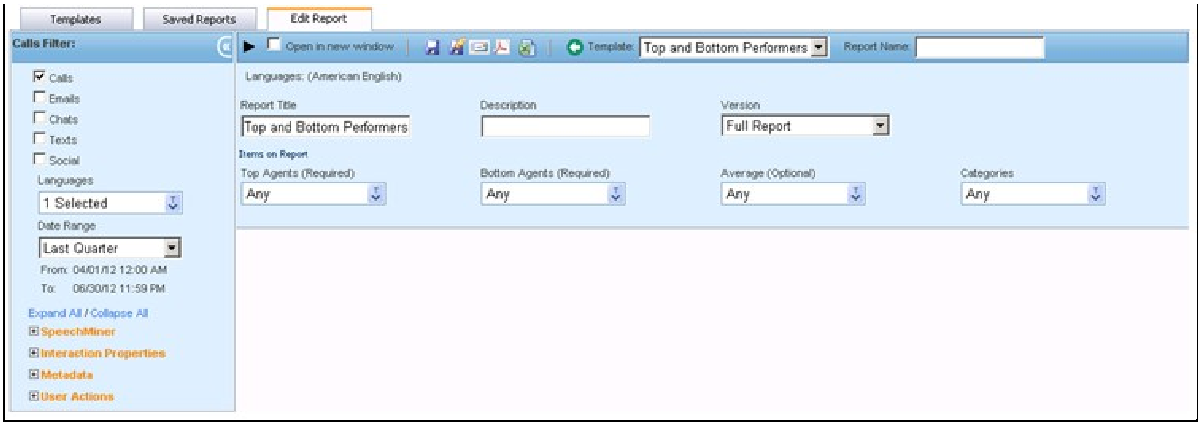
- Click a bar in the graph to open a list of calls included in the item.

Sample Report



Home > Appendix A: Standard Reports > Templates > Top and Bottom Performers

Top and Bottom Performers



Description

The Top and Bottom Performers report is a bar graph that indicates values for three groups (top performers, bottom performers, and average performers) across multiple Categories. This enables you to identify what top performers do differently from the rest and thereby spread the knowledge of best practices. This report is only useful if you know ahead of time who your top, bottom, and average Agents or teams are. It is purely a graphical representation of comparison, and will NOT tell you who the top and bottom Agents are, but rather how they compare in specific areas of performance.

Common Usages

- Compare the behavior of top and bottom performers to identify best practices.
- Utilize the data obtained from the report to optimize agent training and improve business processes.

Customizing the Report

General Settings

- **Version:** Available in Full Report (standard size), Mini, and Wide versions. For additional information, see Common Parameters.

For all other parameters, see Common Parameters.

Data Set Filters

See Common Parameters.

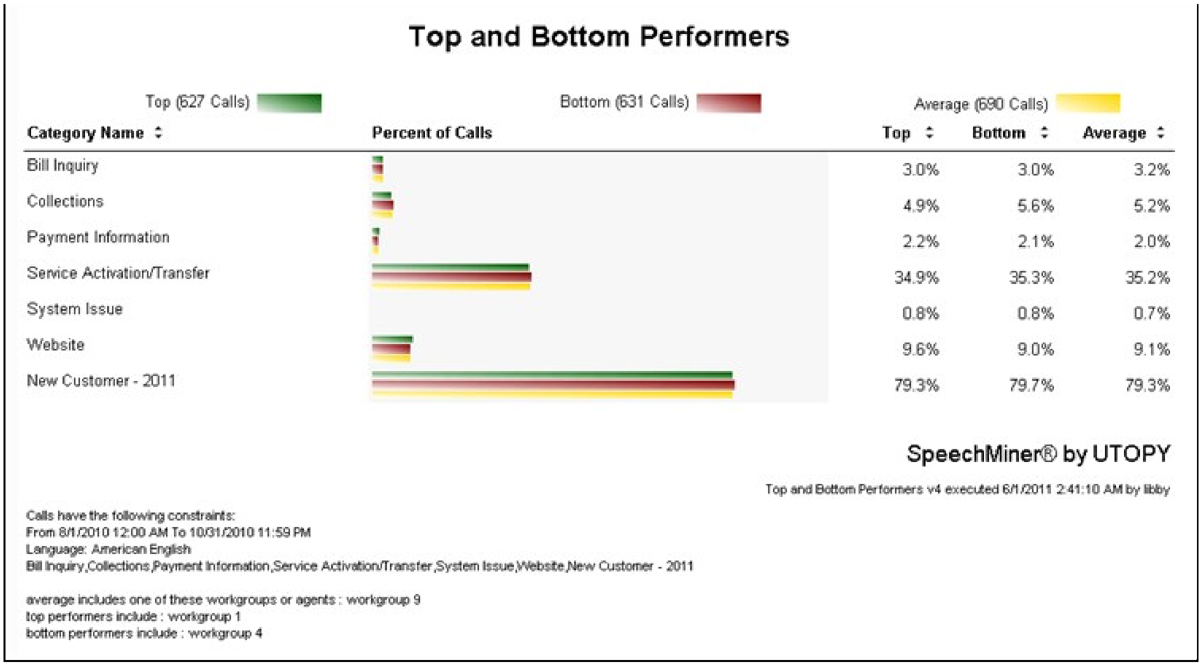
Items on Report

- **Top Agents:** Specify the top Agents (based on prior assessment) to be displayed for each Category. The percentage of calls handled by the selected top Agents will be displayed for each Category. Selections here must be within those made in the Workgroup and Agent filters in the Data Set Filters.
- **Bottom Agents**: Specify the bottom Agents (based on prior assessment) to be displayed for each Category. The percentage of calls handled by the selected bottom Agents will be displayed for each Category. Selections here must be within those made in the Workgroup and Agent filters in the Data Set Filters.
- **Average:** Specify the average-performing Agents (based on prior assessment) to be displayed for each Category. The percentage of calls handled by the selected average-performing Agents will be displayed for each Category. Selections here must be within those made in the Workgroup and Agent filters in the Data Set Filters.
- **Categories:** See Common Parameters.

