SpeechMiner User Manual

Speech and Text Analytics 8.5.2

2/23/2015

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SpeechMiner User Manual

The SpeechMiner browser-based interface offers a variety of ways to access recorded interactions and the results of the analyses performed by the speech-analytics system on them (when one of the modes that includes Analytics is in use). Users of all modes can employ this interface to search for interactions based on their metadata, play back calls, and view the text of other interactions. Users of the speech-analytics system can also employ this interface to find interactions 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.

The SpeechMiner 8.5.2 User Manual explains how users can use the SpeechMiner browser-based interface.

For more information about on the SpeechMiner interface, refer to the topics in this guide.

About SpeechMiner

Find out about SpeechMiner:

New in this Release

This section describes the new features that were released in the 8.5.2 version of SpeechMiner.

- **New Responsive Sytle User Interface**: 8.5.2 entails a new UI design. The application will be redesigned in the upcoming version updates. In this release, the Main page, Menus, Media Player, Search pages and grids have been updated with the new design.

- **New Media Player with Video Playback Capability**: The updated media player, now supports screen recordings. When working with GIR, audio and screen recordings can now be synchronized.
- **Multiple QM Forms per Interaction**: Multiple QM form evaluations can now be attached to a single interaction.
- **Categorization Based on Spatial Relationships**: Text interactions can now be categorized based on rules such as: `found abc within X words of xyz`.
- **Wildcard Support for Text Interaction Topic Definitions**: Like Voice interaction topic definitions, Text interaction topic definitions can now utilize wildcards.
- **Recognition Improvements**: Continuous recognition improvements were made in this release based on new customer and vertical training material.

Getting Started

This section explains how to log into SpeechMiner and gives an overview of the interface.

Log In

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.

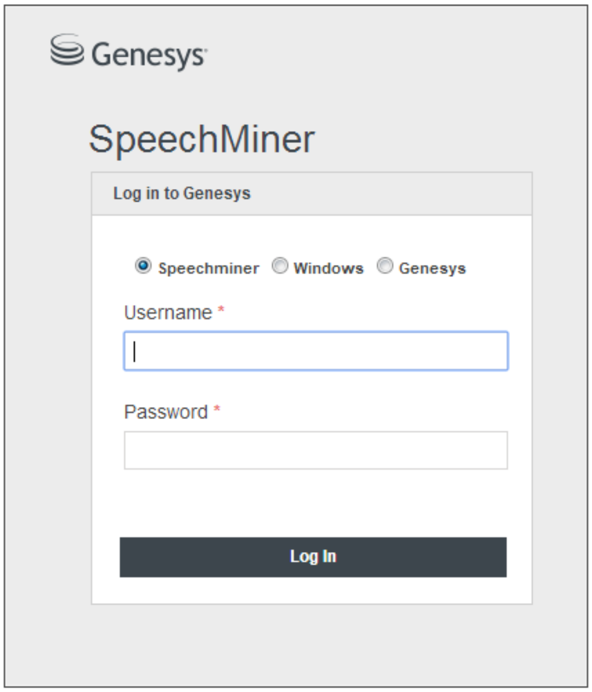
> Important
>
> You can log into SpeechMiner from any of the currently supported browsers. For an up-to-date list, consult the Release Notes of the SpeechMiner version you are using.

To log into SpeechMiner:

1. In a browser, navigate to the SpeechMiner address. The **SpeechMiner Login** page appears.

   > Important
   >
   > 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

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, or Genesys if you log into SpeechMiner using the same username and password you use to log into other Genesys products. The fields required for the selected option are displayed.

Important

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.

Important

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 will then be displayed.
If you do not have the correct SpeechMiner access permissions, refer to the Configuring Permissions section in the Administration Guide. 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.

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
Dashboard	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. **Note:** Only available in Recording UI mode if the license includes the Quality Management system.
Explore	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 > Trending	Identifying unexpected trends and problems by viewing automated analyses of the terms that were found in call transcripts and records of other interactions. **Note:** Not available in Recording UI mode.

Reports	Managing reports by selecting filter criteria, generating reports, and handling the results. **Note:** Not available in Recording UI mode.
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. **Note:** Only available if the license includes the Quality Management system.
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. **Note:** Only available if the license includes the Coaching Management system.
Tools	Access to system administration tools, including user management, Preset-View management, and system administration.
Help (?)	A drop-down 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 drop-down menu opens, select one of the options in the menu. If no drop-down menu opens, click the name of the page.

Recording UI

About Recording UI Mode

Beginning with version 8.5, SpeechMiner is available in a scaled-down version called *Recording UI* mode. In this mode, the SpeechMiner browser-based user interface is used for accessing interactions that were recorded by Genesys Interaction Recording system and then imported to the SpeechMiner database. The interface can be used to play back calls, to search for interactions based on their metadata, to manually create interaction lists, and to perform some other basic actions. In this mode, no recognition-audio processing or content analytics is performed on the calls. As a result, only a subset of the standard SpeechMiner features are available, because only the features that are relevant to the mode are supported.

In addition, a Recording UI mode license is also available that does not include the SpeechMiner Quality Management features. When this version is in use the Quality menu is not included in the interface..

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: e-mails, social interactions (such as posts on Twitter), and chats. 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, Smicon envelope.png an e-mail, and Smicon chat.png an excerpt from a chat.

> **Important**
>
> Calls that were imported from a Genesys Interaction Recording system may be divided into segments.
>
> When they are, the standard call icon ( ) is replaced by a Smicon expand.png

Dashboard

Your **Dashboard** page is your customizable home page in SpeechMiner. The **Dashboard** 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.

Two types of views can be included in your **Dashboard** page:

- **Preset Views**—views that were created by a manager or system administrator and published to your account. Preset views are only available in an Analytics environment.
- **Personal Views**—views that you created manually in your **Dashboard** page. Personal Views are identified by giving them a specific name.

Important

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 **Dashboard** 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.

Opening a View

To open a specific view select **Dashboard** from the Main Menu and click the name of the view you want to open.

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 view page, and delete existing view.

Important

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 Dashboard page as you wish. Each view can contain a different selection of widgets. For example, if you are a manager of two work groups, you may choose to create two different views, to help keep track of each work group separately. To create a new view:

1. In the **Dashboards** page, click the plus sign (+) at the end of the tabs. A new blank view opens, and its tab is labeled **New View**.
2. Modify the properties of the view; see "Renaming a View and Changing the Column Layout of a View".
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

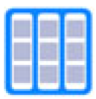
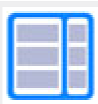
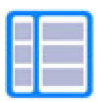
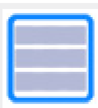
You can change the column layout of an existing view. The widgets in the view are arranged to fit into the column layout you select. The width of each widget is determined by the width of the column in which it appears. Within a given column layout, you can manually change the width of each column to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

Important

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:

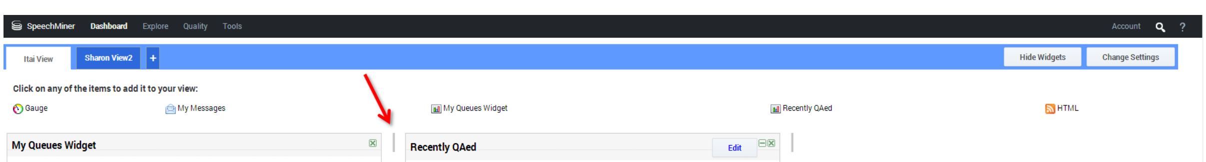
1. On the right side of the screen, click **Change Settings**. The setting options appear on the screen.
2. Under **Change Columns**, click the desired layout, as follows:

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 your mouse on the top corner of the tab. The mouse pointer changes to plus.
2. Drag the tab to its new location. Additional tabs move accordingly.
3. When the tab 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 Dashboard 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.

Managing Widgets

Widgets are small applications that can be included in a view in the **Dashboard** 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 (Drill down)
- My Messages
- My Queues Widget
- 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.

Important

Only the My Queues, and Recently QAed widgets are available in the Recording UI mode.

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:
    - Report Widget
    - My Messages 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.

The Widgets

The following sections describe the widgets.

Report

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

Dashboard page because they require less space on your screen, but you can select reports of any size.

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 interaction 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:

Settings	Description
Height	The height of the widget, in pixels.
Refresh Rate	How often the data in the report should be refreshed, in minutes.
Report Description	Enter a description of the report you want to create.
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.

> **Important**
>
> 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.
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.

> **Important**
>
> 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.

> Important
>
> To return to the **Dashboard** page, use your browser's **Back** button.

My Messages

My Messages Widget

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

> Important
>
> Coaching session is not available in the Recording UI mode.

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

Message Type	Description
Call	A message containing a link to a recorded interaction. This type of message is sent by other users. Click the link to play the interaction. When you click the play icon, the player is opened in a pop up window.

	Note: This type of message is sent when a user forwards an interaction 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.

Important

The number of messages that can be displayed in a page depends on the height of the widget.

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.
   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.

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

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.

Managing Actions

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.

Create a New Action Item

Creating a New Action Item

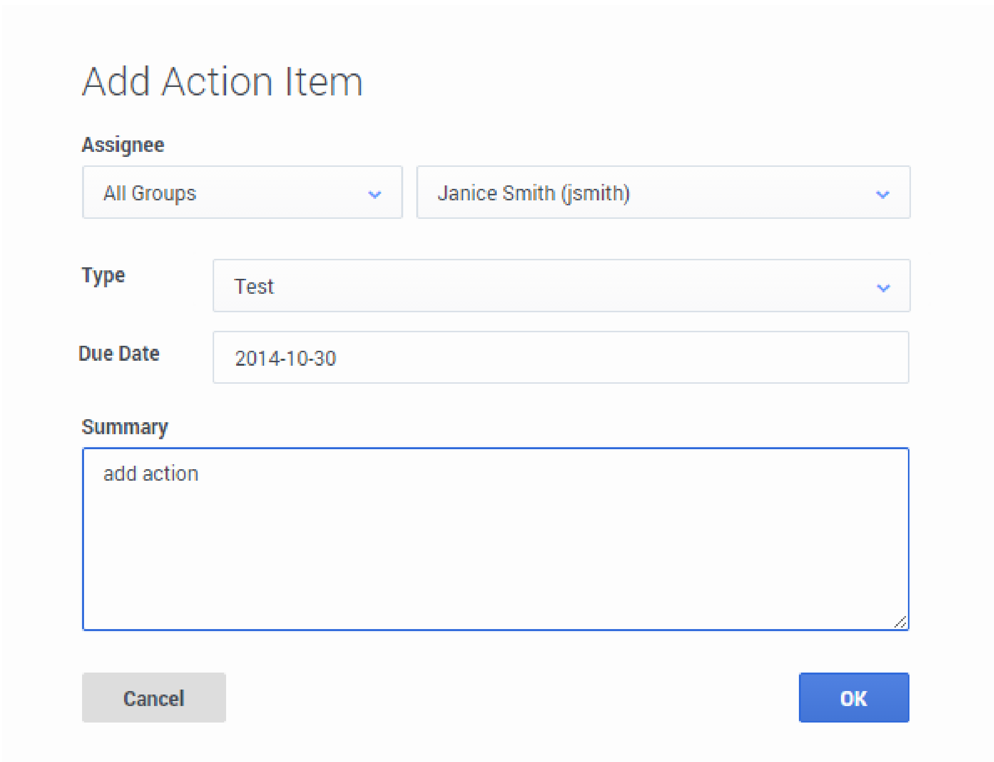
You can create new Action Items as required, and assign them to the appropriate person. If you wish, you can assign Action Items to yourself, to help you keep track of your own tasks.

Important

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 Item**. The **Action Item** dialog box opens.



2. Fill in the fields as follows:

Field	Description
Assignee	Select the assignee from the Assignee drop down lists.
Type	Select the type of Action Item.
Due Date	Select the due date by which you want the assignee to perform the task.

Summary	Type a description of the Action Item.

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

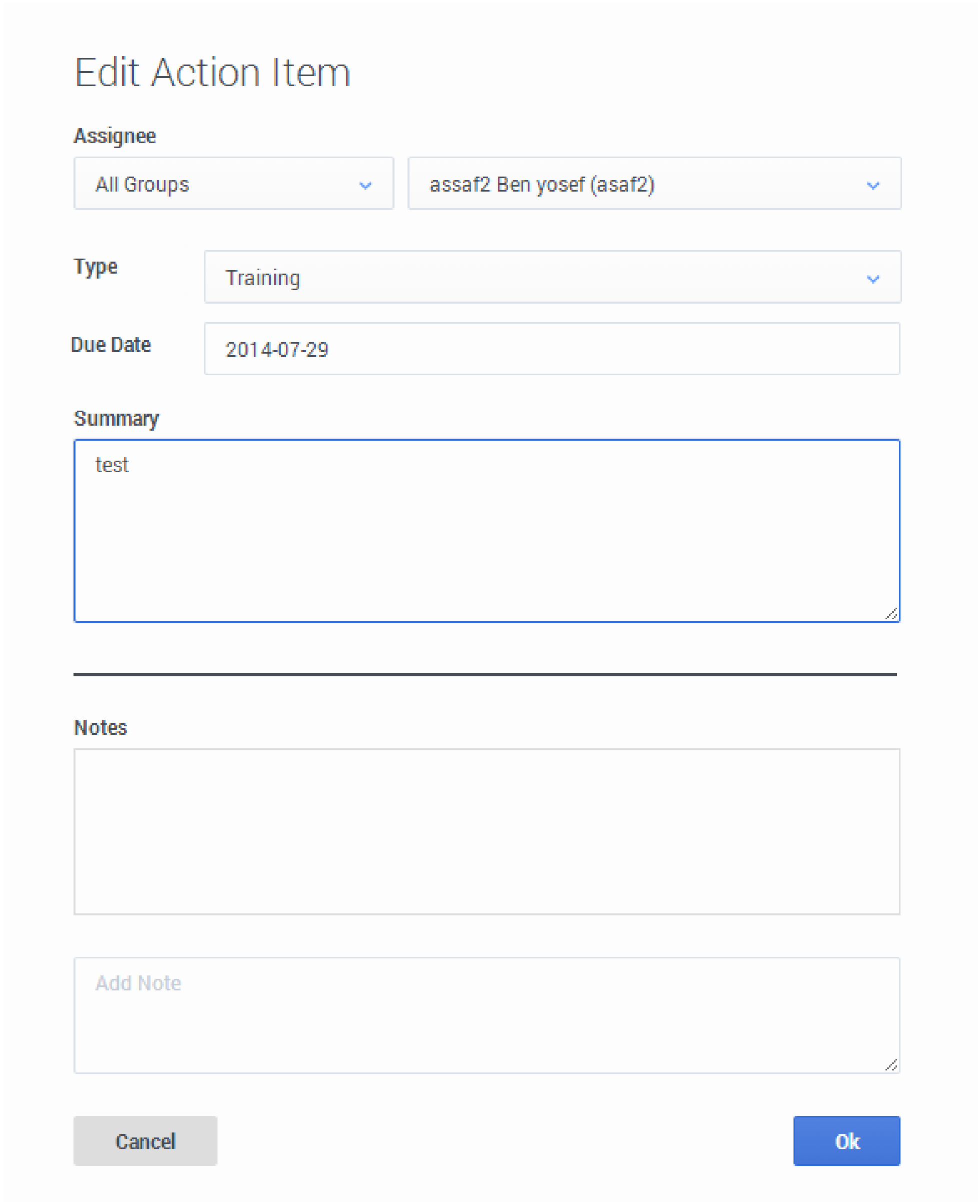
Edit

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 **Edit Action Item** dialog box opens.



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

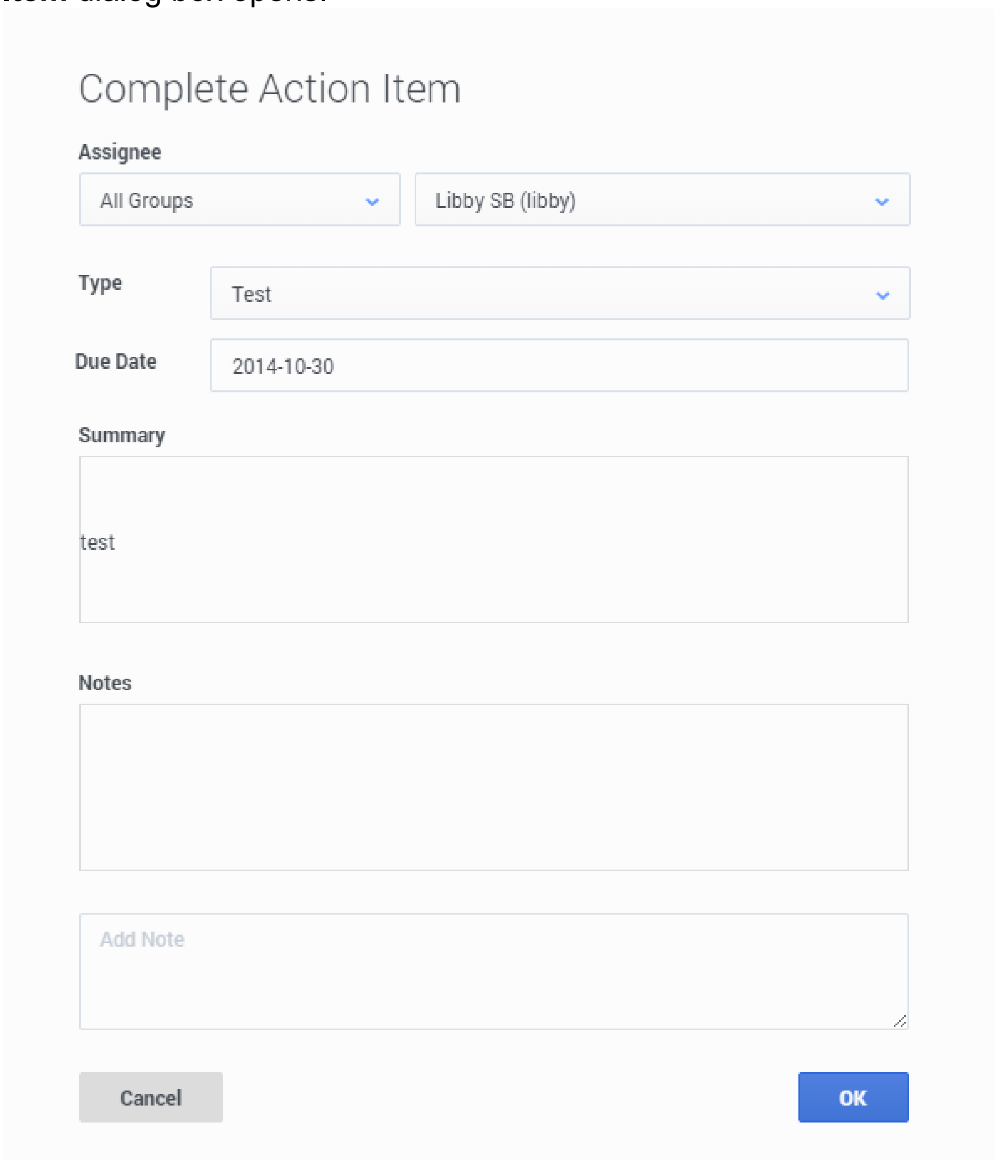
Change to Complete

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 **Complete Action Item** dialog box opens.



2. If you want to add a note to the Action Item, under **Notes**, type the note.
3. Click **OK**. 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.

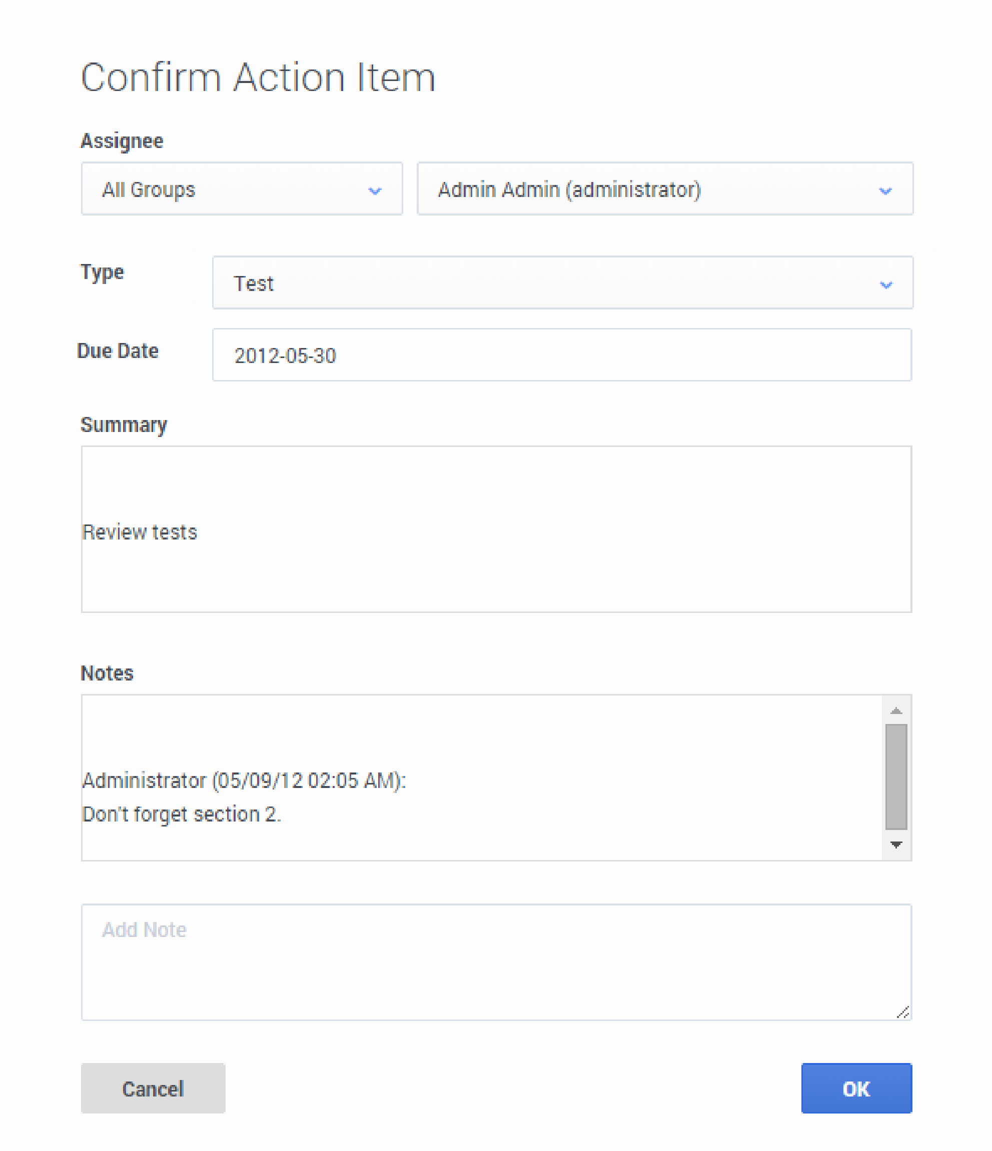
Confirm

Confirming 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 **Confirm Action Item** dialog box opens.



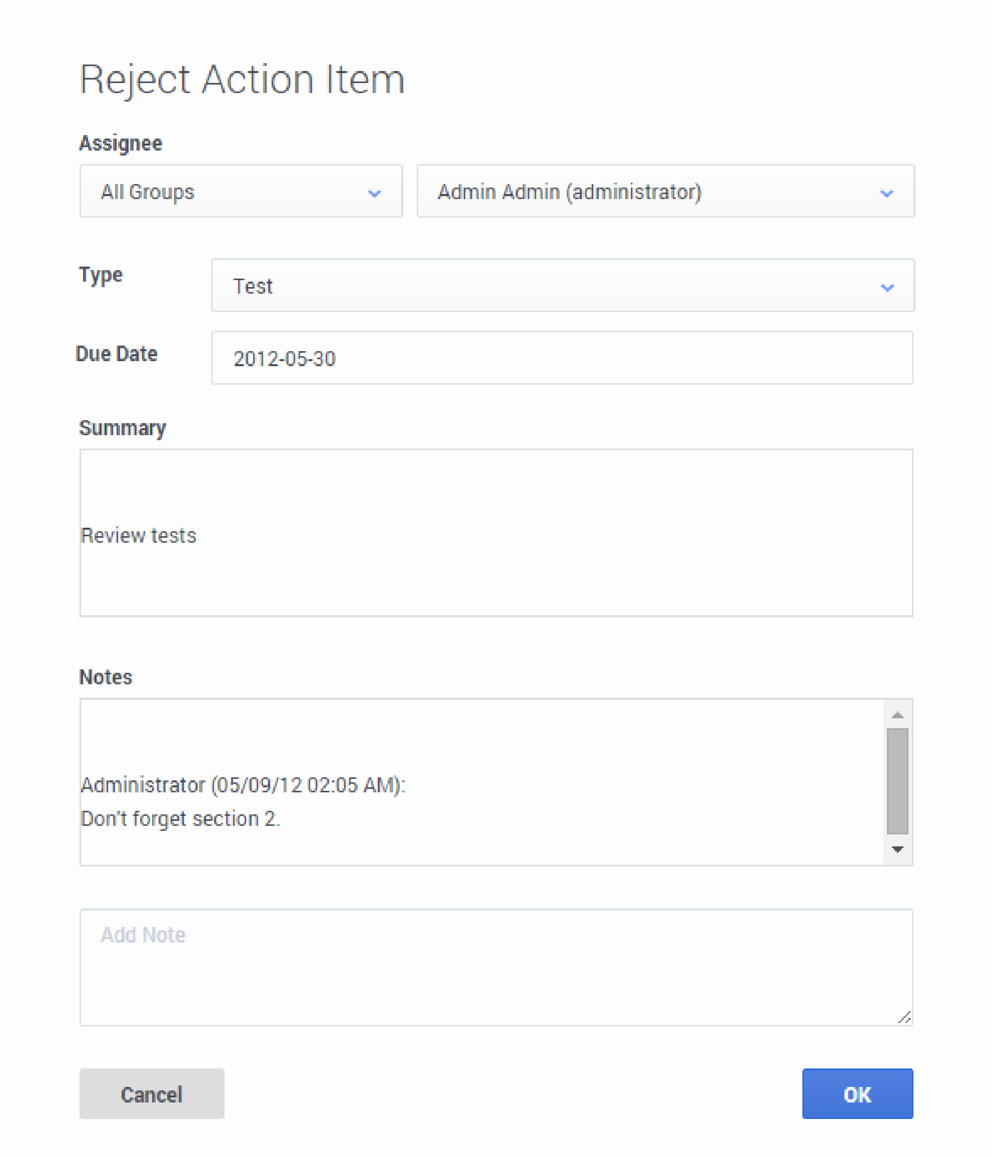
2. If you want to add a note to the Action Item, under **Notes**, type the note.
3. Click **OK**. The dialog box closes. The Action Item is closed and removed from the list of Action Items.

Reject

Rejecting a Completed Action Item

To reject a completed Action Item:

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



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

Viewing List

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.

