SpeechMiner User Manual

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About Genesys

Genesys is the world's leading provider of customer service and contact center software—with more than 4,000 customers in 80 countries. Drawing on its more than 20 years of customer service innovation and experience, Genesys is uniquely positioned to help companies bring their people, insights and customer channels together to effectively drive today's customer conversation. Genesys software directs more than 100 million interactions every day, maximizing the value of customer engagement and differentiating the experience by driving personalization and multichannel customer service—and extending customer service across the enterprise to optimize processes and the performance of customer-facing employees. Go to www.genesys.com for more information.
Each product has its own documentation for online viewing at the Genesys Documentation website or on the Documentation Library DVD, which is available from Genesys upon request. For more information, contact your sales representative.

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Home > Introduction to SpeechMiner

Introduction to SpeechMiner

Designed to provide valuable information, the Genesys Interaction Analytics solution uncovers the cause and effect relationships that influence business issues and contact center performance.

Valuable insights about workforce performance and the customer experience your organization delivers are hidden within the agent-customer interactions your organization records. By automatically recognizing spoken or written terms and phrases from these recorded interactions, Interaction Analytics can be used to extract vital information about the origin of significant business issues.

Genesys Text Analytics is an optional add-on to Genesys Speech Analytics. Text Analytics enables your system to analyze various forms of written texts (for example, e-mails, social media and chats). If your system does not include Text Analytics, some of the menu items and options described in this manual will not appear in your user interface.

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

Interaction Analytics enables you to extract useful information from agent-customer interactions by analyzing numerous interaction dynamics (for example, topic identification, category association, interaction transcripts and so on), that help you understand the nature of the interactions. For example, Interaction Analytics can provide full transcription for every interaction, including multimedia interactions.

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

SpeechMiner Deployments

SpeechMiner provides a single User Interface (UI) across most of the solutions within the Genesys Workforce Optimization suite, including Interaction Recording, Interaction Analytics and Quality Management. Since each of these solutions are sold separately and the combination your organization uses depends on your specific requirements, a high-level summary of the different "deployment options" for the SpeechMiner UI is provided here.

SpeechMiner can be deployed in one of the following three environments:

- Recording Only
- Analytics Only
- Recording and Analytics

Note: The availability of SpeechMiner features is dependent on the deployment you are working in and your permissions.

Recording Only:

As of version 8.5, SpeechMiner is available in a scaled down version referred to as Recording only UI mode. In this mode, the SpeechMiner browser-based interface is used for accessing interactions that were recorded by the Genesys Interaction Recording system.

In Recording mode, SpeechMiner can be used to:

- Playback interactions.
- Search for interactions.
- Manually create an interaction list.
- Perform additional basic actions.

In Recording only mode, the audio recognition process and content analytics are not performed on interactions.
As a result, only a subset of the standard SpeechMiner features is available.

In Recording only mode with an optional Quality Management (QM) license, you will be able to perform QM tasks on the recorded interactions.

Analytics Only:

The Analytics Only mode delivers the same functionality as a Recording Only environment, with the addition of Analytics processing capabilities that allow interactions to be automatically transcribed and analyzed.

Analytics Only does not connect to the Genesys Interaction Recording (GIR) system. Instead, it relies on the customer's own recording subsystem (validated for compatibility by the Genesys Professional Services department).

QM functionality is optional in this configuration and is enabled with a QM license.

Recording and Analytics:

The Recording and Analytics mode enables customers to use Analytics and Genesys Interaction Recording (GIR) integration. This deployment provides users with the ability to perform Analytics tasks on interactions captured using the GIR system.

In this deployment GIR integration offers features that are not typically available with other non-Genesys recording subsystems. Refer to the GIR Release Notes for a full list of its functionality or contact your Genesys professional to help you decide if you need GIR recording.

QM functionality is optional in this configuration and is enabled with a QM license.

Home > Introduction to SpeechMiner > New in this Release

New in this Release

The following is a list of the new SpeechMiner features:

- **QM Evaluations Manager - Media Player:** When you playback an interaction in the QM Evaluations Manager, the Media Player can be opened in a separate window. **Localization of new languages:** User Interface localization was added for the following languages:
    - German
    - Brazilian Portuguese
    - Japanese
    - Italian
    - Catalan
    - Mandarin
    - French
- **Related Words:** When you view the transcript of an interaction, you can use the Related Words option to graphically show which terms are commonly found within the same or similar term clusters as a selected term and how frequently the terms are found together in the cluster.
- **Search by ID:** You can filter an interaction search query according to the interaction's ID.
- **Show/Hide Search Filter:** You can now select to show or hide the SpeechMiner Search filter.
- **SpeechMiner Command Line Configuration:** SpeechMiner can now be configured using the command line.
- **Transcript - Comments and Events display:** With a new Comments and Events panel, you can now view and edit a list of all the comments and events associated with the transcript you selected to view.
- **Playback speed:** When you playback an interaction you can now select the playback speed. 1.0 is the default normal speed and every number above is faster. For example, 2.0 is twice as fast as the normal speed.
- **Column selections:** Column selections are now saved per user profile. The columns you select to view in a SpeechMiner grid are displayed until you select the "Reset to defaults" option. "Reset to defaults", resets the grid to display the default column layout.

Home > Introduction to SpeechMiner > Log Into SpeechMiner

Log Into SpeechMiner

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

When you log into the system, SpeechMiner automatically verifies the roles and groups assigned to your account.
The roles assigned to your account signify what SpeechMiner features you are allowed to access.
Only the features you have permissions to view are displayed in the interface when you log into the system.

Before you log into SpeechMiner consider the following:

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

To log into SpeechMiner:

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

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

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

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

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

Home > Introduction to SpeechMiner > SpeechMiner Menu Reference

SpeechMiner Menu Reference

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

Dashboard:
Enables you to create one or more views. Each view can contain a selection of one or more widgets.
The widgets show the data SpeechMiner has automatically surfaced for you.
This data provides insights into the content and nature of agent-customer interactions.

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

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

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

Coaching:
Enables you to help managers, supervisors, Quality Monitoring personnel and agents improve their performance by providing training sessions designed specifically for their professional goals. For example, new employees can be introduced to their jobs through a coaching session that highlights their position's purpose and responsibilities and veterans can be encouraged to fine-tune their techniques with a coaching session that highlights specific aspects of their jobs.

Tools:
Provides access to an array of global SpeechMiner functions and management features. Depending on your permissions and on your system's mode of operation, you can use Tools to manage user accounts and Permissions, Categories, Preset Views and so on. With Tools you can also monitor and manage the system and its servers and view detailed information about Topics, Programs and Categories used by SpeechMiner to analyze interactions.

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

Home > Dashboard

Dashboard

The SpeechMiner Dashboard provides the ability to display summary information about a specific set on interactions through the use of Views and Widgets. Each View can be customized to display interaction details relevant to a particular interaction set. The Dashboard can have one or more views and each view can contain information about a different set of interactions.

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

A Dashboard view can contain one or both of the following widgets:

- Report: Displays any existing report.
- My Messages: Used to schedule a new Coaching session and send and receive messages.

The Dashboard can include numerous views with one or more of the following view types:

- Preset View: A view created by a manager or system administrator and published to your account. A Preset view is only available in an Analytics Only environment.
- Personal View: A view created in your Dashboard that only you can view.

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

Home > Dashboard > Dashboard Menu Reference

Dashboard Menu Reference

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

New View:
Enables you to create a new view for specific reports, notes and a new coaching session.
Once you create a new view, the new view will be added to the list of views in the Dashboard menu.

<View Name>:
An existing customized Dashboard view. This view can only be edited by a user with the relevant permissions to do so.

Home > Dashboard > Create a New Dashboard View

Create a New Dashboard View

You can add as many new views as you like and each view can contain a different set of widgets.
For example, if you manage two work groups, you can create two views (one for each group), to help keep track of each group separately.

To create a new personal Dashboard view:

1. Select **Dashboard > New View**. The Dashboard is opened with all of its existing views.
2. Click the **Add New View** icon +. A new empty view opens.

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

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

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

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

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

Home > Dashboard > Working with Dashboard Views

Working with Dashboard Views

The following procedures enable you to modify an existing Dashboard view:

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

To rename a view:

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

To change the column layout:

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

To change the order of the view tabs:

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

To delete a view:

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

Home > Dashboard > Widgets

Widgets

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

A Dashboard view can contain one or both of the following widgets:

- Report: Displays any existing report.
- My Messages: Used to schedule a new Coaching session and send and receive messages.

Home > Dashboard > Widgets > Working with Widgets

Working with Widgets

Each widget is displayed in the view as a rectangle.

Depending on your permissions you can:

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

To add a new widget:

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

To move a widget within a view:

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

To edit a widget:

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

To minimize a widget:

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

To manually refresh a widget's data:

1. Select **Dashboard**.
2. Select the view whose widget you want to refresh.

3. Click the **Refresh** icon to update the data in the widget.

To delete a widget:

1. Select **Dashboard**.
2. Select the view whose widget you want to delete.
3. Click the **Delete** icon to remove the widget from the view.

Home > Dashboard > Widgets > Report Widget

Report Widget

The Report widget can be used to display any report saved in your system and can be configured to display information about a variety of topics. As a result, you can broaden the scope of information in a single view by including more than one Report widget, where each Report widget displays different data.

From the Report widget you can:

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

To run a report in the Report widget:

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

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

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

   c. Click **Run report**.

   d. Click **Save**.

   e. Select **Dashboard** and the name of the view that contains the Report you are changing. The report is re-sized to match the size of the Report widget.

To drill down on any report:

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

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

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

To configure a Report widget:

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

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

   Height: The widget height in pixels.

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

   Report Description: An explanation about the report.

   Select: Select the report to display in the widget.

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

To edit the report:

1. Select **Dashboard**.

2. Select the view that includes the report whose settings you want to change.
3. Click the **Edit Report** icon . The Report is opened in the Reports > Edit Report tab in a new window.
4. Modify the report settings as necessary.
5. Click **Save Changes**. The Reports window is closed and the report is generated with the new settings and the results are displayed in the widget.

   Note: If the saved report was not in your account, you are prompted to create a copy of the report by giving it a new name. The new report is saved in your account.
6. Click **Close** in the top right corner of the widget to hide the setting options.

Home > Dashboard > Widgets > My Messages Widget

My Messages Widget

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

- Receive a message associated with a specific interaction list.
- Send a note.
- Schedule a new coaching session.
- Open and accept a coaching session.
- Configure the My Messages widget.

Note: The option to schedule a new coaching session is not available in a Recording Only environment.

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

- **Call:** A message containing a link to a specific interaction list. The **Call** type message is created when another user forwards an interaction(s) from the Interaction grid or Media Player. This type of message is sent by other users.
- **Note:** A message you send to or receive from another user.
- **Coaching:** An automated notice from the system informing you that another user scheduled a Coaching session for you. When you open the message, the **Session Details** page opens.

To access and view an interactions list:

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

To send a note:

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

To schedule a new coaching session:

1. Select **Dashboard**.
2. Select the view from which you want to create a new Coaching Session.
3. Select the widget in which you want to create the new Coaching Session.
4. Click **New** in the My Messages widget and select **Coaching Session**.
5. In the **New Coaching Session** window configure the following options:
   - **Session Name:** The name of the session.
   - **Schedule Date:** Click the Calendar icon to select the date and time period in which you want the trainee to take part in the session.
   - **Coach:** Select the coach by either typing the coach's name in the text field provided or by using the browse button to select the coach from a list of users in the relevant work group.
   - **Trainee:** Select the user who must take part in this Coaching Session by either typing the user's name in the text field provided or by using the browse button to select the user from a list of users in the relevant work group.
   - **Type:** Select the type of Coaching Session you are creating.
   - **Public/Private:** Select Public if you want the session notes to be visible to anyone who can access the session or Private if you do not want anyone other than yourself to view the session details.

- **Notes:** Enter a description of the session to the user about the Coaching Session.

6. Click **Save**. The Coaching Session is created. It is now listed in the My Messages widget belonging to the user who the Coaching Session was assigned to.

   For additional information about Coaching see: Coaching.

To open and accept a coaching session:

To accept a Coaching Session means that you agree to participate in the Coaching Session.

1. Select **Dashboard**.
2. Select the view from which you want to accept a new Coaching Session.
3. Click **Accept** under Action. The Coaching Session is removed from the My Messages widget.

To Configure a My Messages Widget:

When configuring a My Messages widget you can change its height and how often it is updated.

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

   Height: The widget height in pixels.

   Refresh Rate: The rate (in minutes) at which the data in the report is refreshed.
3. Click **Save**.
4. Click **Close** in the top right corner of the widget to hide the setting options.

Home > Explore

Explore

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

You can search for interactions using terms and phrases that you believe were used in the interaction between the agent and the customer.

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

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

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

- Searching: Enables you to create a set of criteria to search for interactions, events and screen recordings. Search criteria can be saved so that it can be run in the future. For example, you could search for interactions handled by Work group A, processed with either Program B or Program C and are assigned to the Frustration category.

- Content Browser: Enables you to create search criteria based on a tree structure with specific interaction characteristics. This method provides a visual overview of the interaction database. With Content Browser you can browse through the database by expanding nodes to see more detailed interactions, limiting the display of specific interaction types and by viewing interaction details. For example, you can browse through the interaction database by dividing it into groups based on the work group you believe handled the interactions.

Regardless of how you search for interactions, the end result is a list of interactions displayed in the Search Results grid. The Search Results grid lists interactions, events and screen recordings and contains detailed information about each.
Interactions in the Search Results grid can be:

- Played back to enable you to listen to specific parts of the interaction.

- Saved so that you can run the search at a later time.

- Attached to a Coaching session.

Home > Explore > Explore Menu Reference

Explore Menu Reference

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

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

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

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

Content Browser:
Enables you to find interactions based on a Category, Agent or Program.

Trending:
Enables you to monitor interactions to surface changes in interactions and subsequently spot unexpected
trends. For instance, Trending enables you to learn about emerging business phenomena, pinpoint important events that may require attention, revea

Home > Explore > Search Results Grid

Search Results Grid

The Search Results grid contains detailed information about each interaction.

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

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

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

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

Search Results Grid Columns:

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

Column	Description	Available in:
Agent	The name of the agent who handled the call.	• Interactions • Screen Recordings • Events
Audit Time	The time at which the event was audited.	• Events
Auditor	The name of the auditor.	• Events
BCC	The users to which the email interaction was sent to secretly.	• Interactions • Events
CC	The users 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 is assigned, the name of the category appears. If multiple categories are assigned, the number of categories appears. Place your mouse on the value to see a list of the categories.	• Interactions
Confidence	A value that indicates the reliability of an event identification. The higher the number, the greater the degree of certainty. You can use this information to select interactions for auditing. **Note:** The Confidence number is not a percentage. The number is a range from 1 to 100.	• Events
Date/Time	The interaction start date and time (in hours:minutes).	• Interactions • Events
Duration	The duration of the interaction (in hours:minutes:seconds).	• Interactions • Events
End Time	The event end time, offset from the start of the interaction (in hours:minutes:seconds).	• Events
External ID	A unique number assigned to the interaction by the external recording storage system.	• Interactions • Events
ID	A unique number assigned to the interaction in the SpeechMiner database.	• Interactions • Events • Screen Recordings
Media	The type of interaction found. For example, interaction, email, video and so on.	• Interactions • Screen Recordings
Open	A **Play** icon ⊙. Clicking the Play icon activates the Media Player.	• Interactions • Events • Screen Recordings
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.	• Screen Recordings • Events
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.	• Screen Recordings • Events
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. Event grid: represents the phrase that SpeechMiner recognized. **Note:** This column is only visible in grids that contain search results from searches that included terms.	• 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 on the value to see a list of topics. **Event grid:** The topic associated with the event.	• Text 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 the value. 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
Work group	The work group associated with the agent who handled the interaction.	• Interactions

Home > Explore > Search Results Grid > Working with the Search Results Grid

Working with the Search Results Grid

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

From the Search Results grid you can:

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

To configure the grid columns:

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

Note: To return the grid columns to their default state, click the **Select Columns** icon and the **Reset to defaults** link.

To generate an interactions list in the Interactions grid:

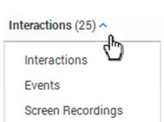
1. Perform one of the following:
   - Explore > Search
   - Explore > Saved Searches > Click the Run icon.
   - Explore > Content Browser

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

To change the type of interactions in the Interaction grid:

1. Access the Interaction grid.
2. Select one of the following from the menu above the Interactions grid (on the left):
   - **Interactions:** A list of all the interactions the meet the search criteria.
   - **Events:** A list of all the events that meet the search criteria.
   - **Screen Recordings:** A list of all the Screen Recording interactions that meet the search criteria.

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



To play an interaction from the Search Results grid:

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

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

   If the interaction is not an audio interaction, the interaction transcript is opened.

To open a segmented interaction:

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

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

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

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

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

To view search criteria:

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

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

If the grid was generated in response to a search for terms, a Related Search list will appear below the search criteria.

If the system determines that one or more of the search terms was misspelled, it will correct the error and indicate the correction in a note below the search criteria.

For additional information, see Searching for Interactions.

Home > Explore > Search Results Grid > What is an Interaction?

What is an Interaction?

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

SpeechMiner can analyze the following interaction types:

- **Audio:** An agent-customer interaction from an audio-based communication channel (phone call).
- **Text:** An agent-customer interaction from a text-based communication channel (email and chat).
- **Screen Recording:** A video of the agent's screen during the agent-customer interaction. Screen Recording search results are different from a general search result list since they only contain the screen recording. When you playback a screen recording interaction only the video of the agent's screen is played back and not the complete interaction. To view a specific screen recording from within the interaction it was recorded, switch to the Search Results grid and search for the interaction ID associated with the specific screen recording. The interaction ID appears in the ID column of the Screen Recordings grid. See: Working with the Search Results Grid.

An interaction can include the following information:

- Event
- Accuracy Rates (auditing)
- Segment
- Comment
- Transcription

Note: SpeechMiner can analyze interaction dynamics such as periods of silence, interaction hold time, time when the employee and customer are talking at the same time (talk-over
time), who is talking (agent/customer) and so on.

Event:

An event occurs when SpeechMiner identifies a topic in an interaction. A topic is a collection of phrases that SpeechMiner looks for when analyzing interactions.
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).

An event is indicated by a numbered icon in the Media Player and within the interaction's transcript. You can view details about each event by placing your mouse over the event icon. In addition, each event has a start time, end time, a name and a type.

Event search results are different from a general search results list 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 playback an event 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.

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

Accuracy Rate (auditing):

Each linguistic event recognized in an audio interaction can be audited. To audit an event a SpeechMiner user listens to the event and rates the accuracy of the identification.
Auditing fine-tunes the SpeechMiner's speech recognition accuracy.

To audit an event, the SpeechMiner user (auditor) listens to the event and subsequently rates the accuracy of the event recognition by selecting one of the following values:

- **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 terms were correctly identified by SpeechMiner, but their use does not match the topic's intent.

Note: Summary information about event auditing can be analyzed using the Audit Analysis and Topic Analysis - Audit reports. Existing audit data can be managed globally in the Interactions Admin screen.