Actions

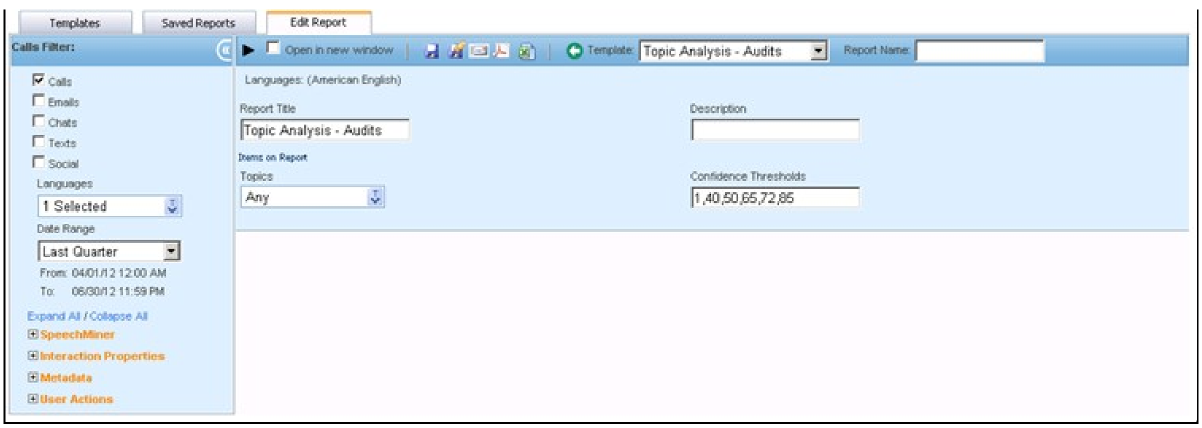
- Click a bar or a value to open a list of calls included in the item.

Sample Report



Home > Appendix A: Standard Reports > Templates > Topic Analysis - Audits

Topic Analysis - Audits



Description

The Topic Analysis - Audits report is a table that shows the precision with which each Topic was identified by SpeechMiner. Precision values are given for one or more confidence levels, as specified in the report parameters, and are determined by the TP/FP/SFP (True Positive/False Positive/Sense False Positive) selections made by the call auditor (see Using an Event Grid).

Each line in the table contains auditing and precision information for one Topic, including the level of strictness required for recognizing the Topic (as defined in the Topic definition in SMART), how many times the Topic was found in the calls that were included in the report, how many calls it was found in, and how many of the events found were audited. In addition, the precision is graded for each threshold included in the report. The grades are calculated by dividing the number of TP events by the sum of the TP and FP events. The grades are presented as follows:

Grade	Value of TP/(TP+FP)

A	**A** >= 0.8
B	0.8 > **B** >= 0.7
C	0.7 > **C** >= 0.6
D	0.6 > **D** >= 0.5
F	**F** < 0.5

This report is instrumental to implementers, as it allows them to fine-tune the system to the correct accuracy level. After learning about Topic-identification performance, the implementer can adjust confidence levels as necessary.

Common Usage

- Monitor the quality of the different Topics in the system based on audit information.

Customizing the Report

General Settings

See Common Parameters.

Items on Report

- **Topics:** Choose the Topics whose audits you want to examine.
- **Confidence Thresholds:** Type in the confidence levels for which you wish to see precision values. Separate multiple values with commas.

  Note: Confidence levels are assigned by the system to each term it identifies. They indicate how closely the term defined in the Topic matches the term that was discovered in the audio segment. "Precision" in the report means the percentage of TPs for all the audits in the Topic whose confidence levels were equal to or above the given Thresholds. This means that each of the Thresholds includes all of the audits in the Threshold levels above it. Thus, in the example below, the 40-Threshold column includes all audits with precision values of 40 or higher, the 50-Threshold column includes all audits with confidence levels of 50 or higher, and so on.

Actions

- Click a Topic to drill down to the audit information for each of the terms in the Topic (shown in the Sample Reports section below).
- Click the  to drill down to an item's details (shown in the last two samples in the Sample Reports section below). The details show information about the precision as a function of confidence level and as a function of elapsed time in calls.
- In the list of terms for a Topic, click the name of a term in order to open a call-search window and find calls in which the term is found.

Sample Reports

Topic Analysis - Audits

Payment Issues

Topic	Percent of Calls	Calls	Strictness	Events	Audits	1	40	50	65	72	85
Customer Identification (9 Terms)	81.8%	305	Very-Low (1)	364	44	B	A	A	A	A	A
Service Activation or Transfer (51 Terms)	34.6%	129	Very-Low (1)	204	55	B	B	C	C	C	C
Last 4 digits of SS (5 Terms)	33.0%	123	Very-Low (1)	127	45	A	A	A	A	A	A
Make Payment (14 Terms)	27.3%	102	Very-Low (1)	150	27	C	B	B	C	C	C
Deposit (17 Terms)	22.3%	83	Very-Low (1)	122	2	D	D	D	A	A	A
Payment Arrangements (10 Terms)	8.0%	30	Very-Low (1)	69	15	C	C	C	C	C	C
Balance Inquiry (16 Terms)	5.9%	22	Med-High (72)	25	1	A	A	A	A	A	A
Payment Locations (6 Terms)	3.5%	13	Med-High (72)	13	5	D	D	D	D	D	A
Payment Issue (4 Terms)	0.8%	3	High (85)	4	1						
Restore Service (2 Terms)	0.8%	3	Low (40)	3	0						
High Bill Complaint (1 Term)	0.3%	1	Medium (65)	1	0						
Payment Address (1 Term)	0.3%	1	High (85)	1	0						
Summary	**100.0%**	**373**		**1408**	**195**	B	B	B	B	B	B
					TP	131	87	80	59	49	30
					FP	44	26	22	18	17	8
					SFP	20	12	11	7	7	5
					PREC	75	77	78	77	74	79
Data Set Summary		**373**		**1408**	**195**						

* Summary of calls containing the selected Topic (defined in Items on Report section)

** Summary of all calls that meet the Data Set criteria (defined in Data Set Filters section)

SpeechMiner® by UTOPY

Topic Analysis - Audits executed 4/7/2011 4:35:02 AM by Libby

Calls have the following constraints:

Language: American English
Topics: (Payment Arrangements,Payment Locations,Balance Inquiry,Payment Issue,High Bill Complaint,Fees and Services Charges,Make Payment,Customer Identification,Payment Address)

Topic Analysis - Audits report

Make Payment (14 Terms)