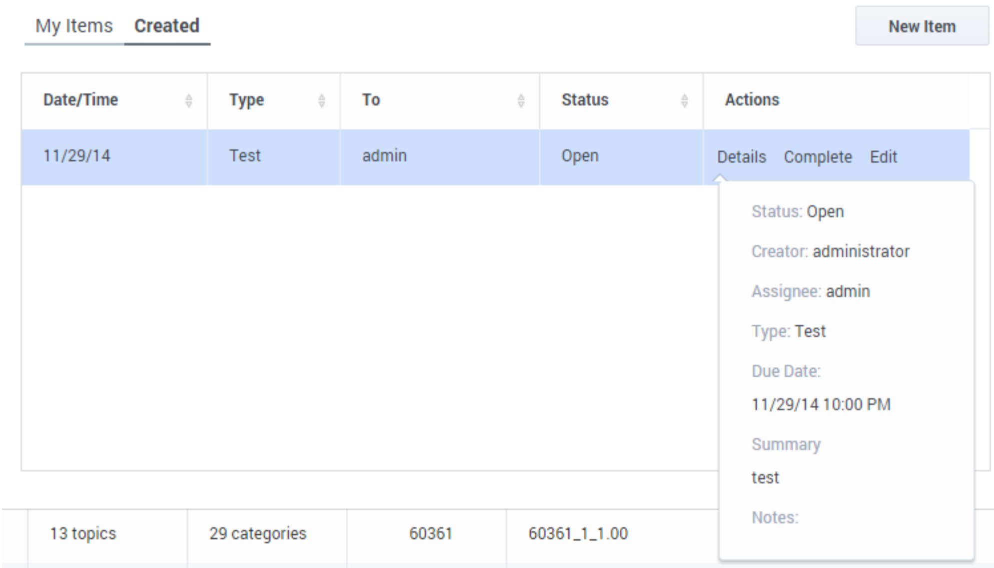
Viewing Details

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.


My Items
Created
New Item
Date/Time
Type
To
Status
Actions
11/29/14
Test
admin
Open
Details
Complete
Edit
Status: Open
Creator: administrator
Assignee: admin
Type: Test
Due Date:
11/29/14 10:00 PM
Summary
test
Notes:
13 topics
29 categories
60361
60361_1_1.00

Explore

The Explore 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:

- **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.
- **Content 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.

Important

The Browsing feature is not available in the Recording UI mode.

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.

Search Results Grid

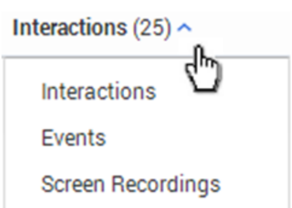
Search results are generated by SpeechMiner when you do one of the following:

- Select **Explore > New Search**. A list appears based on your filter configuration. When you first access Explore > New Search the list that appears includes all the interactions in the system.
- Select **Explore > Saved Searches** and click Run associated with the search for which you want to view a list of interactions.
- Select **Explore > Content Browser** and click a line in the tree structure

The Search Results grid contains detailed information about each interaction.

You can modify the display to suit your requirements by selecting the type of interactions to view and the columns you want to include in the grid.

From the following menu above the Search Results list, you can select to view:



- **Interactions**: A search result list that contains all interaction types.
- **Events**: A search results list that only contains events.
- **Screen Recordings**: A search results list that only contains screen recordings (not interactions).

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 added 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.

For information about how to view and listen to the different types of interactions, refer to the Media Player page.

Grid Columns

Search Results Grid Columns

The following columns can be displayed in the Search Results grid. The availability of each column depends on the type of search results list you selected to view:

Column	Description	Available in:
Agent	The agent who handled the interaction.	• Interactions • Screen Recordings • Events
Audit Time	The time at which the event was audited.	• Events
Auditor	The name of the auditor.	• Events
Bcc	Individuals to which the email interaction was sent to secretly.	• Interactions • Events
Cc	Individuals to which the email interaction was sent to as a copy.	• Interactions • Events
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.	• Interactions
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.	• Events
Date/Time	The start date and time (in `hours:minutes`) of the interaction.	• Interactions • Events
Duration	The duration of the interaction, in hours:minutes:seconds	• Interactions

		• Screen Recordings
End Time	The end time of the Event, offset from the start of the call, in `hours:minutes:seconds`.	• Events
External ID	A unique number assigned to the interaction by the external recording or storage system.	• Interactions • Events
ID	A unique number assigned to the interaction in the SpeechMiner database.	• Interactions • Screen Recordings • Events
Media	The type of interaction found. For example, call, email, video, etc.	• Interactions • Screen Recordings
Open	A **Play** icon. Clicking the button opens the call in the Media Player.	• Interactions • Screen Recordings • Events
Program	The program that was used by SpeechMiner to analyze the interaction.	• Interactions • Events
Receiver	The name of the individual(s) to whom the email interaction was sent.	• Interactions • Events
Segment ID	The segment of the audio interaction associated with the event. Segment ID is only available in a Recording UI environment and a Recording + Analytics environment.	• Events
Sender	The name of the individual who sent the email interaction.	• Interactions • Events
Size	The size of the video file.	• Screen Recordings
Start Time	• The start time of the event within the interaction or segment in `hours:minutes:seconds`. • The start time of the screen recording in `date:hours:minutes:seconds`.	• Events • Screen Recordings
Stop Time	• The end time of the event within the interaction or segment in `hours:minutes:seconds`. • The end time of the screen recording in `date:hours:minutes:seconds`.	• Events • Screen Recordings

Subject	The subject of the email interaction.	• Text Interactions • Events
Term ID	The ID number of the term that was identified in the Topic.	• Events
Text	• Interaction grid: 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 grids that contain search results from searches that included terms. • Event grid: represents the phrase that SpeechMiner recognized.	• Interactions • Events
Topic	• Interaction grid: the topic or topics SpeechMiner identified in the interaction. If only one topic is 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 topics. • Event grid: the topic associated with the event.	• Interactions • Events
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 red • **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.	• Events

Type	The video format.	• Screen Recordings
Workgroup	The workgroup of the agent who handled the interaction.	• Interactions

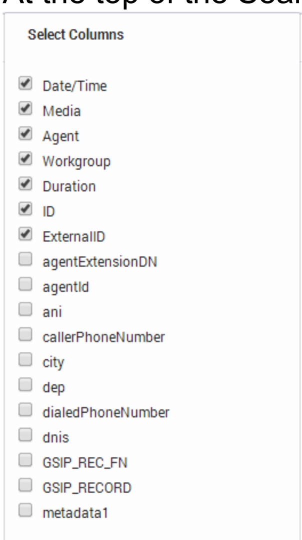
Working with the Search Results Grid

Common Grid Procedures

The following sections represent four common grid procedures.

Select Grid Columns

1. At the top of the Search Results grid, click **Select Columns**.



2. Select the columns you want to display and clear those you do not want display.
3. Click **Select Columns** to close the list.
   The list closes, and the columns are displayed in accordance with your choices.

Viewing 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. Hover over the summary to 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.

Playback an Interaction

To open an interaction click the play icon next to the interaction you want to playback. 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 the interaction is not an audio call, the transcript of the interaction is opened.

Opening a Segmented Call

Calls that were imported from the Genesys Interaction Recording system may be divided into segments. When this is the case, a appears instead of a Smicon arrow.png

To open a segmented call:

1. Click in the row associated with the call you want to open.

   The call row is expanded, and a list of the call's segments is displayed in it. Each segment is identified with a icon. In addition, the Media Player opens above the grid, and the first segment of the call automatically begins to play. Playback stops when the end of the segment is reached.

2. To play another segment of the same call, click its **Play** icon.

Events

Working with the Event Search Results Grid

An event occurs when SpeechMiner identifies a topic in an interaction. Each topic event identified by SpeechMiner has a start time, end time,a name and a type. For example, if the "can offer you a loan" phrase associated with the Loan Offer topic is identified, the start of the event is "can" and the end of the event is "loan". SpeechMiner can also identify non-linguistic events. Non-linguistic events are sounds other than speech (for example, a dial tone, silence, music or noise, key press, and so on).

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

- The items in the list represent events and not complete interactions. For this reason, the same interaction may appear more than once in the grid, if events matching the search filter criteria are found multiple times in the same or different interaction.
- When you play back an event from the grid, the entire interaction in which the event was found is opened in the Media Player, but playback begins at the beginning of the specific event.
- Events can be audited.

Important

When you search for events you must search for a term, term ID or a topic

Auditing an Event

Each linguistic event recognized in an audio interaction 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.

Screen Recordings

Working with the Screen Recordings Search Results Grid

The Search Results grid contains a list of all the screen recordings in the system.

Each screen recording is a video of the agent's screen during the agent/customer interaction.

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

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

To view a specific screen recording in the context of the interaction it was recorded, switch to the Interactions list and search for the interaction ID associated with the specific screen recording. The interaction ID appears in the ID column of the Screen Recordings Search Results grid.

Batch Actions

Working with Batch Actions

From the Search Results grid you can perform a number of batch actions for selected interactions.
The following sections represent the available batch actions.

Exporting Interactions

You can export and save selected audio interactions by creating a zip file that contains the selected interactions.
The zip file contains the following:

- A CSV file containing a list of the audio interactions that were exported. The file also contains the search results grid data associated with each interaction. The CSV file can be opened using a spreadsheet application (for example, Microsoft Excel).
- A WAV file for each audio interaction included in the list (optional).

To export an audio interaction(s):

1. Select the check box to the left of each audio interaction you want to export.

   Important

   If you select to export a text interaction(s), a text file is created. The text file includes the content of the selected interaction(s).

2. In the title of the check box column click the **Batch Actions** icon and select **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 **Save** and navigate to the folder in which you want to save the file.
5. Click **Save**.
   The .zip file is saved in the selected location.

Forwarding Links

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

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 interaction. If the recipient is not logged into SpeechMiner, the user is prompted to do so before the Media Player opens.

To forward an audio interaction to another user:

1. Select the check box to the left of each audio interaction you want to forward.
2. In the title of the check box column click the **Batch Actions** icon and select **Forward**.
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 recipient's name or username. As you type, names and user names containing those letters are displayed in a drop down 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 work group.
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 message is sent to the recipient's My Messages box for each audio interaction you selected. If you chose to send the user an e-mail notification, an e-mail is also sent for each audio interaction.

Adding Audio Interactions to an Interaction List or a Coaching Session Interaction List

An **Interaction List** is a list of audio interactions that is saved for later use.

SpeechMiner supports two types of Interaction Lists:

- **Global Interaction Lists**: a group of interactions. For additional information about interactions lists, see Interaction Lists.
- **Coaching-Session Interaction Lists**: a group of interactions associated with a specific Coaching Session. For additional information about coaching sessions, see Coaching.

When working with interaction lists:

- You can add interactions to an existing interaction list or a new interaction list.

- You can select an existing interaction list from a list of Global interaction lists or select a Coaching Session interaction list from those that are attached to the Coaching Session.
- You can add a new Coaching Session directly from the Interaction Grid, and then add interactions to a interaction list that is attached to that session.

Add interactions to an Existing Global Interaction List

1. Select the check box to the left of each audio interaction you want to include in the interaction list.
2. In the title of the check box column click the **Batch Actions** icon
3. Select **Add To**.
4. Select **Call List**.
5. Select the list to which you want to add the selected interactions.
6. Click **Add**.

   The selected interactions are added to the selected list.

   For more information about creating a new list or adding to an existing list, refer to: Interaction Lists.

Add interactions to an Existing Coaching Session

1. Select the check box to the left of each audio interaction you want to include in the interaction list.
2. In the title of the check box column click the **Batch Actions** icon
3. Select **Add To**.
4. Select **Coaching Session**.
5. Select the coaching session to which you want to add the selected interactions.
6. Click **Add**.

   The selected interactions are added to the selected coaching session.

   For more information about creating a new coaching session or adding to an existing coaching session, refer to: coaching.

Reprocessing Interactions

Reprocessing enables you to reapply the SpeechMiner recognition process on selected interactions. This procedure is helpful when you know that topic definitions have changed.

To reprocess an interaction(s):

1. Select the check box to the left of each interaction you want to reprocess.
2. In the title of the check box column click the **Batch Actions** icon and select **Reprocess Call**.
3. Click **Yes** when asked if you are sure you want to reprocess interactions
   The selected interactions are reprocessed.

> Important
>
> Reprocessing interactions is only available in an Analytics Only environment.

Delete an Interaction

You can delete any interaction in the Search Results grid if you have the permissions to do so.

To delete an interaction(s):

1. Select the check box to the left of each interaction you want to delete.
2. In the title of the check box column click the **Batch Actions** icon and select **Delete**.
3. Click **Yes** when asked if you are sure you want to delete the selected interactions
   The selected interactions are deleted.

Searching for Interactions

This section explains how to search for interactions, events or screen recordings by specifying their parameters.

To perform a search, you use filters to specify which types of interactions, events or screen recordings 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.

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

Important

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

Create a New Search

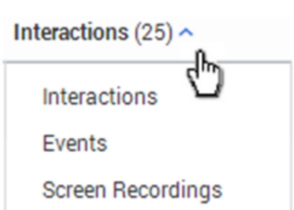
Create a New Search

1. In the Main Menu, under **Explore**, select **New Search**.

   A list of interactions associated with your previous search appears.

2. In the left corner of the screen select the type of interactions you want to view and search for (as shown in the following image).

   The interaction list is automatically updated with your selection.



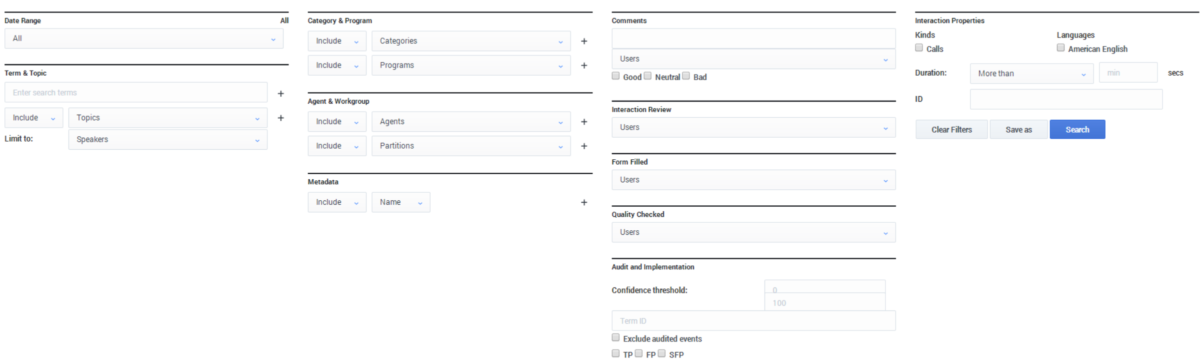
Important

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

3. Click **Search Filters** .

   The search filter window is opened.

   If you selected to view and search for Events the following filter window is automatically opened.



4. Configure the filter options in accordance with the interactions you want to find
5. Click one of the following:
   - **Search**: update the current search results according to the new filter configuration.
   - **Save**: save the changes you made as a new Saved Search. You can run the saved search at a later time..
   - **Clear Filters**: clear the current filer configuration.

Sorting Method

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

Important

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. 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.

Related Searches

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 "account," the list of results includes interactions in which "account" 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 "confirming" is related to "account" in this way, and suggests performing a search for interactions in which both "account" and "confirming" appear.

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

To run a related search:

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

Spelling Corrections

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.

To repeat the search with the original terms you typed:

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

Active Search

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 occurrences 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.

Important

Active Search is not available in Recording UI-mode or Analytics and Recording UI-mode systems.

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.

   Important

   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.

   Important

   You can see the status of the Active Search as it runs in the Saved Search screen.

Open the Filter Panel

Hiding the Filter Panel

To specify search criteria and run a search you must open the Filter panel and change the relevant options.

To open the Filter Panel:

- In the upper-right corner of the Interaction Grid, click .

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 displayed at the top of the Interaction Grid. As you configure the search filter and 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 permalinks, or as a queue.

Important

- 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.
- Some of the filter options described below are not available in Recording UI mode.

Filter Groups

Filter Groups

The filters in the Filter Panel are divided into groups. The following groups of filters are available:

Filter Group	Description
Date Range	Filter for interactions according to a specific date range.
Term & Topic	Filter for interactions according to a specific term, topic and/or speaker.
Category & Program	Filter the Categories and Programs of calls, and/or the Topics and terms that must be found in them.
Agent & Workgroup	Filter for interactions according to specific agents and work groups.
Metadata	Filters for selecting metadata values.
Comments	Filters for finding calls that have user comments, were played back by users, about which forms were filled out, or quality checking was performed.
Interaction Review	Filter for interactions that were played/opened by specific a user(s).
Form Filled	Filter interactions according to users users who filled in a feedback form about a call.
Quality Checked	Filter interactions according users who checked the quality of a call.
Audit and Implementation	Filter for Events based on their confidence ratings and auditing results. **Note:** This group only appears if the `Events` grid type is selected.
Interaction Properties	Filter interactions according to the type of interaction, the interaction language, duration and ID.

Multi-Select Boxes

Using Multi-Select Boxes

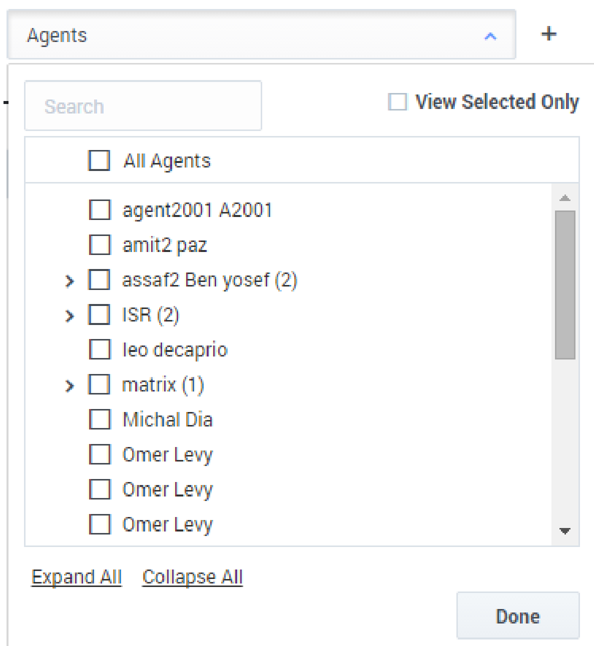
Many of the filters allow you to select more than one item. For example, you can select three categories to include in your search.

Important

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—Used for all multiple-selection tasks except the selection of agents and workgroups.
- Agent Multi-Select boxes—Used to make selecting agents simple and efficient.

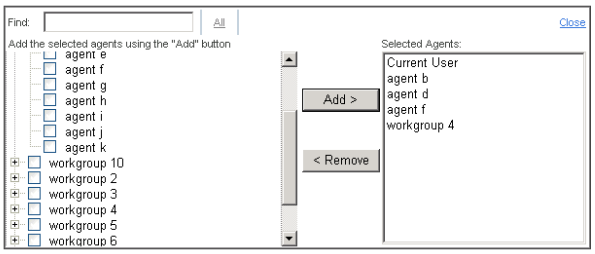


To select items for a field using a Standard Multi-Select box:

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.

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.



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

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.
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

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.

Available Filters

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
Types	Select the types of interactions to include in the search. **Note:** This set of filters is not displayed if your system only includes calls.
Language	Select the language or languages of the calls you want to include in the search. **Notes:**

	• 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. • 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. **Notes:** • 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. • This filter is not available in Recording UI-mode or in Analytics and Recording UI-mode, because Active Search is not supported in these modes.

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.
Term & Topic	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.
Duration	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.
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 (for example, "Detroit"), a decimal number (for example, "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:

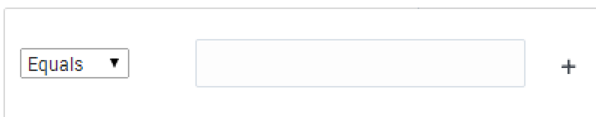
1. Select to **Include/Exclude** the metadata.

   > Important
   >
   > If you only want to specify that the calls must have values for the specified type of metadata,

> but any value is acceptable, you only have to select the name of the metadata type; you do not have to perform any of the steps below.

2. Select the type of metadata from the list provided.
3. Click **Values** to configure the metadata.

   A field appears depending on the metadata you selected to add. For example, the following field appears when you select to add a name metadata:



4. In the first field, select **Equals** 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**, an additional field is added to the box.

> Important
>
> 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 outside the box to close the box.
7. To convert the condition into a negative condition (for example, to exclude calls with the specified metadata values from the data set), in the **Filter** panel, add **Not** to the left of the condition.
8. 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.
9. 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
Comments: • Text: The 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. • 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.	
Playback	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	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	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. **Notes:** • This field only appears if you have Event Audit permissions. • 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.

Queries

Working with Queries

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.

> Important
>
> 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

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. In 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.

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.

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 Text Mode

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 Filters

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.

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

> **Important**
>
> 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.

> **Important**
>
> 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 Filters

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:

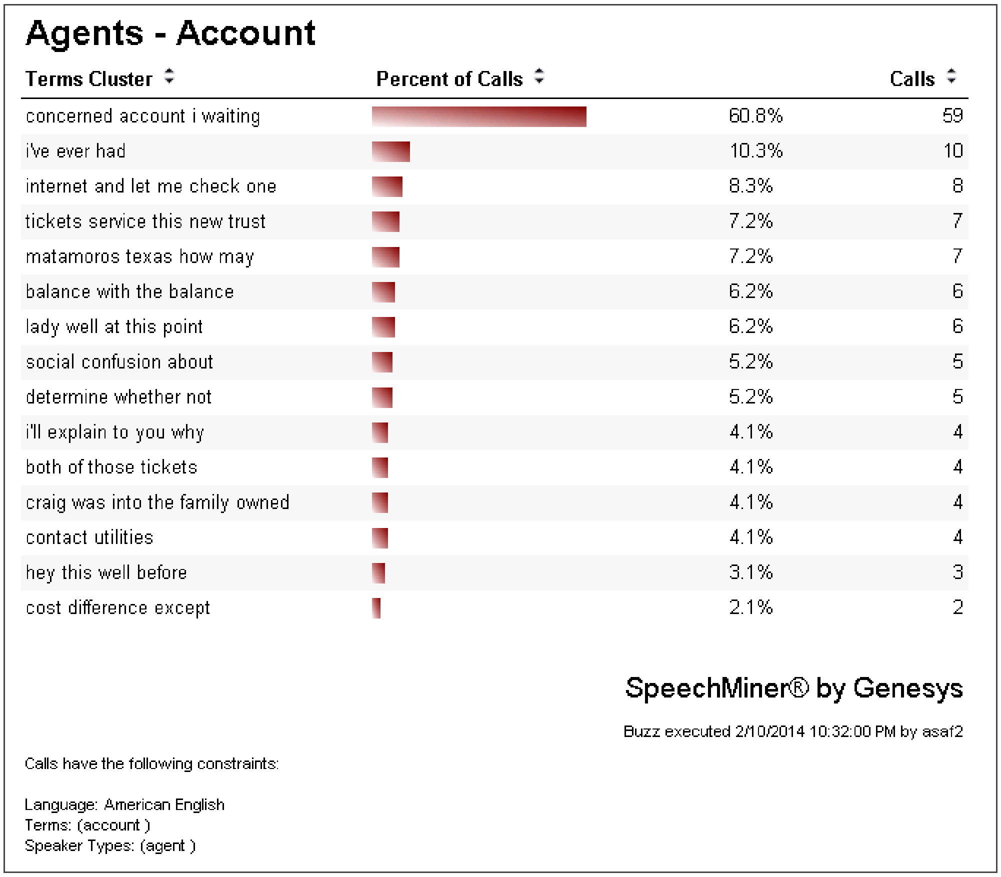
1. At the top of the Filter Panel, click **Clear Filters**. You are prompted to confirm that you want to delete all of the currently defined filters (including those that are not currently visible).
2. Click **Yes**. The filters are cleared.

Exploring Terms with a Custom Data Set

Important

This feature is not available in Recording UI mode.

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 **Explore** 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.



Agents - Account

Terms Cluster	Percent of Calls		Calls
concerned account i waiting		60.8%	59
i've ever had		10.3%	10
internet and let me check one		8.3%	8
tickets service this new trust		7.2%	7
matamoros texas how may		7.2%	7
balance with the balance		6.2%	6
lady well at this point		6.2%	6
social confusion about		5.2%	5
determine whether not		5.2%	5
i'll explain to you why		4.1%	4
both of those tickets		4.1%	4
craig was into the family owned		4.1%	4
contact utilities		4.1%	4
hey this well before		3.1%	3
cost difference except		2.1%	2

SpeechMiner® by Genesys

Buzz executed 2/10/2014 10:32:00 PM by asaf2

Calls have the following constraints:

Language: American English
Terms: (account)
Speaker Types: (agent)

When you initiate the exploration process in the **Explore** 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.

Important

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 **Explore** page, select **New Search**.
2. Click and open the Filter Panel to define the data set you want to use for the exploration. See: Defining Search Criteria. Be sure to select a single language, and only the Calls interaction type.
3. Click **More** and select **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.

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 **Explore > 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.

The Columns

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.
Run	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.

Name	The name of the search.
Creator	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 **Share** 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.

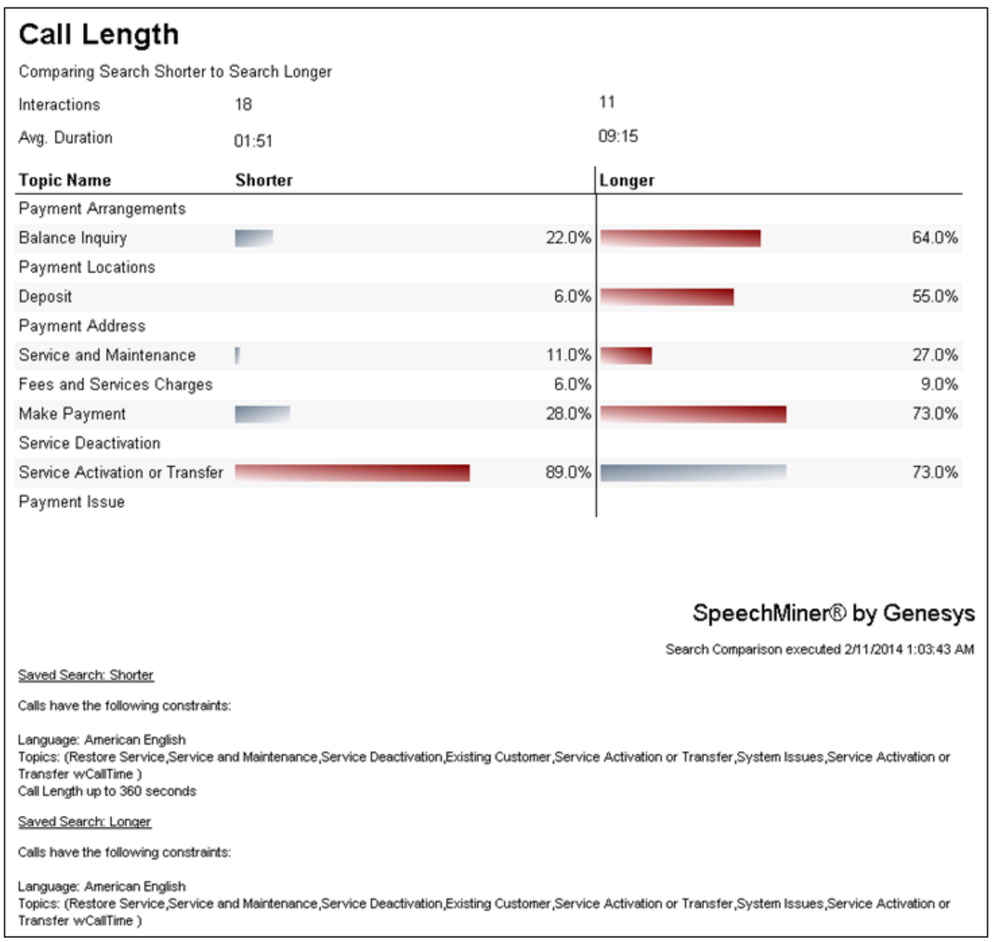
Compare Saved Searches

Compare Saved Searches

Important

This feature is not available in Recording UI mode.

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 noticeable 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 page, and save each of them as Saved

Searches. In the second stage, you select the two data sets in the Saved Searched page and then initiate the comparison process. The results of the comparison are 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.