Segment:

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

For more information about how to add a comment to an interaction, see: Working with the Search Results Grid.

Comment:

Comments are added to interactions to express a thought about the interaction. A comment can be general or associated with a specific time during the interaction.
User comments are indicated by icons above the audio graph in the Media Player and within the interaction transcript.

There are three types of comments:

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

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

Transcript:

An interaction transcript is a textual representation of the agent-customer interaction.

For more information about how to work with an interaction transcript, see: Interaction Transcript.

Home > Explore > Search Results Grid > Batch Actions

Batch Actions

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

- Export interactions.
- Forward interaction links.
- Add interactions to a global interaction list or a Coaching session interaction list.
- Reprocess an interaction.
- Delete an interaction.

To export an interaction:

Export an interaction(s) creates a zip file with the following files:

- A .csv file containing a list of audio interactions there were exported. The file also contains the search results grid data associated with each interaction.
  The .csv file can be opened using a spreadsheet (for example, Microsoft Excel).
- A .wav file for each audio interaction included in the list (optional).
- A text file is created when you select to export a text interaction.

1. Select **Explore > Search**.
2. Run a search for the interaction(s) you want to export. See: Create a New Search.
3. In the title of the check box column click the **Batch Actions** icon and select **Export.**
4. Select **Yes** if you want to export the audio with the .csv file or **No** if you only want to export the .csv file.
5. Select **Save** and navigate to the folder in which you want to save the file.
6. Click **Save** to save the .zip file in the selected location.

To forward a link to an interaction(s):

You can send a link to one or more interactions to other users in the system. Each link is sent in a separate message. Depending on your selection, the message appears in the My Messages widget or as an email notification. When the recipient clicks the message a SpeechMiner Media Player is activated in a separate window to play back the interaction.

1. Select **Explore > Search**.
2. Run a search for the interaction(s) you want to export. See: Create a New Search.
3. In the title of the check box column click the **Batch Actions** icon and select **Forward**.
4. Under **Subject** modify the subject.
5. Under **Select a user** select the user to whom you want to send the link from the lists provided.
6. To send notifications to the user's email address as well as to the user's My Messages widget, select **Send Email Notification.**
7. Click **Send**. A message is sent to the recipient's My Messages widget and email address for each audio interaction you selected.

To add interactions to a global 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 interactions lists:

- **Global Interaction List:** A group of interactions.
- **Coaching Session Interaction List:** A group of interactions associated with a specific Coaching Session.

  Note: Coaching Session interaction lists can only be viewed within the coaching session.

When working with interaction lists you can:

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

- Add a new Coaching Session directly from the Search Results Grid.

To add interactions to an existing global interaction list:

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

To add an interaction(s) to an existing Coaching Session:

1. Select **Explore > Search**.
2. Run a search for the interaction(s) you want to add to a Coaching Session. See: Create a New Search.
3. Select the interactions you want to add to the Coaching Session.
4. In the title of the check box column click the **Batch Actions** icon and select **Add To**.
5. Select **Coaching Session.** A list of Coaching Sessions appears.
6. Under each Coaching Session title you will see a list of the Interaction lists associated with the specific Coaching Session and a **New Static List** link.
7. Under the Coaching Session title find the session to which you want to add the selected interactions.
8. Under the session title select the Interaction list to which you want to add the selected interactions.

   If the Coaching Session does not contain an Interaction list, click **New Static List** to create a new list with the selected interactions for the specific session.

   Once you give the list a name and click **OK,** the list is created. The list will appear in the Interaction Lists tab and under the specific Coaching Session.
9. Click **Add**.

To reprocess an interaction:

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

Note: Reprocessing an interaction can only be performed in an Analytics Only environment.

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

To delete an interaction:

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

Home > Explore > Create a New Search

Create a New Search

With SpeechMiner you can search for interactions, events and screen recordings.

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

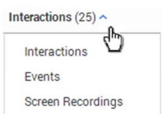
When performing a search SpeechMiner continues searching for interactions that match your search criteria until one of the following occurs:

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

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

To create a new search:

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

   Note: To view Screen Recordings in Internet Explorer 10 and 11, you must enable the Miscellaneous > Access data sources across domains in the Security Settings - Trusted Sizes Zone window.
3. Click the **Search Filters** icon . For additional information, see Search Filter.
4. Configure the filter options.
5. Click one of the following:
   - **Search:** Update the current search results according to the new filter configuration.
   - **Save As:** Save the filter configuration as a Saved Search. You can run the saved search at a later time.
   - **Clear Filters:** Clear the current filter configuration.
   - **Explore:** Create a report that graphically illustrates the distribution of the selected terms in the resulting interaction list. See: Explore Terms for additional information.

   The search is run according to your selection.

Home > Explore > Create a New Search > Search Filter

Search Filter

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

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

When configuring the Filter panel consider the following:

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

The Filter panel is divided into the following groups:

- Date Range
- Terms & Topics
- Categories & Programs
- Agents & Workgroups
- Metadata
- Comments
- User Actions
- Interaction Properties
- Audit and Implementation

Date Range:

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

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

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

and year of both the beginning and end dates.

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

Terms & Topics:

Enables you to filter for interactions according to a one or more terms or phrases that must be part of the interaction. , topic and/or speaker.

- **Text field:** Enter the term(s) or phrase(s) to search for.
- **Topics:** Select one or more topics from the list to search for.
- **Limit to:** Select one or more Speaker Types from the list.

  Only interactions found in one of the following situations are included in the search results:

  - For interactions with only one audio channel (the system cannot identify who is speaking) where at least one of the selected Speaker Types were involved in the interaction.
    For example, the topic Payments was found at least once in the interaction and one of the participants in the interaction was a speaker of type Agent.
  - For interactions with more than one audio channel (the system identifies who is speaking at every moment in the interaction) where at least one of the selected Speaker Types mentioned the required topics and/or terms at least once in the interaction.
    For example, the Agent in the interaction talked about the topic Payments.

Categories & Programs:

Enables you to filter the Search Results grid according to categories and/or programs. Only interactions in which at least one category/program is identified are included in the search results.

- **Categories:** Select one or more categories that should be associated with the interaction(s) you are searching for.
- **Programs:** Select one or more programs that should be associated with the interaction(s) you are searching for.

Agents & Workgroups:

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

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

Metadata:

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

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

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

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

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

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

The format used in your system is specified in the webserviceparams table, in the ''globalDateFormat'' parameter.
For additional information, please consult your system administrator.

To define a metadata filter:

1. Select to Include/Exclude the metadata.

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

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

   Equals to specify a specific value for the metadata type.

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

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

Comments:

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

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

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

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

User Actions:

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

Interaction Properties:

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

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

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

- **Languages:** Set the language of the interactions you are searching for.

  Note: In some systems some or all of the interactions do not undergo speech-recognition processing. In these system the option **No Speech Recognition** appears in the Languages list. Select this value to include interactions that did not undergo speech recognition.

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

  Less Than: Only interactions that are shorter than the value you specified are included in the search.

  Between: Interactions whose duration's are more than the first value and less than the second value are included in the search.

  More Than: Only interactions that are longer than the value you specified are included in the search.

- **Interaction ID:** Only interactions with the value you entered for the ID are included in the search results. Type any portion of an interaction's external ID. 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 additional 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.

Audit and Implementation:

Enables you to filter the Event Search Results grid according to confidence ratings and auditing results.

Note: This group only appears if the Search Results grid is configured to only show events.

- **Confidence threshold:** Select the minimum confidence value required. Only events whose confidence values are at least this high are included in the Search Results grid.

  Note: The confidence value is generated by SpeechMiner when the interactions are processed. It indicates the reliability of the event identification. The higher the value, the greater the degree of certainty.

- **Term ID:** Searches for the a term ID included in a topic.

  Note: This field only appears if you have Event Audit permissions. Also, the term ID for each term found during the search appears in the Event Search Results grid.

- **Exclude audited events:** Select this check box to exclude interactions that have already been audited from the search.
- **TP, FP, SFP:** Select the required audit ratings. Only audited events whose ratings match one of the selected types are included in the search results.

Home > Explore > Create a New Search > Explore Terms

Explore Terms

SpeechMiner's Explore feature enables you to produce reports that graphically illustrate the distribution of specific terms in a list of interaction(s).

The Explore feature is completely automated and is based on the analysis of interactions associated with a specific search criteria.

The process produces a common terms report that shows the most common term clusters in the generated data set.

When you initiate the Explore feature, the results are sent to you via email. You can also see the reports from the **Reports > Saved Reports** tab.

Note: The Explore feature is not available in a Recording Only deployment.

To run the Explore process on a specific search criteria:

1. Select **Explore > Search**.
2. Click the **Search Filters** icon to define the data set to use during the Explore process.
3. Select at least one language and only one interaction type. See Search Filter for additional information.
4. Click **Explore**.
5. Enter a name for the report.
6. Click **OK**. A message appears informing you that you will receive an email with a link to the report.

Home > Explore > Saved Searches

Saved Searches

Search criteria (created in the Explore > Filter panel) can be saved as a Saved Search.

Saved searches enable you to run a specific search query whenever the information the query generates is required.

To access the Saved Searches list:

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

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

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

Column	Description
	Select the check boxes to delete or compare.
Run	Click the **Run** icon to run the search and display the results in the Search Results grid. If the specific search was a search for events, the Search Results grid will show a list of event interactions.
Delete	Click the **Delete** icon to delete the specific saved search.
Name	The name of the saved search.
Creator	The name of the user who created the saved search.
Status	The status of the saved search.
Sharing	The names of the user groups and users with whom the search is shared. Click the **Sharing** icon to share the saved search with others.
Created on	The date on which the search was created.
Coaching	Click **Add** to add the search to a Coaching session. See Coaching for additional information.
Permalink	Click **Copy** to create a Permalink to the specific saved search. You can copy this link to your clipboard and then paste it elsewhere as necessary. See Permalink for additional information.

Home > Explore > Compare Saved Searches

Compare Saved Searches

SpeechMiner enables you to compare two saved searches. The result is a report that shows how the two data sets differ.

For example, you can compare two customer-service agent teams to learn which team has more interactions with dissatisfied customers. You can also compare two search results to see whether there are any noticeable differences with regard to the most common terms in the interaction flows.

Note: You can only compare audio interactions. You cannot compare text interactions.

To compare two Saved Searches (two data sets):

1. Select **Explore > Search**.
2. Click to open the **Filter** panel.
3. Define the search criteria for the data set you want to compare. See Create a New Search for additional information.
4. In the **Filter** panel click **Save As** to save the new search.
5. Repeat the steps above to define the second data set for the comparison.
6. Select **Explore > Saved Searches**.
7. Select the check boxes associated with the two Saved Searches you want to compare.
8. Click **Compare** in the top right corner of the screen.
9. In the **Report Name** field enter a name for the comparison report.
10. From the **Categories** and **Topic** lists select the categories and topics you want to compare in relation to the two Saved Searches you selected.
11. Select **Also run exploration** to create an Exploration report in addition to the Comparison report. See Explore Terms for additional information.
12. Click **Run**. The report will appear in the **Saved Reports** list. You will also receive an email with a direct link to the report.

Home > Explore > Interactions Lists

Interactions Lists

An Interaction list enables you to create a collection of one or more interactions about a specific issue.
The list is made up of interactions that you manually select from the Search Results grid and add to the list.
You can add an interaction to an existing Interaction list or you can create a new Interaction list.

An Interaction list can be created from:

- Search Results list
- Interaction Lists tab

To create an Interaction list from the Search Results grid:

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

To create an Interaction list from the Interaction Lists tab:

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

   The Interaction Lists tab is opened with the following options:

   - **Drop down list:** Find and select the user(s) whose interaction lists you want to see.
   - **Text field:** Type a letter or sequence of letters that appears in the name of the interaction list you want to find.
   - **Delete :** Select one or more lists from the interaction list and click **Delete** to remove them from the system.
   - **Rename an Interaction list :** Select the interaction list whose name you want to change. Click the **Rename** icon and give the list a new name.
   - **Table:** See column descriptions below:

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

2. Click the **Create a new Interaction list** icon **+**.
3. Enter a name for the new list.
4. Click **OK**.
5. Add interactions to the new list.
   a. Select **Explore** > **Search**.
   b. Select interactions from the Search Results grid.

c. Click the **Batch Actions** icon and select **Add To**.

d. Select **Interaction List**.

e. Select the list you created at the beginning of this procedure.

f. Click **Add**.

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

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

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

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

Home > Explore > Content Browser

Content Browser

Content Browser enables you to view the interactions associated with specific categories, agents and programs. For example, selecting the category option will produce a list of all the categories and their sub-categories associated with one or more interactions.

With Content Browser you can filter your selection further by selecting an additional search criterion. For example, you can select to search for interactions associated with categories and a specific program. If you selected a category and a program called"debt", the result will be a list of all the categories associated with interactions that are also associated with the program "debt".

Note: Content Browser is not available in a Recording Only environment.

To search for interactions associated with a specific category, agent or program:

1. Select **Explore > Content Browser**.
2. From the **Explore** list select the type of interaction distribution you are interested in seeing.
3. From the **Filter By** list select an additional criterion type for the interaction distribution.
4. From the **Any** list select the specific criterion.

   For example, if you select Work group in the Filter By list, you must select the specific work group name. If you select Any then all work groups associated with a category in the list will be part of the search results.

   The Content Browser list is automatically refreshed and updated with every selection you make and is displayed in a table with the following columns.

Column	Description
Classified Interactions	The list of categories, programs or agents that are associated with an interaction.
Language	The language the program is associated with when created in SMART.
Last Call	The date and time of the last interaction the specific agent took part in.
Last updated	The last date on which the specific program was updated.
Number of Agents	The number of agents the agent manages.
Number of Interactions	The number of interactions associated with the category, agent or program.
Percentage	**Category percentage:** The percentage of interactions associated with the category compared with all the categories in the list. **Sub-category percentage:** The percentage of interactions associated with the sub-category compared with all the sub-categories within the specific category.
Priority	The priority level given to the program in SMART.

For more information about SMART refer to the *SMART User Manual*.

Home > Explore > Trending

Trending

The Trending page is designed to help you monitor interactions and identify and explore unexpected trends and problems. For example, viewing trends can help you understand emerging business issues, pinpoint events that may require close attention and identify process or service issues before they escalate.

From the Trending page you can create configurable exploration reports that show the distribution of terms within interactions. The data is based on automated analysis of interaction transcripts, without the need for input from users about what terms should be sought. For this reason, the information in the Trending page can help you identify issues and trends that were not predicted or planned.

During SpeechMiner analysis a phrase is considered a short series of terms (usually two to six terms) that were detected together in an interaction. SpeechMiner attempts to identify the most significant terms in the phrases it detects. Once the terms are detected SpeechMiner groups them into clusters.
For example, if the phrase "I lost my credit card", "my credit card was stolen", and "I can't find my credit card" were all found in interactions, SpeechMiner would identify "credit card" as the significant phrase in each of the terms. It will group the phrases together into a cluster called "credit card".

From the Trending page you can:

- Filter interaction data: Specify the data to include in the reports by selecting a time period, language and related words.
- Highlight Term Trends: Show the clusters for which there was the greatest difference between their prevalence in the selected time period and in the previous time period.
- Highlight Common Terms: Identify the term clusters that were most common in the selected time period.
- Analyze Related Words: Graphically show which terms are commonly found within the same or similar term clusters as a specific term and how frequently the terms are found together in the cluster.
- Create a Trend Graph: Shows changes over time about how often a term cluster was found.

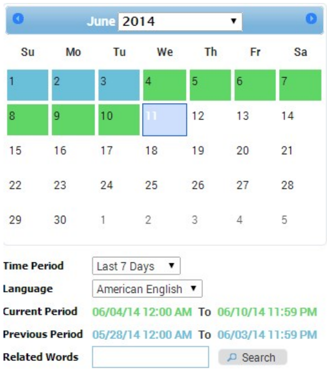
Home > Explore > Trending > Filter Trends

Filter Trends

The data in the Trending page covers a single time period and language. You can select any day as the base day for the filtered period and then select the time period relative to that day. For example, if you select 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 on the right side of the page will compare those seven days with the preceding seven days (May 6th-12th).

To set the term trends filter:

1. Select **Explore > Trending**.
2. In the **Calendar** select the base date for the filter period (see image below).



3. From the **Time Period** list select one of the following:
   - **Last 7 days:** Includes data from the last seven full calendar days prior to the base date (that is, 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 the 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.
4. From the **Language** list select the language of the interactions you want to analyze.

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

Home > Explore > Trending > Identify Term Trends

Identify Term Trends

The right side of the Trending page contains a histogram (see image below) that shows the term clusters whose prevalence within interactions differed the most between the current time period and the baseline period. The report indicates how the percentage of interactions 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.

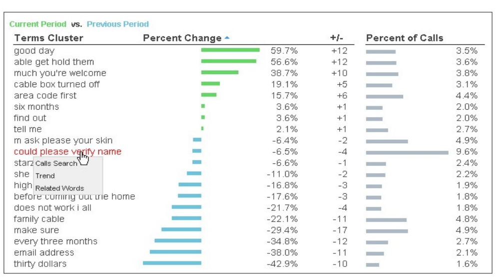
The term histogram contains the following columns:

Column	Description
Terms Cluster	Indicates the term cluster(s) found for the filtered time and language.
Percent Change	Indicates how 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 interactions in the current period than it did in the interactions of the baseline period, and -24.1% means the cluster appeared in 24.1% fewer of the interactions in the current period than it did in the baseline period.
+/-	Indicates the difference between the number of interactions 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 interactions in the baseline period than it did in the current period. For example, -5 means that the cluster was found in five more interactions in the baseline period than it was in the current period.
Number of Interactions	Indicates the number of interactions associated with the category, agent or program.
Percentage of Interactions	Indicates the percentage of interactions in the current time period in which the term cluster was found. Both the bar and the number represent the same value.

To see additional information about the term clusters that appear in the histogram:

1. Place your mouse on a cluster.

   As shown in the following image the cluster appears in red and a pop up menu opens.

2. From the menu click one of the following, as required:

   - **Interactions Search:** Opens a Search Results grid that lists interactions containing the term cluster. The Search Results grid opens in a separate window.
   - **Trend:** Opens a trend graph for the term cluster in place of the histogram.
   - **Related Words:** Opens the Related Words window for the term cluster.

Home > Explore > Trending > Find Common Terms

Find Common Terms

The bottom of the Trending page contains a graphic depiction of the distribution of term clusters within the interactions that are included in the analysis (as configured in the filter area). The font used to print each cluster indicates how common the term was in the interactions; 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.

To see additional information about common terms:

1. Place your mouse on a cluster.

   As shown in the following image the cluster appears in red and a pop up menu opens.

2. From the menu click one of the following, as required:

   - **Interactions Search:** Opens a Search Results grid that lists interactions containing the term cluster. The Search Results grid opens in a separate window.
   - **Trend:** Opens a trend graph for the term cluster in place of the common terms graphic.
   - **Related Words:** Opens the Related Words window for the term cluster.

Home > Explore > Trending > Related Words

Related Words

Additional analysis of term clusters and their prevalence in the selected time period can be viewed in the Related Words window. Related Words 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 graphic representation of related words enables you to explore terms and term clusters actively, by selecting and zeroing in on the terms that are of interest to you.