Payment Issues

Term	Percent of Calls	Calls	Strictness	Events	Audits	1	40	50	65	72	85
name on the check	4.5%	31	Very-Low (1)	34	0						
to do a one time payment	2.9%	20	Very-Low (1)	23	13	B	B	B	B	C	C
do you authorize almat energy to take a one	2.2%	15	Very-Low (1)	15	0						
is it a visa or a master card	2.0%	14	Very-Low (1)	14	14	C	B	B	D	D	
name of the bank	2.0%	14	Very-Low (1)	16	0						
is this a checking account	1.9%	13	Very-Low (1)	14	0						
and the expiration date	1.4%	10	Very-Low (1)	10	0						
expiration please	1.0%	7	Very-Low (1)	7	0						
i'll take your routing number first	0.6%	4	Very-Low (1)	4	0						
would you like to pay by check	0.6%	4	Very-Low (1)	4	0						
and how much are you paying	0.4%	3	Very-Low (1)	3	0						
and what is that bank account number	0.4%	3	Very-Low (1)	3	0						
how would you like to make that payment	0.3%	2	Very-Low (1)	2	0						
the zip code where you receive your card	0.1%	1	Very-Low (1)	1	0						
Summary	**14.8%**	**102**		**150**	**27**	C	B	B	C	C	C
					TP	17	14	13	7	6	2
					FP	8	5	4	4	4	1
					SFP	2	1	1	1	1	1
					PREC	68	74	77	64	60	67
Data Set Summary		**690**		**1829**	**233**						

* Summary of calls containing the selected Topic (defined in Items on Report section)