> Important
>
> Only calls can be included in the custom data sets that are compared.

To compare two custom data sets:

1. Select **Explore > New Search**.
2. Click and open the Filter Panel to define the data set you want to use for the exploration. See: Defining Search Criteria. Be sure to select a single language, and only the Calls interaction type.
3. 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. Select **Explore > Saved Searches**.
7. Select the check boxes beside the two Saved Searches you created. The **Compare** option in the **Actions** area above the table of Saved Searches becomes active.
8. Click **Compare** . A dialog box opens.
9. Under **Report Name**, enter a name for the comparison report.
10. Under **Categories** and **Topics**, select the Categories and Topics you want to compare. (For information about using the Multi-Select box, see Defining Search Criteria.)
11. If you also want to receive an Exploration report for the two data sets, 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.

Sorting Columns

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.

Important

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

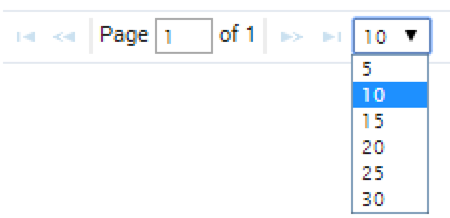
Selecting Rows

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.



Filtering Tables

Filtering a Table

If there are a lot of items in the Saved Searches 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 Creator, open the Multi-Select box.
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.

Important

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

Collapsing Tables

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 / expand a table:

- In the upper-left corner of the table, beside the title of the table, click the collapse icon.

Deleting Searches

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.

Interaction Lists

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

To open the **Interaction Lists** tab:

- Select **Explore > Interaction Lists**. The **Interaction Lists** tab opens and displays a list of the interaction lists you have created or other users have shared with you.

Creating Interaction Lists

Creating a New Interaction List

New interaction lists can be created in one of two ways:

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

To create an empty interaction list

1. Above the Interaction Lists table, in the right corner of the screen click +. You are prompted to enter a name for the new list. Interaction List names are case sensitive.
2. Enter a name, and then click OK. The new interaction list is created and added to the Interaction Lists table.

The Columns

Columns in the Interaction Lists Table

The following columns appear in the **Interaction Lists** table:

Column	Description
☐	Select the check box to include the interaction list in a Delete action (see below). **Note:** If you did not create the interaction list, this option is not available.
Run	Click the ▶ icon to run the interaction list and display the results in an Interaction Grid the bottom of the screen.
Delete	Click the 🗑 icon to delete the interaction list. **Note:** If you did not create the interaction list, this option is not available.
Name	The name of the interaction list.
Creator	The name of the user who created the interaction list.
Sharing	The names of the groups and users with whom the interaction list is shared appear in the table beside the icon. Click the **Share** icon to open a dialog box in which you can select the groups and individual users with whom you want to share the interaction list. The members of the selected groups and the selected users will see the interaction list listed in their **Interaction Lists** tab, and will be able to run them. **Note:** You can only modify or delete interaction lists that you created.
Created	The date on which the interaction list was initially saved.
Coaching	Click **Add** to add the interaction list to a Coaching session.
Permalink	Click **Copy** to create a Permalink to the interaction 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 interaction list will open in the browser. For additional information, see Permalinks.

Sorting Columns

Sorting the Columns

You can choose to sort the tables by any column that contains an interaction parameter.

To sort a table by a column:

- Click the title of the column.

Important

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

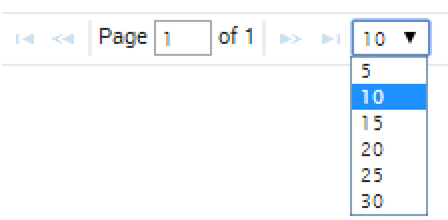
Selecting Rows

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.



Filtering Tables

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, open the Multi-Select box.
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.

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

Collapsing Tables

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 / expand a table:

- In the upper-left corner of the table, beside the title of the table, click the collapse icon.

Removing Interactions

Removing an Interaction from an Interaction List

To remove interactions from an interaction list:

1. In the interaction list table, click **Display** () to display the list of interactions in an Interaction Grid at the bottom of the screen.
2. Select the checkbox to the left of each interaction you want to remove from the interaction list.
3. In the title of the check box column click the **Batch Actions** icon , select**Delete**. The selected interactions are deleted from the list.

Deleting Interaction Lists

Deleting Multiple Saved Interaction Lists

To delete multiple saved interaction lists:

1. In the table, select the check box 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.

Browsing Interactions

Important

This feature is not available in the Recording UI mode.

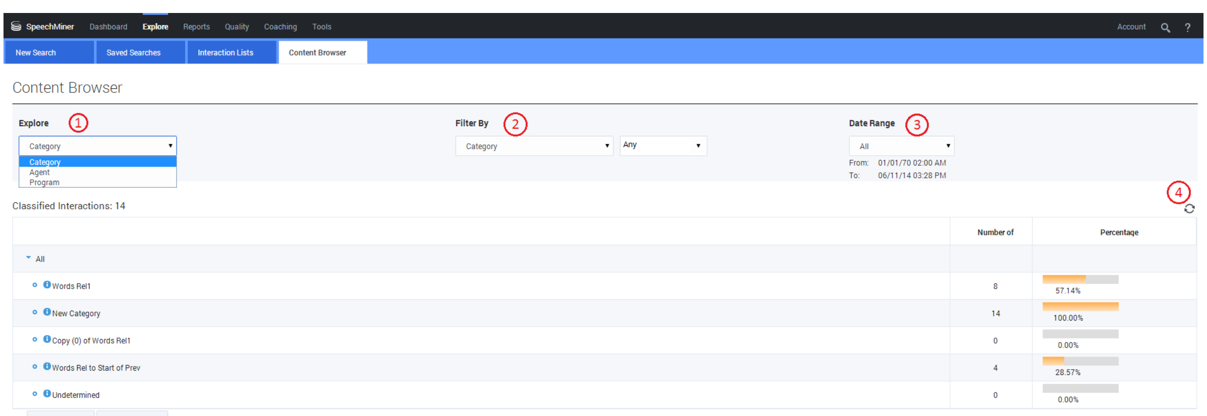
This section explains how to use the Content Browser to find interactions with the characteristics that interest you.

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

Classification Base	Description
Category	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.
Agent	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.
Program	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 **Explore**, select **Content Browser**. The Content Browser opens with the default base classification, **Category**, selected.



Key to Illustration:

Number	Description
1	Classification base tab
2	Filter By classification
3	Filter By date range
4	Refresh button

Exporting Interactions

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.

Important

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.

   Important

   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. In the title of the check box column click the **Batch Actions** icon , 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.

Media Player

The SpeechMiner Media Player is used to play the audio of recorded interactions. It provides a range of interaction playback features that can help you quickly and easily find the parts of interactions that interest you, find information about interaction properties, view transcripts of interactions, add comments to interactions and view the comments of other users. To open the Media Player, click a **Play** button beside an interaction in an 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 interaction at any given moment, so you can skip over silence or find times when voices were raised. If interactions 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 interaction.

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

Using the Media Player

The following sections describe how to use the Media Player.

Playback

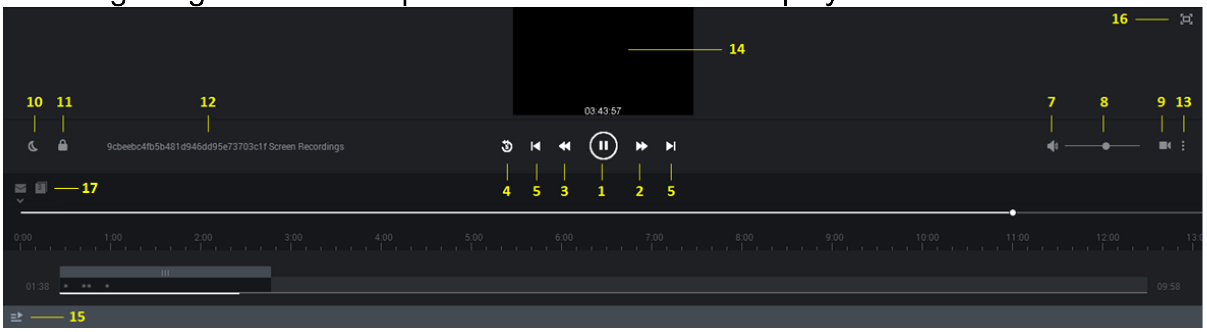
Playing Back an Interaction

The Media Player opens above an Interaction or Event Grid when you select an interaction or event for playback. This section explains how to use the Media Player to play and manage the open interaction.

Playback Controls

You can play an interaction from any point in the recording. Playback always begins from the location of the marker in the audio graph. When you open an interaction from an Interaction

Grid, the marker is placed at the beginning of the interaction. When you open an interaction from an Event Grid, the marker is placed at the beginning of the Event. Playback begins automatically when the interaction is loaded.
The Media Player can playback audio interactions, events and screen recordings. The following image and table represent all of the available playback controls.



Important

If the screen recording is longer than the available audio an ACW (after call work) icon appears. The ACW icon appears on the playback timeline at the time that is equal to the duration of the audio media file. The screen recording plays beyond the end of the audio file.

Number:	Description:	Available for:
1	Play or pause the interaction in the current location.	• audio interactions • events • screen recordings
2	Play the next event.	• audio interactions • events • screen recordings
3	Play the previous event.	• audio interactions • events • screen recordings

4	Rewind the playback 5 seconds from the current location of the marker.	• audio interactions • events • screen recordings
5	Play the next or previous interaction.	• audio interactions • events • screen recordings
7	Turn on/off the volume.	• audio interactions • events • screen recordings
8	Select a volume level.	• audio interactions • events • screen recordings
9	Show / Hide Screen Recording.	• audio interactions • events • screen recordings
10	Change the screen's brightness.	• audio interactions • events • screen recordings
11	Lock/Unlock playback with the scroll bar. When this option is turned off, you can scroll towards the end of the interaction before the playback reaches the same location. Turn this option on if you want the interaction to automatically scroll so that the part of the interaction that is currently being played back is always visible. The scroll bar moves automatically to keep up with the playback.	• audio interactions • events • screen recordings
12	Indicates the specific interaction ID and agent name.	• audio interactions

		• events • screen recordings
13	More	• audio interactions • screen recordings
14	Screen Recording Playback. In this area of the screen, you can view the selected screen recording. A screen recording is a video of the agent's screen during the specific agent/customer interaction.	• audio interactions • screen recordings
15	Return to search results list.	• audio interactions • events • screen recordings
16	Full Screen view	• audio interactions • screen recordings
17	The envelope (email) and paper (chat) icon appear in the location of the recording during which an email was received or a chat conversation took place.	• audio interactions • screen recordings

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 + Alt + n	Skips to the next interaction in the grid
Ctrl + Alt + p	Skips to the previous interaction in the grid
Ctrl + Alt + t	In an Event Grid, marks the current event as TP (True Positive)
Ctrl + Alt + f	In an Event Grid, marks the current event as FP (False Positive)

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

Important

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

Filtered Content

Interaction 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. For this reason, different users may have different permissions. As a result, certain parts of an interaction may be filtered out for some users but not others. The parts of an interaction that have been filtered out appear in the audio graph in gray rather than black. Likewise, the text associated with the filtered parts is not included in the interaction transcript and the Media Player skips these areas during playback.
Filters can be implemented as following:

- **Sensitive Topics**: Some Topics may be defined in your system as Sensitive. This attribute is assigned to Topics in the SMART application and only users with special permissions can hear the audio or see the text.
- **Numbers**: Numbers consisting of more than two digits may be filtered out of interactions to 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 the parts of an interactions to which comments have been attached.

Important

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 an interaction and the other for the customer's side of the interaction. 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 a result, you may see as many as three different colors in the audio graph

Interaction Content

Viewing Interaction Content

The Content panel can be used to view a transcript of the interaction that is open in the Media Player, as well as the Events that SpeechMiner detected in the interaction and comments that were added to the interaction 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 interaction. You can choose to display or hide the comments that users added to the interaction. 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.

Important

In Recording UI mode, the Content panel is blank because no recognition processing is performed.

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.

Opening and Closing the Transcript Panel

To open or close the Transcript panel:

- Click the **Transcript** icon .

View a Comment

To view and edit a comment:

- To view a comment hover over the **Comments** icon . A tool tip appears with the comment.
- To edit a comment click the Comment icon. An **Edit Comment** window opens.

Working with Events

The locations of Events are indicated in the transcript by numbered Event icons . The numbers match the Event numbers that appear **Events** drop down list.

Viewing Related Words

You can view Related Words report for any word in the interaction transcript. To view related words for a specific word:

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

Important

For additional information see Trending > Related Words.

Interaction Comments

Interaction Comments

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

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 interaction transcript. The icons are color-coded to indicate whether the comments are positive ( ), general (Smicon generalcomment.png), or negative (Smicon badcomment.png). 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 interaction (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).

If you cannot see the interaction comments in the Content panel, at the top of the left pane of the panel, click **Comments**. For additional information, see Viewing Interaction Content.

View a Comment

To view a comment:

1. Hover over the comment you want to view.

Add a Comment to an Interaction

To add a comment to an interaction:

1. Click **Add Comment** .
2. To add the comment at a specific time during the interaction select **Specify time** and enter the time in the **Time** field.

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

3. Enter your comment in the field provided.
4. Select one of the following:
   - Good : indicates a positive comment.
   - Bad : indicates a negative comment.
   - Neutral : indicates an unbiased comment.
5. Click **Add** to add the comment to the interaction.

Editing an Existing Comment

To edit a comment:

1. Click the comment icon associated with the comment you want to edit either from within the Media Player or the transcript.
2. Modify the comment as required.
3. Change comments sentiment if necessary.
4. Click **Apply** to modify the comment.

Interaction Details

Interaction Details

The Interaction Details panel enables you to view interaction details. In addition, you can use it to assign manual Categories to the interaction.

The following information can be included in the interaction details:

- Interaction processing time
- Work groups
- Agents
- Metadata values
- Manually assigned Categories
- Automatically assigned Categories

Opening and Closing the Interaction Attributes window

To open or close the Interaction attributes:

- Click the **Attributes** button.

Assigning Manual Categories

You can assign manual Categories to the interaction that is open in the Media Player.

To assign a manual Category to an interaction:

- In the Interaction Attributes window, under **Manual Categories**, select the check box beside the Category.<br

To remove a manual Category from an interaction:

- Clear the check box beside the Category.

Forms

Filling in Forms

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

Only one form can be filled out by each user for each interaction. 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.

> Important
>
> For information about creating forms, see Forms Manager.

Filling in a New Form

If you have not yet filled in a form for the interaction, 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 interaction, 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.

More Options

More Options

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

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

These options can be accessed from the **More** menu in the right corner of the Player.

Exporting the Interaction

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

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

To export the interaction :

1. Click **More** and 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 Interaction

You can send a link to a specific interaction to other users in the system. The link is sent in an Interaction 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 interaction.
If you wish, you can also send the recipient an e-mail notification with a link to the interaction. When the recipient clicks the link, the Media Player opens in a new browser tab or window and plays the interaction. If the recipient is not already logged into SpeechMiner, they are prompted to do so before the Media Player opens.
To send an interaction link to another user:

1. Select **More** and click **Forward**. A dialog box opens.
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 recipient's name or username. Select the recipient from the list that is generated.
   - Click the ... button (...) beside the text field. In the dialog box select the user from the list of users in the relevant work group.

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**. An Interaction 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 an Interaction to an Interaction List

An interaction list is a list of interactionss that is saved for later use. SpeechMiner supports two types of interaction lists: global interaction lists and coaching-session interaction lists. You can see existing global interaction lists in the Calls page in the Interaction Lists tab, under interaction lists. Coaching-session interaction lists can only be viewed within the coaching session. For additional information about coaching sessions, see Coaching. You can add interactions to an existing interaction list or a new list. You can select an existing interaction list from a list of global interaction lists or select a coaching-session interaction 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 interactions to an interaction list that is attached to that session. To add the interaction to an interaction list:

- From the **More** menu select **Add To** and then select one of the following:

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

attached to an existing Coaching session	session] > [existing interaction list]	
Add the interactions to a new interaction list.	**interaction list** > **New**	A **Call-List** dialog box opens. In the text field, type a name for the interaction list, and then click **OK**. The new interaction list is created and the interactions are added to it.
Add the interactions to an existing interaction list	**interaction list** > [existing interaction list]	The interactions are added to the selected interaction list.

Deleting an Interaction from an Interaction List

If you opened the current interaction from an interaction list, you can remove it from the interaction list using the Media Player. To delete the interaction from an interaction list:

- From the **More** menu select **Delete From List**. The interaction is removed from the interaction list.

Generating a Permalink to the Interaction

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

> Important
>
> For additional information, see Permalinks.

To create a Permalink to the current interaction:

- from the **More** menu select **Permalink**. A **Permalink** dialog box opens and displays the Permalink.

Finding Similar Calls

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

- From the **More** menu select **Similar Calls**. A new window opens and displays the list of interactions.

Reprocessing the Call

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

Important

- For information about reprocessing batches of interactions, see Reprocessing Calls and Managing Audits.
- Reprocessing of interactions is not available in Recording UI-mode or Analytics and Recording UI-mode systems.

To reprocess the interaction:

- From the **More** menu select **Reprocess Call**.

Event Icons

Event Icons

Event icons (both linguistic and non-linguistic) indicate when events were detected. The numbered icons appear above the audio graph.
As shown in the following image, you can see details about the event by placing your mouse pointer over the event icon. Event icons and information also appear in the Content panel.

To jump to the event location in the interaction, click the player at the location of the event icon.

Trending

Important

This feature is not available in the Recording UI mode.

The **Trending** 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.

The **Trending** 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.

Using the Trending Page

The following sections describe how to use the Trending Page.

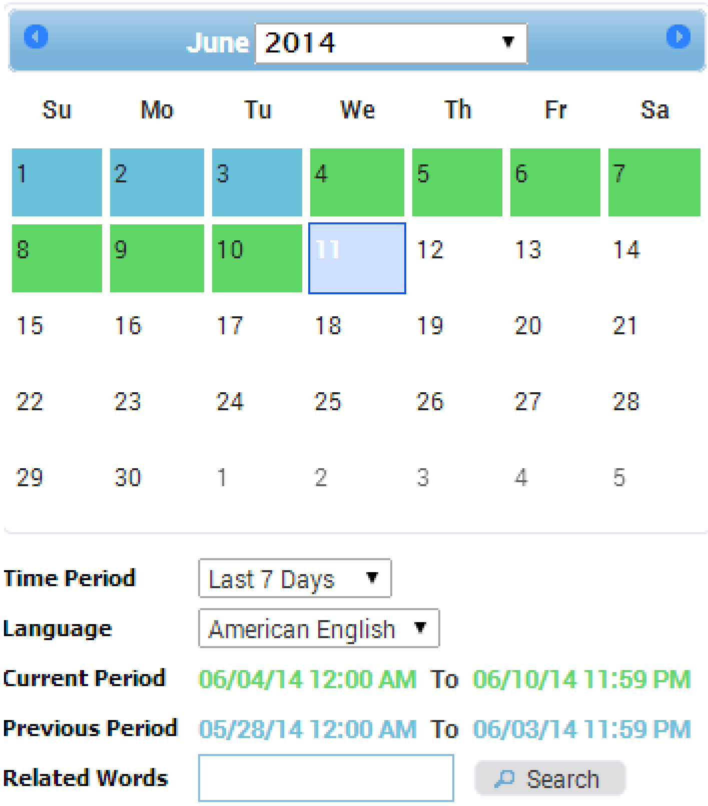
Filters

Setting the Filters

The data in the **Trending** 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).

Important

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



To set the filters for the exploration analysis:

1. In the upper-left part of the **Explore > Trending** 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 **Language**, select the language of the calls you want to include in the analysis.

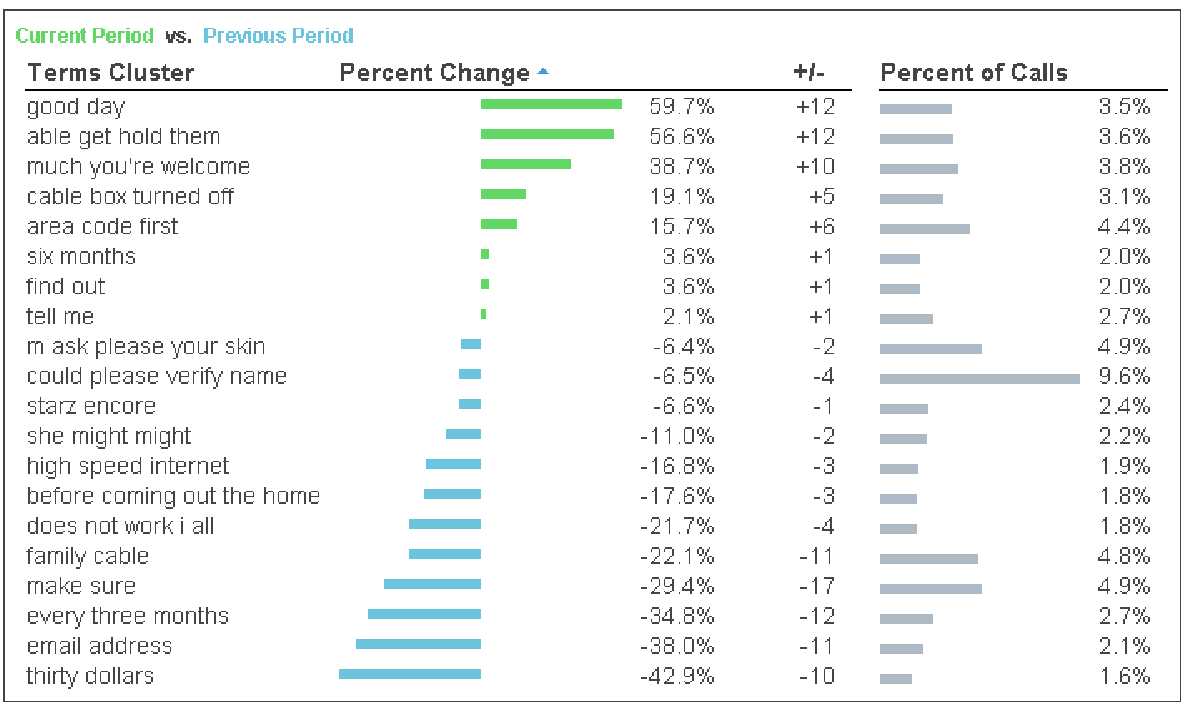
Important

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

Term Trends

Identifying Term Trends

The right side of the **Trending** 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.



The following columns appear in the histogram:

Column	Description

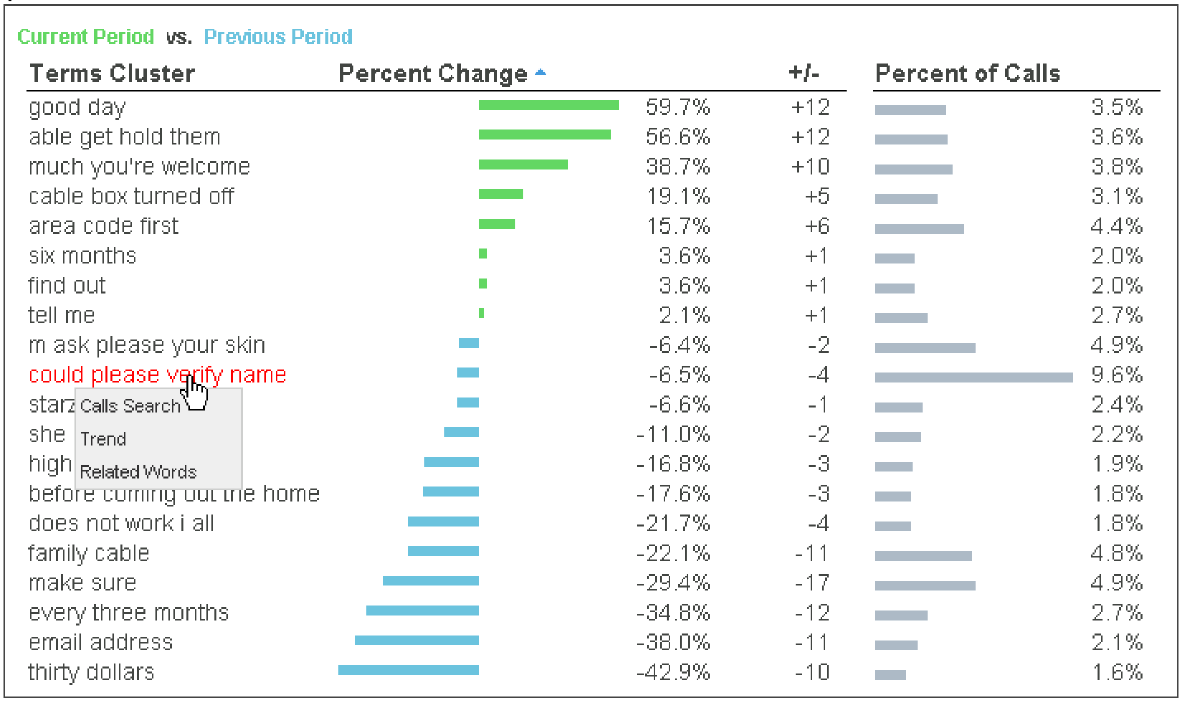
Terms Cluster	Term cluster
Percent Change	How much more or less common the cluster was in the current period as compared with the baseline period. Both the bar and the number represent the same value. If the cluster was more common in the current time period, the bar representing the percent change is 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.



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.

Common Terms

Finding Common Terms

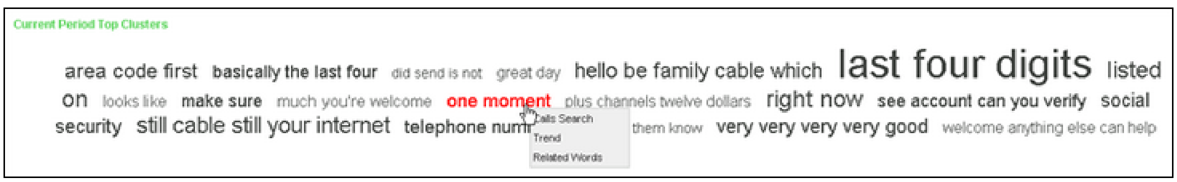
The bottom part of the **Explore** page contains a graphic depiction of the distribution of term clusters in the calls that are included in the analysis (as specified in the filter area). The font used to print each cluster indicates how common the term was in the calls; the more frequently a term cluster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

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.