The Related Words window graphically illustrates the following information:

- The terms commonly associated with the term for which you requested to view related words.
- How frequently the terms are found together within the current interaction sample.
- The term for which related words are requested. This term is presented at the center and its related terms are displayed around it (for example, in image 1 below, the Related Words window was activated for the original term "issue").
- How frequently are the related terms found near the selected term. The more frequently a term is found, the larger the term appears in the diagram.

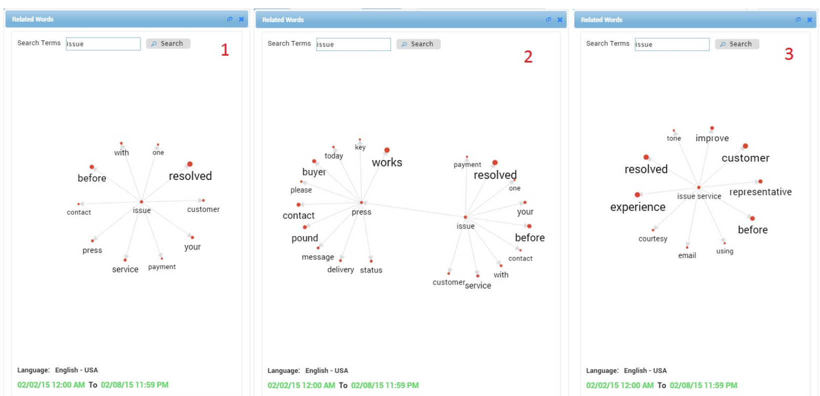
For each term in the Related Words window you can:

- **Expand:** Expands the diagram to view additional related words (for example, in image 2 below, related words were requested for the term "press").
- **Merge:** Merges the selected related term with the term for which the window was opened. As a result, the Related Words window is refreshed and a new Related Words diagram is created for the two terms. For example, in image 3 below, the terms "issue" and "service" were merged and the new diagram shows data for the new combination of terms.
- **Search:** Searches for the selected related word. If you select to perform a search, a new window is opened with the Search grid and player. The window lists all the interactions associated with the specific search. If you perform the search for the central term, SpeechMiner finds interactions in the sample in which the term is found. If you perform the search for a related term, SpeechMiner finds interactions in the sample in which all of the terms in both the original term and the related term are found. The interaction search opens in a separate window.

To open, move and change the Related Words window:

- To **open** the Related Words window:
  - In the right side of the Trending page click a term in the Term Cluster list and select Related Words.
  - At the bottom of the Trending page click a term in the common trends graphic and select Related Words.
  - Click a term in the interaction transcript and select Related Words.
- To **move** a diagram within the Related Words window hover over the diagram, click and drag your mouse to the new location. This option is helpful when you expand the diagram and it is too large to fit in the entire Related Words window.
- To **change** the size of the Related Words diagram roll your mouse wheel up and down over the diagram.

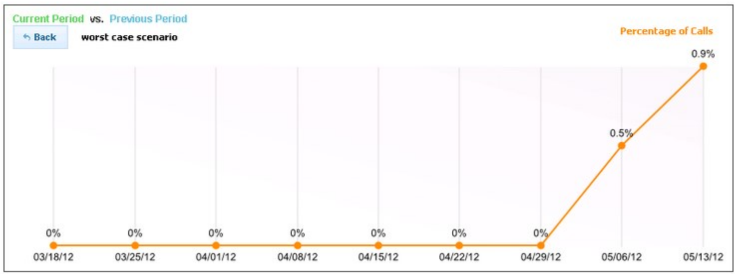
The following three images are an example of how related words are represented:



Home > Explore > Trending > Trend Graphs

Trend Graphs

The Trend Graph is a line graph that shows changes over time in relation to how often a term cluster was found. The graph shows the percentage of interactions that included the term cluster in the current time period and in the preceding weeks. As shown in the following image, the term cluster for which the graph is created appears in black above the graph.



To open the Trend Graph for a specific cluster:

1. Place your mouse on a term cluster in the Common Words graphic or the Term Trend histogram.
2. Click **Trend.**
3. Click **Back** to close the graph and return to the location from which it was opened.

Home > Media Player

Media Player

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

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

- Quickly and easily find information associated with the specific interaction.
- View events associated with the interaction.
- View an interaction's transcript.
- Add comments and view comments made by other users.

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

Events (both linguist and non-linguistic) and comments are indicated by icons above the audio graph.

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

- Playback: Enables you to listen to a specific interaction.
- Interaction Transcript: Enables you to view the words spoken during the interaction.
- Interaction Comments: Enables you to view other users ideas and thoughts about the interaction and provides you with the option of making comments yourself.
- Interaction Attributes: Enables you to view specific characteristics about the interaction you are playing.
- Media Player Options: Enables you to perform numerous tasks associated with the interaction you are playing.
- Event Icons: Shows you when events are detected during the interaction.

Note: To view Screen Recordings in Internet Explorer 10 and 11, you must enable the **Miscellaneous > Access data sources across domains** in the **Security Settings - Trusted Sizes Zone** window.

Playback

The Media Player is activated above the Search Results grid when you select to playback an audio interaction, event and/or screen recording.

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

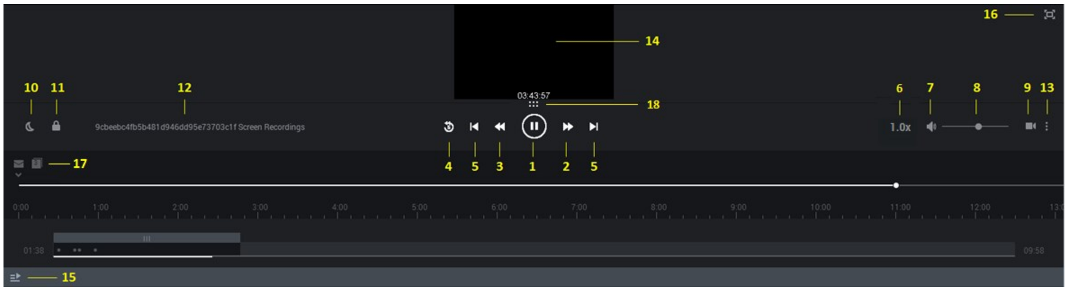
- You can playback an interaction from any point in the recording.
- Playback always begins from the location of the marker in the audio graph.
- When you playback an interaction from the Search Results grid, the marker is placed at the beginning of the interaction.
- Playback begins automatically when the interaction is loaded.
- The Media Player includes various playback controls that enable you to better analyze the specific interaction. For additional information see Playback Controls.
- Interaction audio and text can be hidden to ensure confidential information. For additional information see Hidden Confidential Information.
- You can work with the Media Player using keyboard shortcuts. For additional information see Media Player Keyboard Shortcuts.

Home > Media Player > Playback > Playback Controls

Playback Controls

The following image and table represent all of the available **playback controls**:

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



Number	Description	Available for:
1	Play or pause the interaction in the current location.	• Audio Interactions • Screen Recordings • Events
2	Play the next event.	• Audio Interactions • Screen Recordings • Events
3	Play the previous event.	• Audio Interactions • Screen Recordings • Events
4	Rewind the playback 5 seconds from the current location of the marker.	• Audio Interactions • Screen Recordings • Events
5	Play the next or previous interaction.	• Audio Interactions • Screen Recordings • Events
6	Control the speed at which the interaction is played. 1.0 is the default normal speed and every number above is faster. For example, 2.0 is twice as fast as the normal speed.	• Audio Interactions • Screen Recordings • Events
7	Turn on/off the volume.	• Audio Interactions • Screen Recordings • Events
8	Select a volume level.	• Audio Interactions • Screen Recordings • Events
9	Show / Hide Screen Recording. **Note:** If the screen recording is longer than the available audio an ACW (after call work) icon appears . The ACW icon appears on the playback timeline at the time that is equal to the duration of the audio media file. The screen recording plays beyond the end of the audio file.	• Audio Interactions • Screen Recordings • Events
10	Change the screen's brightness.	• Audio Interactions • Screen Recordings • Events
11	Lock/Unlock the playback with the scroll bar. When this option is turned **Off**, you can scroll towards the end of the interaction before the playback reaches the same location. Turn this option **On** if you want the interaction to automatically scroll so that the part of the interaction that is currently being played back is always visible. The scroll bar moves automatically to keep up with the playback.	• Audio Interactions • Screen Recordings • Events
12	Indicates the specific interaction ID and agent name.	• Audio Interactions • Screen Recordings • Events
13	A menu with the following options: **Export:** Enables you to export the interaction to a zip file. **Forward:** Enables you to forward the interaction to another user. **Add To...:** Enables you to add the interaction to an interaction list or coaching session. **Permalink:** Enables you to copy a link to the specific interaction. **Delete:** Enables you to delete the specific interaction.	• 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 the search results list.	• Audio Interactions • Screen Recordings • Events
16	Full screen view. **Note:** Internet Explorer 10 and 11 does not support this option.	• Audio Interactions • Screen Recordings
17	The envelope (email) and paper (chat) icon appear in the location of the recording when an email was received or a chat conversation took place.	• Audio Interactions • Screen Recordings
18	Enables you to enlarge the video screen in the media player.	• Audio Interactions • Screen Recordings • Events

Home > Media Player > Playback > Media Player Keyboard Shortcuts

Media Player Keyboard Shortcuts

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

Note: TP, FP and SFP rating are assigned to events during the auditing process (see: Accuracy Rates - Auditing).

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.

Home > Media Player > Playback > Hidden Confidential Information

Hidden Confidential Information

Interaction audio and text may be filtered in your system so that it is hidden from the users eyes. This is done to ensure that 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 hidden for some users but not for others.

The parts of an interaction that are hidden appear in the audio graph in gray rather than black. Likewise, the text associated with the hidden parts of the interaction is not included in the interaction transcript and the Media Player skips these areas during playback.

The following content can be hidden:

- **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 ensure unauthorized users do not have access to credit card numbers and other confidential information. When filtering text interactions the confidential digits are changed to asterisks.
- **Comment-Only permission:** Some users may only be able to access the parts of an interaction to which comments have been attached.

Note: For additional information about the filter rules in your system consult your system administrator.

Home > Media Player > Interaction Transcript

Interaction Transcript

An interaction transcript enables you to view:

- An interaction transcript
- Words spoken during the interaction
- Events found in the interaction.
- Comments that you and other users added to the interaction
- Related words for a selected term.
- Who is talking during the interaction.

View an interaction's transcript:

1. Select **Explore > Search**.
2. Playback an interaction.
3. Click the **Transcript** icon to view the interaction transcript.

View the spoken word within the transcript:

- When playing back an interaction, the current playback location in the transcript is indicated by a line beneath the word being spoken.
- Once a word is played back its color changes from gray to black and the typeface of the text reflects the confidence of the transcription: the darker the text, the higher its accuracy.

View an interaction's events: (see: Events)

- The locations of Events are indicated in the transcript by numbered Event icons .
- To view an event refer to the right side of the Transcript page.
  The right side of the Transcript page contains a list of all the comments and events in the interaction.
- The numbers match the event numbers that appear **Events** list on the right side of the page.

Show or hide comments added by SpeechMiner users: (see: Interaction Comments)

- To view a comment hover over the **Comments** icon . A tip appears with the comment.
- To view a comment refer to the right side of the Transcript page.
  The right side of the Transcript page contains a list of all the comments and events in the interaction.
- To edit a comment click the Comment icon. An **Edit Comment** window opens.

View related words for a selected term: (see: Related Words)

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.

View who is talking (agent or customer):

- When your system employs multiple audio channels, the speakers are identified in the transcript and
  the transcript includes information about when the agent is talking and when the customer is talking.

If your system employs multiple audio channels, the speakers are identified in the transcript, and the text is color-coded to match the speakers.

Note: In a Recording UI mode, the Transcript panel is blank because recognition processing is not performed.

Home > Media Player > Interaction Comments

Interaction Comments

Interaction comments enable you to:

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

There are three types of comments:

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

A comment can be added:

- At a specific time above the audio wave. When a comment is associated with a specific time in the interaction it also appears in the transcript at the same time.
- In the transcript alone. When a comment is added to the transcript without it is not associated with a specific time in the interaction.

To view a comment in an interaction:

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

To add a comment to an interaction:

1. Select **Explore > Search**.
2. Playback the interaction to which you want to add a comment.
3. Click **Add Comment** .
4. To add the comment at a specific time during the interaction select **Specify time** and enter the time in the **Time** field.

   Note: The time in the Time field is automatically set to the time associated with the location of the cursor on the audio graph.
5. Enter your comment in the field provided.
6. Select one of the following:
   - **Good** : Indicates a positive comment.
   - **Bad** : Indicates a negative comment.
   - **Neutral** : Indicates an unbiased comment.
7. Click **Add** to add the comment to the interaction.

To edit an existing comment:

1. Click the comment icon associated with the comment you want to edit either from the Media Player or from the transcript.
2. Modify the comment as required.
3. If necessary change the comments sentiment (good, bad, neutral).
4. Click **Apply** to modify the comment.

Home > Media Player > Interaction Attributes

Interaction Attributes

The Interaction Attributes panel enables you to view characteristics about the interactions in the Search Results grid.
In addition, you can use the Interactions Panel to assign manual Categories to the selected interaction.

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

- **Interaction processing time:** Indicates the date and time the interaction was processed in the system.
- **Work groups:** Indicates the work group associated with the agent(s) that participated in the interaction.
- **Agents:** Indicates the agent(s) that participated in the interaction.
- **Metadata values:** Indicates the metadata values associated with the interaction.
- **Manually assigned Categories:** Enables you to manually associated one or more categories with the specific interaction.
- **Automatically assigned Categories:** Indicates the categories associated with the interaction.

To manually assign a category to an interaction:

1. Select **Explore** > **Search**.
2. Select an interaction.
3. Click the **Interaction Attributes** icon .
4. Under the **Manual Categories** heading select the category that you want to assign to the specific interaction.

Home > Media Player > Media Player Options

Media Player Options

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

In this page you will learn how to:

- Export an interaction.
- Forward an interaction to another user.
- Add an interaction to an interaction list or coaching session.
- Delete an interaction from the current interaction list.
- Create a permalink to the interaction.
- Find interactions that are similar to the interaction you are currently playing.
- Reprocess the interaction by running event analysis.

Note: The list of available options is dependent on your permissions. For more information see Administer Roles.

To export an interaction:

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

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

1. Select **Explore > Search**.
2. Select the interaction(s) that you want to export.
3. Click **More** ⋮ and select **Export**. A dialog box opens and asks if you want to include the audio files with the export.
4. Select **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.
5. 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.
6. Navigate to the folder in which you want to save the file, and then click **Save**. The file is saved in the selected location.

To forward a link to a specific 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.

When the recipient clicks the message, a SpeechMiner Media Player opens in a new window and the interaction is played.

In addition, 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.

1. Select **Explore > Search**.
2. Select the interaction(s) that you want to forward.
3. Select **More** ⋮ and click **Forward**. A dialog box opens.
4. Under **Subject**, modify the subject text if you wish.
5. 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.
6. 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**.
7. 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.

To add an interaction to an interaction list or a coaching session interaction list:

An interaction list is a list of interactions that is saved for later use.
You can add an interaction to a global interaction list and/or a coaching session interaction list.
For additional information, see the Add interaction to a global interaction list or a coaching session interaction list in the Batch Actions page.

To delete an interaction from the current interaction list:

1. Select **Explore > Search**.
2. Select the interaction(s) that you want to delete.
3. Select **More** and click **Delete**.
4. Click **OK** when asked if you are sure you want to delete. The selected interactions are deleted.

To create a permalink to an interaction:

1. Select **Explore > Search**.
2. Select the interaction(s) that you want to delete.
3. Select **More** and click **Permalink**.
4. Copy the link from the dialog box that opens.

To find similar interactions:

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 search for similar interactions a new window is opened with a list of all the similar interactions. The interactions are arranged according to how similar they are to the original interaction. The number of interactions that can be included in the list is defined in your system's variables.

1. Select **Explore > Search**.
2. Select the interaction for which you want to find similar interactions.
3. Select **More** and click **Similar Calls**. A new window is opened and displays the list of similar interactions.

To reprocess an interaction:

Reprocess calls enables you to reanalyze a selected interaction(s).
Keep in mind that if the definitions in SMART have been modified or interaction auditing has fine-tuned the speech analysis system since the interaction was originally processed, the system may produce different results when you reprocess the interaction.

Note: Reprocessing Calls is not available in a Recording UI-mode or Analytics and Recording UI-mode systems.

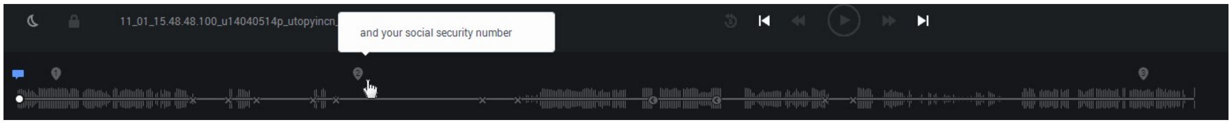
1. Select **Explore > Search**.
2. Select the interaction(s) you want to reprocess.
3. Select **More** and click **Reprocess Calls**.

Home > Media Player > Event Icons

Event Icons

Numbered Event icons (both linguistic and non-linguistic) indicate when events are detected during the interaction. The icons appear above the Media Player audio graph.

As shown in the following image you can see details about the event by placing you mouse over the event icon.



Event icons and information about each event also appear in the Interaction transcript. For more information, see Interaction Transcript and What is an Interaction?

Home > Reports

Reports

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

To help you monitor your business, SpeechMiner offers a wide range of standard reports that can be customized to better suit your needs. Depending on the type of report the results may be presented as lists or data and/or in graphic form.
In some reports, you can drill down within a report to see additional details.

In this section you will learn how to:

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

Home > Reports > Reports Menu Reference

Reports Menu Reference

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

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

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

Edit Report:
Enables you to change an existing report.

Home > Reports > Create a New Report

Create a New Report

New reports are based on an existing template.

To create a new report:

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

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

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

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

   If you are creating a report based on a saved report click **Save As** .

Home > Reports > Edit a Report

Edit a Report

After a report is created you can change its properties.

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

To edit an existing report:

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

   Note: Not all templates include **Calls Filter** on the left side of the screen.
4. Click **Save** to change the existing report.
5. Click **Run Report**. The report appears at the bottom of the screen under that report parameters.

   If you are creating a report based on a saved report click **Save As** .

Home > Reports > Run a Report

Run a Report

You can run a report in a number of ways:

- Run the report and view the results in the browser.
- Run the report and send the results as an email attachment to selected recipients.
  The results are sent as an MHT file.
  The .mht file is opened in a browser and is linked to the SpeechMiner system.
- Run the report and export the results using a PDF or Excel file.

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

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

1. Select **Reports > Saved Reports** to run an existing report or **Reports > Edit Report** to run a new report.
2. From Saved Reports select the report you want to run. From Edit Report configure the report you want to run.
3. Select how to view the report results in the browser:
   - To view the results in a new browser window, at the top of the form select **Open in new window**.
   - To view the results in the **Customize Report** tab, below the template form, clear the **Open in new window** check box.
4. Click **Run** . The report results are displayed as you requested in the SpeechMiner Report Viewer window.