** Summary of all calls that meet the Data Set criteria (defined in Data Set Filters section)

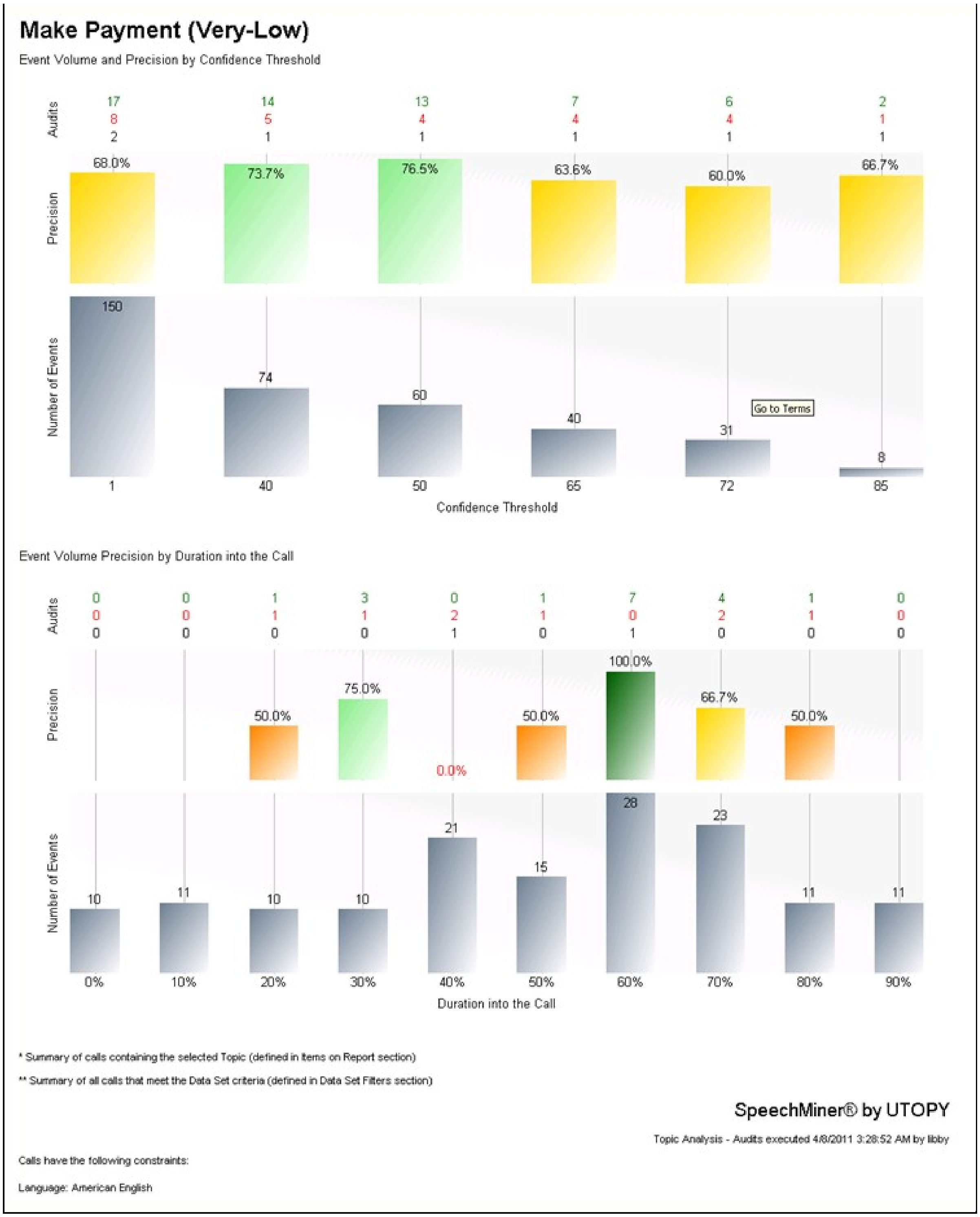
SpeechMiner® by UTOPY

Topic Analysis - Audits executed 4/8/2011 3:35:39 AM by libby

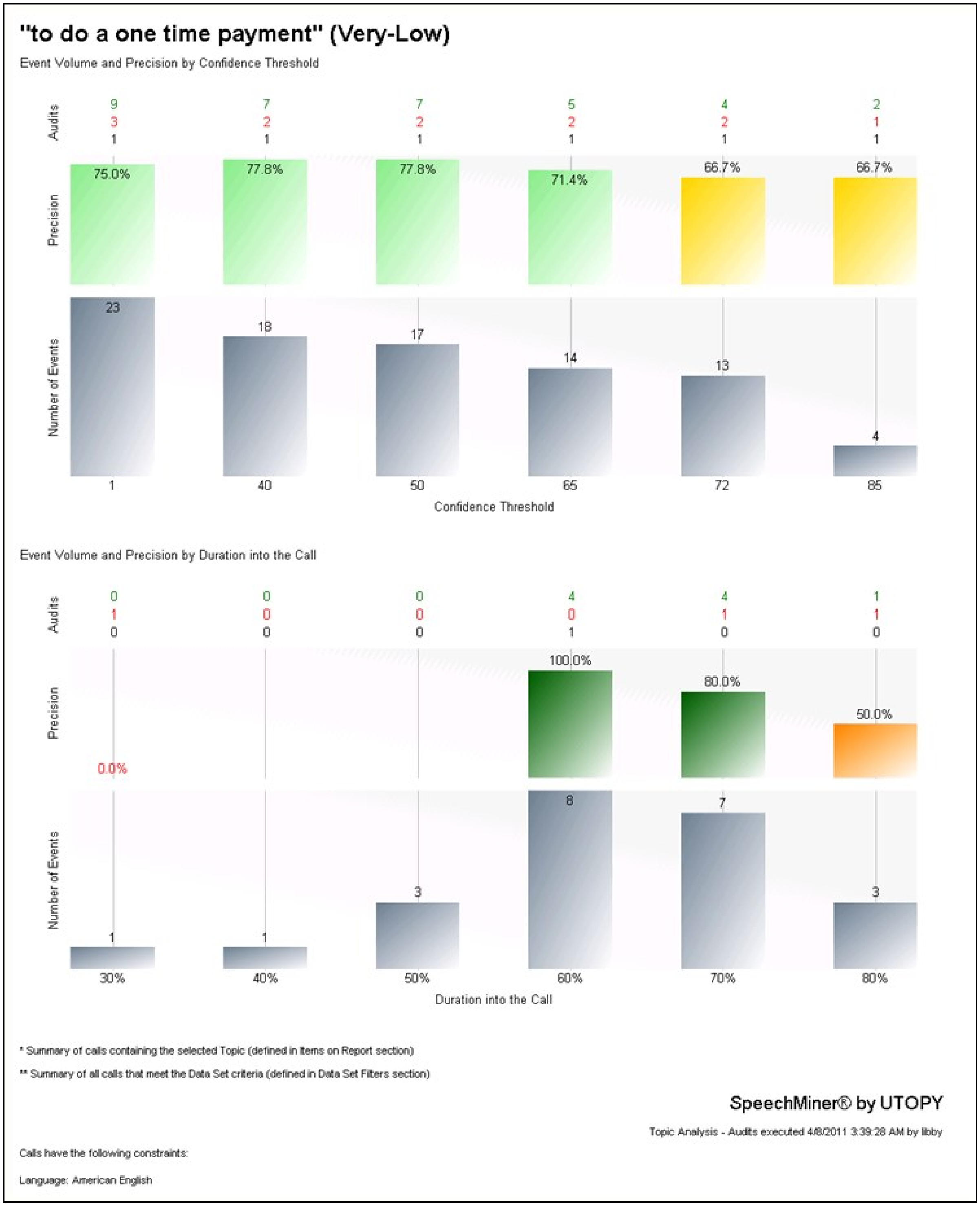
Calls have the following constraints:

Language: American English

Terms in a selected Topic



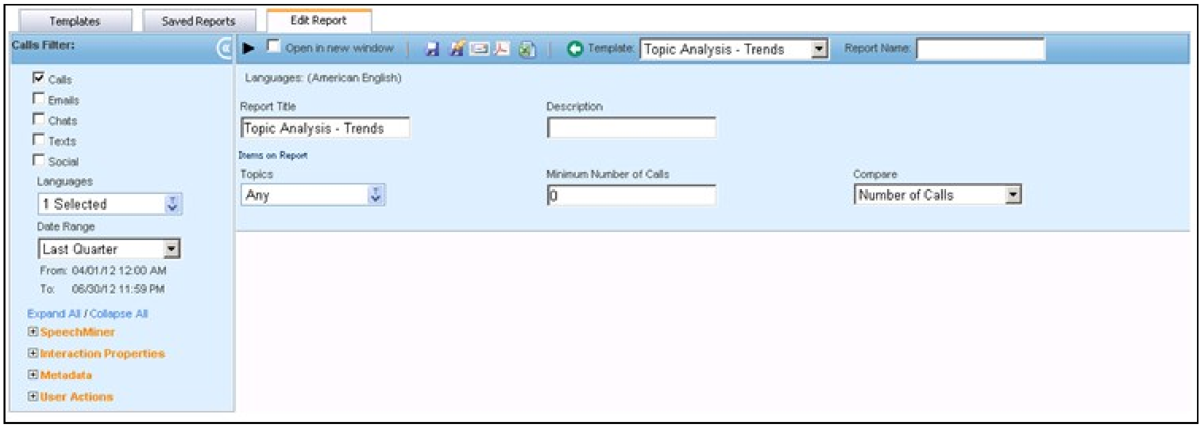
Topic Details



Term Details

Home > Appendix A: Standard Reports > Templates > Topic Analysis - Trends

Topic Analysis - Trends



Description

The Topic Analysis - Trends report is a table that compares how often particular Topics were found in the selected time period with how often they were found in the preceding time period. Each line in the table contains information for one Topic, including the percent change between the current period and the preceding period, and the number and percent of calls in each period in which the Topic was found.

The baseline time period for the report is selected in the Data Set parameters (see Common Parameters). The preceding time period is automatically set by the system based on the baseline. For example, if the baseline is a two-month period, the preceding time period used is the two months preceding that baseline period.

Common Usage

- Monitor Topic trends in calls handles by the system

Customizing the Report

General Settings

See Common Parameters.

Items on Report

- **Topics:** Choose the Topics whose audits you want to examine.
- **Minimum Number of Calls:** Type in the minimum number of calls in which a Topic must be found in order for it to be included in the results.

Actions

- Click a Topic to drill down to the trend information for each of the terms in the Topic (shown in the Sample Reports section below).
- In the list of terms for a Topic, click the name of a term in order to open a call-search window and find calls in which the term is found.