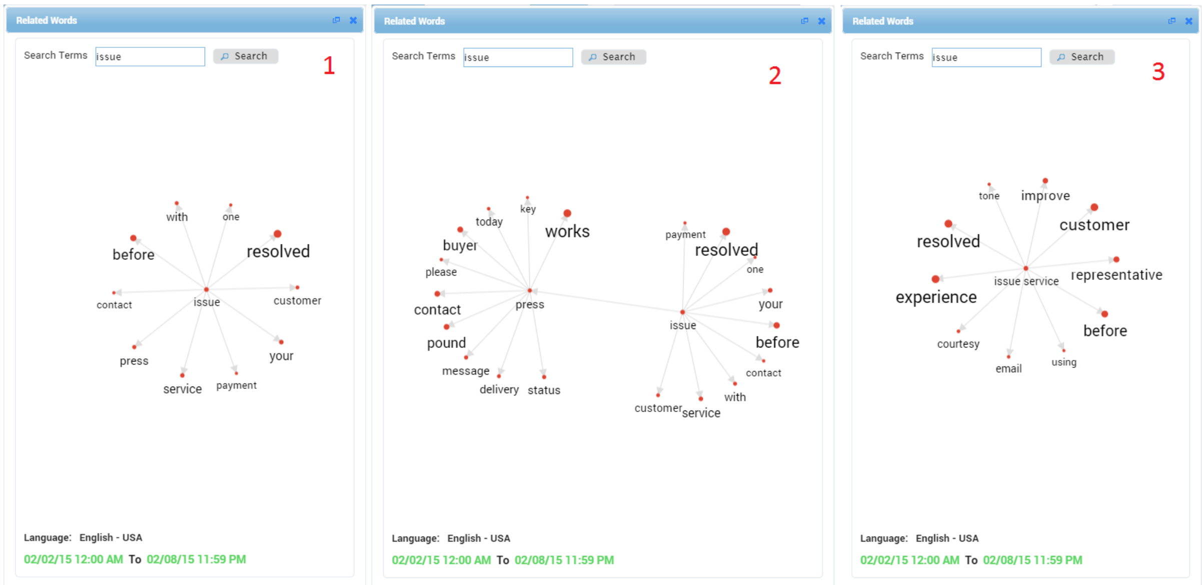
2. Click one of the following, as required:
   - **Calls Search**—Opens an Interaction Grid that lists calls containing the term cluster. The Interaction Grid opens in a separate window.
   - **Trend**—Opens a Trend Graph for the term cluster in place of the cluster-distribution information.
   - **Related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

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.



Opening the Related Words Window

The Related Words window can be opened by:

- In the right side of the Trending page, click a term in the Term Cluster list and select Related Words. See: Term Trends
- At the bottom of the Trending page click a term in the graphic depiction of the distribution of term clusters and select Related Words. See: Common Terms.
- Click a term in the interaction transcript and select Related Words. See: Interaction Transcript.

Moving the Diagram Around

Moving the **Related Words** diagram enables you to view hidden parts of the diagram. This option is especially helpful if you expanded the diagram and the window is not large enough to fit the entire diagram.

To move the diagram within the Related Words window:

1. Hover over the diagram and hold down your mouse button.

2. Drag the mouse cursor over the diagram.
3. Let go of your mouse when the diagram is in the correct location within the window.

Change the size of the Related Words diagram

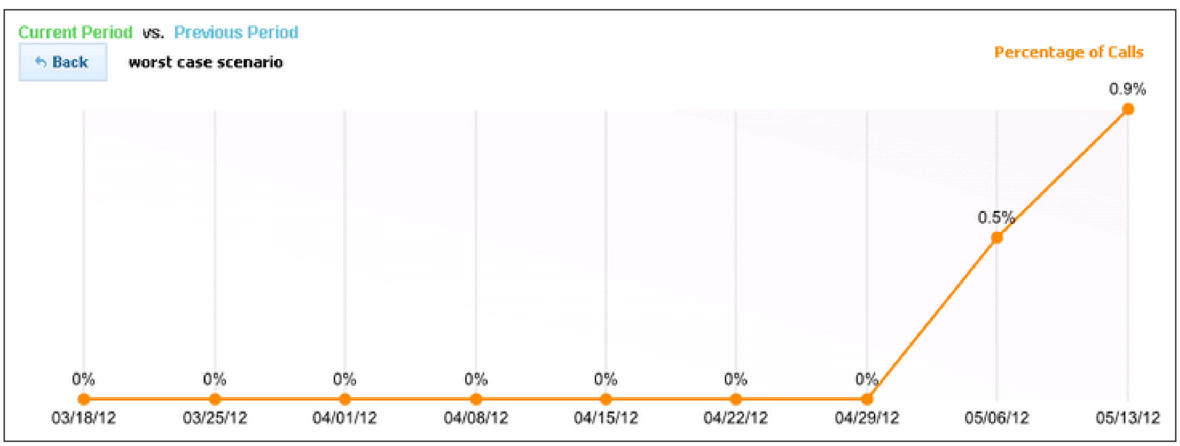
To make the diagram larger or smaller:

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

Trend Graphs

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.



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

To open the Trend Graph for a term cluster:

- In the **Trending** 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**.

Quality Monitoring

> **Important**
>
> This page is only available in Recording UI mode if the license includes the Quality Management system.

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.

Queues

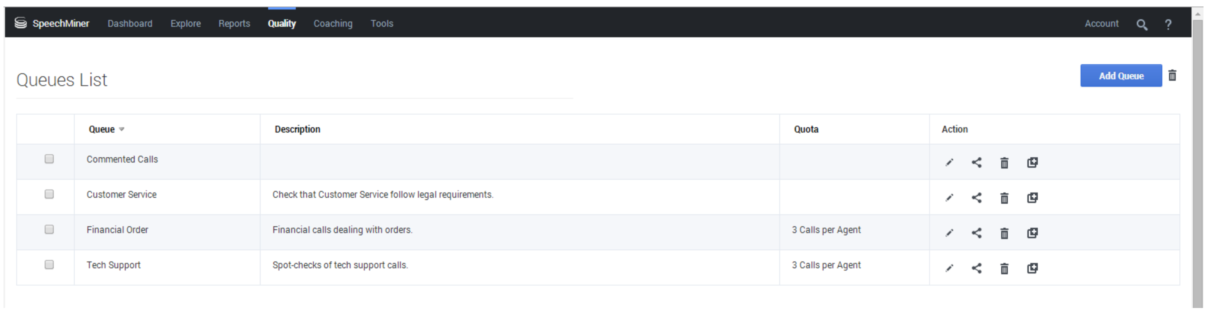
The **Queues** page is used to create and manage sets of search criteria for use by quality managers. The system automatically generates lists of calls for each set of criteria, so that the quality analyst can listen to them. The generated lists are randomized. That is, the system does not just take 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**.



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.

Using the Queues Page

Managing Queues

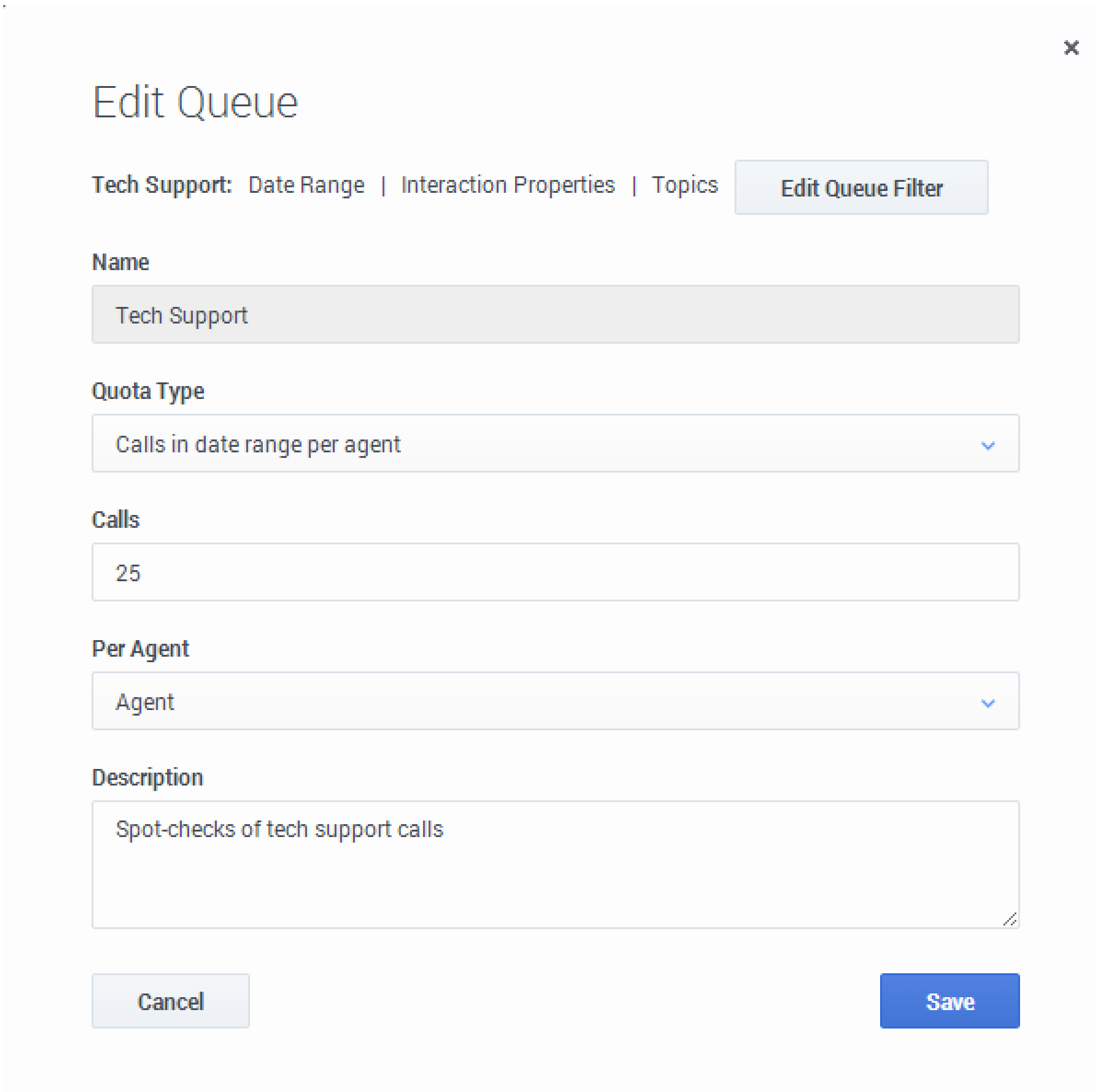
Managing Queues

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

To edit a queue's settings:

1. Select **Quality > Queues**.
2. In the **Queues List**, under **Action**, click the **Edit** icon associated with the queue you want to change.
   The **Edit Queue** dialog box opens, with the name of the queue in its title and the quota and search settings displayed below:



3. Modify the quota settings and description as required.
4. Click **Save** to save the changes.

To edit a queue's search filter:

1. Click **Edit Queue Filter** to edit the queue's search criteria.

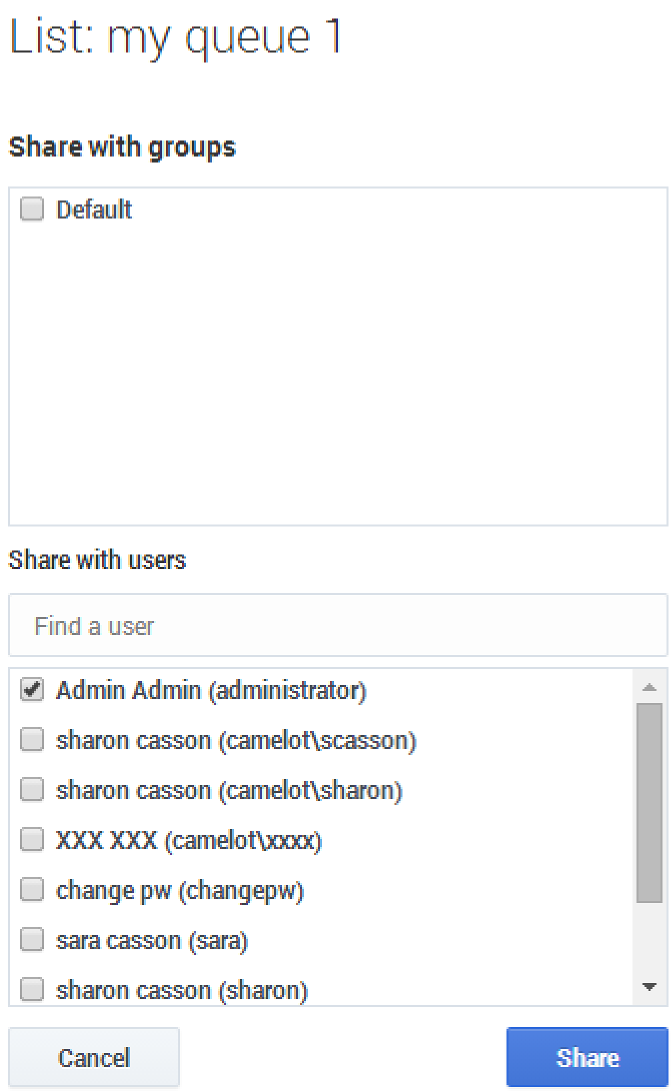
   The **Search Filter** page is opened. The top of the page contains the name of the queue and the filter settings.

2. Configure the search filter criteria.
3. Click **Update Queue**.
   The queue search filter is updated.

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 an interaction in the queue, the queue record (interactions 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:



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 search for specific users, type the user name in **Share with users** text box.

4. Click **Share**.
   The queue is shared with the selected groups and users.

Deleting Queues

To delete a single queue:

1. Select the queue you want to delete.
2. In the corresponding row under **Action**, click **Delete** .
3. Click **Yes** when prompted to confirm that you want to delete the queue.

To delete multiple queues:

1. Select the queues you want to delete.
2. In the top right corner of the screen, click **Delete**.
3. Click **Yes** when prompted to confirm that you want to delete the selected queues.

Copying a Queue

To create a new copy of an existing queue:

1. Select the queue you want to copy.
2. # In the corresponding row under **Action**, click **Copy** .
3. Enter an name when prompted to do so and click **OK**.

A copy of the queue is added to the list of queues.

Important

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.

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. Select **Quality > Queues**.
2. In the **Queues** screen, click **Add Queue**.

   The **Search Filters** screen opens.

3. Define a filter for the interactions you are searching for and click **Search**
4. In the left column, select the interactions that should be included in the queue.

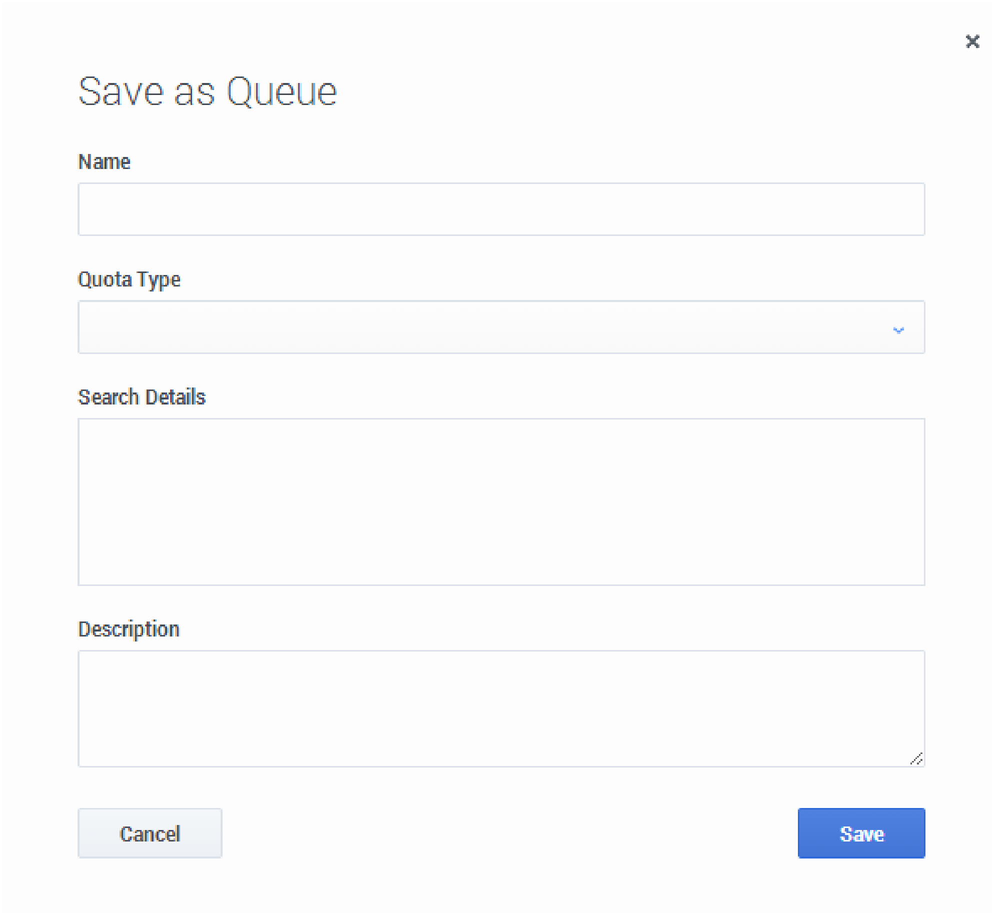
   For additional information, see **Defining Search Criteria**.

   Important

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

5. At the upper-right corner of the screen, click **More** ⋮.
6. Select **Save as Queue**.

   The **New Queue** dialog box opens.



7. Under **Name**, enter a name for the queue.
8. 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.

9. If you selected **Calls in date range per agent** from the Quota Type list, 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.).

Important

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

10. Under **Description**, enter a description for the queue (optional).
11. Click **Save**. The queue is added to the **Queues List** and in your **My Queues** widget.

Important

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

Queues List

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
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.)

Forms Manager

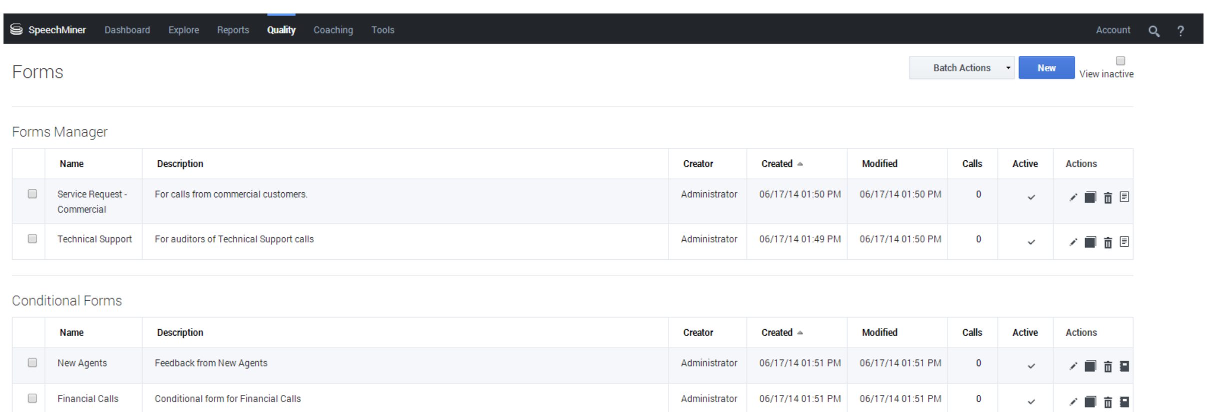
The Forms Manager is used to create forms for users to fill in after they have reviewed calls or participated in coaching sessions. After a form is filled out, SpeechMiner automatically analyzes it and extrapolates an overall score from the user's answers to the questions it contains. The system can 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**.



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

Using the Forms Manager

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.

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.

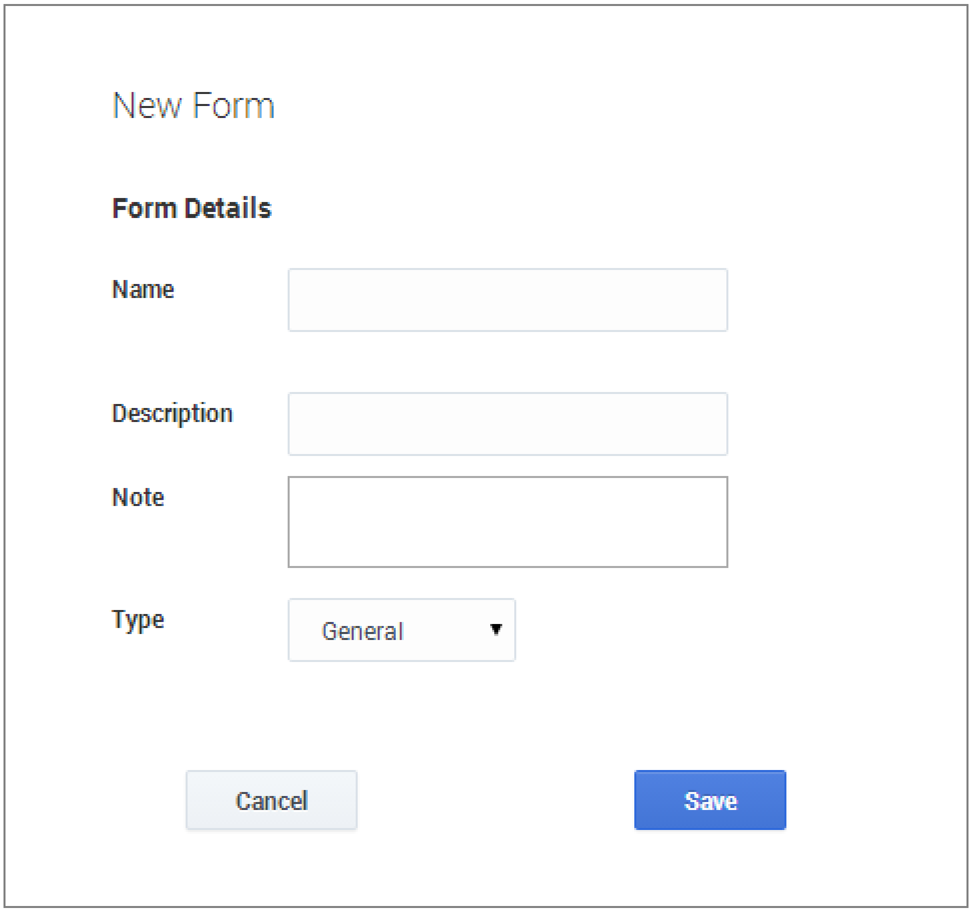
Opening a Blank Form

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.

> **Important**
>
> 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:

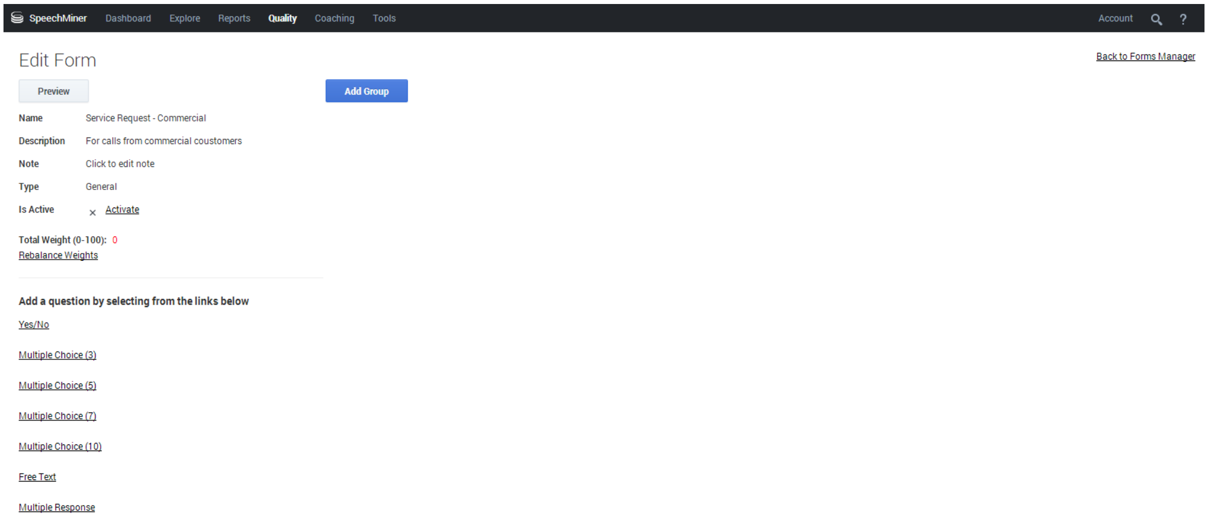
1. In the **Forms Manager** screen, click **New**. The **New Form** dialog box opens.



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



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.

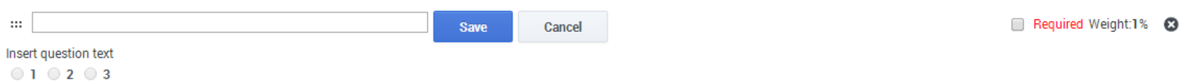
Adding a Question to a Form

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.

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.

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

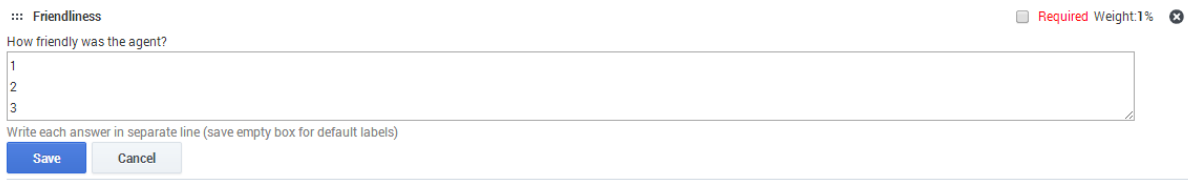
5. Edit the text and then click **Save** to save the new text.
6. If the question is required, select the **Required** checkbox.
7. For multiple-choice and Multiple-Response questions, if you want to replace the default numbers with text, edit the answers as explained below.

Editing Multiple-Choice Answers

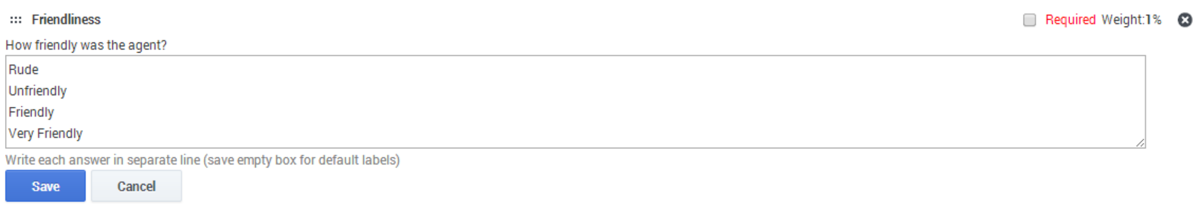
When you add a multiple-choice or Multiple-Response question to a form, each of the possible answers is assigned a number. You can replace the numbers with text as necessary.

To edit multiple-choice or Multiple-Response answers:

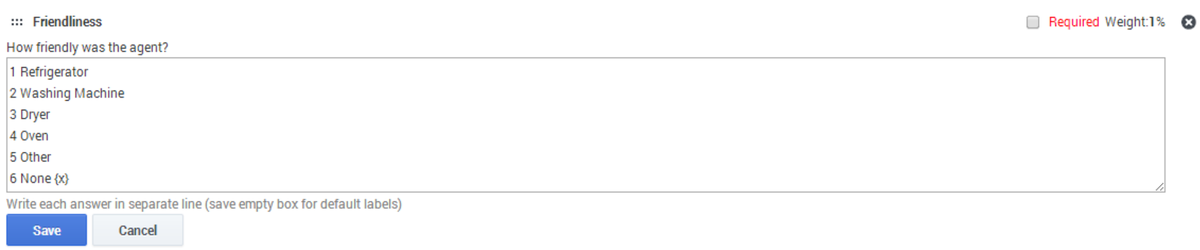
1. Below the answers, click **Edit answers**. A text box opens, and displays each of the answers on a separate line.



2. Edit each line as necessary.



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



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

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

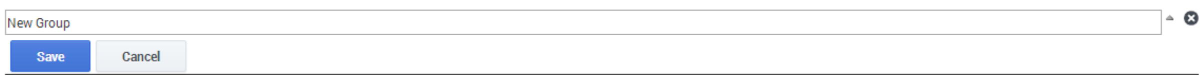
All of the questions in a form are included in question groups. When you add the first question to a form, a default group, called New Group, is automatically added to the form, and the question is included in it. You can change the name of a question group, add additional question groups, and rearrange 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.



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.