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

1. Select **Reports > Saved Reports** to run an existing report or **Reports > Edit Report** to run a new report.
2. From Saved Reports select the report you want to run. From Edit Report configure the report you want to run.
3. At the top of the form, click **Email Report** . A dialog box opens.
4. Under **To** enter the required e-mail addresses.

   Separate multiple addresses with semi-colons (;).
5. Under **Notes** type any text you want to include in the body of the e-mail.
6. Click **Send**. The report runs and the results are sent to the recipients you specified. A confirmation message appears when the results are sent.

To run the report and export the results:

1. Select **Reports > Saved Reports** to run an existing report or **Reports > Edit Report** to run a new report.
2. From Saved Reports select the report you want to run. From Edit Report configure the report you want to run.
3. At the top of the form, click Run report. The report is created and appears at the bottom of the screen.
4. 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.
5. Select the desired option.
   - If you select **Open**, the file is opened 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. Navigate to the folder in which you want to save the file and click **Save**.
     The file is saved in the selected location.

Home > Reports > Analyze Report Data

Analyze Report Data

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

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

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

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

For additional information about user profiles and mapping users to agents or work groups, see Administer Users.

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

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

Home > Reports > Drill Down a Report

Drill Down a Report

Depending on the type of report, the report results may be in the form of a graph, a histogram, or a table.
You can drill down to the underlying data on which any graphic component is based (graph bars, lines, or table headers).
When you do this, you will be presented with a new report that is based on the data point you clicked on.

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

- Click the component.

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

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

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

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

To sort data in a table:

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

Home > Reports > Working with Saved Reports

Working with Saved Reports

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

Note: The System Alert report is automatically generated and saved by the system. For additional information, see Alerts.

From the Saved Reports grid you can:

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

The Saved Reports grid contains the following columns:

Column	Description
Run	Click the **Run** icon to run the report and display the results in a new window.
Edit	Click the **Edit** icon to open the report in the Edit Report tab where you can change the parameters and settings.
Delete	Click the **Delete** icon to delete the selected report.
Name	The saved report name.
Template	The template on which the report is based.
Created By	The name of the user who created the report.
Sharing	A black **Sharing** icon is present for reports that you created. A faded Sharing icon is present 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 Sharing icon. Click the Sharing icon to open a dialog box in which you can select the groups and individual users with whom you want to share the report. The members of the selected groups and selected users will see the report listed in their Saved Reports tab. **Note:** You can only edit reports that you created. If you want to edit a report that you did not create you must first save the report under a new name.
Schedule	Indicates whether the report is scheduled to run at a specific date and time. Click the **Schedule** icon to activate, deactivate, create or modify the report's schedule.
Last Modified	The date on which the report was last edited and saved.
Permalink	Click **Copy** to create a Permalink to the specific report.

To filter the Saved Reports list:

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

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

Filter	Description
Delete	Click the **Delete** icon to delete the selected report.
Name	Enter a sequence of characters. Only the saved reports whose name contains the letters you entered are displayed.

Template	Select the report template to include in the list and click **Done** to activate the filter. Only the saved reports based on the template(s) you selected are displayed.
Created By	Select the users to include in the list and click **Done** to activate the filter. Only the saved reports that were created by the selected user(s) are displayed.
Sharing	Select My Reports to display only those reports that you created or Shared Reports to display only those reports that were created by other users and shared with you. Click **Done** to activate the filter.

To drill down and view additional details about the report:

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

To delete a saved report:

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

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

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

Home > Reports > Schedule a Report

Schedule a Report

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

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

- **Deactivated:** The report is not scheduled to run.
- **Time Based:** The report runs automatically at specific times.
- **Event Based:** The report runs automatically when specific events are detected.

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

The report scheduling feature enables you to:

- Create a report schedule for a specific report.
- Create a report schedule for a group of reports.
- Send the report to specific recipients.
- Schedule a report to run when an event is detected.
- Deactivate a report schedule.

To create a report schedule for a single report:

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

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

   The parameters that appear on the right side of the window change according to your time period selection
8. Select the Recipients tab and configure the available parameters.
9. Click **Schedule**. The report is scheduled to automatically run according to the settings you configured.

To create a report schedule for a group of reports:

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

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

   The parameters that appear on the right side of the window change according to the selected time period.
8. Select the Recipients tab and configure the available parameters.
9. Click **Schedule**. The reports are scheduled to automatically run according to the settings you configured.

To send the report to specific recipients:

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

1. Select **Reports > Saved Reports**.
2. Select the group of reports you want to run according to a specific schedule.
3. Click the **Schedule** icon .
4. Select the **Recipients** tab and configure the fields as follows:
   - **To:** The e-mail addresses of the report recipients. Separate multiple addresses with semi-colons (;).
   - **Reply To:** The sender's address.
   - **Subject:** The text that should appear in the subject line of the e-mail.
   - **Report Format:** Select **Web archive** to create the results in an MHT file that can be opened in Internet Explorer. Or, select **PDF** to create the results in a PDF file.

     Note: If the Schedule Report does not produce expected results refer to the *Configuring the Reporting Services* in the *Administration Guide*.
   - **Priority:** Select the desired priority level for the e-mail message.
5. Click **Schedule**. The reports are scheduled as specified in the Schedule tab and the recipients are set as specified in the Recipients tab.

To schedule a report to run when an event is detected:

Event-based scheduling enables you to keep track of potentially significant trends. It also enables you 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.

1. Select **Reports > Saved Reports**.
2. Select the report(s) you want to schedule.
3. At the top of the scheduling dialog box, select **Active**.
4. From the **Schedule Type** list select **Time Based**. The fields required to configure the schedule are displayed.
5. In the **Condition** line, under **Categories** select the categories that must be identified in the interactions. For additional information, see Search Filter.
6. In the next field, select one of the following:
   - **Exceeds (>):** Run the selected reports when the selected categories are identified in more than a specified number or percentage of interactions.
   - **Equals (=):** Run the selected reports when the selected categories are identified in a specified number or percentage of interactions.
   - **Drops Below (<):** Run the selected reports when the selected categories are identified in fewer than a specified number or percentage of interactions.
7. Under **Values**, fill in the number or percentage of interactions.
8. 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.
9. 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 select Days in the next field.
10. Select the unit of time for the duration value you entered in the previous field.
11. Configure the **Recipients** tab and save the settings.

To deactivate a report schedule:

1. Select **Reports > Saved Reports**.
2. Select the report(s) for which you want to deactivate the schedule.
3. At the top of the scheduling dialog box, clear the **Active** check box.

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

Report Templates

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

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

Before you begin working with reports consider the following:

- Some reports offer options not included in the remaining reports. When a report contains additional options they will be described in an **Actions** section in the report description.
- Some reports have a number of available versions (for example, Full and Wide). Use the **Version** parameter to select the desired version.
- The information visible in the reports you create is limited to the data to which you have access.
- Some reports may not be available to all users.
- You may have access to reports that were not documented because they were custom made for your organization.
- Recording templates do not include the Categories option since recording does not categorize interactions.

The following is a list of all the available templates:

- Agent Bubble Chart
- Agent Comparison
- Agent Evaluation Comparison
- Agent Trend
- Calibration Report
- Capacity Trend
- Category Bubble Chart
- Category Distribution
- Category Trend
- Coaching Summary
- Evaluation Summary
- Evaluator Evaluation Comparison
- Metadata Frequency
- Performance Profile
- System Load
- Team Comparison
- Team Evaluation Comparison
- Top and Bottom Performers
- Topic Analysis - Audits
- Topic Analysis - Trends
- Topic Correlation
- Usage Tracking

Home > Reports > Report Templates > Report Template Layout

Report Template Layout

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

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

The SpeechMiner report template has a maximum of three parameter rows. Each row deals with different functions in the report.
In addition, most report templates have a Data Set filter section on the left side of the screen.

In this section, we will explain the report template layout using the Agent Comparison template as an example. The Agent Comparison report represents the most common template layout.

First Row:

The first row contains:

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

Second Row:

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

Third Row:

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

Data 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 additional information about the filters and how to configure them, see Report Parameters.

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

Home > Reports > Report Templates > Report Parameters

Report Parameters

Most report parameters 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.

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

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

Template

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

Report Name

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

Report Title

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

Description

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

Version

The output of some reports can be generated in different versions and different sizes or formats.
In this field, select the desired output version from the drop down list.
The available options vary depending on the template.

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

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

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

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

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

- **X-Axis Only:** a bubble chart option. 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:** a bubble chart option. 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 Filter options allow you to narrow down the data from the entire database. This enables you to base your report on a subset of the available data.

All of the Data Set Filters have an "AND" relationship. This means that each filter further restricts the options available and all interaction 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 (for example, a Program designated as "Customer Service France" with interactions only in French and the Language option "Dutch"), you will have zero data in your report.

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

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

The following groups of filters are available:

Filter Group	Description
Basic filters	Enables you to filter for interaction types, languages, and date range. **Note:** A day begins at 0:00 and ends at 23:59. **To Date** date filters (All, Today, Week to Date, Last 7 Days, Month to Date. Last Month, Quarter to Date, Last 90 Days) include the interactions collected in the system up 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	Enables you to filter for interaction categories, programs and the topics that must be found in them. For each option, select one or more values. Only interactions 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 interactions 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, an interaction must be in both categories to be included. To add a line, click [+]. To create a negative filter, click the Not button beside the field. For example, to include all categories except Category A, select Category A and select the Not button beside the Category field.
Interaction Properties	Enables you to select agents, interaction length, and external interaction ID properties. • **Agents:** Select any combination of agents and work groups. If you select a work group, all the agents in the work group are included in the data set. You can also choose to search for the "current user" rather than a specific agent or work group. In this case, the condition changes depending on which user runs the report. • **Interaction Length:** Select the range of the interaction duration 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 interactions that are shorter than the value you specified are included. If you selected '''Between''', interactions whose duration is more than the first value and less than the second value are included. If you selected '''More Than''', only interactions that are longer than the value you specified are included. • **Interaction External ID:** Type any portion of an interaction's external ID. Any interaction whose external ID is include in the characters you specify is 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	Enables you to filter according to metadata values. Metadata is collected by the recording system and is relayed to SpeechMiner. The types of available metadata vary from system to system. You can select any type of metadata available in your system and, if you wish, you can specify a value for it. The search results will only include interactions for which the selected type of metadata has an automatic or manually defined value.
User Actions	Enables you to filter interactions according to: • Specific user comments added to the interaction. • Interactions that were played back. • Forms that were filled out. • Whether or not quality checking was performed. Under **Interaction Comment Text**, specify the text that must appear in a comment that was added to an interaction. In the other fields, select the users who must have performed the specified actions.

Items on Report

The parameters in this section allow you to select specific information and calculate distributional information on the data in the data set that was selected using the Data Set Filters.
If no selections are made under **Items on Report**, default values will determine how the data will appear in the report.

Since the parameters in Items on Report differ from report to report, 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 work groups to be analyzed and displayed in your report. The default value (Any) includes all agents.

If your Data Set Filters are not set to Any, your selections for Agents must match your selections in the Data Set Filters (for example, the same work groups or agents, belonging to the same languages and programs). 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 interaction categories to limit the data set analyzed for your report. Your data set will include interactions belonging to any of the categories selected.
Use the default value (Any) to include all available categories.

Note: If a single interaction belongs to multiple categories it will be counted as one interaction for each category selected under this parameter. Also, bear in mind that the report output will only include interactions in categories that were selected from the Categories list and were not excluded from the data set in the Data Set Filters.

If you selected specific categories in the Data Set Filters section, only categories that are selected from both the Categories list and the Data Set Filters will appear.
When used with Percentage of Interactions in the Data Type parameter, the report will display the ratio of the following as a percentage:

{the number of interactions from the selected Categories in Items on Report} to *{the number of interactions from the Categories selected for analysis in Data Set Filters}*

Note: If one or more interactions belong to multiple categories, the sum of the percentages of interactions 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 Interactions:** Displays the number of interactions per each report item. Data may vary depending on the other filters selected.
- **Percentage of Interactions:** Displays the percentage of interactions per report item in your data set. For additional information, see Categories.
- **Average Interaction Duration:** Displays the average length, in minutes, of all interactions for each report item. The entire conversation for the interaction recording session is considered, excluding the wrap time after the interaction.
- **Total Resources:** Displays the total amount of time, in hours, of all the interactions per report item. It is essentially the sum of all interaction 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 Interactions" and the Period Type is "Day," the number of interactions for each day in the date range included in the report will be shown.

Top or Display

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

Home > Reports > Report Templates > Available Templates

Available Templates

The following is a list of all the available templates:

- Agent Bubble Chart
- Agent Comparison
- Agent Evaluation Comparison
- Agent Trend
- Calibration Report
- Capacity Trend
- Category Bubble Chart
- Category Distribution
- Category Trend
- Coaching Summary
- Evaluation Summary
- Evaluator Evaluation Comparison
- Metadata Frequency
- Performance Profile
- System Load
- Team Comparison
- Team Evaluation Comparison
- Top and Bottom Performers
- Topic Analysis - Audits
- Topic Analysis - Trends
- Topic Correlation
- Usage Tracking

Home > Reports > Report Templates > Available Templates > Agent Bubble Chart

Agent Bubble Chart

Description

The Agent Bubble Chart report compares agents and/or work groups 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 work group, rather than a bubble chart.

Note: 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.

Items on Report

- **X-Axis Categories:** Select one or more categories to include in the bubble chart's x-axis.
- **Y-Axis Categories:** Select one or more Categories to include in the y-axis of the bubble chart.

Note: Only categories that are not excluded from the data set (that is, using the filter on the right side of the screen), are included in the report.

For additional information, see Report 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.

Home > Reports > Report Templates > Available Templates > Agent Comparison

Agent Comparison

Description

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

Common Usages

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

Customizing the Report

General Settings

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

For additional information, see Report Parameters.

Actions

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

Home > Reports > Report Templates > Available Templates > Agent Evaluation Comparison

Agent Evaluation Comparison

Description

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

Common Usages

Used to compare agent evaluation scores.

Customizing the Report

General Settings

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

  Tip: If the Form list does not include the form you want to select, refresh the page.
- **Agents:** Enables you to select the agents that should be analyzed in the report.

For additional information refer to Report Parameters.

Actions

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

Home > Reports > Report Templates > Available Templates > Agent Trend

Agent Trend

Description

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

Common Usages

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

Customizing the Report

General Settings

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

For additional information, see Report Parameters.

Actions

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

Home > Reports > Report Templates > Available Templates > Calibration Report

Calibration Report

Description

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

Common Usages

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

Customizing the Report

General Settings

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

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

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

For additional information refer to Report Parameters.

Actions

Sort the evaluator names in the Y-axis.

Capacity Trend

Description

The Capacity Trend report contains information that can be used by the system administrator to monitor the system load and to see the extent to which the system can handle new incoming interactions.

The Capacity Trend report includes the following:

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

Common Usages

- Analyze the number of recent interactions in the system to determine if the current hardware resources meet the required capacity.
- Forecast future hardware needs and allocate resources accordingly.

Customizing the Report

For additional information, see Report Parameters.

Home > Reports > Report Templates > Available Templates > Category Bubble Chart

Category Bubble Chart

Description

The Category Bubble Chart report compares categories by plotting them on a graph according to the percentage of 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.

Note: This template is only available in an Analytics UI deployment.

Common Usages

- Plot interaction - Categories show the average interaction duration plus two customer-experience categories (for example, Dissatisfaction and Escalation).
- Plot interaction - Categories show the average interaction duration plus two agent-efficiency categories (for example, Transfer Rate and Hold Rate).
- Plot interaction - 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.

Items on Report

- **Bubble Categories:** Select the categories to represent as bubbles in the chart.
- **X-Axis Categories:** Select one or more categories to include in the x-axis of the bubble chart.
- **Y-Axis Categories:** Select one or more categories to include in the y-axis of the bubble chart.

Note: Only categories that are not excluded from the data set are included in the report.

For additional information, see Report Parameters.

Actions

- Click a bubble in a chart, a bar in a graph, or an item in a table to open the interaction list included in the item.
- In X-Axis Only and Y-Axis Only versions, click to drill down to a Category Trend report.

Home > Reports > Report Templates > Available Templates > 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).

Note: This template is only available in an Analytics UI deployment.

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 are bar graphs that list the selected categories and showing their proportion in the data set.
- **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 associated with the selected categories. You can select to base the calculations on the number of interactions or on the total resources selected under Distributed By.

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 Report 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** to drill down to the category's interaction distribution. If the distribution of the items in the report (see Items on Report above) is the percentage of interactions, the distribution of interactions will be presented according to the percentage of interactions. If the distribution is the percentage of resources, the distribution of interactions will be presented according to the average interaction duration.

Home > Reports > Report Templates > Available Templates > Category Trend

Category Trend

Description

The Category Trend report shows changes in categories over a period of time. The trend line can represent the number of interactions, percentage of interactions, average interaction duration, or total resources. There is one line for every category selected.

Note: This template is only available in an Analytics UI deployment.

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, X-Axis Only, and Y-Axis Only versions.

For additional information, see Report Parameters.

Actions

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

Home > Reports > Report Templates > Available Templates > Coaching Summary

Coaching Summary

Description

The Coaching Summary report summarizes the current status of coaching sessions in a pie chart and table and lists active coaching sessions by user. Items in the list can be expanded to display details about coaching sessions.

Common Usages

Enables you to monitor personnel training.

Customizing the Report

General Settings

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

For additional information, see Report Parameters.

Actions

- Click **+** beside a user/trainee to expand it and view a list of coaching sessions assigned to the user/trainee.
- Click **+** beside a coaching session to expand it and view details about the session.
- Click **+** or **-** at the top of the table to expand or collapse all of the items in the table.

Home > Reports > Report Templates > Available Templates > 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 Usages

Enables you to monitor evaluator performance.

Customizing the Report

General Settings

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

  For additional, see Report Parameters.

Home > Reports > Report Templates > Available Templates > Evaluator Evaluation Comparison

Evaluator Evaluation Comparison

Description

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

Common Usages

Enables you to compare evaluator evaluation scores.

Customizing the Report

General Settings

- **Date Range:** 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.

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

For additional settings, see Report Parameters.

Actions

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

Home > Reports > Report Templates > Available Templates > Metadata Frequency

Metadata Frequency

Description

The Metadata Frequency report is a histogram that shows values for a specific metadata field.
The histogram shows how many interactions in the data set are associated with the selected metadata field.

The Metadata Frequency report includes:

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

Items on Report

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

  Note: The field selected must be within the range selected in the Data Set Filters. If it is not within the range the report will be empty.
- **Pattern to Include:** Enter a series of one or more characters that must be found in the field value in order for it to be included in the report (optional; leave the field blank to include all patterns).
- **Values to Exclude:** Enter one or more field values to exclude from the report. If you enter more than one value separate the multiple values with commas and do not leave a space after the comma (optional; leave the field blank to include all values).
- **Minimum 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 additional information, see Report Parameters.