Sample Reports

Topic Analysis - Trends

			Selected (10/8/10 - 10/11/10)		Previous (10/6/10 - 10/8/10)	
Topic	**Percent Change**	**Calls**	**Percent of Calls**	**Calls**	**Percent of Calls**	**Calls**
Restore Service (2 Terms)	253.6%	2	1.1%	3	0.3%	1
Collections (4 Terms)	194.6%	3	1.8%	5	0.6%	2
Service Deactivation (8 Terms)	165.2%	5	3.2%	9	1.2%	4
Balance Inquiry (13 Terms)	155.4%	7	4.6%	13	1.8%	6
Existing Customer (4 Terms)	106.2%	9	7.5%	21	3.6%	12
Emergency (15 Terms)	27.3%	2	9.6%	27	7.6%	25
Deposit (12 Terms)	26.5%	3	15.7%	44	12.4%	41
Payment Locations (5 Terms)	17.9%	0	2.1%	6	1.8%	6
Fees and Services Charges (4 Terms)	17.9%	0	1.1%	3	0.9%	3
Last 4 digits of SS (5 Terms)	8.0%	-7	27.5%	77	25.5%	84
Customer Identification (8 Terms)	5.5%	-15	45.7%	128	43.3%	143
Explosion (3 Terms)	-5.7%	-1	1.4%	4	1.5%	5
Payment Arrangements (7 Terms)	-9.9%	-4	4.6%	13	5.2%	17
Service Activation or Transfer (36 Terms)	-20.6%	-32	23.6%	66	29.7%	98
Make Payment (13 Terms)	-28.1%	-23	12.9%	36	17.9%	59
Service and Maintenance (6 Terms)	Und.	5	1.8%	5	0.0%	0
Adjustments (1 Term)	Und.	1	0.4%	1	0.0%	0
Payment Issue (3 Terms)	Und.	2	0.7%	2	0.0%	0
Summary*	**-1.8%**	**-43**	**76.8%**	**215**	**78.2%**	**258**
Data Set Summary**		**-50**		**280**		**330**

* Summary of calls containing one or more of the selected Topics (defined in Items on Report section)

** Summary of all calls that meet the Data Set criteria (defined in Data Set Filters section)

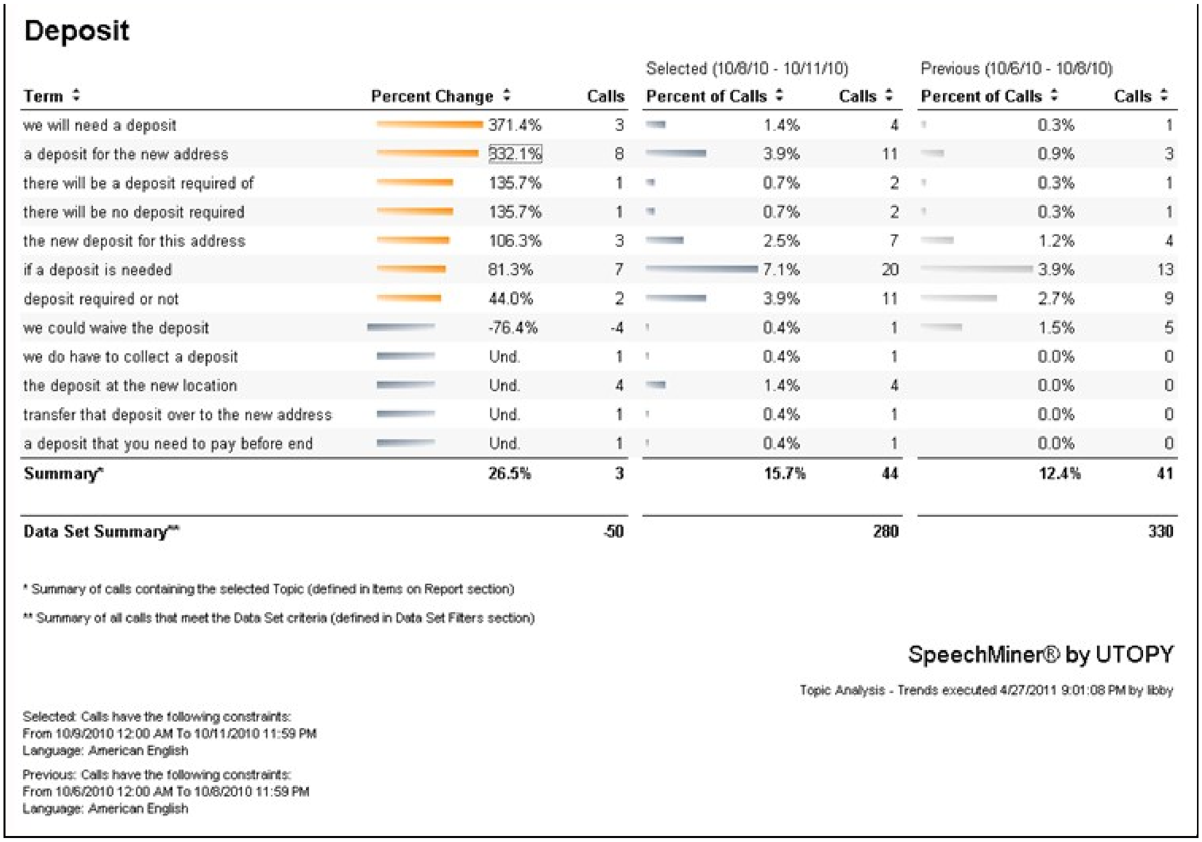
SpeechMiner® by UTOPY

Topic Analysis - Trends executed 4/27/2011 8:55:55 PM by libby

Selected: Calls have the following constraints:
From 10/9/2010 12:00 AM To 10/11/2010 11:59 PM
Language: American English

Previous: Calls have the following constraints:
From 10/6/2010 12:00 AM To 10/8/2010 11:59 PM
Language: American English

Topic Analysis - Trends report



Deposit

			Selected (10/8/10 - 10/11/10)		Previous (10/6/10 - 10/8/10)	
Term	Percent Change	Calls	Percent of Calls	Calls	Percent of Calls	Calls
we will need a deposit	371.4%	3	1.4%	4	0.3%	1
a deposit for the new address	332.1%	8	3.9%	11	0.9%	3
there will be a deposit required of	135.7%	1	0.7%	2	0.3%	1
there will be no deposit required	135.7%	1	0.7%	2	0.3%	1
the new deposit for this address	106.3%	3	2.5%	7	1.2%	4
if a deposit is needed	81.3%	7	7.1%	20	3.9%	13
deposit required or not	44.0%	2	3.9%	11	2.7%	9
we could waive the deposit	-76.4%	-4	0.4%	1	1.5%	5
we do have to collect a deposit	Und.	1	0.4%	1	0.0%	0
the deposit at the new location	Und.	4	1.4%	4	0.0%	0
transfer that deposit over to the new address	Und.	1	0.4%	1	0.0%	0
a deposit that you need to pay before end	Und.	1	0.4%	1	0.0%	0
Summary*	**26.5%**	**3**	**15.7%**	**44**	**12.4%**	**41**
Data Set Summary**		**-50**		**280**		**330**

* Summary of calls containing the selected Topic (defined in Items on Report section)