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 Sm icon movedown.png 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

Default Weights for Available Answers

As shown in the following table, each answer has a default weight value:

Question Type	Possible Answers and Corresponding Default Weights (%)									
	1	2	3	4	5	6	7	8	9	10
Two Answers	0.5	1								
Three Answers	0.33	0.67	1							
Four Answers	0.25	0.5	0.75	1						
Five Answers	0.2	0.4	0.5	0.8	1					
Six Answers	0.17	0.33	0.5	0.67	0.83	1				
Seven Answers	0.14	0.28	0.43	0.57	0.71	0.86	1			
Eight Answers	0.125	0.25	0.375	0.5	0.625	0.75	0.875	1		

Nine Answers	0.11	0.22	0.33	0.44	0.55	0.66	0.77	0.88	1	
Ten Answers	0.1	0.2	0.3	0.4	0.5	0.6	0.7	0.8	0.9	1

Important

Questions with a **Yes**, **No**, or **NA** answers have corresponding default values of **1**, **0** and **2**.
In addition, the default values of questions that enable you to select more than one answer is **0** for each answer.

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

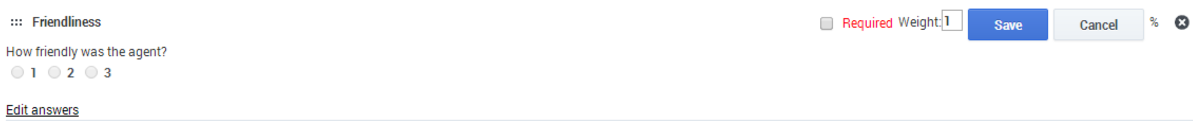
You can manually modify the weight of any Yes/No or multiple-choice question in a form.

Important

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.



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.

To collapse or expand question groups in a Preview window:

- Click the name of the group.

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**.

> Important
>
> 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**.

> Important
>
> 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

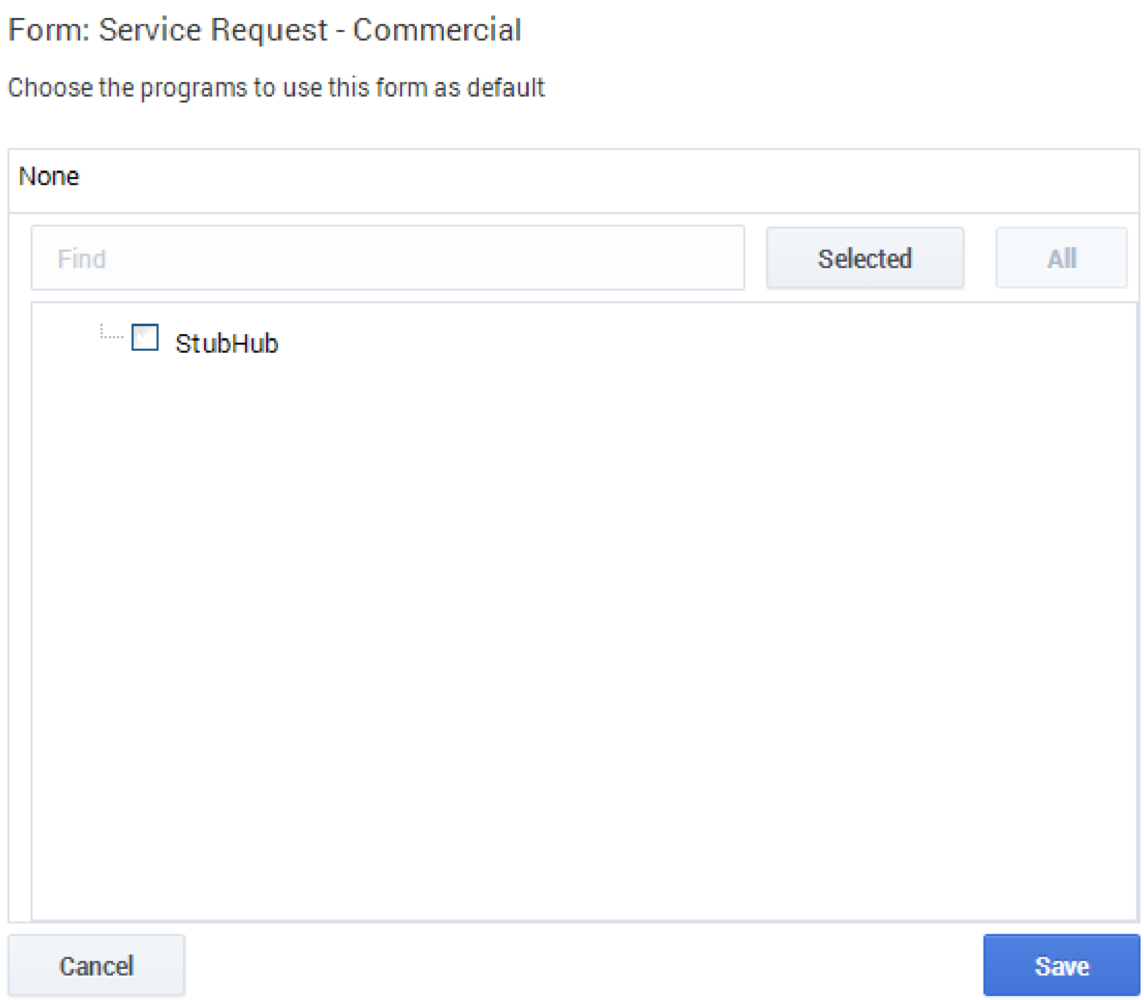
Once a Quality-Monitoring form is activated, you can select Programs for which it is the default form if you wish. When users open the list of forms for calls belonging to these Programs, the form appears at the top of the list of available forms.

> Important

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.



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.

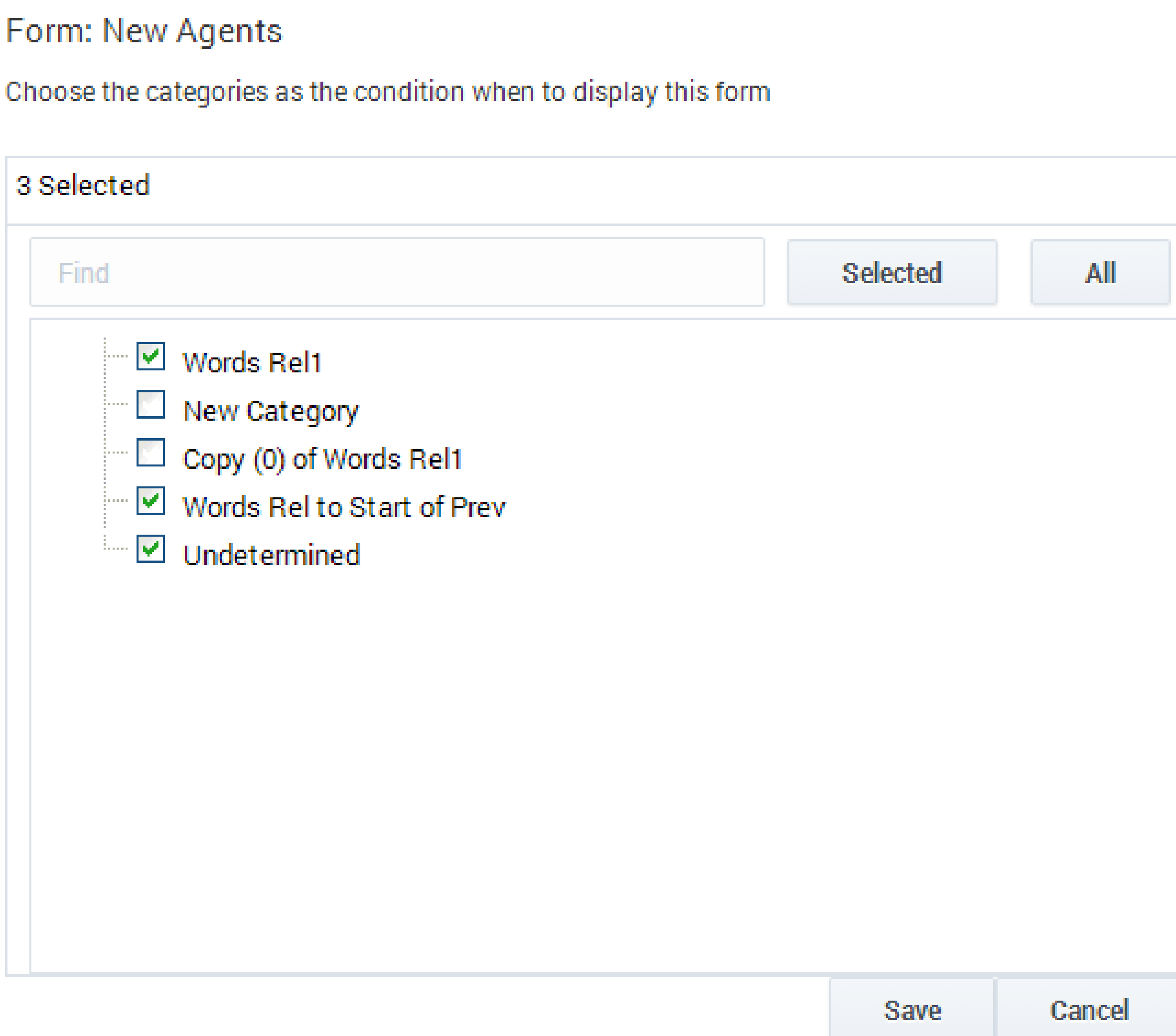
Selecting the Conditions for a Conditional Form

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.

> **Important**
>
> 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.



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

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**.

> Important
>
> 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:

1. 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 check box to the left of each form you want to delete.
2. At the top of the list, click **Batch Actions**, and then, in the drop down 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 inactiv**e is selected.)

Forms List

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.)

Coaching

> Important
>
> This feature is not available in the Recording UI mode.

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.

Using Coaching Sessions

Coaching Sessions

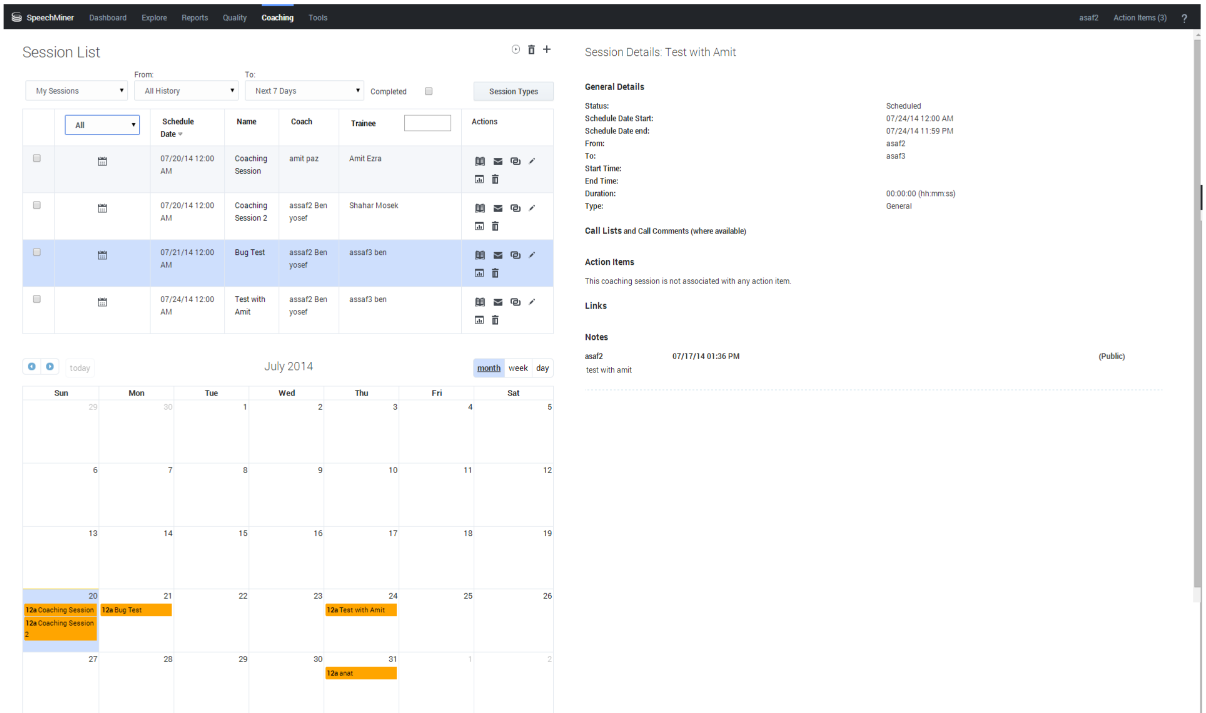
Working with Coaching Sessions

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**.

As shown in the following image, 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
Scheduled	The session has been created, but was not yet started.
In Progress	The trainee is currently taking part in the session.
On Hold	The session was paused after the trainee began taking part in it.
Completed	The trainee has finished taking part in the session.

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
	Deletes the specific 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 drop-down 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 drop-down 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:

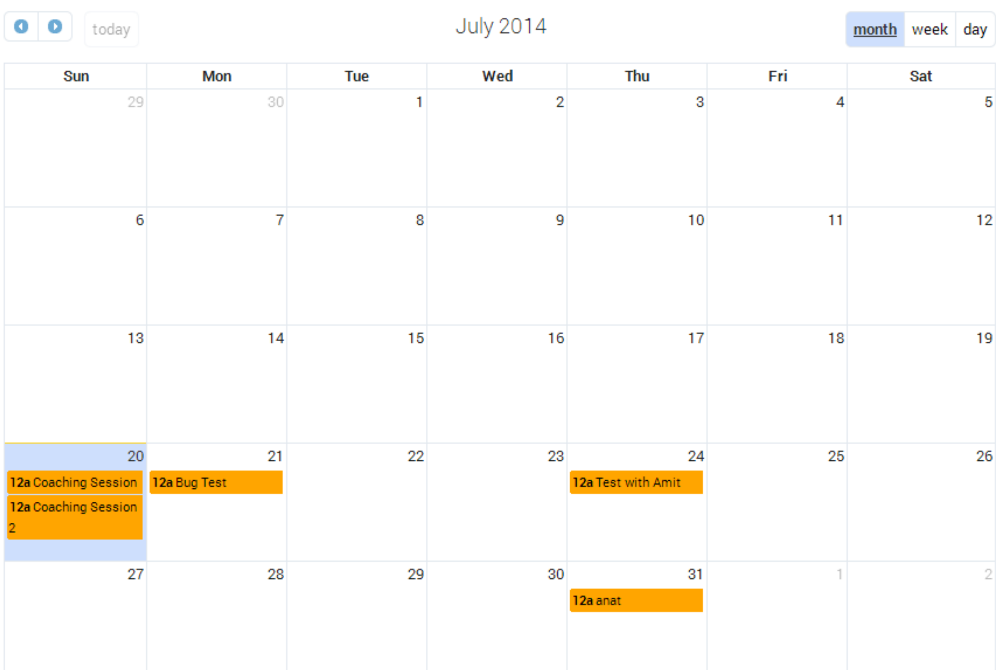
- Click the title of the column.

Important

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

Working with the Calendar

The lower left area of the Coaching > Session 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.



To select the type of calendar display:

- In 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 (for example, if you are displaying a weekly calendar, the previous week), or Smicon to expandtable.png 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

To view session details in the **Sessions** screen, click the specific session row. The session details are displayed on the right side of the screen.
See Working with the Coaching Session List
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.
Interaction Lists	Lists all interaction lists that are attached to the session. For each interaction list, indicates how many interaction s have comments, and how many interaction s are in the list. For example, (1,3) indicates that one interaction in the list has comments, and the list contains three interaction s. If an interaction has comments, the comments appear below the interaction list.
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.

Edit Session Details

The **Session Details** page is used to manage an individual session. In the Session Details page you can add a new session, create reports, listen to interactions, and so on.

> Important
>
> The creator or coach can also open the **Session Details** screen in Setup mode.

To edit a session:

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

   The **Sessions** screen opens.

2. In the session list, under **Actions**, click the **Set up Coaching Session** icon ( ) associated with the session you want to edit.
3. Manage the specific session, properties, notes, links and so on. For additional information, refer to Create and Manage Coaching Sessions

Deleting Sessions

You can delete one or more coaching sessions. To delete coaching sessions:

1. Select the check box to the left of each session you want to delete.
2. At the top of the screen, 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.

Session Details

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.

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.

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	Interaction lists and links attached to the session
General	Session properties
Interaction lists	Summary information about each interaction list attached to the session. Each interaction list, indicates how many interaction s have comments, and how many interaction s are in the list. For example, (1,3) indicates that one interaction in the list has comments, and the list contains three interaction s. If an interaction 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.

> Important
>
> 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 interaction s in the interaction lists and pay special attention to those parts that are mentioned in the notes.

Listening to Interactions

The interaction lists attached to the session can be opened in an Interaction Grid, and the interaction s can be played back in a Media Player, in the **Session Details** screen. To view an interaction list:

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

To play back an interaction :

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

Create and Manage Coaching Sessions

Create and Manage a New Coaching Session

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

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

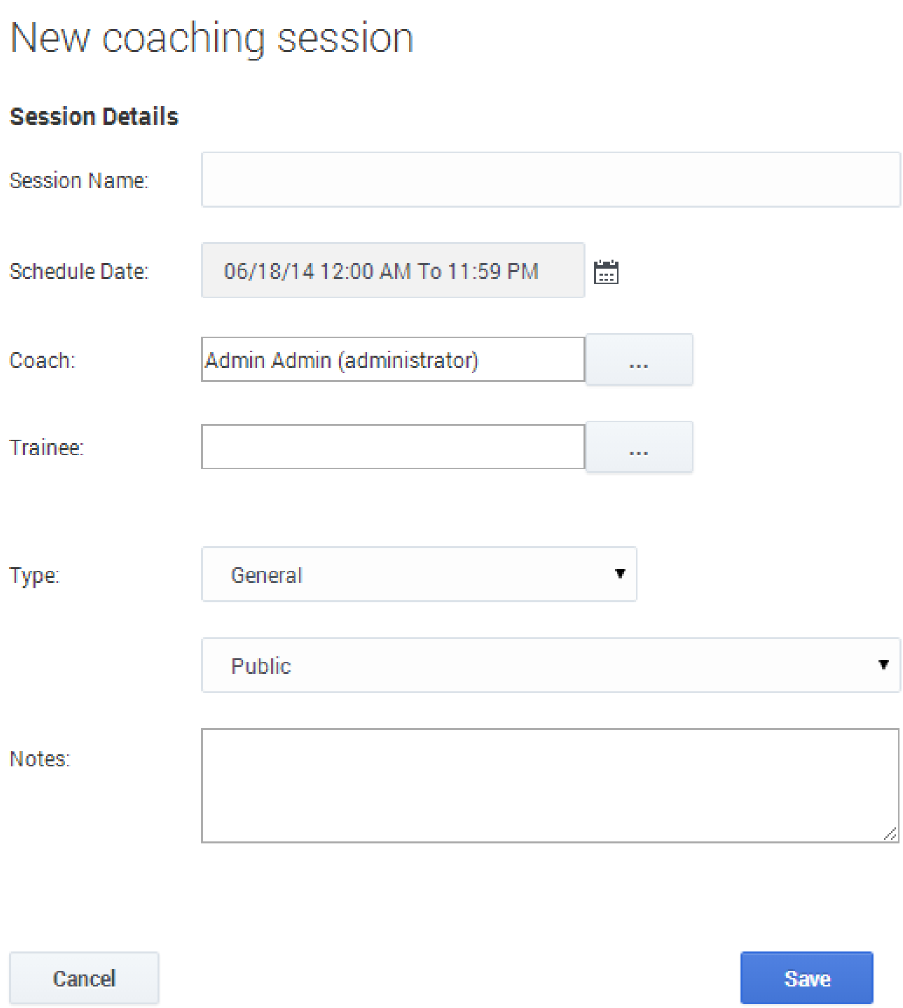
- In the **Coaching** page
- In the **Views** page, in the My Messages widget
- In a Interaction Grid or an Event Grid, from the **More** menu

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 interaction 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** drop-down menu, select **Sessions**. The **Sessions** screen opens.
2. At the top of the **Sessions List**, click **New Session**. The **New coaching session** dialog box opens.



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/ Private	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 **Private** 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 Interaction Lists

Once a coaching session is open, you can add interactions to it. Interactions are added as interaction lists. Two types of interaction lists can be added:

- **Saved Searches:** Sets of interaction search criteria that can be used to retrieve lists of interactions.
- **Interaction Lists:** Lists of interactions that were created manually by adding specific interactions. The interactions can be added from an Interaction or Event grid or from a Media Player.

Important

For additional information about the two types of interaction lists, see Saved Searches.

Interaction 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 interactions and removing existing interactions. Modifications that are made to an interaction list in the **Coaching** page do not affect the original interaction list.

Adding Existing Global Interaction Lists to a Session

The simplest way to add interaction lists to a coaching session is to select existing global interaction lists and copy them to the session. When a global interaction 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 interaction list, and is not linked to the original global interaction list. It can only be viewed from the coaching session. From within the coaching session, you can add or remove interactions from an attached interaction list and change the search criteria of a Saved Search. These modifications do not affect the original, global interaction lists or Saved Searches.

1. In the **Session List** screen, click the **Edit** icon associated with the session to which you want to add an interaction list.
2. Under **General Details**, click the **Add call list** + icon next to **Calls**.

   A list of global interaction lists and global Saved Searches appears.

3. Select an interaction list.
   The list closes and a copy of the interaction list is created and attached to the session. The added interaction list appears in the relevant section (**Interaction Lists** or **Searches**) under **General Details**.

You can also add existing interaction lists to a coaching session from the Saved Searches page.

Creating New Interaction Lists within a Session

1. In the **Session List** screen, click the **Edit** icon associated with the session in which you want to perform a search.
2. In the **General Details** screen, on the left side of the screen click **New Search**.

   An Interaction Search form opens on the right side of the screen.

3. Fill in the search criteria.
4. Click **Search**.

   The search results appear to the right of the form.

5. Select the check box next to each interaction you want to add to the interaction list.
6. At the top of the list, under **Batch Actions**, select **Add To** > **Coaching** > **New Session**.

   A new sessions window opens.

7. Give the session a name and fill in the remaining fields.
8. Click **Save**.

Modifying Session Interaction Lists

Once an interaction list is attached to a Coaching session, you can add interactions to it or remove them as necessary. Interactions can be added to an interaction list from any Interaction or Event Grid or from the Media Player. You can also remove interactions from a list. If the interaction list was copied from a global list, the global list is not affected by changes you make to the coaching-session list.

To remove interaction from an interaction list:

1. Under **General Details**, click the name of the interaction list. The list opens in an Interaction Grid on the right side of the screen.
2. Select the checkbox to the left of each interaction you want to remove from the interaction list.
3. Under **Batch Actions**, select **Delete From List**. The selected interactions are removed from the list.

Removing an Interaction List from a Session

1. Under **General Details**, click the x to the right of the name of the interaction list. You are prompted to confirm that you want to remove the interaction list from the session.
2. Click **OK**. The interaction 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 interactions 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, in the title bar of the **Notes** box, click **New**. A blank **New Note** form opens.

   > Important
   >
   > 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, 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.

Important

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 Items** link in the top right corner of the screen.

   The **Action Item** dialog box opens below the link with a list of the existing action items.

2. Click **New Item** and configure the fields as necessary.
3. Click **Ok**.
   The Action Item is created and appears in the **Action Items** box in the **Session Details** screen. In addition, it is added to both your general **Action Items** box and in the assigners general **Action Items** box.

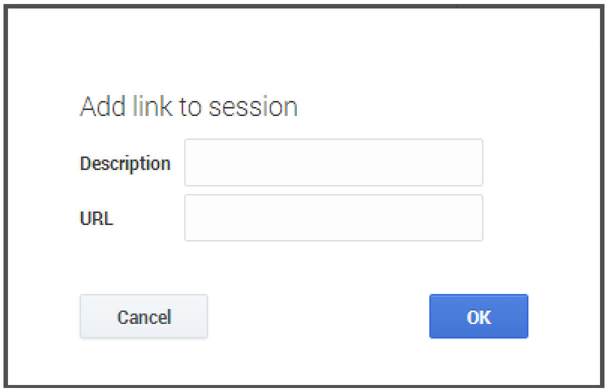
Important

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.



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 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. You can modify these properties as necessary. To modify session properties:

1. In the **Session Details** screen, in the title bar of the **General** box, click **Edit**.

> Important
>
> 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.

Reports

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.

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 interactions 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 interactions that the trainee listened to during the session.

To play an interaction that appears in the expanded list:

- Click the interaction link. The Media Player opens in the window, and plays the interaction.

Important

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.

Managing Sessions

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.

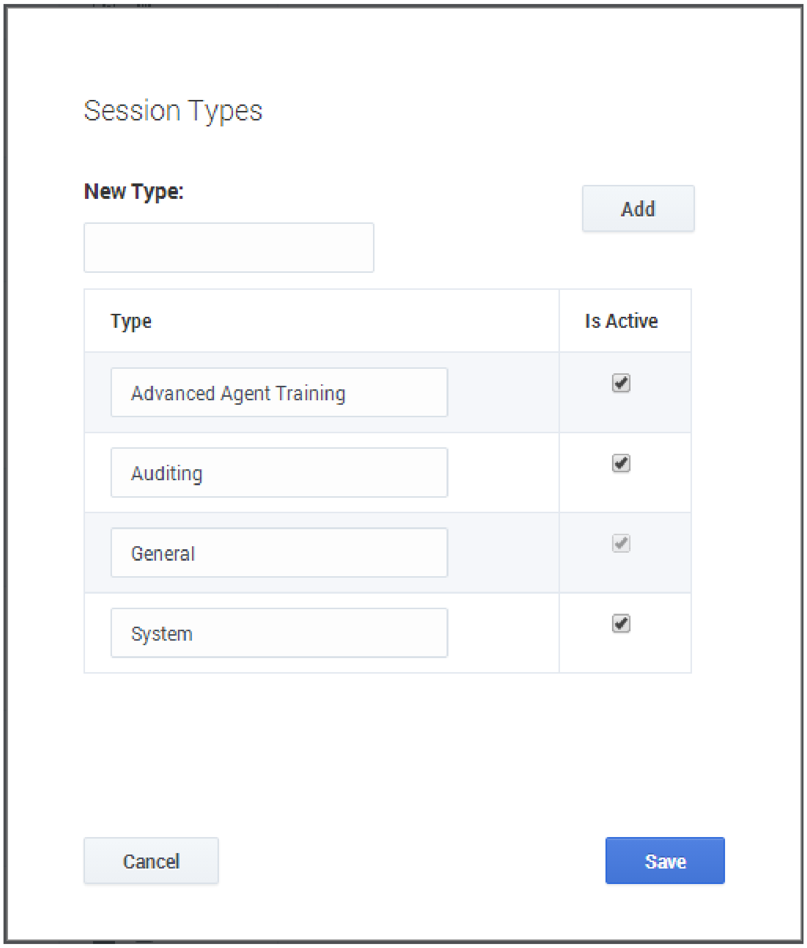
Once a session type is saved, you cannot delete it. However, you can deactivate it if you do not want it to be available at present. (The General type cannot be deactivated.) In addition, you can modify the name of an existing session type as necessary.

Important

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 **Session Types**. The **Session Type Manager** opens and displays a list of the session types that are currently defined and their statuses.



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 check box 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.

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 Standard Reports.

Templates

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 **View** link 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**, select **Templates** and click **Edit** to create a report based on the specific template.
- In the Main Menu, under **Reports**, select **Edit Report** and from the **Template** drop-down list, select the template on which you want to base your new report.

The selected template opens in the **Edit Report** tab. For information about using this tab to customize and run the report, see **Custom Reports**.
For information about customizing reports for display in the **Views** page, see Managing Widgets.