Actions

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

At the bottom of the graph:

- Click a bar in the graph to search for interactions that have the field value represented by the bar.
- Click to drill down to a Category Distribution report.

Home > Reports > Report Templates > Available Templates > Performance Profile

Performance Profile

Description

The Performance Profile report is a bar graph and table that compares work group or agent performance for a specified category or a group of categories to the benchmark (the work group 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.

Note: This template is only available in an Analytics UI deployment.

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 (standard size), Mini, Wide, X-Axis Only, and Y-Axis Only versions.

Items on Report

- **Profile:** Select the agents or work groups you would like to compare to the average (the benchmark) of specific categories. Your selection must match the Benchmark Type, but it does not have to match the work group or agent parameters in the Data Set Filters.
- **Benchmark Type:** Select the type of benchmark to use: Agent or Team (work group). The selection here must correspond with those in the Data Set Filters. If you selected work groups in the Data Set Filters (rather than individual agents in the expanded work groups), you must select Team for the Benchmark Type in order to return results. The Benchmark Type must also match the Profile selected. That is, if agent is selected as the benchmark type, agents must also be selected in the Profile parameter.
- **Compare:** Select the data type you want to compare.
- **Categories:** Select specific interaction categories to limit the data set analyzed for your report.
- **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.

For additional information, see Report Parameters.

Actions

- Click **+** next to an agent or team to expand the tree and view a list of categories.
- Click **+** to collapse and expand an item.
- When an item is expanded, click **Trend** to drill down to a Category Trend report.

Home > Reports > Report Templates > Available Templates > System Load

System Load

Description

The System Load report includes a line graph and a grid displaying the amount of audio hours processed per day or hour. On the line graph, two lines are displayed, one for processed 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.

Note: 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 deployment.

Common Usages

Enables you to monitor the system's processing load.

Customizing the Report

- **Dates:** Enter a date range for the report.
- **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:** Type the name of the report.

For additional information, see Report Parameters.

Home > Reports > Report Templates > Available Templates > Team Comparison

Team Comparison

Description

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

Common Usages

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

Customizing the Report

General Settings

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

Items on Report

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

For additional information, see Report Parameters.

Actions

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

Home > Reports > Report Templates > Available Templates > Team Evaluation Comparison

Team Evaluation Comparison

Description

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

Common Usages

To compare team evaluation scores.

Customizing the Report

General Settings

- **Date Range:** 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.

  Note: 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 Report Parameters.

Actions

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

Home > Reports > Report Templates > Available Templates > Top and Bottom Performers

Top and Bottom Performers

Description

The Top and Bottom Performers report is a bar graph that indicates values for three groups (top performers, bottom performers, and average performers) across multiple categories.
This report 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 a comparison and it will NOT tell you who the top and bottom agents are. Instead, it will tell you how they compare in specific areas of performance.

Note: This template is only available in an Analytics UI deployment.

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, Wide, X-Axis Only, and Y-Axis Only versions.

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 the same as those made in the work group 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 the same as those made in the work group 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 the same as those made in the work group and agent filters in the Data Set Filters.
- **Categories:** Select specific interaction categories to limit the data set analyzed for your report.

For additional information, see Report Parameters.

Actions

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

Home > Reports > Report Templates > Available Templates > Topic Analysis - Audits

Topic Analysis - Audits

Description

The Topic Analysis - Audits report is a table that shows the precision with which each topic was identified by SpeechMiner. Precision values are given for one or more confidence levels, as specified in the report parameters. The Precision values are determined by the TP/FP/SFP (True Positive/False Positive/Sense False Positive) selections made by the interaction auditor. For additional information, see the **Event** and **Comment** sections in the What is an Interaction? page.

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 beneficial because it allows you to fine-tune the system to the correct accuracy level. After learning about Topic Identification performance you can adjust confidence levels as necessary.

Note: This template is only available in an Analytics UI deployment.

Common Usages

Enables you to monitor the quality of the different topics in the system based on audit information.

Customizing the Report

Items on Report

- **Topics:** Choose the Topics whose audits you want to examine.
- **Confidence Thresholds:** Type in the confidence levels for which you wish to see precision values. Separate multiple values with commas.

Note: Confidence levels are assigned by the system to each term it identifies. They indicate how closely the term defined in the topic matches the term that was discovered in the audio segment. **Precision** in the report means the percentage of TPs for all the audits in the topic whose confidence levels were equal to or above the given thresholds. This means that each of the thresholds includes all of the audits in the threshold levels above it.

For additional information, see Report Parameters.

Actions

- Click a topic to drill down to the audit information for each of the terms in the topic.
- Click to drill down to an item's details. The details show information about the precision as a function of the 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 a list of interactions in which the specific term is found.

Home > Reports > Report Templates > Available Templates > Topic Analysis -Trends

Topic Analysis -Trends

Description

The Topic Analysis - Trends report is a table that compares how often particular Topics were found in the selected time period with how often they were found in the preceding time period. Each line in the table contains information for one Topic, including the percent change between the current period and the preceding period, and the number and percent of 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 [[Documentation:SPMI:user:standardreports:draft#t-2|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).

Note: This template is only available in an Analytics UI deployment.

Common Usages

Enables you to monitor topic trends within interactions handled by the system.

Customizing the Report

Items on Report

- **Topics:** Choose the topics whose audits you want to examine.
- **Minimum Number of Calls:** Type the minimum number of interactions in which a topic must be found in order for it to be included in the results.

For additional information, see Report Parameters.

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 a list of interactions in which the specific term is found.

Home > Reports > Report Templates > Available Templates > Topic Correlation

Topic Correlation

Description

The Topic Correlation report provides 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.

Note: This template is only available in an Analytics UI deployment.

Common Usages

- Identifying scenarios in interaction flows that tend to produce specific results.
- Investigating the root causes of events that take place during interactions.
- Customizing the report.

Customizing the Report

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 side of the report, or "Any" to include all topics. Only patterns that associate 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.

For additional information, see Report Parameters.

Home > Reports > Report Templates > Available Templates > Usage Tracking

Usage Tracking

Description

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

Common Usages

- Monitor the activity of SpeechMiner users.
- Find out who performed the last system Apply in SMART.
- See which interactions have been listened to.

Customizing the Report

For additional information, see Report Parameters.

Actions

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

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

Home > Quality Management

Quality Management

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

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

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

Quality Monitoring key features include:

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

Home > Quality Management > Quality Management Menu Reference

Quality Management Menu Reference

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

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

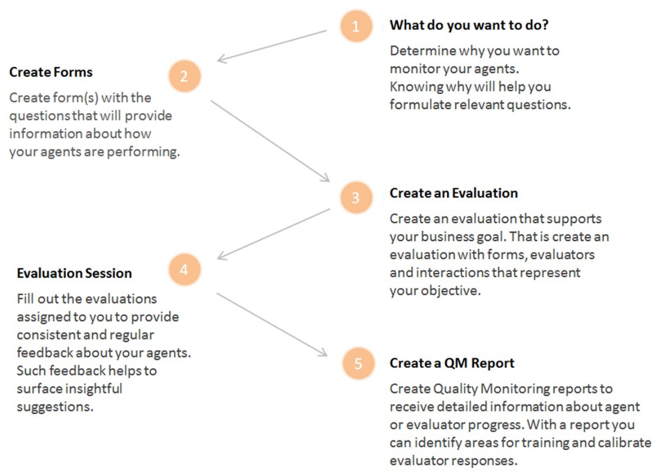
Evaluations Manager:
Enables you to create evaluations to monitor your agents productivity and efficiency.

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

Home > Quality Management > Quality Management Workflow

Quality Management Workflow

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



Home > Quality Management > Forms Manager

Forms Manager

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

Before you create a form consider the following:

- Each form has a name, optional description and a list of questions.
- Forms can contain one or more of the following question types:
  - Yes/No
  - Multiple Choice
  - Choose from List
  - Free Form
  - Sliding Scale
- Questions are created and contained within groups. A group can contain one or more questions.
- Each question can be defined as mandatory or optional.
- Multiple Choice, Choose from List, Yes/No/NA and Slide Scale questions are assigned weights. The given weight is used to calculate the overall score of the form.
- Yes/No/NA, Multiple Choice, the minimum Slide Scale value and Choose from List questions can include Auto-Fail answers.
- Forms are inactive until you activate them.
- Forms are only available to users when they are active.
- An active form cannot be modified or deleted.
- A form used in one or more evaluations cannot be deleted.
- Each active form can be attached to one or more evaluations.

Home > Quality Management > Forms Manager > Forms Manager Grid

Forms Manager Grid

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

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

The Forms Manager grid contains the following information:

Parameter / Column	Description
	Enables you to create a new form.
	Enables you to search for a specific form according to its name.
	Deletes the selected form(s).
0 Selected	Indicates the amount of forms selected in the grid.
Name	Indicates the form name.
Creator	Indicates the name of the user that created the form.
Created	Indicates the date and time on which the form was created.
Modified	Indicates the date and time on which the form was changed.
Status	Indicates if the form is active or inactive.
	Enables you to select the columns that appear in the grid. **Note:** To return the grid columns to their default state, click **Reset to defaults** from the Select Columns list().

Home > Quality Management > Forms Manager > Create a New Form

Create a New Form

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

To create a new quality management form:

1. Click **Quality > Forms Manager**. The Forms Manager grid appears.
2. Click **New Form**. A blank form appears.
3. In the **Untitled Form** field enter a name for the form.
4. In the **Description** field enter a description about the form you are creating. (optional)
5. Click **Insert Group** to create a group of questions about a specific topic within the form.

   By default one empty group already exists when you create a new form.

   For example, a form about agent/customer communication could have a group of questions called Interaction, containing questions about the interaction and another group called Agent, containing questions about how the agent handled the interaction.
6. In the fields provided add a group name and group description.
7. Click **Insert** to add a question to the form and select one of the following question types:

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

Question	Description
Yes/No or N/A	A question whose expected answer is either yes, no or not applicable.
Choose from List	A closed ended question that enables the user to select multiple answers from a list of choices.
Multiple Choice	A closed ended question that enables the user to select one answer from a list of answers.
Free Form	A text box for users to input short answers to the question.
Sliding Scale	A scale with a minimum and maximum value, where the maximum value represents a stronger association to the question.

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

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

   Note: You can move the location of a question using the arrows provided ↑ ↓.
9. Repeat steps 5-8 until the form contains all of the groups and questions you want.

   Tip: Click **Clone Group** to create a copy of an existing group of questions.
10. Click **Weighting...** to assign your questions a weight.

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

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

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

    Note: Each form must contain at least one question that can be given a weight. For more information see: Configure Question Weights.
11. Click **Auto-fail** for a Yes/No, Multiple Choice, the minimum Slide Scale value or Choose from List answer, to create a form that will automatically fail when the user selects an answer to one of these questions.
12. Click **Done** when you complete a group of questions. All of the group options will disappear and the group will appear as it will in the final form.

    Note: To edit the same group simply click within the group. The group options will reappear.
13. Click the **Preview Form** icon to review the form before you save it.

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

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

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

Home > Quality Management > Forms Manager > Form Questions

Form Questions

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

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

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

Yes/No:

A Yes/No question requires the user to select one answer.
The question offers three answers: Yes, No or Not Applicable (N/A).

To add a Yes/No question:

1. In a new or existing form, click **Insert** in the form group to which you want to add the Yes/No question.
2. Select **Yes/No**. The question appears without a title and two options (Yes, No).
3. Click the **Untitled question** field and enter the question.
4. Click **Add N/A** to add the not applicable option.
5. If the question is mandatory, select the **Required** check box.
6. Click **Auto Fail** next to the answer that when selected will cause the entire form to fail and receive a score of 0.
7. Click **Done**.

Multiple Choice:

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

To add a Multiple Choice question:

1. In a new or existing form, click **Insert** in the form group to which you want to add the Multiple Choice question.
2. Select **Multiple Choice**. The question appears without a title and the statement "No answers defined".
3. Click the **Untitled question** field and enter the question.
4. Click **Add new choice** to add the first of a number of choices.
5. Repeat step #4 until you have added all the possible answers.

   When the form is saved, a list of radio buttons will appear along with the answers.
6. If the question is mandatory, select the **Required** check box associated with the specific question.
7. Click **Auto Fail** next to the answer that when selected will cause the entire form to fail and receive a score of 0..
8. Click **Done**.

Choose from List:

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

To add a Choose from List question:

1. In a new or existing form, click **Insert** in the form group to which you want to add the Choose from List question.
2. Select **Choose from List**. The question appears without a title and the statement "No answers defined".
3. Click the **Untitled question** field and enter the question.

4. Click **Add new choice** to add the first of a number of answers.
5. Repeat step #4 until you have added all the Choose from List answers.

   When the form is saved, a list of check boxes will appear along with the answers.
6. If the question is mandatory, select the **Required** check box.
7. Click **Auto Fail** next to the answer that when selected will cause the entire form to fail and receive a score of 0..
8. Click **Done**.

Free Form:

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

To add a Free Form question:

1. In a new or existing form, click **Insert** in the form group to which you want to add the Free Form question.
2. Select **Free Form**. The question appears without a title.
3. Click the **Untitled question** field and enter the question in the **Question title** field.

   When the form is saved, the question appears with a text field in which the user can write a response.
4. If the question is mandatory, select the **Required** check box.
5. Click **Done**.

Sliding Scale:

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

To add a Sliding Scale question:

1. In a new or existing form, click **Insert** in the form group to which you want to add the Sliding Scale question.
2. Select **Sliding Scale**. The question appears without a title.
3. Click the **Untitled question** field and enter the question.
4. Click **From** to add the minimum value.
5. Click **To** to add the maximum value.
6. In the **Low Title** text box provide a name for the minimum value.
7. In the **High Title** text box provide a name for the maximum value.
8. If the question is mandatory, select the **Required** check box.
9. Click **Done**.

Home > Quality Management > Forms Manager > Configure Question Weights

Configure Question Weights

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

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

Before you create a form consider the following:

- The sum of the group weights for each form must be 100%. If the sum of the group weights is not 100% the form cannot be activated.
- The sum of the questions within each group must be 100%. If the sum of the questions weights within a group is not 100% the form cannot be activated.
- Each Multiple Choice and Choose from List answer should be assigned a weight.
- The weight you give each Choose from List answer does not have to total 100% but it cannot be more than 100%.
- The weight of each Multiple Choice and Choose From List question is entered manually.
- The weight of each group is entered manually.

For a better understanding see the examples and procedure below:

Example 1:

A form may contain three questions:

- One in which the evaluator is asked if he can rely on the specific agent (Yes/No/NA question).
- A second in which the evaluator is asked to select the agent's demeanor during an interaction (Multiple Choice question).
- A third in which the evaluator is asked to select the agent's positive features (Choose from List question).

  The first two questions are required and the third is optional.
  Evaluators cannot save the form if they do not answer the first two questions. They can leave the third blank.
  The questions are given a weight of 40%, 30% and 30% respectively for an overall score of 100%.
  If the optional question is not answered it's weight will be divided between the two required questions.
  In this case, the two required questions will receive a weight of 55% and 45% respectively.

Example 2:

The following three questions are from Example 1 and will be used in this example as well:

- Yes/No/NA - By default the Yes/No/NA questions are give a weight of 100% for Yes, 0% for No and NA is not given a weight.
- Multiple Choice - Includes 3 answers and the their respective weights are 30%, 60% and 100%.
- Choose from List - Includes 4 answers and each has a weight of 25%.

  Evaluator-A
  Evaluator-A answers NA for the Yes/No/NA question.
  The evaluator selects the 60% answer for the Multiple Choice question and two 25% answers for the Choose from List question.
  Since Evaluator-A selected NA for the Yes/No/NA question its weight of 40% is equally divided between the remaining two questions.
  The score for the Multiple Choice question is 50% (question weight) X 60% (answer weight). The score is 30.
  The score for the Choose from List question is 50% (question weight) X 50% (summary of selected answers weight). The score is 25.
  As a result, the forms score is 55.

  Evaluator B
  When Evaluator B fills this form, he answers Yes for the Yes/No/NA question.
  The evaluator selects the 100% answer for the Multiple Choice question and three 25% answers for the Choose from List question.
  The score for the Yes/No/NA question 40% (question weight) X 100% (answer weight). he score is 40.
  The score for the Multiple Choice question is 30% (question weight) X 100% (answer weight). The score is 30.
  The score for the Choose from List question is 30% (question weight) X 75% (summary of selected answers weight). The score is 22.5.
  As a result, the forms score is 92.5.

To configure a question weight:

1. Create a form with with one or more groups of questions.
2. Click **Weighting...**. The **Weighting for <form name>** window appears.
3. Enter a weight for each group in the fields provided.
4. Verify that the group weights total is 100.

5. Click the name of each group to see a list of the group's questions.
6. Enter a weight for each question within the group and verify that the total of the weights for the group's questions is 100.
7. If you included a Multiple Choice or Choose from list question in your group, click the name of the question to see a list of the question's answer.
8. Enter a weight for each answer associated with the Multiple Choice or Choose from list question.
9. Repeat steps 5-8 for each group in the form.
10. Save the form.

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

Home > Quality Management > Forms Manager > Manage a Form

Manage a Form

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

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

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

To save a form:

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

To save a form you must give it a name.

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

To change an existing form:

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

To delete a form:

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

To delete one or more forms:

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

To delete a specific form:

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

To delete a form question:

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

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

To create a copy of an existing form:

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

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

To preview a form:

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

1. In a new or existing form click the **Preview Form** icon . The form appears in a new window as it will appear when accessed by a user.
2. Click **X** in the top right corner of the Preview Form window to close the preview

To collapse/expand all the groups:

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

To collapse/expand all the groups:

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

To collapse/expand a specific group:

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

Home > Quality Management > Evaluations Manager

Evaluations Manager

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

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

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

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

Before you create an evaluation consider the following:

- Only a user with QM Manager Role permissions can create evaluations.
- SpeechMiner Quality Management enables you to create two types of evaluations (Regular and Calibration).
- Once an evaluation is saved, one or more evaluation sessions are created according to a predefined schedule.
- If you selected Interactions when working with a One Time schedule, each evaluation creates one evaluation session for every agent associated with selected interactions and each evaluation session is assigned to each evaluator. For example, if an evaluation contains 2 evaluators and 3 interactions (each with a different agent), 6 evaluation sessions will be created. That is, each evaluator will be asked to fill out the evaluation for each of the 3 agents.
- If you selected Criteria when working with a One Time schedule, the interactions are randomly distributed among the evaluators.