** Summary of all calls that meet the Data Set criteria (defined in Data Set Filters section)

SpeechMiner® by UTOPY

Topic Analysis - Trends executed 4/27/2011 9:01:08 PM by libby

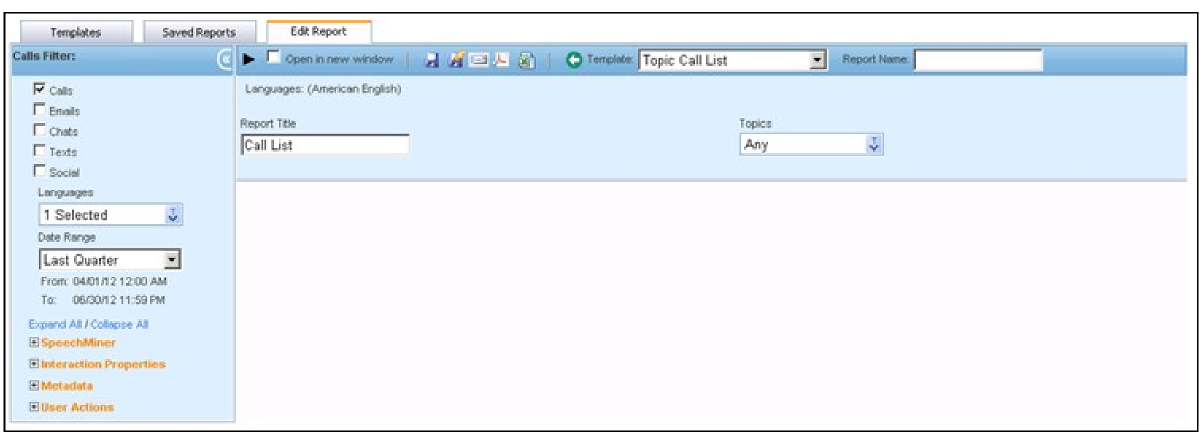
Selected: Calls have the following constraints:
From 10/9/2010 12:00 AM To 10/11/2010 11:59 PM
Language: American English

Previous: Calls have the following constraints:
From 10/6/2010 12:00 AM To 10/8/2010 11:59 PM
Language: American English

Terms in a selected Topic

Home > Appendix A: Standard Reports > Templates > Topic Call List

Topic Call List



Description

The Topic Interaction List report returns a list of calls in specific Topics based on the search parameters entered.

Common Usages

- As a drill down from First Topic Distribution

Customizing the Report

Data Set Filters

See Common Parameters.

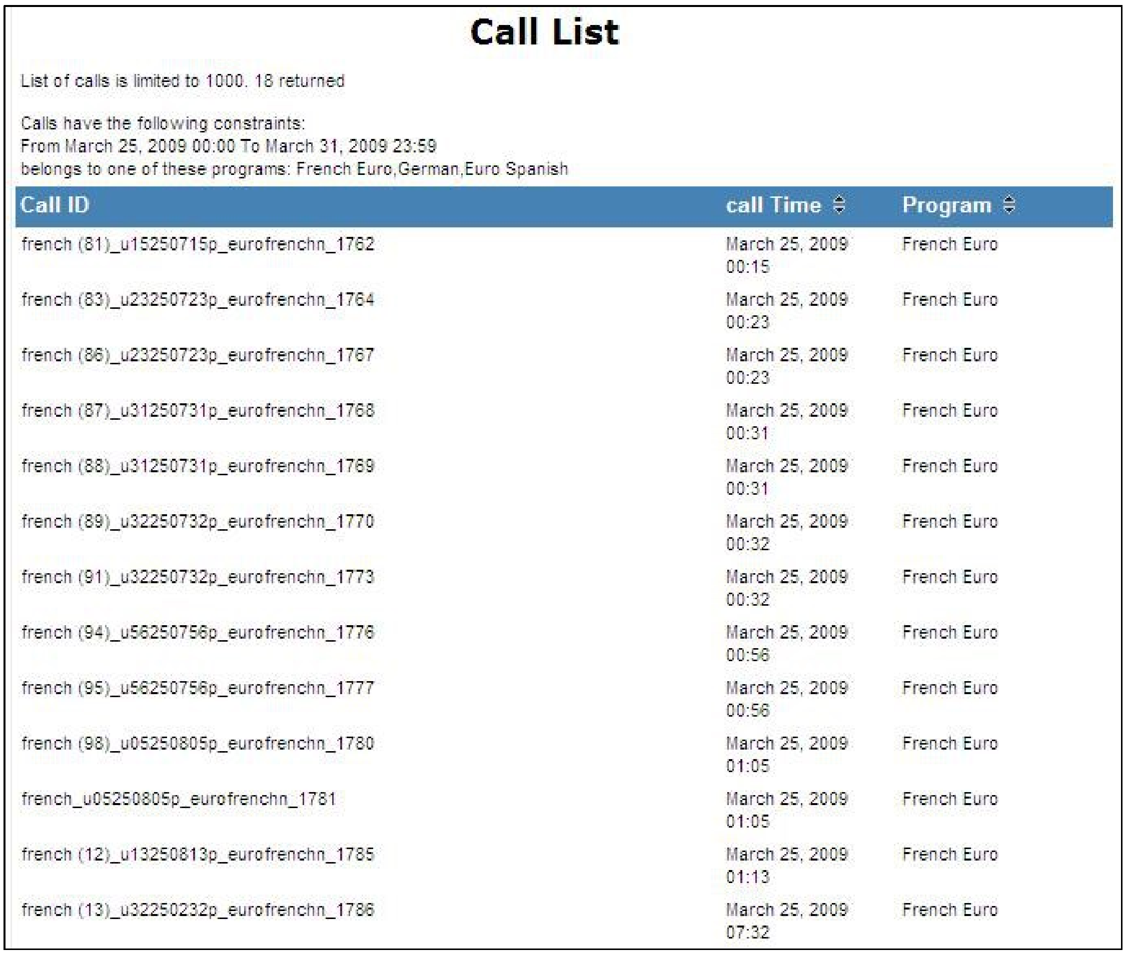
Items on Report

- **Report Title:** See Common Parameters.
- **Topics:** Select the desired Topics of calls you want displayed. The Topics must match up with the appropriate *Workgroup, Agent, Language,* and *Program* selections in the Data Set Filters.

Actions

- Click any call ID to open the Media Player and play the call.