Custom Reports

Creating a Custom Report

This section explains how to use the **Edit Report** tab of the **Reports** page to create and run custom reports.

Customizing the Settings of a Report

Each report template has a different set of fields, but 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

To create a custom report:

1. Click **Reports > Edit Report**.
2. From the **Template** list select the required template.
3. On the left side of the screen under **Calls Filter**, select the Data Set filters.

   These filters are configured in the same way **New Search** filters 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.

4. On the right side of the screen, select the parameters you want to include in the report results.
5. Click **Run Report** to create the custom report.

   The report appears at the bottom of the screen.

6. Click **Save report settings** to save the report.

   The saved report will appear in the **Saved Reports** list.

To hide or show the Data Set filter panel:

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

Analyzing Data for 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 used changes depending on which user runs it. For example, if the user is agent 12, the report will only include interactions that were handled by agent 12. This feature will only work if the user's profile includes mapping. 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 manager's workgroup 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 Manage Users.

Configure a report to analyze data for the current user

1. Under **Calls Filter**, select **Current User** from the **Agents** list and click **Add**.
2. Click **Done**.

   Once the report is configured in this way, different users can create the report to analyze their own data and the report can be shared with other users.

Running a Customized Report

Once you finalized the customized report configuration 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 is opened in a browser and is linked to the SpeechMiner system. The data drill-down feature can be used in the file.
- Run the report and export the results using a PDF or Excel file

Important

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. Select how to view the report results in the browser:
    - To view the results in a new browser window, at the top of the form select **Open in new window** at the top of the **Edit Report** tab.
    - To view the results in the **Customize Report** tab, below the template form clear the **Open in new window** checkbox.
3. 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 **Email report** ( ).

    A dialog box opens.

    >li>Under **To**, fill in the e-mail addresses of the recipients.

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

2. Under **Notes** type any text you want to include in the body of the e-mail.
3. 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 

.

    The report is created and appears at the bottom of the screen.

2. Click either the PDF or Excel icon to export the results to a PDF or Excel file.

   A dialog box opens and asks you if you want to open or save the file.

3. Select the desired option.
4. 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.
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.

Using Report Results

Depending on the type of report, the report results may be in the form of a graph, a histogram, or a table. You can drill down to the underlying data on which any graphic component of a report is based (graph bars, lines, or table headers). 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 an interaction from a drill-down list:

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

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

- If the report was displayed in the **Customize Report** tab, 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**.

To sort data in a table:

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

Saving a Customized Report

Save your report to run the report with the same settings in the future.

> Important
>
> 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** ().

Saved Reports

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.

Important

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 Run 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 Edit 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 Delete icon to delete the report. **Note:** You can also delete a number of reports at once.
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 Sharing icon appears for reports that you created. A grayed out Sharing 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 Sharing icon to open a dialog box in which you can select the groups and individual users with whom you want to share the report. The members of the selected groups and 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.
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.

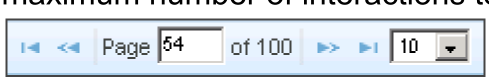
To sort a table by a column:

- Click the title of the column.

> Important
>
> 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. 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 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	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	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	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

> Important
>
> 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.

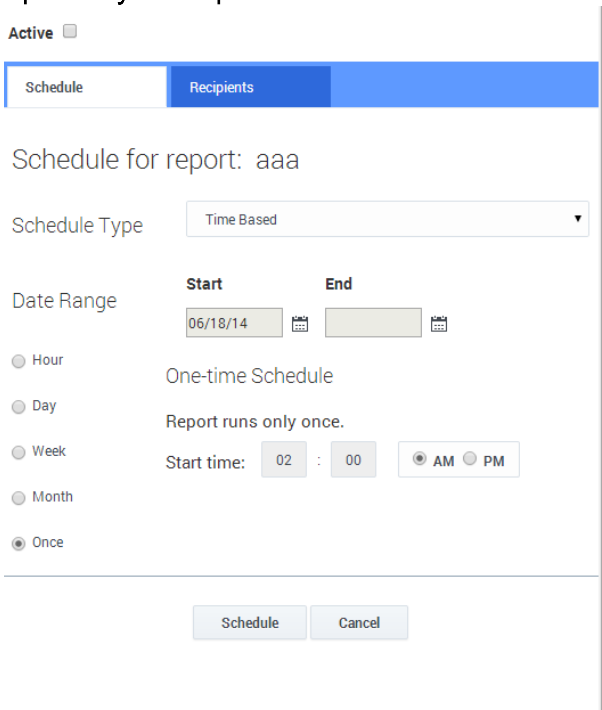
To configure the schedule for a single report:

- In the report table, in the report's row, click **Schedule** ( ). The scheduling dialog box opens. 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 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:

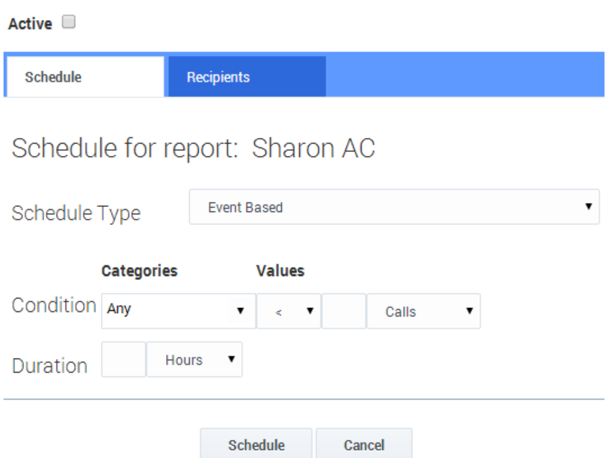
1. At the top of the scheduling dialog box, select **Active**. The scheduling settings in the dialog box become available.
2. In the **Schedule** tab, under **Schedule Type**, select **Time Base**d. The options for configuring the schedule are displayed.
3. Under **Date Range**, select the start and 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.

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 interactions in which the Event was detected. For example, the detection of caller agitation in more than 10% of interactions 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.



3. In the **Condition** line, under **Categories** select the Categories that must be identified in the interactions. 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 interactions.
    - **Equals** (=) if you want the selected reports to run when the selected Categories are identified in a specified number or percentage of interactions.
    - **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 interactions.
5. Under **Values**, fill in the number or percentage of interactions.
6. In the next field, select **Calls** if the value refers to a number of interactions, or **% of interactions** if the value refers to a percentage of interactions.

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.

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's address.
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** check box.

> Important
>
> If you selected a group of saved reports before you opened the scheduling dialog box, the

> **Active** check box 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 an interaction from a drill-down list:

- Click the icon. The Media Player opens in a new browser window and begins to play back the interaction.

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

- 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 Smicon.excel.png 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 delete reports individually for a specific report or globally for a number of selected reports.

Important

You can only delete reports that you created.

To delete a single report:

1. In the report table, in the report's row, click **Delete** ( ). You are prompted to confirm you want to delete the report.
2. 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.

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 to ensure 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.

Tools

SpeechMiner **Tools** provide access to an array of global SpeechMiner functions and management features. Depending on your permissions, and on your system's mode of operation, you may be able to use these features to manage user accounts and permissions, Categories, Preset Views; to monitor and manage the system and its servers; and to 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

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.

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.

Important

Category Management is not available in Recording UI mode.

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

About Categories

Categories are used to group interactions with similar characteristics so that SpeechMiner users can find interactions that require their attention for particular reasons. The interaction characteristics that define a Category can be as simple as "interactions 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 interactions to Categories after it has finished processing them. All the Categories in the system are global Categories that can be applied to any interaction. When interaction processing is completed for an interaction, SpeechMiner goes one by one through the list of Categories in the system and checks whether the interaction meets the conditions of the Category. If it does, the interaction is assigned to the Category. A single interaction may not belong to any Categories, but it can also belong to many Categories.

Category assignment is intended to help reviewers find interactions 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 interactions. For example, SpeechMiner can check the percentage of calls in September in which customers exhibited agitation.

Four types of categories exist in SpeechMiner:

- **Regular Categories**: Categories that have conditions defined in the form of a logical expression. When SpeechMiner processes an interaction, the interaction 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. Interactions 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.
- **Subcategories**: A category can contain one or more subcategories in a multi-tiered category structure. The parent-category is defined as a container of its subcategory. When SpeechMiner identifies an interaction as belonging to a subcategory, it automatically identifies it as belonging to the parent-category as well. For example, a 5-60 seconds Interaction Duration category contains three subcategories 10 seconds category, 20 seconds category and 50 seconds category. Any interaction associated with the 10 Minute category is also associated with the Hour Interaction Duration category. In this case, you receive data about all the interactions that were between 5 to 60 seconds and specific data about interactions that were specifically 10, 20 and 50 seconds long.
- **Manual Categories**: Categories that include a collection of interactions that do not fit into a predefined category. This type of category is referred to as a **Manual** category. A Manual category has no criteria. Instead, it is a category to which you can manually add any and as many interactions as you like without preconditions. For example, a Manual category could be used as placeholder for interactions the SpeechMiner user would like to review during routine weekly staff meetings.

See also

Overview of the Manage Categories Screen
Creating a Blank Category
Configuring Category Conditions

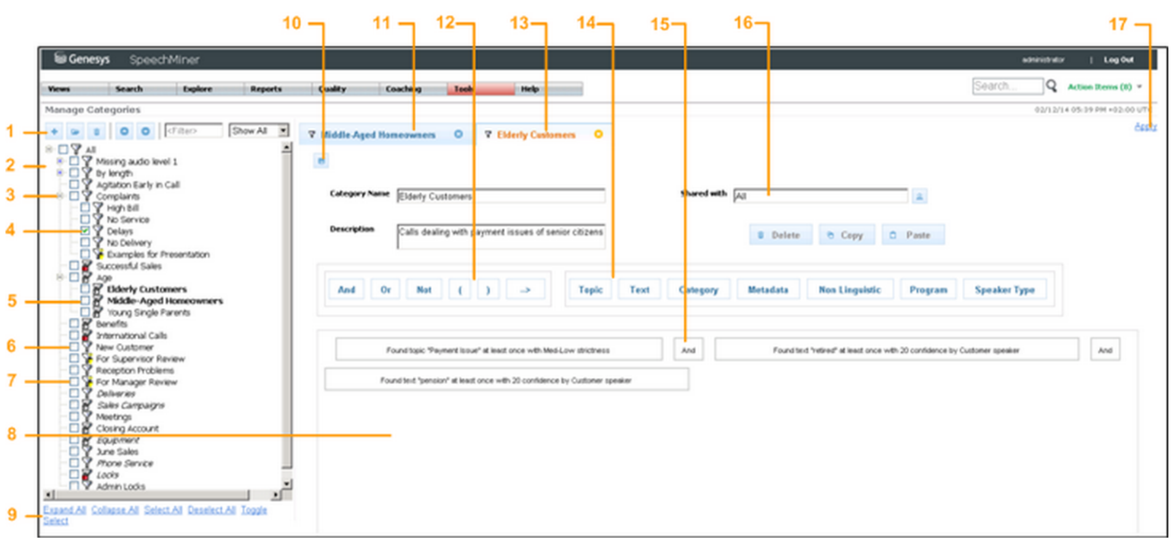
Saving and Applying Changes
Modifying Categories
Deleting Categories
Managing Version History

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.

Categories Screen

The Manage Categories screen contains the following elements:



#	Element	Description
1	Tree-list controls	Controls for managing the items in the tree list and for filtering them.
2	Tree structure	Expandable list of categories.

3	Expanded category	Parent category expanded to display its sub-categories.
4	Selected category	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).
5	Open category	Category whose definition is open on the right side of the screen.
6	Locked category	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. identifies a Category that you locked; Locked by another.png identifies a Category that was locked by another user. Permissions for overriding locks are configured under Tools > User Management > Administer Roles in the SMART tab. For additional information, see Managing Roles.
7	Manual category	Category that includes interactions that are manually assigned to it by users .
8	Selection options	Menu of global selection options for the tree list.
9	Category Definition pane	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.
10	Save button	Click to save changes that were made to the displayed Category; changes are saved but not applied (see Saving and Applying Changes).
11	Open category tab	A tab associated with a category that is open but not currently displayed. Click the tab to display the Category.
12	Operator elements	Drag an operator to insert it into the logical expression.
13	Displayed category tab	The tab associated with the currently displayed category. Multiple windows can be open at one time in the screen. Click a tab to view the desired window.
14	Category elements	Drag an element to insert it into the logical expression.
15	Expression area	Box containing a logical expression that defines the conditions for inclusion in the Category that is open and selected in the right panel.

16	Sharing settings	Displays the current sharing settings of the category. Click in the right of the field to open a dialog box in which you can edit the sharing settings of the Category.
17	Apply link	Click to implement changes in SpeechMiner (see Saving and Applying Changes).

See also

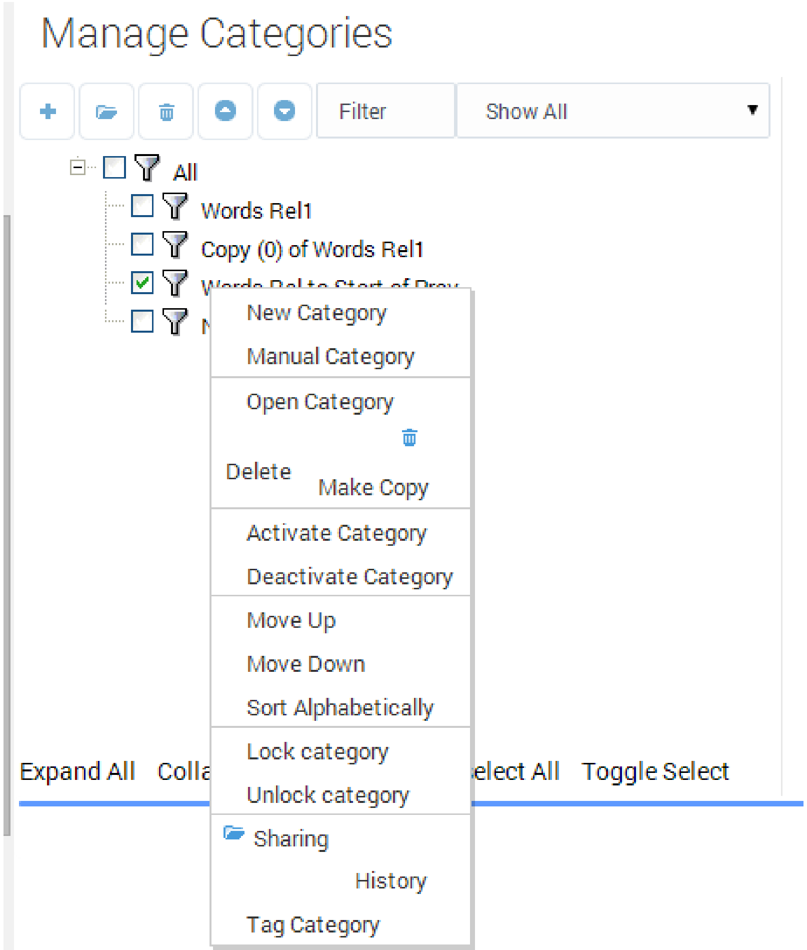
Category Management
User Management
System Administration
Elements Explorer

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 categories screen), an option for alphabetically sorting categories, and some additional options for working with individual Categories in the list.

To open the context menu

Right-click a category in the tree list.



See also

Category Management
User Management
System Administration
Elements Explorer

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 (locked by the current user)
	Locked category (locked by a different user)
Normal typeface	Active category
Gray typeface	Inactive category
Italic typeface	Modified category - changes not yet applied
Bold typeface	Open category (for example, open on the right side of the screen).

See also

Category Management
User Management
System Administration
Elements Explorer

Filtering the Categories List

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.

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

Category Management
User Management
System Administration
Elements Explorer

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, work groups, and specific users with whom a Category should be shared.

Important

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.

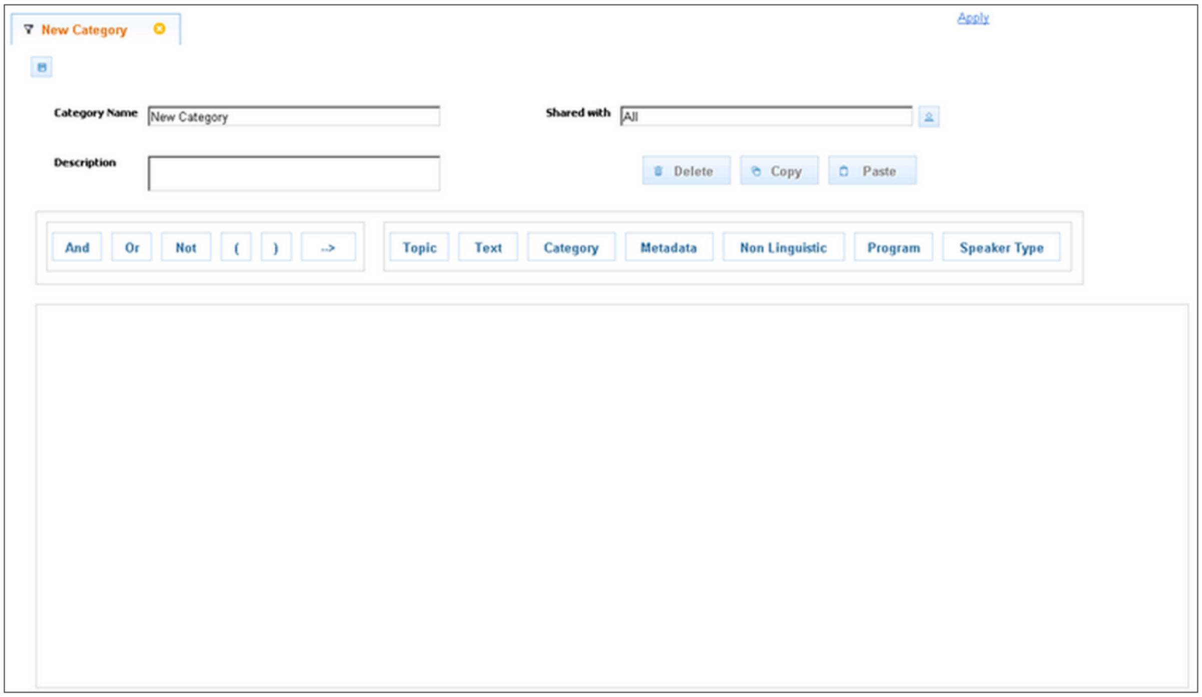
   If you select an existing Category, the conditions defined for inclusion in the Category (its logical expression) are automatically erased.

   If you want to create a manual Category, you must right-click **All**. Manual Categories cannot be sub-Categories of any other Category.

   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.

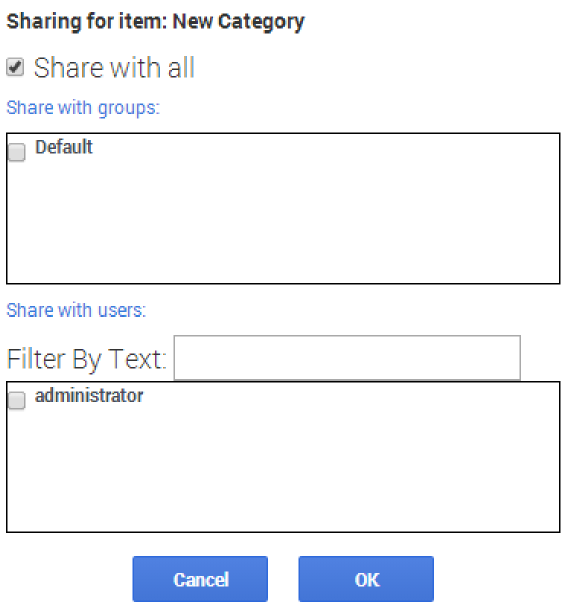
   You can also create a new regular Category by selecting in the tree-list controls, but to create a manual Category, you must open the Context menu.



3. Under **Category Name**, enter a name for the category.

   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.

   If you do not want to change the Sharing settings, skip to step 8.



4. Clear the **Share with all** check box. The sharing options become active.
5. Select the groups, and users with which the Category should be shared.

> Important
>
> 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.

6. Click **OK**.

   The sharing settings are displayed in the **Shared with** field.

7. Under **Description**, enter a description for the category (optional).
8. In the upper-left corner of the right panel, click (Save). The category is saved.

> Important

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

Configuring a Category

Managing a Category

Category Conditions

An interaction is assigned to a regular category if it meets the conditions that are defined for inclusion in that category. Conditions can include a wide variety of interaction characteristics:

- The program to which the interaction belongs.
- Recognized topics.
- Non-linguistic events.
- Interaction metadata properties.
- Categories to which the specific category belongs.

The following expressions and conditions can be used when configuring a category:

Logical Expressions

Configuring category conditions is performed by defining a logical expression for SpeechMiner to evaluate. If the logical expression is evaluated as True, 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 (that is, the topic must be found and the interaction must have taken place in the specified time period), 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 for the expression to be evaluated as True.
OR	At least one of the conditions must be met 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 (for example, the second must occur within 30 seconds after 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, the following logical expression means the interaction should be assigned to the category if the interaction took place between Jan. 1st and Jan. 30th and the Reduction topic was found, or if the interaction took place Jan. 31st or later and either the Time Frame topic or the Payment Locations topic was found:

(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))

> Important
>
> The logical expressions that are used as category conditions are configured by incorporating elements and logical operators to create the conditional statement.

See Also

Configure Category Conditions

Operators

You can add logical operators to the expression as necessary to define the relationships between the elements of the expression.

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).

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.

See Also

Configure Category Conditions

Parentheses in Expressions

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 write the following expression, it is clear whether the Topic must be found in interactions handled by both agents or only in interactions handled by agent b.

Workgroup\Agent=workgroup 1/agent a OR Workgroup\Agent=workgroup 1/agent b AND Found topic "New Account" at least once with Low Strictness

If you add parentheses as follows, the topic should be be found in interactions handled by one of the agents.:

(Workgroup\Agent=workgroup 1/agent a OR Workgroup\Agent=workgroup 1/agent b) AND Found topic "New Account" at least once with Low Strictness

If you write the following, the topic is only be required in interactions handled by agent b.

Workgroup\Agent=workgroup 1/agent a OR (Workgroup\Agent=workgroup 1/agent b AND Found topic "New Account" at least once with Low Strictness)

See Also

Configure Category Conditions

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 during 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 option in the element's conditions.

The following are two examples of the same negative condition written in two different ways. These conditions are True as long as the date is not on or before January 31st, 2011.

NOT Date Of Interaction<1/31/2011

- Or -

Not Date Of Interaction

An expression containing multiple elements can only be marked as a negative condition using the **NOT** operator. For example, in the following expression, the NOT operator is attached to a multi-element condition. The condition is True for all workgroups except workgroup 1 and workgroup 4.

NOT (Workgroup\Agent=/workgroup 1 OR Workgroup\Agent=/workgroup4)

See Also

Configure 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.

Define your category by including conditions that will recognize interaction characteristics associated with the specific category's business issue.

To configure a category condition

1. Configure one or more of the following conditions:

   If you are adding a condition to an existing expression, select the element in the expression before which you want to insert the new element.

   ## Metadata

   Metadata is information about an interaction that is gathered by the external recording systems and relayed to SpeechMiner together with the interaction's data. For example, interaction metadata can include the agent's name, the customer's location, the interaction duration, and so on.

   Metadata category conditions are based on 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 interactions 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.

   a. Drag **Meta Data** to the area below the conditions bar.

      The fields required to configure the element appear below the **Type** parameter.

      In the first field on the left, specify the type of metadata in one of two ways:
      - If the type you want appears in the drop-down list, select it. For example, select Workgroup\Agent if you want to define a condition based on the workgroup or agent that handled the interaction.
      - Manually enter the type in the field. For example, if your system gathers data about an interaction's direction under the name interactiondirection, enter interactiondirection.

c. 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 can 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 text field on the right.

   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 specific 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.

d. If you want the condition to include all interactions except those that match the condition, select **Not found**.

2. Click **OK**.

See Also

About Categories
Category Conditions

Non-Linguistic

Non-linguistic events include various sounds that SpeechMiner detects in an interaction, such as busy tones, key presses, and music or noise. Depending on the program settings of the interaction, 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. When you select multiple types of non-linguistic events, if any of those events is found in the interaction, it meets the condition.

Each non-linguistic event that is identified by SpeechMiner has a start time, an end time, and a type. For example, if SpeechMiner identifies silence in an interaction, this is a non-linguistic event whose start time is the beginning of the silent period, whose end time is the end of the silent period, and whose type is "Silence."

You cannot select Agitation along with other types of events.

a. Drag **Non Linguistic** to the area below the conditions bar.
b. Select one or more of the following types of non-linguistic events:

   Types of non-linguistic events that cannot be selected along with the selected type, become inactive.

   - **Dial Tone**: A dial tone.
   - **Ringback**: A signal used in PSTN (Public Switched Telephone Networks - standard "land lines") to indicate that the line is being called or an incoming interaction is present.
   - **Silence**: Silence, usually indicating that the Mute button was held down on one of the handsets.
   - **Busy Tone**: A busy signal.
   - **Music and Noise**: Music or noise, generally indicating the interaction was on hold.
   - **DTMF**: Key press on a touch-tone phone. 16 different keys can be identified using DTMF (Dual Tone Multi Frequency). Select **any** to accept any key press.
   - **Agitation**: Non-verbal expressions of frustration and anger, such as deep sighs, grunts or rapid changes in pitch.
   - **Cross Talk**: When the agent and customer talk at the same time.

i. If you selected Silence, Busy Tone, Music/Noise, Dial Tone, Ring Back Tone, or Cross Talk, define the amount of time that the selected types of non-linguistic events must occupy in the interaction total as follows:

Field	Description
From / To	Define the minimum amount of time that the selected types of non-linguistic events must occupy in the total interaction time in one of the following ways: ▪ **Seconds**: The minimum and maximum number of seconds from the beginning of the interaction at which the event types must be found and end. ▪ **Percentage**: The minimum and maximum proportion of the interaction (percentage), at which the event type must start and end. (Insert the %

	character after the value to indicate it is a percentage.)
Accumulated Amount	The values in the From and To fields refer to the total amount of time in the interaction 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 interaction 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.

j. Configure the following **Position** settings:

Field	Description
Not found	Select this option if you want the condition to include all interactions except those in which the selected types of non-linguistic events were found.
From	Define the earliest position in the interaction audio at which the non-linguistic event can be found and select one of the following types of reference points: ▪ **Secs Abs**: The number of seconds from the beginning of the interaction. ▪ **Secs Abs from End**: The number of seconds from the end of the interaction. That is, the event must be found no earlier in the interaction than this number of seconds from the end of the interaction. ▪ **Secs Rel to Start of Prev**: The number of seconds relative to the beginning of the previous item in the expression. This option will work only 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 relative to the end of the preceding item. This option will work only 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 interaction audio at which the non-linguistic even may be found.

3. Click **OK**.

See Also

About Categories
Category Conditions

Program

A Program element specifies which interaction's belong to the program for the interaction to be assigned to the specific category.

a. Drag **Program** to the area below the conditions bar.
b. Select the program to which the interactions should belong.

> Important
>
> If you want to include the interactions except those that belong to the specific program, select **Not found** as well.

3. Click **OK**.

See Also

About Categories
Category Conditions

Topic

A topic element specifies that a topic must be found (or must not be found) by SpeechMiner in an interaction for the interaction to be assigned to the specific category.