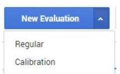
Home > Quality Management > Evaluations Manager > Evaluations Manager Grid

Evaluations Manager Grid

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

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

The Evaluations Manager grid contains the following information and options:

Parameter / Column	Description
	Enables you to select to create a new Regular or Calibration evaluation.
	Deletes the selected evaluation.
	Enables you to search for a specific evaluation.
0 Selected	Indicates the amount of evaluations selected in the grid.
Name	The name of the evaluation.
Evaluators	If you selected Interactions when working with a One Time schedule, this parameter indicates the amount of evaluators associated with the specific evaluation. Each one of these evaluators will be required to perform the same evaluation sessions. For example, if an evaluation is scheduled for over the course of a month with 3 evaluators and is configured to generate 30 sessions, each evaluator will receive 10 different interactions. If you selected Criteria when working with a One Time schedule, the interactions are randomly distributed among the evaluators.
Schedule	Indicates if the evaluation is a one time evaluation or a recurring evaluation.
Type	Indicates whether the evaluation is a Regular or Calibration evaluation. For details, see Evaluations manager.
Form(s)	Indicates the number of forms associated with the evaluation.
Last Activity	Indicates the last time the evaluation created an evaluation session(s).
Status	Indicates if the evaluation is active or inactive. An inactive evaluation cannot create evaluation sessions.
Created	Indicates the date on which the evaluation was created.
Evaluations Created	Indicates the number of evaluation sessions created as a result of the evaluation.
	Enables you to select the columns that appear in the Evaluations Manager grid. **Note:** To return the grid columns to their default state click **Reset to defaults** from the Select Columns list.

Home > Quality Management > Evaluations Manager > Create an Evaluation

Create an Evaluation

SpeechMiner Quality Monitoring enables you to create two types of evaluations:

- **Regular Evaluation:** Creates evaluation sessions about an agent's performance during customer interactions. The evaluator(s) associated with the evaluation will receive an evaluation session for each agent associated with the evaluation. The agent(s) for which the evaluation is created are the agents that participated in the interactions you added to your evaluation.
  For example, if you add 2 evaluators and 3 interactions (each with a different agent) to the evaluation, 6 evaluation sessions will be created. That is, each evaluator will be asked to fill out the evaluation for each one of the 3 agents.

- **Calibration Evaluation:** An evaluation used to compare evaluator performance so as to ensure consistency across teams. The evaluations are created with the same form and are performed in the same way as a regular evaluation session, the difference is that the result of these evaluation sessions can be used in a Calibration Evaluation report (that is, a report that compares how the evaluators filled out the same evaluation session).

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

Before You Begin:

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

To create an evaluation:

1. Click **Quality > Evaluations Manager**. The Evaluations Manager grid appears.
2. Click the drop down arrow next to **New Evaluation** and select one of the following:
   - **Regular:** An evaluation of an agent's performance during customer interactions.
   - **Calibration:** An evaluation used to compare evaluator performance so as to ensure consistency across teams.

   Note: A Calibration evaluation cannot be a recurring evaluation.
3. In the **Untitled Evaluation** field, enter the name of your evaluation.
4. In the **Description** field, enter a description of the evaluation.
5. From the **Schedule** list select one of the following and configure the schedule using the options available:
   - **Recurring:** Enables you to create an evaluation that repeatedly produces evaluation sessions for a configurable interval and amount of time.
   - **One Time:** Enables you to create an evaluation that only produces evaluation sessions once.

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

   Note: When creating an evaluation, only the Schedule and Expires After options are available.
6. Select the **Forms** tab and from the **Forms** list, select the forms to add to the evaluation.

   As soon as you select a form from the list, it appears in the Evaluation Summary under Forms.
   Select the form again to remove the form from the Evaluation Summary.
   The forms selected consist of the questions that must be answered to complete the evaluation session.
7. Select the **Evaluators** tab and from the **Evaluators** list, select the evaluator(s) that should perform the evaluation session(s).

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

Note: A Calibration Evaluation must contain a minimum of two evaluators.

8. Select the **Interactions** tab.

   Note: The Interactions option will not be available if you selected a **Recurring** schedule
   .

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

      - **Interactions:** Enables you to select interactions from the list created after you click **Search.**
        See step 8d.
      - **Criteria:** Randomly selects interactions from the result set. The amount of interactions selected correspond to what you entered in the '''Exactly''' field.
        You cannot select the interactions yourself.

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

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

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

   c. Click **Search.**

   d. If you selected **'Interactions** in step 8a, select the interactions to add to the evaluation from the list provided.

      As soon as you select an interaction from the list, it appears in the Evaluation Summary under Interactions.

   e. Clear the interaction's check box to remove the specific interaction from the Evaluation Summary.

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

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

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

Home > Quality Management > Evaluation Sessions

Evaluation Sessions

To help ensure that an agent's participation in an interaction coincides with a specific business agenda, SpeechMiner Quality Management evaluators receive a list of evaluation sessions that they must fill out according to a configurable schedule.

A completed evaluation session provides a view into how an agent communicates with consumers. Such evaluation sessions provide consistent and regular feedback that helps surface insightful reports, comments and suggestions that can lead to formal skills training and action plans to improve an agent's performance.

Before you perform an evaluation consider the following:

- Every evaluation session is associated with one interaction. When working with a Recording license every evaluation session is associated with one segment.
- An evaluation session can be saved and continued at a later time. Only when you select Complete will the evaluation session end.
- A Calibration Evaluation session is filled out in the same way as a Regular Evaluation session. But, unlike a Regular Evaluation a Calibration Evaluation can be used as part of a report that compares the performance of two or more evaluators.
- If your system includes an Analytics license each evaluation contains the specific interaction's transcript.
- When performing an evaluation you have the option of enabling the evaluator to see their evaluation score when the evaluation session is completed.
- To complete an evaluation session you must answer all the required questions in all the forms associated with the specific evaluation session.

Home > Quality Management > Evaluation Sessions > Evaluation Sessions Grid

Evaluation Sessions Grid

The Quality Manager - Evaluations Sessions grid contains a list of all evaluation sessions the user must fill out.

From the grid you can quickly see which evaluation sessions were started, in progress and or completed.

The Evaluations Sessions grid contains the following information and options:

Parameter / Column	Description
	Deletes the selected evaluation session.
Filter Data	Enables you to search for a specific evaluation session according to the session's name.
0 Selected	Indicates the amount of evaluation sessions selected in the grid.
Name	The name of the evaluation session.
Description	Contains an explanation about the specific evaluation session.
Type	Indicates whether the evaluation session is a Regular or Calibration session. For details, see Evaluations manager.
Form(s)	Indicates the number of forms associated with the evaluation session.
Agent	Indicates the agent for which the evaluation session was created.
Due	Indicates the date on which the evaluation session must be completed.
Assigned	Indicates the evaluator that must perform the evaluation session.
Status	Indicates if the evaluation session is: • **In Progress** = The evaluation has started, but has not been completed. • **Ready** = The evaluation has not started. • **Complete** = The evaluation session has been completed.
Creator	Indicates the user that created the evaluation session.
Interaction	Indicates the interaction in which the agent participated.
Score	Indicates the score the agent received as a result of the evaluation.
	Enables you to select the columns that appear in the Evaluations Manager grid. **Note:** To return the grid columns to their default state click **Reset to defaults** from the Select Columns list.

Home > Quality Management > Evaluation Sessions > Perform an Evaluation Session

Perform an Evaluation Session

The results of the evaluation session provide feedback about how a specific agent interacts with consumers.

To perform an evaluation session:

1. Click **Quality > Evaluation Sessions**. The Evaluation Sessions grid appears.
2. Click the name of the evaluation you want to perform.
3. From the **Form** list at the top of the screen, select the first form you want to fill out.

   Once you complete the selected form, continue filling out the remaining forms.

   Note: You cannot complete an evaluation session without answering all the required form questions.
4. Answer the questions provided.
5. Playback the interaction to hear the discussion between the agent and the customer. (optional)

   Tip: Click the **Play** icon associated with the interaction you want to hear. For more information about playing an interaction, refer to Media Player.
6. Click the inactive **Show score** option Show score to enable the evaluator to see the evaluation session score when the evaluation is completed.

   For more details about scores see Configure Question Weights.
7. Select one of the following options:
   - **Save:** Save your work so you can continue at a later time. If you select to save the evaluation session the specific evaluation session status in the Evaluation Session grid will be **In Progress**.
   - **Complete:** Finalize the evaluation session.
   - **Close:** Close the evaluation session without saving your work.

   If you selected **Complete** a summary of the completed Evaluation session appears.
8. Click **Complete** to finalize the evaluation session. If you select to complete the evaluation session its status in the Evaluation Session grid will be **Completed**.

Home > Quality Management > Evaluation Sessions > Open a Completed Evaluation Session

Open a Completed Evaluation Session

A completed evaluation session provides an overview about the agent's productivity in relation to a specific business goal.

Note: A completed evaluation session cannot be edited. To open a completed evaluation session:

To open a completed evaluation session:

1. Click **Quality > Evaluation Sessions**. The Evaluation Sessions grid appears.
2. Click the name of the completed evaluation you want to review.

   The completed evaluation opens with the following options:

Parameter / Column	Description
Form List	Enables you to view the different evaluation session forms and the given answers.
Show Score	Enables you to view the evaluation session score. The score appears next to the Form list and within the exported Excel worksheet.
Export	Enables you to create an Excel worksheet that contains evaluation session details.
Media Player	Enables you to playback the interaction associated with the evaluation session. For more information about playing an interaction, refer to Media Player.

Home > Coaching

Coaching

The coaching system is designed to enable you to create coaching sessions that can help managers, supervisors, quality-monitoring personnel and agents manage training objectives.
Both novice and experienced personnel can benefit from taking part in a coaching session. New employees can be introduced to their jobs and veterans can be encouraged to fine-tune their techniques by means of coaching sessions that highlight specific interactions. For example, the coach and agent can listen to example interactions that highlight and demonstrate to the agent how to properly interact with a customer.

Coaching sessions consist of lists of interactions that the trainee is asked to listen to, either in part or in their entirety. The interactions 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.

In this section you will learn how to:

- Create a Coaching Session: Enables you to help manage training objectives.
- Participate in a Coaching Session: Enables you to learn about new techniques, processes and so on.
- Edit a Coaching Session: Enables you to better suit your training goals.
- Manage Coaching Sessions: Enables you to view specific information and better understand the session details.
- Create a Coaching Session Report: Enables you to extract statistical information about the coaching sessions in the Coaching Session grid.
- Manage Coaching Session Types: Enables you to classify each session.

Home > Coaching > Coaching Menu Reference

Coaching Menu Reference

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

Sessions:
Enables you to create coaching sessions that will help you train your employees.

Home > Coaching > Coaching Session Grid

Coaching Session Grid

The Coaching Session grid contains a list of all your coaching sessions. The list contains general information about each coaching session and offers you a wide variety of tools to manage your sessions.

- The left side of the Coaching Session grid contains the session list.
- Below the Coaching Session list is a calendar that shows when the sessions in your list are scheduled.
- The right side of the screen displays details about the session selected in the grid.

The Coaching Session grid contains the following information:

Column	Description
Status All	The session status. Session statuses are indicated by icons in the session list and by color-coding in the calendar. The following session status can be selected for the session: • **Scheduled:** The session has been created, but it has not been 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 completed the session.
Schedule Date	The date and time on which the trainee is expected to start the session.
Name	The name of the session.
Coach	The coach's user name.
Trainee	The trainee's user name.
Actions	Click one of the following actions: • Adds the session to the Outlook calendar on your local computer. • Re-sends the email notification about the session to the coach and trainee. • Creates a permalink to the specific session. • Open the Sessions Details screen in setup mode so that you can add content to the session or modify the session properties and content. **Note:** this action is only available to the coaching session creator and the 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 assigned to the session. • Deletes the specific session.

Home > Coaching > Create a New Coaching Session

Create a New Coaching Session

In this page you will learn how to create a new Coaching Session.

To create a new comprehensive coaching session that will produce the best results, it is recommended that the following be added to the new session:

- Interaction lists
- Action Items
- Links

To create a new coaching session:

1. Select **Coaching** > **Sessions**.
2. Click the **New Sessions** icon +.
3. Enter the following information:
   - **Session Name:** Indicates the name of the session.
   - **Schedule Date:** Select the date and time at which the trainee should take part in the session.
   - **Coach:** Select the name of the coach who will oversee this coaching session.
   - **Trainee:** Select the name of the user who should take part in this coaching session.
   - **Type:** Select the type of coaching session that should be performed.
   - **Public/Private:** When you add notes in the Notes field, select **Public** if you want the notes to be visible to others. Select **Private** if you do not want anyone but yourself to see the notes.
   - **Notes:** Type anything about the session. Public notes can be used to help the coach or trainee with the session.
4. Click **Save.**

   The coaching session is created and an invitation is sent to the coach and trainee's My Messages widget. If their user profiles include an email address, notifications are sent to their email. The notification emails include an iCal file. When the attachment is opened the session is automatically added to the user's Outlook calendar.

   The new session will now appear in the Coaching Session list. When the session is selected in the Coaching Session list its details appear to the right of the list.

To add and manage session interactions lists:

Once a coaching session is created you need to add an interaction list(s) to the session. The interaction list provides the trainee with the knowledge required for the training objective.

There are two types of interaction lists. One list is created as a result of an interaction search criteria and another list can be created manually.
For more information, see Interactions Lists.

Note: Interaction lists can be added in the Session Details screen during the setup mode. Once they are 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 Session do not affect the original interaction list.

To each coaching session you can:

- Add an existing interaction.
- Create a new interaction list.

To add an existing interaction list to a session:

When an existing interaction list is added to a coaching session a copy of the original list is made and attached to the session. The copy becomes part of the specific coaching session and is not linked to the original interaction list. It can only be viewed from the coaching session. From within the coaching session you can add or remove interactions from the list and even change the search criteria. These modifications do not affect the original interaction list or the Saved Searches.

1. Select **Coaching** > **Sessions**.
2. Click the **Edit** icon ✎ associated with the coaching session to which you want to add an interaction list.

3. Click the **Add call list** icon + next to **Calls**.

   A list of Interaction Lists and Saved Searches appears.

   Select an interaction list or a Saved Search that contains the interaction list you are interested in.

   A copy of the interaction list is created and attached to the coaching session. The list appears under the **General Details > Interaction Lists:**.

To add a new interaction list to a session:

1. Select **Coaching** > **Sessions**.
2. Click the **Edit** icon associated with the coaching session to which you want to add an interaction list.
3. Click **New Search**. The search criteria options appear.
4. Fill in the search criteria and click **Search**. The search results appear to the right of the form.
5. Select the check box next to each interaction that you want to add to the new interaction list.
6. At the top of the list click **Batch Actions > Add to** and select **Coaching**.
7. Select the coaching session to which you are adding the new interaction list.
8. Select **New Static List**.
9. Enter a name for the list and click **OK**. The new list name appears under the **General Details > Interaction Lists:**.

To add and manage action items:

Adding an action item to a coaching session enables you to ask the trainee to perform a particular task.

Note: When you create an action item from within a coaching session, the action item appears both in the coaching session and in the general Action Items list. The item can be edited from both locations.

1. Select **Coaching** > **Sessions**.
2. Click the **Edit** icon associated with the coaching session to which you want to add an action item.
3. Click the **Add Action Item** icon + in the top corner of the coaching session screen.
4. In the **Action Item** window, configure the parameters as necessary. For more information, see Action Items.
5. Click **Save**. The action item is added to the coaching session and appears under the **Action Items** title.

To add and manage session links:

A coaching session can contain links to external files, websites and SpeechMiner permalinks. For example, if you want the trainee to learn from content in a website, you can add a link to the specific website. During the coaching session when the trainee clicks the link a new window is opened and the link is displayed.

1. Select **Coaching** > **Sessions**.
2. Click the **Edit** icon associated with the coaching session to which you want to add a link.
3. Click the **Add** link icon + next to Links under **General Details**.
4. Type a description of the link in the **Description** field.
5. Type the link address in the **URL** field.
6. Click **OK**. The **Add link to session** window closes and the link is added under **General Details > Interaction Lists:**.

Note: Click the link under the General Details area and a new browser is opened with the contents of the link.

Home > Coaching > Participate in a Coaching Session

Participate in a Coaching Session

Once a coaching session is created the trainee assigned to the session should begin the session on the scheduled date.

Participating in a coaching session involves listening to interactions, reading notes, opening links and performing action items attached to the session.

To participate in a session:

1. Select **Coaching > Sessions**.
2. In the **Coaching Session** grid, click the session you want to participate it. The **Session Details** screen is opened.
3. Click **Start**. The start time is recorded and the status is changed to In Progress.
4. Work through all the actions items and notes. Use the information in the notes to guide you through the session.
5. Listen to the interactions associated with the session and pay close attention to the parts mentioned in the notes.
6. On the left side of the session screen, under **General Details**, click the name of the interaction list. The **Interaction** list is opened on the right side of the screen.
7. Click **Play** to playback a specific interaction. The **Media Player** opens below the grid and begins to play the interaction. For more information, see Media Player.
8. Click **End** complete the session.

Note: Only a coach can click Pause to temporarily stop the session.

Edit a Coaching Session

After a session is created and saved you can edit the session details.

Note: A session can be opened from the Coaching Session grid or from the My Messages widget by clicking the specific session name.

Once a session is created you can:

- Edit a coaching session's details.
- Add and/or remove a session's interaction list.
- Add or edit a session note.
- Edit a session link.
- Delete a session link.

To edit coaching session details:

1. Select **Coaching** > **Sessions**.
2. Click the **Edit** icon associated with the coaching session whose properties you want to edit.
3. Click the **Edit** icon to the far right of the **General** title. The fields become active.
4. Make the necessary changes.
5. Click the **Save** icon to the far right of the **General** title. The changes are saved.

To modify the session Interaction list:

Interactions can be added to an interaction list from any Interaction grid, Event grid and Media Player. You can also remove interactions from a list.

Note: If the interaction list was copied from a global list, the global list is not affected by the changes you make to the coaching session interaction list.

To remove an interaction list from a session:

1. Select **Coaching** > **Session**.
2. Click the name of the session from which you want to remove an interaction list.
3. Under **General Details** click the delete icon . The session is deleted.

To add an interaction to an existing session interaction list:

1. Select **Explore** > **Search**.
2. Create a search for the interaction(s) you want to add. For additional information, see Create a New Search.
3. Select the interactions you want to add to the interaction list in the session.
4. Click **Batch Actions**. For additional information, see Batch Actions.
5. Select **Add To...**.
6. Select **Interaction List**.
7. Select the list to which you want to add the interaction(s).
8. Click **Add**. The interactions are added to the list. The interaction list is automatically updated for the specific coaching session.

To add or edit a session note:

Session notes can be added to a coaching session while it is created and after. Notes can be defined as:

- **Public notes:** 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. Public notes are visible to everyone who accesses the session.
- **Private notes:** Visible only to the person who wrote them. You can use Private notes to add reminders or comments to yourself. For example, when you createe a session you can leave yourself a note reminding you to add a link later on.

1. Select **Coaching** > **Sessions**.
2. Click the **Edit** icon associated with the coaching session to which you want to add a note.
3. At the bottom of the screen click the **Add new note** + icon to the right of the **Notes** title.
4. In the field that appears write your new note.
5. From the **Visibility** list select **Public** or **Private**.
6. Click **Add**. The note is added to the coaching session.

   Note: You can always open the session's details and edit the contents of the note by clicking the **Edit** icon associated with the specific note or delete the note by clicking the Delete icon .

To edit a session's link:

1. Click **Coaching** > **Session**.
2. Click the name of the session whose associated link you want to edit.
3. Click the **Edit** icon next to the link you want to edit. The **Add link to session** window opens.
4. Modify the description and/or link as required and click **OK**. The link is automatically modified.