Sample Report



Call List

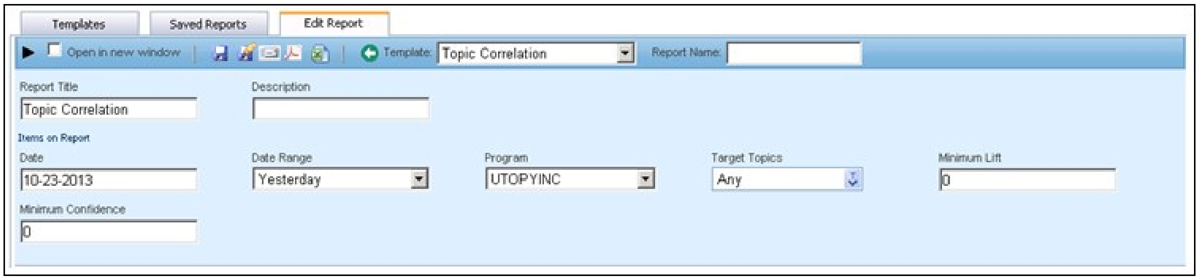
List of calls is limited to 1000. 18 returned

Calls have the following constraints:
From March 25, 2009 00:00 To March 31, 2009 23:59
belongs to one of these programs: French Euro,German,Euro Spanish

Call ID	call Time	Program
french (81)_u15250715p_eurofrenchn_1762	March 25, 2009 00:15	French Euro
french (83)_u23250723p_eurofrenchn_1764	March 25, 2009 00:23	French Euro
french (86)_u23250723p_eurofrenchn_1767	March 25, 2009 00:23	French Euro
french (87)_u31250731p_eurofrenchn_1768	March 25, 2009 00:31	French Euro
french (88)_u31250731p_eurofrenchn_1769	March 25, 2009 00:31	French Euro
french (89)_u32250732p_eurofrenchn_1770	March 25, 2009 00:32	French Euro
french (91)_u32250732p_eurofrenchn_1773	March 25, 2009 00:32	French Euro
french (94)_u56250756p_eurofrenchn_1776	March 25, 2009 00:56	French Euro
french (95)_u56250756p_eurofrenchn_1777	March 25, 2009 00:56	French Euro
french (98)_u05250805p_eurofrenchn_1780	March 25, 2009 01:05	French Euro
french_u05250805p_eurofrenchn_1781	March 25, 2009 01:05	French Euro
french (12)_u13250813p_eurofrenchn_1785	March 25, 2009 01:13	French Euro
french (13)_u32250232p_eurofrenchn_1786	March 25, 2009 07:32	French Euro

Home > Appendix A: Standard Reports > Templates > Topic Correlation

Topic Correlation



Description

The Topic Correlation report gives information about the co-occurrence of Topics. The report generates a list of association patterns by mining the set of Topic events for frequent and significant patterns of association. Each pattern of association is composed of a cause ("Left Hand Side") and a consequence ("Right Hand Side"); that is, each pattern identifies a particular Topic or sequence of Topics that seem to lead to the appearance of another specific Topic. For example, the report might include a pattern indicating that when the Topics *Transfer* and *Dispute* are found in a call, they are often followed by the Topic *Dissatisfaction*.

For each correlation in the report, statistical information is provided indicating how significant the correlation was in the data set:

- **Support:** How many times the pattern was found in the data set
- **Confidence:** The percentage from the calls in which the cause was found, in which the consequence was also found
- **Lift:** How dependent the the consequence was on the causes
- **Saliency:** The significance of the correlation - how much information is represented by the pattern of association

Common Usages

- Identifying scenarios in the flows of calls that tend to produce certain results
- Investigating the root causes of events that take place during interactions

Customizing the Report

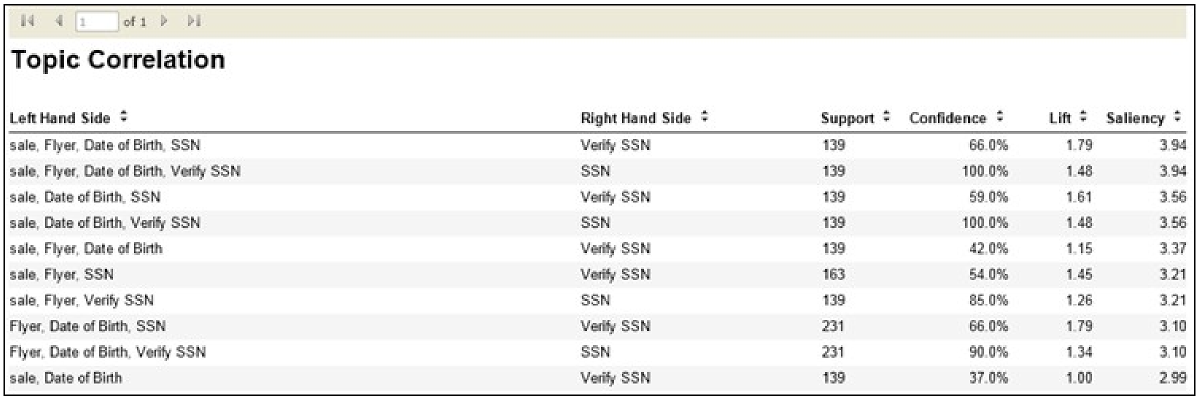
General Settings

- **Report Title:** See Common Parameters.
- **Description:** See Common Parameters.

Items on Report

- **Date:** The end-date of the **Date Range** included in the report
- **Date Range:** The time period to include in the report, relative to the date specified under **Date**
- **Program:** Select the Program to use as the data set; interactions belonging to this Program will be included in the report
- **Target Topics:** Select one or more Topics for the Right Hand Side of the report, or **Any** to include all Topics; only patterns associating Topics with the selected target Topics will be included in the report.
- **Minimum Lift:** The minimum degree of dependency that must be exhibited between the causes and affects of an association for the pattern to be included in the report. "Lift" is always greater than or equal to "0"; the higher the value, the greater the dependency.
- **Minimum Confidence:** The minimum percentage from the calls in which the cause was found, for which the consequence was also found, required for the pattern to be included in the report. Range: an integer between 0 and 100.

Sample Report



Topic Correlation

Left Hand Side	Right Hand Side	Support	Confidence	Lift	Saliency
sale, Flyer, Date of Birth, SSN	Verify SSN	139	66.0%	1.79	3.94
sale, Flyer, Date of Birth, Verify SSN	SSN	139	100.0%	1.48	3.94
sale, Date of Birth, SSN	Verify SSN	139	59.0%	1.61	3.56
sale, Date of Birth, Verify SSN	SSN	139	100.0%	1.48	3.56
sale, Flyer, Date of Birth	Verify SSN	139	42.0%	1.15	3.37
sale, Flyer, SSN	Verify SSN	163	54.0%	1.45	3.21
sale, Flyer, Verify SSN	SSN	139	85.0%	1.26	3.21
Flyer, Date of Birth, SSN	Verify SSN	231	66.0%	1.79	3.10
Flyer, Date of Birth, Verify SSN	SSN	231	90.0%	1.34	3.10
sale, Date of Birth	Verify SSN	139	37.0%	1.00	2.99

Home > Appendix A: Standard Reports > Templates > Usage Tracking

Usage Tracking

Description

The Usage Tracking report shows information about the activities of users over a selected date range.