A program element specifies which interactions belong to the program for the interaction to be assigned to the specific category.

a. Drag **Topic** to the area below the conditions bar.
b. Select the topic to which the interactions should belong.
c. Configure the following settings as necessary:

<table>
<tr><th>Condition</th><th>Description</th></tr>
<tr><td>Not found</td><td>Select this option if you want the condition to include all interactions except those in which the specific topic was found.</td></tr>
<tr><td>Occurrence</td><td>The number of occurrences indicates the minimum number of times a topic must be found for the condition to be met. If the minimum is not met, SpeechMiner proceeds as if the Topic was not found.
The Strictness level indicates the minimum strictness level required for SpeechMiner to recognize the Topic. If the minimum Strictness level is not found, SpeechMiner proceeds as if the topic was not found.
The Confidence level (a range from 1 to 100), indicates the minimum level of confidence for the recognition of the phrase. If the SpeechMiner Confidence Level does not meet this minimum, SpeechMiner proceeds as if the phrase was not found.</td></tr>
<tr><td>Position</td><td>The Secs options should be selected to match audio interactions and the Words options should be selected to match text interactions. If you define 0 seconds from the start and 0 seconds from the end of the interaction, the entire (audio or text) interaction will be analyzed.
From: Define the earliest position in the interaction at which the topic should be found and then select one of the following.
Secs Abs: The number of seconds from the beginning of the interaction.
Secs Abs from End: The number of seconds from the end of the interaction. That is, the event must be found no earlier in the</td></tr>
</table>

	interaction than this number of seconds from the end of the interaction. ▪ **Secs Rel to Start of Prev**: The number of seconds relative to the beginning of the previous item in the expression. This option will work only 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 relative to the end of the preceding item. This option will work only if the operator connecting the two elements is Conditional AND (->). Otherwise, selecting this is the same as selecting Secs Abs from End. ▪ **Words Abs**: The number of words from the beginning of the interaction. ▪ **Words Abs from End**: The number of words from the end of the interaction. That is, the event must be found no earlier in the interaction than this number of words from the end of the interaction. ▪ **Words Rel to Start of Prev**: The number of words relative to the beginning of the previous item in the expression. This option will work only if the operator connecting the two elements is Conditional AND (->). Otherwise, selecting this is the same as selecting Words Abs. ▪ **Words Rel to End of Prev**: The number of words relative to the end of the preceding item. This option will work only if the operator connecting the two elements is Conditional AND (->). Otherwise, selecting this is the same as selecting Words Abs from End. ▪ **To**: Define the latest position in the interaction at which the preceding Topic should be found and then select one of the available options.
Speaker	Select a speaker type to instruct SpeechMiner to find and analyze Topics where only the Agent, Customer or both speak.

4. Click **OK**.

> Important
>
> The **Position > Words** options are only available when Text Analytics is enabled.

See Also

About Categories
Category Conditions

Category

A category element specifies that an interaction must (or must not) belong to another category for the interaction to be assigned to the category that is currently being configured.

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 Applying Changes.

> Important
>
> Including a Category element in the expression that defines a category is not the same as changing a category into a sub-category of the other. For additional information about sub-categories, see About Categories.

a. Drag **Category** to the area below the conditions bar.
b. From the **Category** list, select the category the interaction must belong to.
   If you want the condition to include all interactions except those that belong to the specific category, select **Not found**.

3. Click **OK**.

See Also

About Categories
Category Conditions

Speaker Type

A Speaker-Type element specifies that either an agent or customer or both must have taken part in an interaction for the interaction to be assigned to the category. This information is gathered by the recording system and passed on to SpeechMiner along with the interaction 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 interaction when each speaker was heard. For this reason, you can specify the times in the interaction when the type of speaker must have taken part in the interaction for the interaction to meet the category condition. For example, you could specify that a supervisor must have taken part in the last 120 seconds of the interaction.

a. Drag **Speaker Type** to the area below the conditions bar.
b. From the **Speaker Type** list, select the type of speaker for which SpeechMiner should search in association with the specific category.

   If you want the condition to include all interactions except those that belong to the specific category, select **Not found**.

c. Configure the following settings as necessary:

Condition	Description

Position	◦ **From**: Define the earliest position in the interaction at which the speaker should be found and then select one of the following: ▪ **Secs Abs**: The number of seconds from the beginning of the interaction. ▪ **Secs Abs from End**: The number of seconds from the end of the interaction. That is, the event must be found no earlier in the interaction than this number of seconds from the end of the interaction. ▪ **Secs Rel to Start of Prev**: The number of seconds relative to the beginning of the previous item in the expression. This option will work only 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 relative to the end of the preceding item. This option will work only 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 interaction at which the preceding Topic should be found and then select one of the available options.

4. Click **OK**.

See Also

About Categories
Category Conditions

Text

A Text element for audio interactions specifies that a phrase containing a sequence of one or more whole words must be found by SpeechMiner within the transcript of an interaction, for the interaction to be assigned to the category. Also, the words should be separated by single spaces and additional symbols and punctuation should not be included in the phrase. A Text element for text interactions (such as, email, chat, and so on), can contain additional symbols.

To meet the category condition, the phrase must be found exactly as it is entered in the Text element definition (not case sensitive). For example, "i want to repay my loan" and "I want to Repay My loan" are treated as identical phrases.

a. Drag **Text** to the area below the conditions bar.
b. In the **Text** field, enter the phrase.

   The phrase should consist of a sequence of one or more whole words. The words should be separated by single spaces. No punctuation or additional symbols should be included in the sequence.

<table>
<tr><th>Condition</th><th>Description</th></tr>
<tr><td>Not found</td><td>Select this option if you want the condition to include all interactions except those that include the phrase.</td></tr>
<tr><td>Occurrence</td><td>The number of occurrences indicates the minimum number of times the phrase must be found for the condition to be met.
The Strictness level indicates the minimum strictness level required for SpeechMiner to recognize the phrase.
The Confidence level (a range from 1 to 100), indicates the minimum level of confidence for the recognition of the phrase. If the SpeechMiner Confidence Level does not meet this minimum, SpeechMiner proceeds as if the phrase was not found.</td></tr>
<tr><td>Position</td><td>The Secs options should be selected to match audio interactions and the Words options should be selected to match text interactions. If you define 0 seconds from the start and 0 seconds from the end of the interaction, the entire (audio or text) interaction will be analyzed.
From: Define the earliest position in the interaction at which the topic should be found and then select one of the following.
Secs Abs: The number of seconds from the beginning of the interaction.
Secs Abs from End: The number of seconds from the end of the interaction. That is, the event must be found no earlier in the interaction than this number of seconds from the end of the interaction.</td></tr>
</table>

	- **Secs Rel to Start of Prev**: The number of seconds relative to the beginning of the previous item in the expression. This option will work only 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 relative to the end of the preceding item. This option will work only if the operator connecting the two elements is Conditional AND (->). Otherwise, selecting this is the same as selecting Secs Abs from End. - **Words Abs**: The number of words from the beginning of the interaction. - **Words Abs from End**: The number of words from the end of the interaction. That is, the event must be found no earlier in the interaction than this number of words from the end of the interaction. - **Words Rel to Start of Prev**: The number of words relative to the beginning of the previous item in the expression. This option will work only if the operator connecting the two elements is Conditional AND (->). Otherwise, selecting this is the same as selecting Words Abs. - **Words Rel to End of Prev**: The number of words relative to the end of the preceding item. This option will work only if the operator connecting the two elements is Conditional AND (->). Otherwise, selecting this is the same as selecting Words Abs from End. ◦ **To**: Define the latest position in the interaction at which the preceding Topic should be found and then select one of the available options.
Speaker	Select a speaker type to instruct SpeechMiner to find and analyze Topics where only the Agent, Customer or both speak.

3. Click **OK**.

Important

> The **Position > Words** options are only available when Text Analytics is enabled.

See Also

About Categories
Category Conditions

Saving and Applying Category 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. In the upper-left of the right panel, click (Save).

   The category is saved, and a confirmation message appears.

2. Click **OK**.

See Also

Create a Blank Category
Configuring Categories

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.)

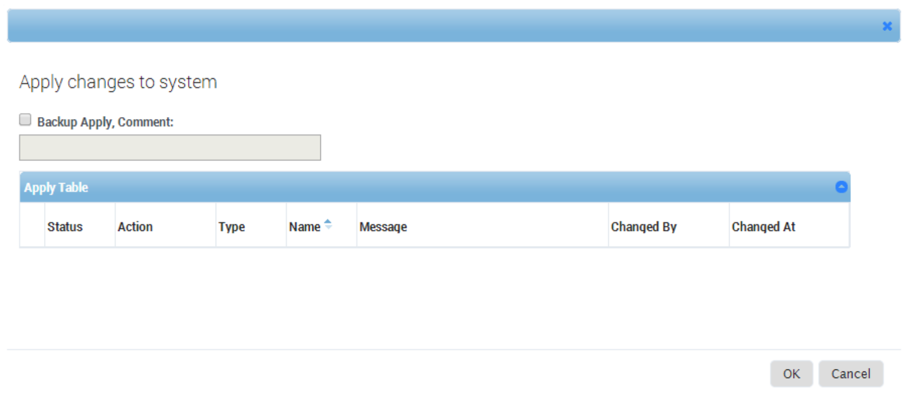
Before you apply a new Category to SpeechMiner, make sure it is active and unlocked. Active Categories appear in the tree list in normal type; inactive Categories appear in gray type. Locked Categories have an icon with a padlock beside their names (). Inactive Categories can be applied, but interactions 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 check box 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).



2. Perform one or more of the follow:
   - 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.
   - 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** and modify the text field below the option as required, to specify the comment that will be attached to the backup. In some systems, the Backup Apply, Comment option is always implemented, or not available.
   - If you do not want to apply a particular item, in the Apply column, clear the check box. (The check box is not available for items that cannot be applied.)
4. 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

Create a Blank Category
Configuring Categories

Activate / Deactivate 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/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 Category Changes.

See Also

Create a Blank Category
Configuring Categories

Moving and Sorting a Category

Move a Category

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, by changing the nesting of categories.

Individual 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** Move cat down.png 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.

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. For additional information about parent and sub-categories refer to About Categories.

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.

See Also

Create a Blank Category
Configuring Categories

Sort a Category

The sub-categories of a parent category can be sorted alphabetically. The sorting operation is not recursive - only the immediate "children" of the selected parent category are sorted; the sub-categories of the sub-categories are not sorted as part of the operation. In addition, the sort order is not case-sensitive.

You can use this feature to sort the sub-categories of individual parent categories, or, if you sort the All Category, you can sort all of the top-level Categories (for example, the immediate children of the All Category). You can also select multiple parent categories, to sort all of their sub-categories in one operation.

To sort a sub-category of a parent category

1. In the tree list, right-click the parent category, and select **Sort Alphabetically**.
   The sub-Categories of the selected Category are rearranged in alphabetical order.

To sort the sub-categories of multiple parent categories

1. In the tree list, select the check box of each of the parent categories.

   The parent categories must all be at the same level in the Category tree.

2. Right-click the last parent Category you selected, and then select **Sort Alphabetically**.
   The sub-Categories of each of the selected Categories are rearranged in alphabetical order.

See Also

Create a Blank Category
Configuring Categories

Delete a Category

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 check boxes 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.

3. Click **YES**.

See Also

Create a Blank Category
Configuring Categories

Manage 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.

Important

It is highly recommended to create a backup of your latest definition set before you apply your changes. A backup will enable you to easily rollback to the previous definition set.

The following tabs represent the processes that are supported:

Creating Tags

Each Item Tag includes the current definition of the topic, program or category, the date and time the tag was created, your user name, and a comment.

A Tag is created when you:

- Manually add a tag. When you manually create a tag, Genesys recommends that you add a comment to explain the changes. The comment is attached to every definition tag in the system.
- Close SMART. That is, the system automatically creates a tag for each definition that was changed and not applied.
- Apply changes to SpeechMiner and choose to create a back up. The tag contains the definition as it appears in SpeechMiner when 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 Manual.

To create a tag

1. In the left panel, in the tree structure, right-click the item you want to tag and select **Tag Category**.

A **Comment for tagging** dialog box opens.

2. Enter a comment to attach to the tag.
3. Click **OK**.
   The tag is created.

See also

Create a Blank Category
Configuring Categories
SMART User Manual

Restore 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. Verify that the category you want to restore is not open or locked.
2. Right-click the category you want to restore and select **History**.

   The **History** window opens and displays a list of all the tagged definitions associated with the selected category, topic or program.

3. Select the tag you want to restore.
4. Click **Mark for Rollback**.

   A rollback message appears at the bottom of the window. The message indicates that the definition will be restored in accordance with the selected tag.

5. Click **OK**.
   The tagged definition is restored.

See also

Create a Blank Category
Configuring Categories
SMART User Manual

Change a Tag Comment

You can change a comment that you entered or a comment associated with a tag for which you have permissions to modify.

> Important
>
> Tags that were generated as a set during an **Apply** process cannot be modified or deleted individually. For more information, see the Manage Version History page in the SMART User Manual

To change a tag comment

1. Right-click the category whose comment you want to modify and select **History**.

   The **History** window opens and displays a list of all the tags associated with the selected category, topic or program.

2. Click the relevant comment field.
3. Modify the text as necessary and click outside the text field to close it.
4. Click **OK**.
   The comment change is saved.

See also

Create a Blank Category
Configuring Categories
SMART User Manual

User Management

This section explains how to manage users in the SpeechMiner user-management system. If users in your system log into SpeechMiner with Genesys user accounts, the operations described here are performed for their accounts in the Genesys Administrator Extension (GAX).

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 work groups, 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.

Important

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

Edit User Profile
Manage Users
Manage Groups
Manage Roles
SMART User Manual

Edit User Profile

Your user profile includes your user name and password, your roles, work groups, 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 **Account**, select **Edit Profile**.
2. The **Edit Profile** screen opens and displays your user profile.
3. Modify the settings and information as necessary.

   For detailed information about the fields, see Managing Users.

4. Click **Save Changes**.
   The changes are saved.

See also

Manage Users
Manage Groups
Manage Roles
SMART User Manual

Manage 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.

Create a New User Account

1. In the top right corner of the screen click **Administrator > Administer Users**.

   The **Administer Users** screen opens and displays a list of the existing user accounts.

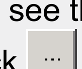
2. Click **New** +.

   A blank **Edit Profile** screen opens.

3. Fill in the fields as follows:

Field	Description
Active	Select this check box 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 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. This field only appears if SpeechMiner is selected under Authentication.
New Password	Type a password for the account. 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. This field only appears if SpeechMiner is selected under Authentication.
User must change password at next logon	Select this option to require the user to change their password the next time they log into SpeechMiner. 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. 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. 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 work groups 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 work groups 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 Templates page as the homepage, and the address of the New Search page is `http://myserver/speechminer/pages/ui/#/reports/templates`, you would remove the base of the address (enter `http://myserver/speechminer`) and enter `pages/ui/#/reports/templates`. 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 work group they manage. You can select the name or work group in one of the following ways: ◦ In the text field, begin typing the name of the agent or work group. A drop-down 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 work groups opens. Click a work group to select it, or expand the relevant work group 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 check box. 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 selected to send the user an e-mail notification, the e-mail is sent.

See also

Edit User Profile
Manage Groups
Manage Roles
SMART User Manual

Filter the User Accounts

You can filter the list of existing users in a number of ways to help you find the accounts that interest you.

1. In the top right corner of the screen click **Administrator > Administer Users**.

   The **Administer Users** screen opens and displays the list. The list includes a summary of each user's profile.

2. Perform one or more of the following:
   - If you want to filter by user name, type a letter or combination of letters in the **Name** field. User accounts that do not include the specified combination of letters will be hidden from the list.
   - If you want to filter by role, open the **Roles** drop-down list and select a role or roles you want to include in the list.
   - If you want to filter by group, open the **Groups** drop-down list and 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.)

   The filter is activated and accounts that do not match the filter settings are not displayed.

See also

Edit User Profile
Manage Groups
Manage Roles
SMART User Manual

Modify 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** menu. For example, you could add a role to a number of users' accounts.

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 Account** tab.

   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.

Make global changes to selected profiles

1. In the **Administer Users** screen, select the check box associated with each user profile you want to modify. To select all of the user profiles, select the check box at the top of the column.
2. Above the list, click **More**.

   The **More** drop-down 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. Inactive accounts can be reactivated later as necessary. When you click **OK**, 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 **Close** 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 **Close** 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 **Close** 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 **Close** to close the list.

4. Click the **OK** button to the right of the **More** field.

   The changes are implemented. If you selected **Mark as Inactive**, before 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.

5. Select the desired action, and then click OK.

See also

Edit User Profile
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Delete 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 check box associated with the 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

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Manage 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 work groups. 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. Work groups are based on the structure of the call center and identify the user's place in the enterprise's hierarchy. For example, a work group might be Denver Center, ABC Bank. In most cases, certain partitions are associated with specific work groups, so it is sufficient to select work groups 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.

Create a New User Group

1. In the Main Menu, under **Tools**, select **User Management > Administer Groups**.

   The **Administer Groups** screen opens and displays a list of the existing groups. For each group, the work groups and partitions associated with the group are listed under **Partitions**.

2. Click **New**.

   A group-definition dialog box opens.

3. Under **Group**, type a name for the group.
4. In the tree area below the group name, select the partitions and work groups to associate with the group. Click the plus sign beside a node to expand a node or the minus sign to collapse it.
5. Click **Save**.
   The dialog box closes, and the group is created and added to the list.

See also

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Delete Users

You can delete groups from the system if no users are associated with them.

To delete user accounts

1. In the **Administer Groups** screen, select the check box associated with the group you want to delete.
2. Click **Delete**. You are prompted to confirm that you want to delete the selected accounts.
3. Click OK.
   The groups are deleted.

See also

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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

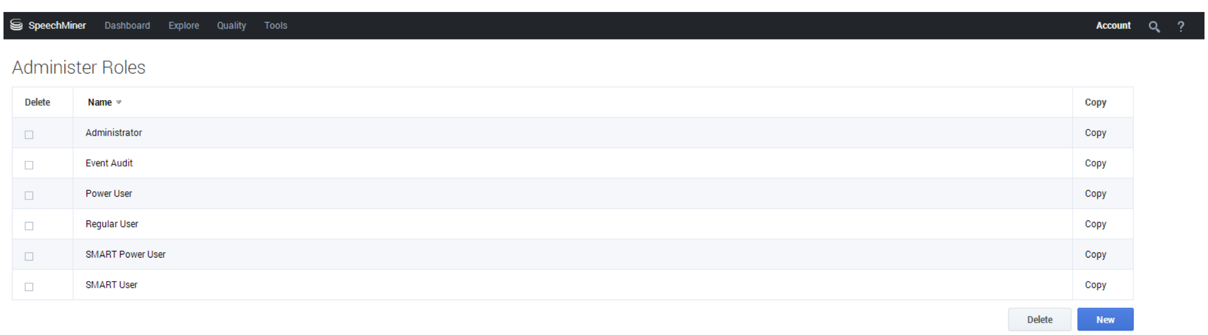
Regular User	A standard set of permissions suitable for most users, this role permits viewing of most pages, playing back calls, and adding comments to calls. It does not permit any access to SMART.
Power User	An expanded set of permissions that includes the standard set of permissions assigned to Regular 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.

Modify a Role

You can modify the permissions that are assigned to any role.

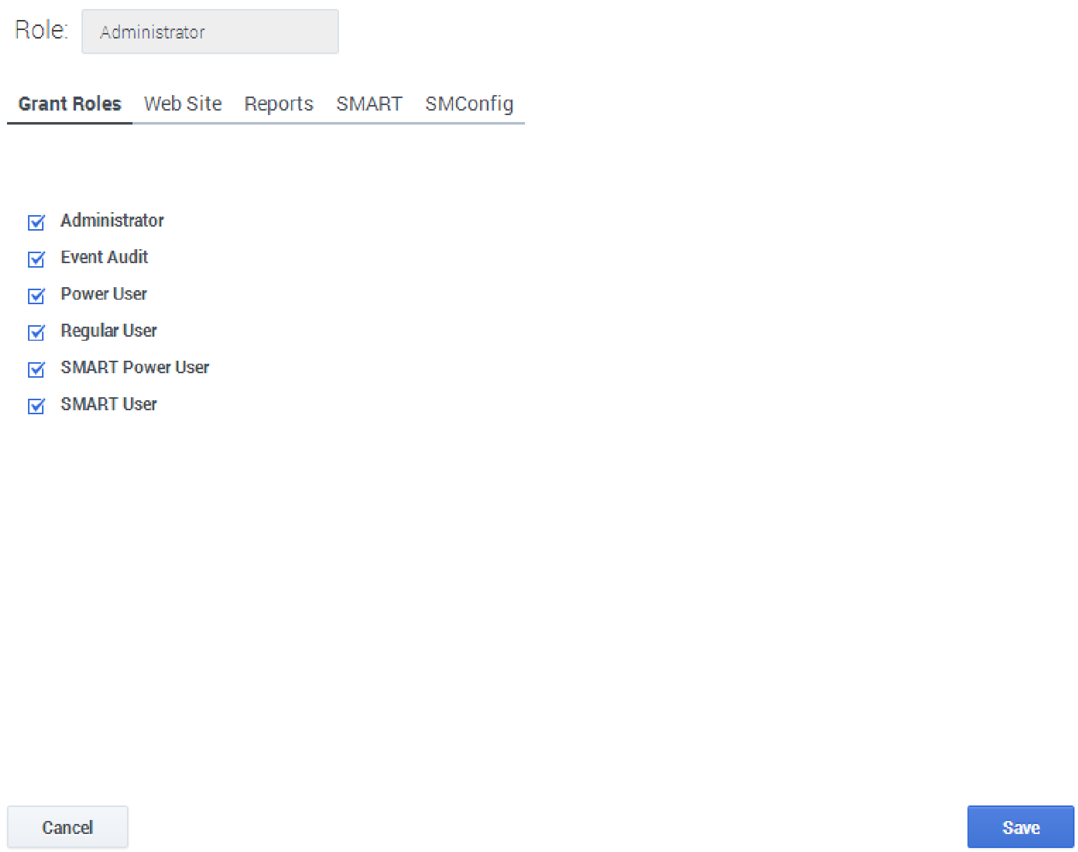
1. In the menu bar, click **Account** and select **Administer Roles**.

   The **Administer Roles** screen opens and displays a list of existing roles.

2. In the **Administer Roles** screen, click the name of the role you want to modify.

   The role configuration dialog box opens.



3. 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.

4. 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.

5. When you have finished modifying the permissions for the role, click **Save**.
   The modifications are saved and the dialog box closes.

See also

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Add a New Role

You can add new roles to the system as necessary. New roles can be added in one of two ways:

- Add a new role and configuring it directly.
- Copy an existing role and then modify 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 finish selecting permissions for the role, click **Save**.
   The role is saved and the dialog box closes.

To copy and modify a role

1. In the **Administer Roles** screen, on 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 (containing 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.
5. When you have finished modifying the permissions for the role, click **Save**.
   The role is saved and the dialog box closes.

See also

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Delete Selected Roles

1. In the **Administer Roles** screen, select the check box in the **Delete** column associated with each role you want to delete.
2. Click **Delete**.
3. Enter a name for the role, and then click **OK**.
   The selected roles are deleted.

See also

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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.

> Important
>
> Some of the options described in this section are not available in Recording UI-mode or Analytics and Recording UI-mode systems.

See also

Preset Views
Monitor System
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Manage 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.

Create 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.

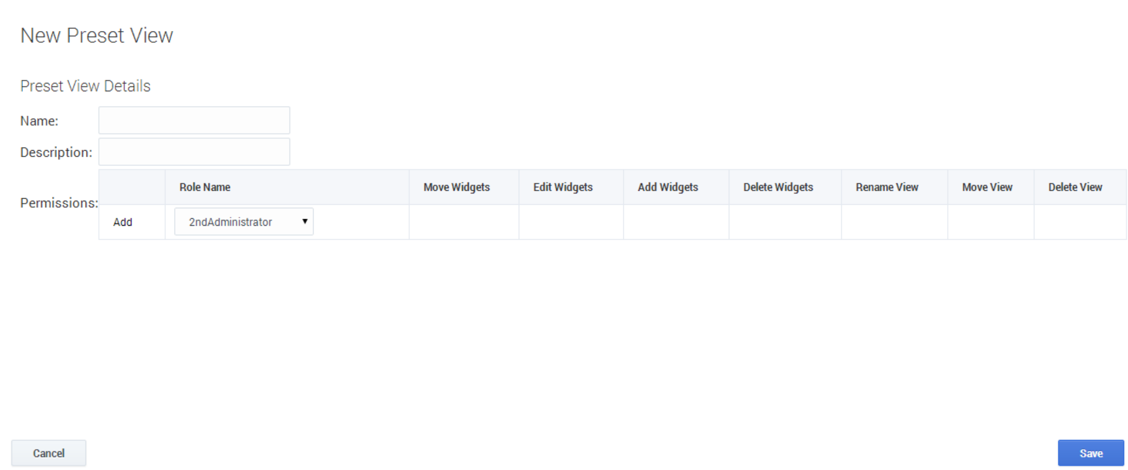
To design a new preset view

1. In the Main Menu, under **Tools**, select **System Admin > Preset Views**.

   The **Preset Views** screen opens.

2. Click **New**.

   A **New Preset View** dialog box opens.



3. Under **Name**, type a name for the Preset View.
4. Under **Description**, type a description for the Preset View.

   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.

   Important

   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.

8. 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.

9. Under **Permissions**, under **Role Name**, select one of the user roles to which you want to publish the Preset View.
10. To the left of the selected role, click **Add**. A permissions row is added for the selected role.

Check boxes appear in the row for each type of permission.

11. Select the check box associated with each permission you want to grant to users of the selected role.
12. Repeat the previous three steps for each role to which you want to publish the Preset View.
13. Publish the Preset View as described in the **Publish Preset View** tab.

See also

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Publish 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.

> Important
>
> 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 check box 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.

See also

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Edit 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.

Modify the name, description, and permissions as required.
2. 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.

See also

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Edit 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.

Important

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 in the **Publish Preset View** tab.

See also

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Delete 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 check box beside each Preset View you want to delete.
2. In the upper-left of the screen, click the **Delete** icon.

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

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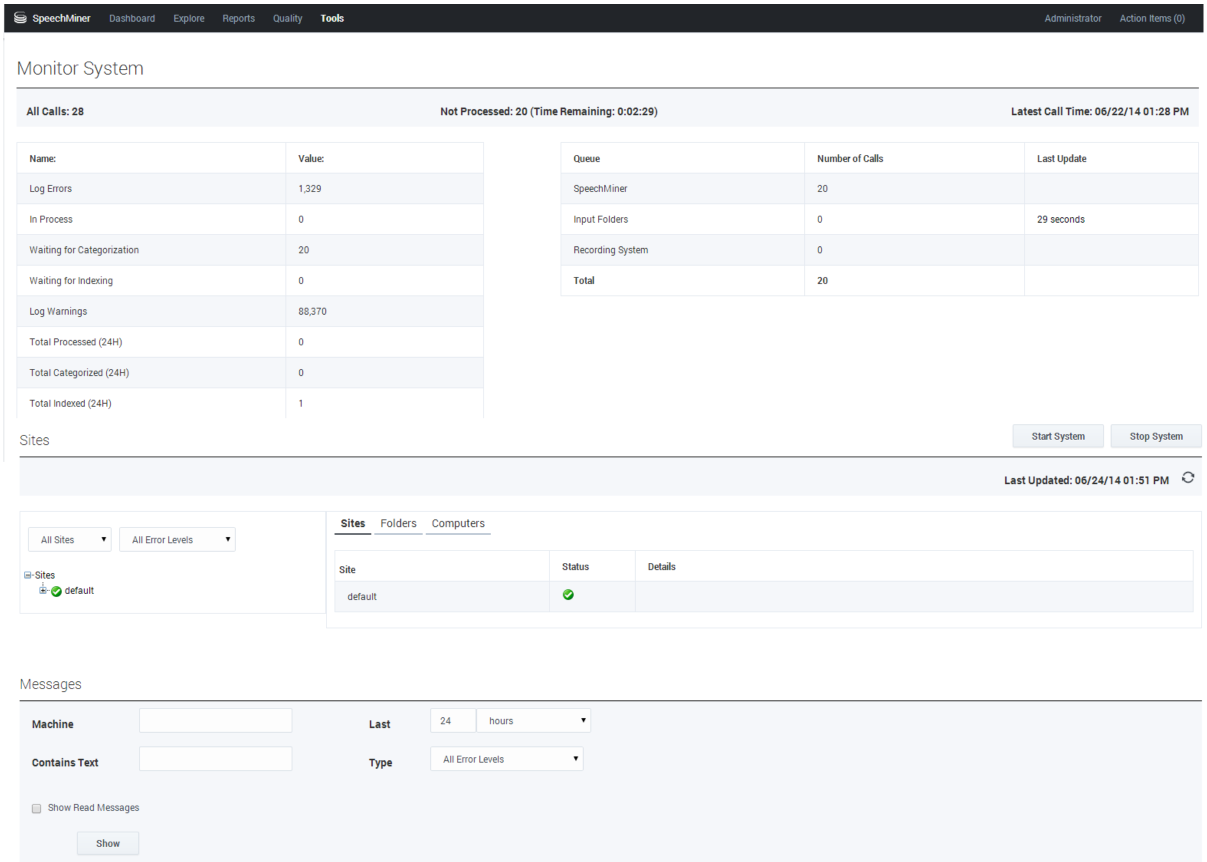
Monitor System

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.