To delete a link from a session:

1. Click **Coaching** > **Session**.
2. Click the name of the session associated with the link you want to delete.
3. Click the **Delete** icon next to the link you want to delete.
4. Click **Yes** if you are sure you want to delete the link. The link is deleted from the Links list.

Working with Coaching Sessions

You can work with the Coaching Session grid to view specific sessions and details about each session.

From the Coaching Session grid you can:

- Filter the Coaching Session grid.
- View sessions on a specific date.
- View session details.

To filter the Coaching Session grid:

You can use the following two filters to limit the sessions that are displayed in the list:

General filter:

Enables you to filter the session list according to a specific user and date. You can also select whether or not to include completed sessions.

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

- **User:** Select **All Sessions** to display all the sessions that you have permission to see. Select **My Sessions** to only include sessions in which you are either the creator, coach or trainee.
- **Date Range (From and To):** From the **Form** list select the beginning of the period to include in the session list. From the **To** list select the end of the period to include in the list.
- **Completed:** Select this check box to include sessions that were completed in the list. Clear the check box to only include sessions that were not completed.

Column based filter:

Enables you to filter the session according to session status and trainee.

- **Status column:** from the Status column select the status you want to include in the list. Select All to view sessions with any status.
  For more information, see Coaching Session Grid
- **Trainee column:** in the Trainee text field type part of the trainee's name or user name to include in the session list. As you type names and user names, the letters are displayed in a drop down list. Select the trainee from the list. Only sessions with the selected trainee are displayed in the session list.

To view sessions on a specific date:

The lower left area of Coaching > Session contains a calendar in which you can see when the sessions that appear in the list are scheduled to take place.

From the calendar you can:

- Choose a time period to display by clicking the **month, weekly** or **daily** links in the top right corner of the calendar.
- View the previous and next time periods by clicking the previous and next icons.
- Open the Session Details screen for a specific session by clicking the session from within the calendar.

To view session details:

To view session details in the **Coaching > Session** screen, click the specific session row. The session details are displayed on the right side of the screen.

The session details display includes the following areas:

- **Session Controls:** Includes a link to the Coaching Session grid, status information and session controls.
- **General Details:** Lists the interaction lists, saved searches and links associated with the session.
- **General Details:** Includes the session properties. If the trainee began the session, the session start time, end time and duration are displayed in this area. If the trainee did not start the session only the Due Date appears.
- **Notes:** Lists all the public and private notes attached to the specific session.
- **Interaction Lists:** Lists all the interaction lists associated with the session. This list contains how many interactions in the list have comments and how many interactions are included in the list. For example, (1,3) indicates that one interaction in the list has comments and the list

contains three interactions. If an interaction has comments, the comments appear below the summary information.

- **Action Items:** Lists all the action items associated with the session.
- **Links:** Lists all of the links included in the session and indicates whether or not the trainee opened them.

Home > Coaching > Create a Coaching Session Report

Create a Coaching Session Report

Coaching Session reports provide statistical information about the coaching session. The report breaks down the sessions by status and indicates how many sessions have not been started, how many are in progress and how many have been completed. The Coaching Session report also provides information about how long the trainee participated in the session on average and in total. Additional details about the sessions appear in the lower half of the report. The details are divided into groups by trainee. For more information about report details, see View Report Details.

There are two types of Coaching Session reports:

- **General Report:** Includes all coaching sessions that are included in the set defined by the general filters in the Coaching Session grid. For example, if the filter specifies **My Sessions** for September 1st through September 30th, and includes Completed sessions, all sessions that meet this criteria are included in the report.

  Note: Column filters do not affect the criteria.

  To generate a general report:

  1. Select Coaching > Sessions.
  2. In the top right corner (above the Coaching Session grid) click the **Run Report** icon. The report is generated and displayed in a new browser window.

- **User Report:** Includes all the sessions that are included in the set defined by the general filters in the Coaching Session grid for a specific user. If the user is wither the creator, coach or trainee, the session is included in the report.

  To generate a user report:

  1. Select Coaching > Sessions.
  2. In the row associated with the user on which you want to base the report, click the **Run Report** icon under **Actions**. A report for all the sessions in which the trainee is either the creator, coach or trainee is generated and displayed in a new browser window.

Home > Coaching > Create a Coaching Session Report > View Report Details

View Report Details

The lower part of a Coaching Session report lists the sessions that were included in the report. From the report you can listen to interactions that the trainee listened to during the session, and open the Session Details screen.

The sessions are grouped by trainee and include the following information:

- The name of each session.
- The name of the coach.
- The date on which the session was scheduled.
- The date on which its status was last changed.
- The session status.
- Whether or not the session was started or completed.
- The amount of time the trainee spent on the session.

To view additional details about a session:

1. From within the report, 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:

1. From within the report, click the interaction link.

   The Media Player opens in the window and plays the interaction.

   Note: To return to the report, press Backspace.

To open a session in the Session Details screen:

1. From within the report, click the name of the session.

   The **Session Details** screen opens in a new browser window.

Home > Coaching > Manage Coaching Session Types

Manage Coaching Session Types

Every coaching session is assigned a type. A session type can help you identify the purpose of a session and the type of trainee intended for the session.
It is recommended that the session type name represent a specific intent and objective since the name represents the scope of the session.
By default, SpeechMiner has one session type called General.

You can add additional session types as appropriate for your organization. For more information about assigning a session type, see Create a New Coaching Session.

When working with session types you can:

- Create a new session type.
- Activate / Deactivate a session type.
- Modify the name of a session type.

Note: Once a session type is saved, you cannot delete it. You can only modify the type's name and deactivate it so that it is not available. The General type cannot be deactivated.

To create a new session type:

1. Select **Coaching > Sessions**.
2. Click the **Session Types** button.
3. In the **New Type** field, type the name of the new session type.
4. Click **Add**. The session type is added to the list and its status is set to Active.
5. Click **Save**. The new session type is included in the list of available session types.

To activate or deactivate a session type:

1. Select **Coaching > Sessions**.
2. Click the **Session Types** button.
3. Under **Is Active** select the check box next to the session type that should be active and clear the check box next to the session type that should be deactivated.
4. Click **Save**. The change is implemented.

To modify the session type name:

1. Select **Coaching > Sessions**.
2. Click the **Session Types** button.
3. Modify the name as necessary.
4. Click **Save**. The change is implemented.

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 and Preset Views.
- Monitor and manage the system and its servers.
- View information about the definitions of Topics, Programs, and Categories that are defined in the system and used by SpeechMiner to analyze interactions.

In this section you will learn how to work with the following SpeechMiner tools:

- Preset Views: Enables you to create a Dashboard view for other users. A Preset View is designed by administrators or managers.
- Monitor System: Enables you to view information on the status of different SpeechMiner modules and to stop/run the system as necessary.
- Manage Call Queue: Enables you to control the order in which interactions are processed by SpeechMiner
- Purge System: Enables you to delete old interactions from the database.
- Manage Cache: Enables you to manually reset the cache.
- Interactions Admin: Enables you to reprocess interactions and manage audits.
- System Configuration: Enables you to view system configuration and security information.
- Alerts: Enables you to send email alerts to specific users when groups of interactions have unusual or significant characteristics.
- Metadata Manager: Enables you to change the name of metadata filter options and columns in the search results.

Tools Menu Reference

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

System Admin:
Enables you to monitor and manage the system and its servers as well as some of its global features (for example, Preset Views and Alerts).

Preset View

Preset Views are views designed by administrators and managers and assigned to the View page of a specific user(s).
The Preset View enables you to create a view that generates information that you think is essential for the user to see.

Note: A view is a set of widgets that displays summary information about a specific set on interactions. For more information, see Dashboard.

With the Preset View tool you can:

- Create a new Preset View.
- Publish a Preset View.
- Edit a Preset View.
- Edit the Preset View layout.
- Delete a Preset View.

To create a new Preset View:

1. Select **Tools > System Admin > Preset Views**.
2. Click the **New** icon +.
3. In the **Name** field, type the name of the Preset View.

   Note: Although you can add **Permissions** now, it is recommended that you design the view (add widgets and set the layout) before adding the roles.
4. Click **Save**. A **Dashboard > View** tab (with the name you gave) is opened.
5. Use the **Add Widgets** and **Change Settings** option to create the view as necessary. For more information, see Dashboard.
6. Click **Back to Preset Views**, once you are finished designing the Preset View. The **Preset View** grid is displayed.
7. Click the **Edit** icon under the **Permissions** column to set the Preset View permissions. The **Edit Preset View** window opens.
8. Configure permissions for the Preset View:
   a. From the **Role Name** column select a user role from the list provided. For more information, see Administer Roles.
   b. Click **Add**. A permission row is added for the selected user role. Check boxes appear in the row for each type of permission.
   c. Select the check box associated with the permission you want to grant the users associated with the selected user role.
9. Repeat step 8 for each role to which you want to publish this Preset View.
10. Click **Publish Preset View** to publish the Preset View. For additional information, see Publish Preset View.

To publish a Preset View:

After you create a new Preset View or modify an existing Preset View, you must publish the view for it to appear in the intended user's Dashboard > View.
Published Preset Views appear for users who have the user role permissions set for the specific Preset View

Note: When you publish a Preset View that was already published, the new version overrides the existing version. In addition, when you republish a Preset View all it's local changes (made by individual users) are removed. The new version replaces the existing Preset View.

1. Select **Tools > System Admin > Preset Views**.
2. Select the check box associated with the Preset View you want to publish.
3. Click the **Reset** icon. You are prompted to confirm if you want this version of each selected Preset View to override any previous version of the same view.
4. Click **Yes**. The Preset View is published to the View page associated with all the users with the roles selected for the specific Preset View.

To edit a Preset View:

You can edit the name, description and permissions of any Preset View that you created.

The changes are implemented as soon as you save them.

Note: You do not have to republish the Preset View after you change its settings.

1. Select **Tools > System Admin > Preset Views**.
2. Click the **name** of the Preset View you want to edit.
3. Modify the name, description and/or permissions as required.
4. Click **Save**. The changes are saved and published to the user's **Dashboard > View** page.

   If you removed a user role from the Permissions grid, the view is removed from the View page associated with the user who has the removed role.

To edit a Preset View layout:

You can modify the layout and widget set of any Preset View you created.

Note: After you modify a Preset View layout, you must publish the view again to implement the changes on the users' Dashboard > View pages. In addition, when you republish a Preset View all it's local changes (made by individual users) are removed. The new version replaces the existing Preset View.

1. Select **Tools > System Admin > Preset Views**.
2. Click the **Layout** icon associated with the Preset View you want to modify. The specific Preset View is displayed.
3. Modify the layout and widget selection as required. For more information, see Working with Dashboard Views.
4. Click **Back to Preset** Views when you finish changing the layout.
5. Click **Publish the Preset View**.

To delete a Preset View:

When you delete a Preset View it is deleted from all the **Dashboard > View** pages in which it currently appears.

1. Select **Tools > System Admin > Preset Views**.
2. Select the check box associated with the Preset View you want to delete.
3. Click the **Delete** icon . You are prompted to confirm that you want to delete the selected Preset View.
4. Click **Yes**. The Preset View is deleted.

Home > Tools > Monitor System

Monitor System

With the Monitor System tool you monitor the status of SpeechMiner modules, start / stop system machines and view system messages.

With the Monitor System tool you can:

- Monitor module status.
- View system messages.

Note: The system can be configured to send reports about errors via email to specified recipients whenever errors occur. For additional information, see Alerts.

To monitor module status:

1. Select **Tools > System Admin > Monitor System**.
2. Review the following status information:

Status	Description
All Interactions	Indicates the number of interactions currently in the SpeechMiner database.
Not Processed:	Indicates the number of interactions waiting to be processed. This is the number of interactions that have been added to the system by the fetcher, but have not gone through recognition.
Last Interaction Time:	Indicates the last time an interaction was added to the system.
Statistics	**Log Errors:** The number of errors that have not been handled. **In Process:** The number of interactions currently being processed. **Waiting for Categorization:** The number of interactions waiting to be processed, plus interactions that completed processing but are awaiting categorization. **Waiting for Indexing:** The number of interactions that have not been indexed and therefore will not appear in the Search Results grid. **Log Warnings:** The number of warnings that have not been handled. **Total Processed (24H):** The number of interactions that were processed in the last 24 hours. This is a good indicator of how well the processing system is functioning. **Total Categorized (24H):** The number of interactions that were categorized in the last 24 hours. This is a good indicator of how well the categorization system is functioning. **Total Indexed (24H):** The number of interactions that were indexed in the last 24 hours. This is a good indicator of how well the indexing system is functioning.
Queue table	**SpeechMiner:** The number of interactions that were fetched but were not processed. **Input Folders:** The number of interactions that need to be fetched. **Recording System:** The number of interactions in the recording system that have not been fetched. **Total:** The total of all interactions in all folders that need to be either fetched or processed.
Start / Stop System	Enables you to start or stop some or all of the machines in the system. In the left panel, select the machine you want to stop/start. **Note:** Stopping the system does not turn off the UPlatform.exe service. To do that, you must run the SMConfig tool.

Sites	**Sites:** Indicates the status of all sites. **Folders:** Indicates the status of the Input, Filter and Store folders. If available space is low, a warning or error is generated. **Computers:** Indicates the status of the various computers. **Note:** The red and white x indicates the machine was stopped.
Messages	Displays system messages for specific machines.

Note: When there are Log Errors the administrator can investigate using the information in the Monitor System window as well as by running the Monitor System report or by using the ULogger utility directly on a server.

To view system messages:

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

1. Select **Tools > System Admin > Monitor System**.
2. Set the filters at the bottom of the screen under the **Messages** title.
3. Click **Show**. The messages are displayed below the filters.
4. Place your mouse on the message text to see the full message.
5. Click **Mark as Read** once you have viewed the message.

Home > Tools > Manage Call Queue

Manage Call Queue

The Manage Call Queue tool enables you to control the order in which interactions are processed by SpeechMiner.

With the options provided in the Manage Call Queue tool you can also change the priority of future interactions in the queue for a specific program.

To change the interaction processing order:

1. Select **Tools > System Admin > Manage Call Queue**.
2. From the Process order list select one of the following:
    - **Older calls first:** Indicates that the older interactions will be processed first.
    - **Newer calls first:** Indicates that the latest (new) interactions will be processed first.

   The **Manage Call Queue** list is updated automatically.
3. From the **Program** table select the **Edit** link associated with the program whose priority you want to change in the queue.
4. Select a priority and click **OK**.

   Note: The Calls in Queue column indicate the amount of interactions associated with the specific program that are awaiting processing.

Home > Tools > Purge System

Purge System

Safely removing old interactions from the system will reduce the database size and will result in better performance overall.

You can select to delete all the interactions in the database or you can select to delete a specific group of interactions.

To purge interactions from the system:

1. Select **Tools > System Admin > Purge System**.
2. Select the type of interactions you want to purge (calls, email, chat, text and/or social).
3. Select one of the following:
    - **Delete all interactions in the system:** Enables you to select all the interactions in the database.
    - **Delete selected interactions:** Enables you to purge interactions associated with a specific date range and program.
        - Select the **date range** to purge only the interactions created within the selected range.
        - Select one or more **programs** from the list provided to purge only those interactions associated with the selected program(s).
4. Click **Delete**. The interactions are purged.

Note: To set up an automatic purging job contact Genesys Support.

Home > Tools > Manage Cache

Manage Cache

SpeechMiner enables you to reset the cache for all or specific interface elements such as agents, saved reports, users and groups and so on.

The contents of the SpeechMiner cache are automatically reset at a configured time interval. Also, the cache is reset when SMART changes are applied to SpeechMiner.

When you manage the cache you can also reset the cache manually. For example, you may wish to manually reset the cache when a new agent begins working, so that the agent's name will appear in the system.

To reset the cache:

1. Select **Tools > System Admin > Manage Cache**.
2. In the drop down list provided select one of the following:
3. Click **Reset**.
    - **All:** Reset the cache for all of the SpeechMiner contents.
    - **Info data (Programs, Topics, Scripts, Categories):** Reset the cache with current Info data definitions.
    - **Users and Groups:** Reset the cache with updated user and group information.
    - **Agents:** Reset the cache with updated agent details.
    - **Searches:** Reset the cache with updated saved search definitions.
    - **Metadata fields:** Reset the cache with updated metadata fields.
    - **Items on Report:** Reset the cache with the current report templates and report template definitions.
    - **Saved reports:** Reset the cache with the current saved report definitions.

   The cache for the selected element is reset and a confirmation message appears.
4. Click **OK**.

Home > Tools > Interactions Admin

Interactions Admin

With SpeechMiner you can manage audit tasks, reprocess interactions and clean the database of information about terms that were removed from topics.

Audits are usually performed when a topic is created (see Accuracy Rates (auditing)). When a topic changes or no longer exists the audit is no longer relevant. For this reason, it is important to periodically delete or clear orphaned audits.

With the Interactions Admin tool you can:

- Delete audits.
- Reprocess interactions.
- Clear orphaned audits.

To delete audits:

1. Select **Tools > System Admin > Interactions Admin**.
2. Select the **Delete Audits** tab.
3. From the list provided select the audits you want to delete and click **Done**.
4. Click **Delete**.

To reprocess interactions:

Reprocessing interactions enables you to run event analysis on all interactions or specified topics or programs.

Note: Reprocessing interactions is not available in a Recording Only environment and in a Analytics and Recording environment.

1. Select **Tools > System Admin > Interactions Admin**.
2. Select the **Reprocess Interactions** tab.
3. Select the types of interactions you want to reprocess.
4. Select one of the following reprocessing options:
   - **All:** Reprocesses all interactions.
   - **Topics:** Reprocesses interactions associated with the selected topics.
   - **Programs:** Reprocesses interactions associated with the selected programs.
5. If you selected Topics or Programs, open the list associated with your selection.
6. From the multi-select list, select the items you want to reprocess. For additional information, see Search Filter.
7. From the list provided, select the date range associated with the items you want to reprocess.
8. Click **Reprocess**. The interactions are reprocessed.

To clear orphaned audits (that is, remove deleted terms from term lists):

If terms are deleted from topics during the auditing and fine-tuning process, they should also be removed from the term lists that are tracked in reports and in the Interaction and Event grids.

1. Select **Tools > System Admin > Interactions Admin**.
2. Select the **Clean Orphaned Audits** tab.
3. Click **Clean**. All the deleted terms are removed from the term lists.

Home > Tools > System Configuration

System Configuration

With SpeechMiner you can review system configuration and security information that enables you to better understand the environment you are working in.

Although the configuration information is intended for view purposes only, some of the security settings can be changed.

With the System Configuration tool you can:

- View system information.
- Manage security settings.
- Manage PCI settings.
- Monitor the security log.

To view system information:

You can review a summary of information about the different system components. When necessary you can also embed this summary in intranet sites that use Wiki markup.

1. Select **Tools > System Admin > System Configuration**.
2. The **Default** tab is displayed.
3. Review the system configuration information.

Note: To embed a summary of this information, copy the text in the **Wiki** tab and paste the text in the desired Wiki location.