Common Usage

- Monitor the activity of SpeechMiner users.
- Find out who performed the last system Apply in SMART
- See which calls have been listened to

Customizing the Report

- **Report Title:** See Common Parameters.
- **Description:** See Common Parameters.
- **Dates:** The same as *Date Range* in Data Set Filters (see Common Parameters).

Actions

- Click a user to drill down to a log of the user's actions (shown in the Sample Reports section below).
- In the log of user actions, 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.

Sample Reports

Usage Tracking

User Id	Last Login	Last Apply	Applies	Calls	Logins	Failed	Pages	Reports	Searches
libby	4/28/2011 3:38 AM		0	0	16	1	120	79	81
jill	4/28/2011 3:33 AM		0	0	4	5	11	14	1
administrator	4/10/2011 7:45 AM		0	0	15	0	28	64	2
harriet			0	0	0	4	0	0	0
johndoe			0	0	0	5	0	0	0
Unknown username			0	0	0	1	0	0	3
Summary			**0**	**0**	**35**	**16**	**159**	**157**	**87**

Calls have the following constraints:

SpeechMiner® by UTOPY

Usage Tracking v2 executed 4/28/2011 3:46:01 AM by libby

User Tracking report

libby

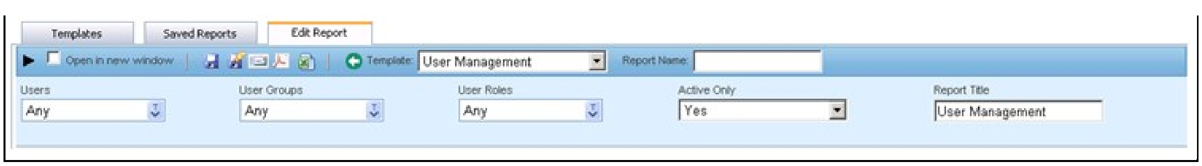
All Events | Admin | Applies | Calls | Logins | Pages | Reports | Searches

Event Time	Event	Comments
4/28/2011 4:03 AM	Report - Run	Report template name: Usage Tracking v2
4/28/2011 3:52 AM	Report - Run	Report template name: Usage Tracking v2
4/28/2011 3:52 AM	Page - View	Page title: Edit Report
4/28/2011 3:52 AM	Page - View	Page title: Edit Report
4/28/2011 3:52 AM	Page - View	Page title: Views
4/28/2011 3:52 AM	Login - OK	
4/28/2011 3:52 AM	Login - Logout	
4/28/2011 3:52 AM	Page - View	Page title: Views
4/28/2011 3:50 AM	Report - Run	Report template name: Usage Tracking v2
4/28/2011 3:50 AM	Page - View	Page title: Edit Report
4/28/2011 3:50 AM	Page - View	Page title: Edit Report
4/28/2011 3:50 AM	Page - View	Page title: Views
4/28/2011 3:50 AM	Login - OK	
4/28/2011 3:48 AM	Login - Logout	
4/28/2011 3:48 AM	Report - Run	Report template name: Usage Tracking v2
4/28/2011 3:48 AM	Page - View	Page title: Edit Report
4/28/2011 3:46 AM	Report - Run	Report template name: Usage Tracking v2
4/28/2011 3:46 AM	Report - Run	Report template name: Usage Tracking v2
4/28/2011 3:46 AM	Report - Run	Report template name: Usage Tracking v2
4/28/2011 3:46 AM	Report - Run	Report template name: Usage Tracking v2
4/28/2011 3:45 AM	Page - View	Page title: Edit Report
4/28/2011 3:44 AM	Static List - Open Link	1003

User log

Home > Appendix A: Standard Reports > Templates > User Management

User Management



Description

The User Management report is a table that displays the properties of groups and users in your SpeechMiner system.

Common Usage

- Monitor users, their roles, and the groups they belong to

Customizing the Report

The first four filters have an AND relationship, which means each filter further narrows down your choices of the users to be presented on the report. Make sure your selections are not mutually exclusive; otherwise, no results will be returned.

- **Users:** Select the users you want to appear on the report. For additional information about users, see Managing Users.
- **User Groups:** Select the user groups you want to appear on the report. For additional information about groups, see Managing Groups.
- **User Roles:** Narrow down users by selecting specific roles. For additional information about roles, see Managing Roles.
- **Active Only:** Select **Yes** to only include active users, or **No** to include all users. Note that a non-active user is a user whose account profile is marked as non-active. (It does not refer to users who are not currently using the system.)
- **Report Title:** See Common Parameters.

Sample Report

User Management

Active Users Only

Group	Partitions	Created On	Created By	Last Update
Default	/ /Shared	1/1/1970 2:00 AM		1/1/1970 2:00 AM
Chicago	/partition 2	6/1/2011 3:57 PM	libby	6/1/2011 4:04 PM
Denver	/Shared	6/1/2011 3:59 PM	libby	6/1/2011 3:59 PM

User	Groups	Roles	Created On	Last Login
administrator	Default	Administrator Event Audit SMART Power User	1/24/2007 4:13 AM	6/1/2011 3:15 PM
harriet	Default	Regular User	10/11/2010 4:36 PM	10/11/2010 4:43 PM
jill	Default	Power User Administrator Event Audit	4/28/2011 3:21 AM	4/28/2011 3:48 AM
jmiller	Chicago	Regular User	6/1/2011 4:01 PM	6/1/2011 4:05 PM
johndoe	Default	Administrator Event Audit	9/7/2010 1:35 AM	9/7/2010 1:39 AM
libby	Default	Regular User Power User Administrator SMART User Event Audit SMART Power User	8/22/2010 3:25 PM	6/1/2011 4:07 PM
libby_ps	Default	Administrator SMART PS	10/26/2010 2:32 PM	2/14/2011 9:03 PM
mfeld	Chicago	Power User	6/1/2011 4:03 PM	6/1/2011 4:03 PM

User Management executed 6/1/2011 4:07:34 PM by libby

UTOPY SpeechMiner®

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