Open the Monitor Screen

In the Main Menu, under **Tools**, select **System Admin > Monitor System**.



See also

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Monitoring Module Status

The Monitor System screen displays system status information that includes the following:

Status	Description
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. 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.
Sites tab	Status of the various sites.
Folders tab	Folder status (Input, Filter, and Store): If available space is low, a warning or error is generated.
Computers tab	Status of the various computers.

See also

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Start/Stop 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 System** and **Stop System** buttons on the right.

Important

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**.

See also

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Viewing System Messages

The bottom of the screen can be used to display system messages.

Important

> You can also see system messages, as well as additional system-status information, by running the Monitor System report.

To view system messages

At the bottom of the screen, in the Messages area, set the filters you want to apply to the message list. 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

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Manage 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.

To open the Manage Call Queue

1. In the Main Menu, under **Tools**, select **System Admin > Manage Call Queue**.

To permanently change the priority of a program

1. In the **Program** column, click **Edit**.
2. In the dialog box, select the required priority level, and then click **OK**.

To temporarily change the priority of a program

1. In the **Calls in Queue** column, click **Set Priority**.
2. In the dialog box, select the required priority level, and then click **OK**.

See also

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Purge 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

Important

Calls that belong to static Interaction Lists or manual Categories are not deleted during a purge. It is possible to set up an automated purging job. For additional information, contact Genesys support.

To purge calls from the system

1. In the Main Menu, under **Tools**, select **System Admin > Purge System**.
2. Select the desired options.
3. Click **Delete**.

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Manage 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 > Manage Cache**.

   The **Manage Cache** screen opens.

2. In the drop-down 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.

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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.

Delete Audits

You can delete all the audits for a particular Topic or for all Topics.

To delete audits

1. In the Main Menu, under **Tools**, select **System Admin > Interactions Admin**.
2. In the **Interactions Admin** screen, in the **Delete Audits** tab, click the arrow to the right of the **Audits** field.

   A drop-down list of Topics appears.

3. Select the Topics for which you want to delete the audits.
4. Click **Delete**.
   The audits are deleted for the selected topics.

See also

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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.

> **Important**
>
> Reprocessing of interactions is not available in Recording UI-mode or Analytics and Recording UI-mode systems.

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.

3. If you selected **Topics** or **Programs**, click the arrow pointing down beside your selection.
4. 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.

5. 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.
6. Click **Reprocess**.
   The items are reprocessed.

See also

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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

1. In the **Interactions Admin** screen, in the **Clean Orphaned Audits** tab, click **Clean**. The terms are deleted.

See also

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System Configuration

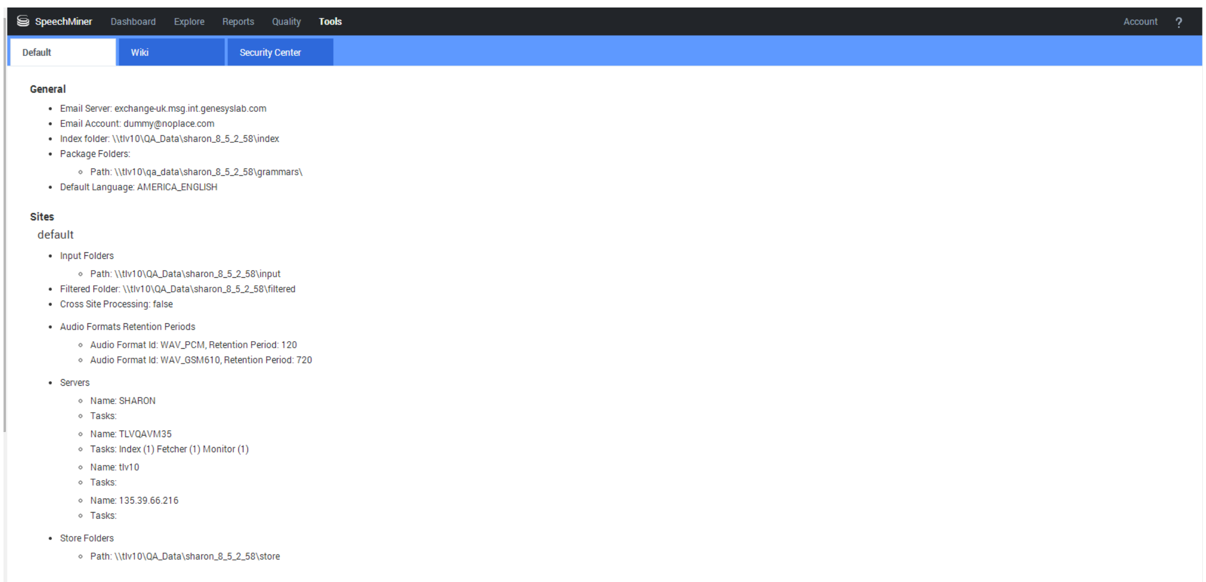
The System Configuration page displays system configuration and security information. The configuration information is for viewing only, but some of the security settings can be changed.

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

1. In the Main Menu, under **Tools**, select **System Admin > System Configuration**. The System Configuration screen opens and displays the Default tab, in which the system-configuration information is displayed.



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

Preset Views
Monitor System
Manage Call Queue
Purge System
Manage Cache

Interactions Administration
System Configuration
Manage Alerts
System Alerts

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 available using Windows, Genesys or SpeechMiner authentication.
- Access to the system is blocked after ten consecutive attempts to log in with an invalid password.
- Permissions are set properly for all users and components of the system.
- All web services use a secure API, and can only be accessed using a token that is supplied by the system upon user login.
- Secure SSL connections are used for all connections to and between servers in the system.
- The SSL certificate is valid and includes all the domains used by the site.
- All user events are logged.
- Tracing is disabled on all web servers in the system.

> Important
>
> Some of the recommendations listed above are not relevant to Recording UI mode, because they relate to features that are not supported in that mode.

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.

Important

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.

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.

The upper part of the tab contains PCI-compliance information. The lower part contains a log of security-related user actions. Both tables can be sorted by any of the columns they contain.

1. In the System Configuration screen, click the **Security Center** tab.

See also

Preset Views
Monitor System
Manage Call Queue
Purge System
Manage Cache
Interactions Administration
System Configuration
Manage Alerts
System Alerts

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

1. 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.

> Important
>
> Settings that require manual correction are not changed when Reset is selected.

See also

Preset Views
Monitor System

Manage Call Queue
Purge System
Manage Cache
Interactions Administration
System Configuration
Manage Alerts
System Alerts

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.)

Configure the display in the table

1. 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

Preset Views
Monitor System
Manage Call Queue
Purge System
Manage Cache
Interactions Administration

System Configuration
Manage Alerts
System Alerts

Manage 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.

Create a New Alert

1. In the Main Menu, under **Tools**, select **System Admin > Alerts**.

   The **Alerts** screen opens and displays a list of the currently defined alerts.

2. Below the list of alerts, click **New**.

   The **Alert Type** dialog box opens.

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.

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, open the **Agent** list and add the work groups and/or agents to the list of selected agents. For additional information about using the **Agent** multi-melect 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 drop-down list, select either categories or topics, and then, select the relevant categories or topics in the drop-down list to the right. For additional information about using the **Agent** multi-melect box, see Defining Search Criteria.

6. Fill in the fields on the next line as follows.

   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

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

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

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.
4. 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.

See also

Preset Views
Monitor System
Manage Call Queue
Purge System
Manage Cache
Interactions Administration
System Configuration
System Alerts

Edit 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.

   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.

See also

Preset Views
Monitor System
Manage Call Queue
Purge System
Manage Cache
Interactions Administration
System Configuration
System Alerts

Delete an Alert

1. In the **Alerts** screen, in the **Delete** column, select the check box 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

Preset Views
Monitor System
Manage Call Queue
Purge System
Manage Cache
Interactions Administration
System Configuration

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).

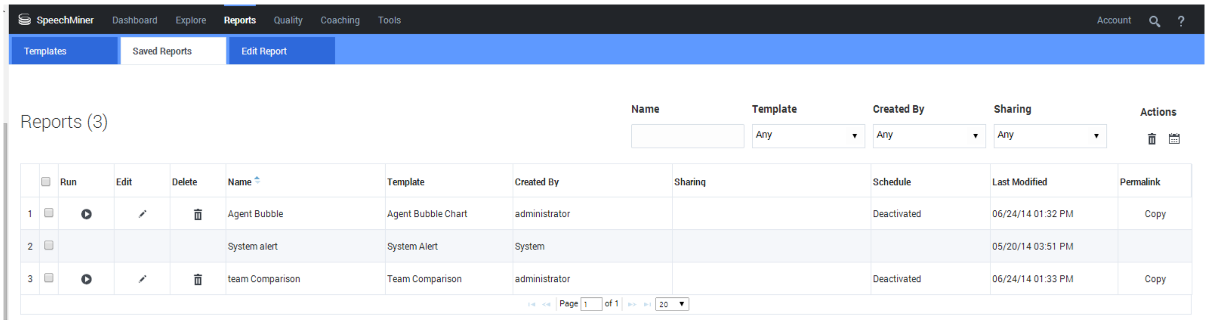
> Important
>
> New notifications are only sent out when new errors are discovered. Even if an error has remained uncorrected for a long period of time, no new notifications are sent out about it unless additional errors are detected.

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

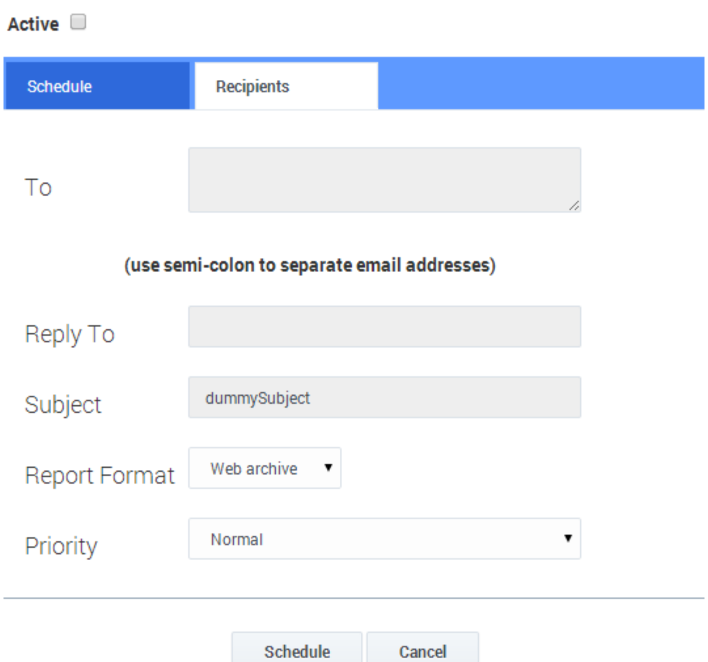
1. In the Main Menu, under **Reports**, select **Saved Reports**.

The **Saved Reports** tab opens.



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.



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

Preset Views
Monitor System
Manage Call Queue
Purge System
Manage Cache
Interactions Administration
System Configuration
Manage Alerts

Elements Explorer

The **Elements Explorer** allows you to browse the elements (Topics, Programs, and Categories) available in your version of SpeechMiner.

> Important
>
> This feature is not available in Recording UI mode.

See also

Topics
Programs
Categories

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).

Open and View Topic Statistics

1. In the Main Menu, under **Tools**, select **Elements Explorer > Topic Statistics**.
2. 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.

3. Click **Search**.
   The properties of the selected topics are displayed.

> Important
>
> To export topic statistics, click **Export**. The topic statistics are exported to an .xls file.

See also

Program Statistics
Category Statistics

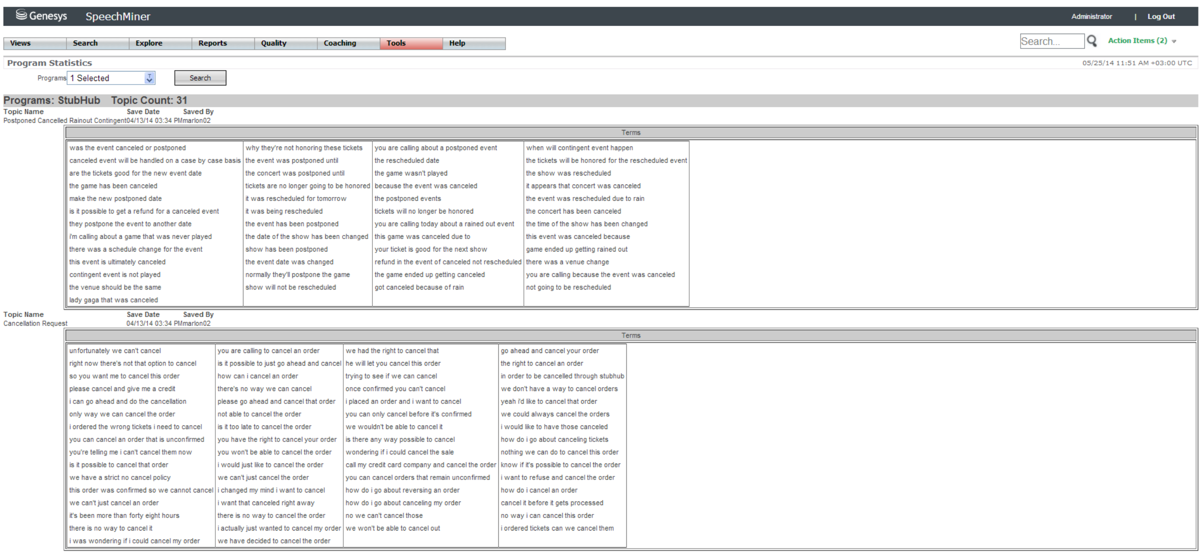
Program Statistics

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

Open and View Program Statistics

1. In the Main Menu, under **Tools**, select **Elements Explorer > Program Statistics**.



2. In the **Program** 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.

3. Click Search.
   The properties of the selected topics are displayed.

See also

Topic Statistics
Category Statistics

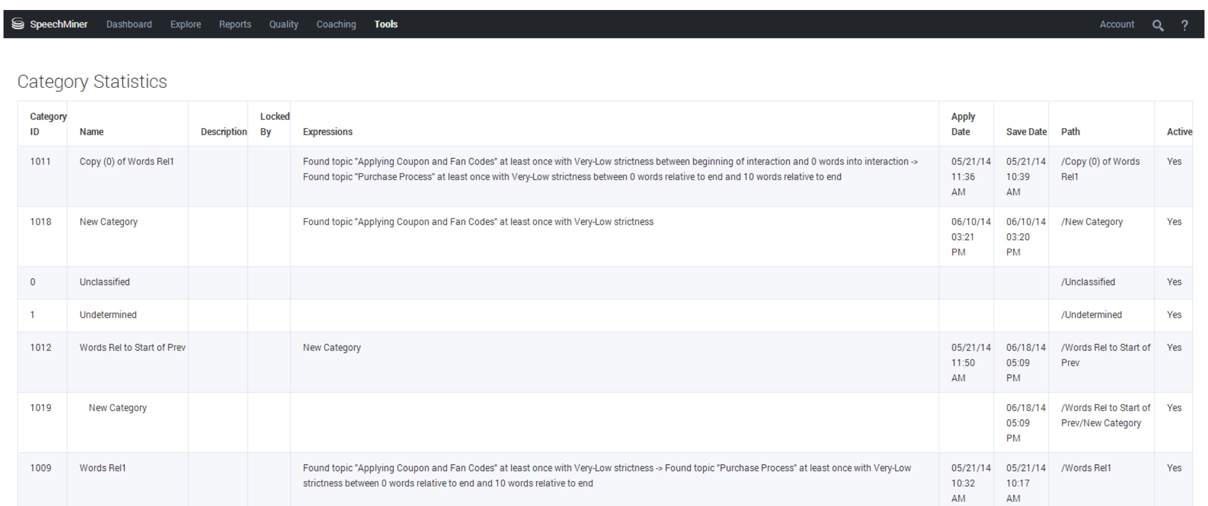
Category Statistics

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

Open Category Statistics

1. In the Main Menu, under **Tools**, select **Elements Explorer > Category Statistics**.



Category ID	Name	Description	Locked By	Expressions	Apply Date	Save Date	Path	Active
1011	Copy (0) of Words Rel1			Found topic "Applying Coupon and Fan Codes" at least once with Very-Low strictness between beginning of interaction and 0 words into interaction -> Found topic "Purchase Process" at least once with Very-Low strictness between 0 words relative to end and 10 words relative to end	05/21/14 11:36 AM	05/21/14 10:39 AM	/Copy (0) of Words Rel1	Yes
1018	New Category			Found topic "Applying Coupon and Fan Codes" at least once with Very-Low strictness	06/10/14 03:21 PM	06/10/14 03:20 PM	/New Category	Yes
0	Unclassified						/Unclassified	Yes
1	Undetermined						/Undetermined	Yes
1012	Words Rel to Start of Prev			New Category	05/21/14 11:50 AM	06/18/14 05:09 PM	/Words Rel to Start of Prev	Yes
1019	New Category					06/18/14 05:09 PM	/Words Rel to Start of Prev/New Category	Yes
1009	Words Rel1			Found topic "Applying Coupon and Fan Codes" at least once with Very-Low strictness -> Found topic "Purchase Process" at least once with Very-Low strictness between 0 words relative to end and 10 words relative to end	05/21/14 10:32 AM	05/21/14 10:17 AM	/Words Rel1	Yes

See also

Program Statistics
Topic Statistics

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. After you select search criteria for a new call search, you can generate and save a Permalink to the query. After you have copied the Permalink 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 item types, 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.

To save a generated Permalink:

1. In the Interactions list page, click ⋮ and click **Permalink**.

   The **Permalink** window opens with the link to the current list of interactions.

2. 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 will be required.

   > Important
   >
   > Allow Anonymous is dependent on specific permissions and is not available for all types of Permalinks.

3. Copy the link:
    - When working with Explorer click **Copy & Close**.
    - When working with Chrome manually select and copy the link and click **Close**.

   The link is copied to your clipboard.
4. 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 do not have permissions. When this is the case, a warning message appears in the **Permalink** dialog box:

Standard Reports

SpeechMiner comes with a number of standard report templates. These report templates are described in this section For information about configuring and generating reports from templates, see Reports.

> **Important**
>
> - 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.

Template Layout

Template Layout

This section explains the general layout of report templates. The Common Parameters section, 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.

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.

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 Sm displayfilterpanelbutton.png

The current filter settings are displayed on the right side of the template below the first row:

Report Templates

Report 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.)

> Important
>
> - The information you see in reports is limited to the data to which you have access.
> - Recording templates do not include the **Categories** option, since recording does not categorize interactions.

The following standard report templates are available. Select a report template for more information.

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 interactions 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 interaction duration.

The X-Axis Only and Y-Axis Only versions present the data as a histogram indicating percentage of interactions per Agent and/or Workgroup, rather than a bubble chart.

> Important
>
> This template is only available in an Analytics UI mode.

Common Usages

- Plot Agents showing average interaction duration plus two customer-experience Categories (for example, Dissatisfaction and Escalation)
- Plot Agents showing average interaction duration plus two agent-efficiency Categories (for example, Transfer Rate and Hold Rate)
- Plot Agents showing average interaction duration plus two Categories that represent metadata (for example, 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 interactions included in the item.
- In X-Axis Only and Y-Axis Only versions, click to drill down to a Category Trend report.

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 interactions 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 interactions included in the item.

Agent Evaluation Comparison

Agent Evaluation Comparison

Description

The Agent Evaluation Comparison Report summarizes the average evaluation score for selected agents.

Common Usage

- To compare agent evaluation scores.

Customizing the Report

General Settings

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

Tip

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

- **Agents:** enables you to select the specific agents to be analyzed and displayed in your report.

For all other settings, see Common Parameters.

Actions

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

Agent Trend

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 interactions included in the item.

Calibration Report

Calibration Report

Description

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

Common Usage

- To create a report that compares two or more evaluators performance.

Customizing the Report

General Settings

- **Evaluation:** enables you to select the Calibration Evaluation on which to base the Calibration Report.

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

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

For all other settings, see Common Parameters.

Actions

- Sort the Evaluator names in the Y-axis.

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 interactions. It has two parts:

- A bar graph that shows the number of hours of loaded interactions and accumulated interactions for each day in the selected time period.
- A table listing the maximum number of channels (for example, the maximum number of agents taking interactions concurrently at any one time in the day) and the maximum number of seats available for example, the maximum number of agents who could use the system) each day.

Important

This template is only available in an Analytics UI mode.

Common Usages

- Analyze the number of recent interactions 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.

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 interactions 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 interaction duration. The x-axis value indicates the percentage of interactions that were in both the Bubble Category and any of the selected x-axis Categories. The y-axis value indicates the percentage of interactions 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 interactions per Category, rather than a bubble chart.

Important

This template is only available in an Analytics UI mode.

Common Usages

- Plot interaction-reason Categories showing average interaction duration plus two customer-experience Categories (for example, Dissatisfaction and Escalation)
- Plot interaction-reason Categories showing average interaction duration plus two agent-efficiency Categories (for example, Transfer Rate and Hold Rate)
- Plot interaction-reason Categories showing average interaction duration plus two Categories that represent metadata (for example, 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.

Important

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 interactions included in the item.
- In X-Axis Only and Y-Axis Only versions, click to drill down to a Category Trend report.

Category Distribution

Category Distribution

Description

The Category Distribution report is a graph or chart that shows the distribution of interactions by Category for a specified domain. The distribution can be calculated by percentage of interactions or by percentage of resources (total duration of all interactions included in the analysis).

Important

This template is only available in an Analytics UI mode.

Common Usages

- Plot the proportion of interactions in specified Categories to analyze business trends and customer issues
- Compare the distribution of multiple Categories—such as interaction or cancellation reasons, product popularity, or competitor mentions—across your body of interactions
- 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 interaction duration for each Category. These values are displayed above the total number of interactions in the Category.
- **Summary (Pie):** A pie chart indicating the proportion of interactions 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 interactions 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 interactions (the total number of interactions) or percentage of resources (the total duration of all interactions).

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 interactions in the Category.
- In the Full version, click **Trend** ([file:smicon_reportdrilldown.png]]) to drill down to the distribution of interactions for a Category. If the distribution of the items on the report (see Items on Report above) was by percentage of interactions, the distribution of

interactions is by percentage of interactions; if it was by percentage of resources, the distribution of interactions is by average interaction duration.

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 interactions, percentage of interactions, average interaction duration, or total resources. There is one line per selected Category.

> Important
>
> This template is only available in an Analytics UI mode.

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, seeCommon 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 interactions included in the item.

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.

Evaluation Summary

Evaluation Summary

Description

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

Common Usage

- Monitor evaluator performance.

Customizing the Report

General Settings

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

For all other settings, see Common Parameters.

Metadata Frequency

Metadata Frequency

Description

The Metadata Frequency report is a histogram that shows, for a selected metadata field, how many interactions 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 interactions they belonged to each value and the percentage of all the interactions in the data set that had the values. For example, if the metadata field "department" is selected, the report shows how many departments (values) were represented in the data set, and divides the departments into groups based on how many interactions they had.
- The lower level gives details for one of the groups in the top level, listing the values that had at least the number of interactions represented by the group, and indicating how many interactions they had. The Wide version of the report also shows the most common Category of those interactions.

Common Usages

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

Customizing the Report

General Settings

- **Version:** Available in Full Report (standard size), Mini, 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 interactions 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 interactions that have the field value represented by the bar.
- Click to drill down to a Category Distribution report.

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 interactions, the percentage of interactions, average interaction duration, or total resources. The table includes data about the number of interactions, the difference from the benchmark, and the percentage above or below the benchmark.

Important

This template is only available in an Analytics UI mode.

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.

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 interactions and one for loaded interactions. 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.

Important

A smaller version of this template, MINI_System Load, is also available. It is intended for use in the

Views page. This template is only available in an Analytics UI mode.

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.

Team Comparison

Team Comparision

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 interactions included in the item.

Team Evaluation Comparison

Team Evaluation Comparison

Description

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

Common Usage

- To compare team evaluation scores.

Customizing the Report

General Settings

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

> Tip
>
> If the Form list does not include the form you want to select refresh the page.

- **Teams:** enables you to select the specific teams to be analyzed and displayed in your report.

For all other settings, see Common Parameters.

Actions

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

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.

> Important
>
> This template is only available in an Analytics UI mode.

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 interactions 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 interactions 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 interactions 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 interactions included in the item.

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 interaction 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 interactions that were included in the report, how many interactions 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.

Important

This template is only available in an Analytics UI mode.

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.

> **Important**
>
> 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.
- Click the to drill down to an item's details. The details show information about the precision as a function of confidence level and as a function of elapsed time in interactions.
- In the list of terms for a Topic, click the name of a term in order to open an interaction-search window and find interactions in which the term is found.

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 interactions 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.

The Percent Change is calculated by the number of calls per topic in the selected period (A) divided by the total number of calls in the selected period (B) divided by the number of calls per topic in the previous period (C) divided by the total number of calls in the previous period (D). For example, (A/B)/(C/D) = (A*D)/(B*C).

Important

This template is only available in an Analytics UI mode.

Common Usage

- Monitor Topic trends in interactions 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 interactions 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.
- In the list of terms for a Topic, click the name of a term in order to open an interaction-search window and find interactions in which the term is found.

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 an interaction, 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:** How frequently the consequence was found in interactions in which the cause was found; that is, from the collection of interactions in which the cause was found, the percentage of interactions in which the consequence was also found
- **Lift:** How dependent the consequence was on the causes
- **Saliency:** The significance of the correlation - how much information is represented by the pattern of association

> Important
>
> This template is only available in an Analytics UI mode.

Common Usages

Identifying scenarios in the flows of interactions 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 confidence level required for the pattern to be included in the report. The confidence level is the percentage of those interactions in which the cause was found that also contained the consequence. Range: an integer between 0 and 100.

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 interactions 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.
- 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.

Important

In a Recording UI mode the Applies column is not relevant and will not be included in the report.

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** (for example, the third row of parameters) 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 Sm notoffbutton.png 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.

Items on Report

The parameters in this section allow you to select specific information and calculate distributional information on the data in the data set that was 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.