To manage security settings:

SpeechMiner complies with the security standards defined in the PCI-DSS standard (Payment Card Industry Data Security Standard). These standards are designed to prevent confidential information from being accessed by unauthorized individuals. For example, one purpose of SpeechMiner security settings is to prevent unauthorized people from hearing interactions that are stored in the database.

Note: The information in this section is intended to explain how to work with the Security Center interface. It includes a general overview to the subject of PCI implementation in SpeechMiner. 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.

Some of the options that must be implemented in SpeechMiner in order for it to conform to the PCI-DSS standard are:

- Interaction export is disabled for all users.
- Anonymous Permalinks are disabled for all users.
- Numbers are filtered out of all interaction 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.

Note: Some of the recommendations listed above are not relevant to a Recording only 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 and you can manually change the settings as you see fit.

The Security Center also contains a log of all security-related actions that were performed in the system. The log lists configuration changes and failed login attempts. This information can be used to monitor the system for security breaches.

To open the security center:

The Security Center is accessed from the System Configuration screen. The upper part of the tab contains PCI-compliance information. The lower part contains a log of security-related user actions. Both tables can be sorted by any of the columns they contain.

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

To manage PCI settings:

The PCI-DSS recommended configuration section contains a table that lists all of the PCI related settings. The table contains the following columns:

- **Setting:** The name of the setting.
- **Explanation:** A description of what conditions must be met in order for the setting to conform to the standard.

  Note: If the system cannot check whether the setting meets the conditions, "Make sure that ..." appears at the beginning of the explanation.
- **Action:** Indicates the current setting status and/or the type of action required to correct it.
- **Fixed:** Indicates that the setting conforms to the PCI requirements.
- **Fix:** Indicates that the setting does not conform, but the system can correct it.
- **Manual:** indicates that either the setting does not conform or the system cannot check whether the setting conforms.

To correct a setting that can be fixed automatically:

1. Select **Tools > System Admin > System Configuration**.
2. Select the **Security Center** tab.
3. Under the **Action** column click **Fix**. You are prompted to confirm that you want to change the setting.
4. Click **Yes**. The system corrects the setting and changes its Action status to Fixed.

To manually correct a setting:

1. Select **Tools > System Admin > System Configuration**.
2. Select the **Security Center** tab.
3. Follow the instructions under the **Explanation** column to manually correct the problem.

To correct all the settings that can be fixed automatically:

1. Select **Tools > System Admin > System Configuration**.
2. Select the **Security Center** tab.
3. Click **Reset**. You are prompted to confirm that you want to change the settings.
4. Cick **Yes**. The system corrects the settings and changes their Action status to Fixed.

Note: Settings that require a manual correction are not changed when Reset is selected.

To monitor the security log:

The lower table in the Security Center tab lists system configuration changes and failed logins that occurred during a specific time period.

Note: System configuration changes are changes that are implemented using SMConfig (the SpeechMiner system configuration tool).

1. Select **Tools > System Admin > System Configuration.**
2. Select the **Security Center** tab.
3. Select what should be displayed in the table as follows:
   - **Last:** Enter the number of hours or days (prior to the current time) to include in the table.
   - **Time Unit:** Select hours or days.

- **Failed Login:** Select this option to include failed logins in the list.
- **Configuration Change:** Select this option to include configuration changes in the list.

4. Click **Refresh**. The table is updated to match the options you selected.

Home > Tools > Alerts

Alerts

SpeechMiner can be configured to send email alerts to specific people when groups of interactions have certain characteristics. For example, you can check for changes in the number of interactions containing agitation within an interaction or how many interactions each agent handled per week.

The following types of alerts are available:

- **Change Alert:** Indicates when the number of interactions 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 interactions dealing with a particular topic is more than ten percent higher then it was the previous week.
- **Threshold Alert:** Indicates when a significant number of interactions meet a certain condition. For example, you could define a Threshold Alert to notify you when the number of interactions handled by an agent falls below 1000 in a given week.
- **Trend Alert:** Indicates the occurrence of significant changes over time in the numbers of interactions that meet a certain condition. For example, you could define a Trend Alert to notify you when the number of interactions dealing with new accounts decreases significantly for four weeks straight.
- **On Event Alert:** Indicates when a particular type of event takes place in a specific number of interactions. For example, you could define an On Event Alert to notify you when your competitors are mentioned in more than ten interactions.

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 can be generated multiple times in the same day, if the conditions are met multiple times.

With the Alerts tool you can:

- Create a new alert.
- Edit an alert.
- Delete an alert.

To create a new alert:

1. Select **Tools > System Admin > Alerts**.
2. Click **New** below the list of existing alerts. The **Alert Type** dialog box opens.
3. Select the type of alert you want to create.
4. Click **Next**. The alert parameters window is opened.

   Note: The fields vary slightly depending on the alert you are creating.
5. In the **Alert Name** field type the name of the alert.
6. Under **Trigger the alert if**, select the interaction property conditions as follows:
   - **Agent:** Enables you to limit the alert to interaction 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. **Note:** This field is not available for Threshold Alerts.
   - **Categories / Topics:** Enables you to limit the alert to interactions that belong to specific categories or topics. For additional information, see Search Filter.
7. Fill in the fields according to the type of alert you decided to create:
   - **Change Alert:**

     Change Value: Enter the percentage of interactions or the number of interactions that should activate the alert. For example, if you want the alerts to be sent out when the number of interactions 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 interactions matching the conditions during the current time period is lower by 100 this week than it was last week, enter 100.

     Interactions / %: Select **interaction** if the Change Value is a number of interactions and select **percentage** if the change is in percentage.

     Time Period: Enables you to select 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 interactions 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 interactions 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 interactions).

Interactions / %: If the Threshold Position is a number of interactions, select **interactions.** If it is a percent change, select **percentage.**

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 decreasing trends. For example, if you want to be notified of an increasing number of interactions involving agitated interactioners, select Up. Alternatively, if you want to be notified when there is an apparent decrease in interactions 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 interactions in which the event must occur before an alert is sent.

8. Under **When triggered, send an email to**, specify the recipients of the alert by selecting any combination or roles and groups, and adding individual users and email addresses as follows:

   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.

   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.

   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.

9. Click **Save**. The alert is created and is added to the list of alerts. When groups of interactions matching the conditions you set are identified by the system, email alerts are sent to the recipients you specified.

To edit an alert:

1. Select **Tools > System Admin > Alerts**.
2. Click the name of the alert you want to edit. The specific alert properties window opens.
3. Configure the alert settings as necessary.
4. Click **Save**.

To delete an alert:

1. Select **Tools > System Admin > Alerts**.
2. Select the check box associated with the alert you want to delete.
3. Click **Yes**. The specific alert is deleted.

Home > Tools > System Alerts

System Alerts

A monitoring process runs on every platform computer in the system. The current state of the platform computers in the system is displayed in the Monitor System page. The system can be configured to send out e-mail notification messages to specified recipients whenever a monitoring process discovers an error, such as a full disk on one of the monitored computers. Whenever a new error is discovered, a notification is sent. The notification lists all errors that are detected in the system at the time it is sent (even if notifications about them have already been sent).

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

To configure System Alert notifications:

1. Select **Reports > Saved Reports**.
2. In the **Saved Reports** tab, locate the **System alert** report and click **Schedule** .

   Note: Only the Recipients tab is displayed. The Schedule tab is not available for this report since it is configured automatically.
3. Fill in the fields as follows:
   - **To:** The email address of the report recipients.

     Note: Separate multiple addresses with semi-colons;
   - **From:** The email address of the sender.
   - **Subject:** The text that should appear in the subject line of the email.
   - **Report Format:** Select Web archive to format the results as an MHT file (can be opened in Internet Explorer). Select PDF to format the results as a PDF file.
   - **Priority:** Select the desired priority level for the email message.
4. Click **Schedule**. The recipients of system alerts are sent as specified.

Home > Tools > Metadata Manager

Metadata Manager

Occasionally, the terminology used for search result column names and metadata filter options is not a clear representation of the significance of the metadata (sometimes referred to as Key Value Pair). With **Metadata Manager** you can change the names of metadata filter options and metadata columns in the search results so that the names clearly represent the meaning of the data.

Note: To change the names you must have Metadata Manager permissions. In addition, the change occurs for all SpeechMiner users.

To change a search result column and filter option name:

1. Select **Tools > System Admin**.
2. Select **Metadata Manager**. A predefined list of metadata names appears.
3. In the **UI Term** field type the name that will appear in the SpeechMiner application; for the **Metadata Key's** name you want to change, .
4. Click **Save**. To undo your changes click **Reset**.

Home > Action Items

Action Items

Action Items enable you to manage SpeechMiner tasks.

To view your Action Items click the **Action Items** link in the upper right corner of the SpeechMiner screen.

The Action Items link contains round brackets. The number within those brackets indicates the amount of Action Items assigned to you.

- A black Action Item link indicates that no items are assigned to you.
- A green Action Item link indicates that the list contains items assigned to you.
- A bold green Action Item link indicates that new items have not been read or the status of an existing Action Item has been changed.

With Action Items you can:

- Create an Action Item: Used to indicate and specify to a user what should be done.
- Edit an Action Item: Used to modify the content and purpose of an action item.
- Change the Action Item Status: Used to indicate if the action item has been completed and whether or not it was either rejected or accepted.

For example, a supervisor can create an Action Item that asks one of his staff members to create a series of Coaching sessions. The staff member will see that a new task has been assigned to him when he logs into SpeechMiner. With Action Item's the staff member can add notes as he progresses with the task and his supervisor can monitor his progress.

Home > Action Items > Create an Action Item

Create an Action Item

An Action Item can be modified by both the creator and the user it is assigned to.

Note: When you add an Action Item to a Coaching session the Action Items appears in the Action Item list. For additional information, see: Coaching.

To create an Action Item:

1. In the top right corner of your SpeechMiner screen click **Action Items**.
2. Click **New Item.**
3. Configure the following Action Item parameters:
   - **Assignee:** The user to whom the Action Item will be assigned.
   - **Type:** The Action Item subject
   - **Due Date:** The date on which the Action Item must be completed.
   - **Summary:** a detailed description of what the user must do.
4. Click **OK.** The Action Item is created and appears in the **My Items** list.

Home > Action Items > Edit an Action Item

Edit an Action Item

When you edit an Action Item you can add a note(s). Notes are used to clarify, describe and point out thoughts and decisions about the Action Item.

Note: You can view an Action Item's details from the Action Item list. To do so, simply click the **Details** link.

To edit an Action Item:

1. In the top right corner of your SpeechMiner screen click **Action Items**.
2. Click **Edit.**
3. Modify the parameter settings as required.

   Note: When you edit an Action Item the Edit Action Item window contains an area for notes.
4. Under **Notes** add your thoughts (for example, decisions made, limitations, ideas, and so on).
5. Click **OK**.

Home > Action Items > Change the Action Item Status

Change the Action Item Status

When an action item is completed, its status should be changed to **Completed**.
Once the status is changed to Completed the user who created the action item must either **Confirm** or **Reject** the change.
When it is confirmed that the action item has been completed, the action item will not appear in the Action Item list.
When the Completed status is rejected the action item remains in the Action Item list and the option to Complete is returned .

When you finish the tasks associated with an Action Item you can:

- Select to Complete the Action Item.
- Confirm that the Action Item has been completed.
- Reject that the Action Item has been completed.

To complete an Action Item:

1. In the top right corner of your SpeechMiner screen click **Action Items**.
2. Under **Actions,** click the **Complete** link associated with the Action Item that has been completed.
3. In the **Complete Action Item** window add a note that describes why the Action Item is complete.
4. Click **OK**.

To confirm that an Action Item has been completed:

1. In the top right corner of your SpeechMiner screen click **Action Items**.
2. Under **Actions,** click the **Confirm** link to approve the Complete status.
3. In the **Confirm Action Item** window add a note that describes why you agreed to the complete status.
4. Click **OK**.

To reject the decision to complete an Action Item:

1. In the top right corner of your SpeechMiner screen click **Action Items**.
2. Under **Actions,** click the **Reject** link to dismiss the Complete status.
3. In the **Reject Action Item** window add a note that describes why you disagree with the complete status.
4. Click **OK**.

Home > Profile Permissions

Profile Permissions

This section explains how an Administrator can manage users in the SpeechMiner user-management system.

Before you begin consider the following:

- Only a user with Administrator permissions has access to all the Profile Permission options described in this section.
- Users will only have access to the profile permission options if they are given access by the Administrator.
- 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).
- The user-management functions in the Tools page relate to users of the SpeechMiner browser-based interface, in which interaction-data is accessed, as well as the SpeechMiner Administration Tool (SMART), in which the interaction analysis features are set up and configured.

All users in the SpeechMiner system are associated with groupings of various types. These groupings control which interaction and system data the user can see and which permissions the user has to see and activate system features.

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.

In this section you will learn how to work with the following SpeechMiner tools:

- Edit User Profile: Enables you to view and edit your profile details.
- Administer Users: Enables you to manage users. For example, create new users, assign roles, groups and partitions to users, and so on.
- Administer Groups: Enables you to create and manage user groups.
- Administer Roles: Enables you to set permissions for different types of users.

The following is a list of the SpeechMiner user groupings:

User Category	Description
Role	A set of permissions that define what features the user can access and use in the SpeechMiner system
Work group	The interaction center or the interaction center department to which the user belongs.
Partition	Interaction data from a particular interaction center or an interaction center department.
Group	A set of work groups and/or partitions that identify the interaction data to which the user has access.

Home > Profile Permissions > Editing User Profile

Edit a User Profile

Depending on your permissions you may be able to view your user profile and edit some or all of its properties.

Your user profile includes your:

- Username
- Password
- Roles
- Work groups you belong to.
- Partitions
- Personal information (name, phone number, email address).

To edit your user profile:

1. In the top right corner of the SpeechMiner screen, select **Administrator**.
2. Select **Edit Profile**.
3. Modify the settings and information as necessary. For more information, see Administer Users.
4. Click **Save Changes**. The changes are saved.

Home > Profile Permissions > Administering Users

Administer 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. This collection of information and group associations are assigned to a user and are referred to as a user profile.

The following procedures detail how to create user accounts and manage user profiles:

- Create a new user account.
- Filter the existing user accounts.
- Modify a users profile.
- Delete users.

To create a new user account:

1. In the top right corner of the SpeechMiner screen, select **Administrator**.

   Note: If you are not an administrator your name will appear instead of the term Administrator and you will not have the option to create a new user account.

2. Click the New icon +. A blank **Add Profile** screen appears.

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 Spee database. Select Windows if the user logs into SpeechMiner using the same username and password used to log into Wir 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 Authenticatio
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 login	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 Administer Roles. If roles appear in the list but are not active, you do not have the permissions required to assign these roles to us
User Groups	Select the groups to associate with the account. Each group represents a set of work groups and/or partitions that identify which interaction data the user will b access. For additional information, see Administer Groups.
User Partitions	Select the work groups and/or partitions from which you want to access interaction data .
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 browser's Address field 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 `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 opened in the Views page is opened when they log in.
Comments	Enter any additional comments.

Mapping	If the user is an interaction-center agent, select the user's name in the interaction center's recording system. If the user is an interaction-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: 1. 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 2. Click the Browse icon. A list of work groups opens. 3. Click a work group to select it, or expand the relevant work group and then click the name of the agent **Note:** Mapping SpeechMiner users to interaction-center agents makes it possible to create a Saved Report for t user." This means that a single Saved Report can be run by different users to retrieve report data about themselves, or subordinates. For additional information, see Creating a New Report.
Send Email Notification	Select this check box to inform the new user via an email message that their account is open. The e-mail messag 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.

To filter the user accounts:

1. In the top right corner of the SpeechMiner screen, select **Administrator**.

   Note: If you are not an administrator your name will appear instead of the term Administrator and you will not have the option to filter the user accounts.

2. Select **Administer Users**.
3. Perform one of the following:
   - If you want to filter by username 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 that 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 more information, see Search Filter.

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

To modify a user's profile:

You can modify user profiles as follows:

- Modify an individual user profile:
  1. In the **Administer Users** screen, click the name of the user whose profile you want to change.
  2. In the **Edit Profile** screen, modify the profile as required. For more information, see Create a New User Account.

     Note: The **User Login** and **Authentication** fields cannot be modified. You may not be able to modify additional fields if you do not have the permissions to do so.

  3. Click **Save Changes**. The profile is updated.
- Make global changes to selected profiles:
  1. In the **Administer Users** screen, select the check box associated with each profile you want to modify.
  2. Above the list click **More Actions...** and select one of the following options:
     - **Mark as active:** Activates the selected accounts.
     - **Mark as inactive:** Deactivates the selected accounts. These 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 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 click **Close**.
     - **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' profile and click **Close**.
     - **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' profile and click **Close**.

- **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' profile and click **Close**.

3. Make the appropriate selection in the dialog box that appears and click **OK**.

To delete a user:

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. For more information, see Edit User Profile.
When an account is deactivated a 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.

1. In the top right corner of the SpeechMiner screen, select **Administrator**.
2. Select **Administer Users**.
3. Select the check box associated with the user account you want to delete.
4. Click the **Delete** icon .
5. Click **Yes**. The account is deleted.

Home > Profile Permissions > Administering Groups

Administer Groups

Groups identify the interaction data that is associated with specific users. When a user belongs to a particular group, they have access to the interaction data that is assigned to that group. All Interaction Lists, searches, and reports they access will only include data about the interactions in their group.

Each group is defined as a list of partitions and work groups:

- **Partitions** identify interaction data using the identification system that was used by the recording system. For example, a partition might include interactions to phone number x, extension y.
- **Work groups** are based on the structure of the interaction 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.

With the Administer Groups feature you can:

- Create a new user group.
- Delete a user group.

To create a new user group:

1. In the top right corner of the SpeechMiner screen, select **Administrator**.
2. Click **Administer Groups**.
3. Click **New**. A group **New Group** dialog box opens.
4. Under Group, type a name for the new group
5. In the tree below the group name select the partitions and work groups to associate with the group.
6. Click **Save**. The group is added to the group list.

To delete a user group:

1. In the top right corner of the SpeechMiner screen, select **Administrator**.
2. Click **Administer Groups**.
3. Select the check box associated with the group you want to delete.
4. Click the **Delete**. The group is deleted.

Home > Profile Permissions > Administering Roles

Administer 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 specific interaction data, take part in coaching sessions, and 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. By contrast, a user with an Administrator role will see all the pages and all the tabs and screens that belong to each page.

With the Administer Roles feature you can:

- Modify a role.
- Add a new role.
- Copy and modify a role.
- Delete a role.

By default the system contains the following seven roles. You can assign one or more roles to each user. The default permission sets of each role 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 the viewing of most pages, playing back interactions and adding comments to interactions. 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.
QM Manager	An expanded set of permissions for all QM features.
SMART User	A standard set of permissions suitable for most users of SMART.
SMART Power User	An expanded set of SMART permissions that includes the standard SMART permissions plus permissions 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 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.

To modify a role:

1. In the top right corner of the SpeechMiner screen, select **Administrator**.
2. Select **Administer Roles**.
3. Click the name of the role you want to modify. The role configuration dialog box opens.
4. 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 most likely select all the roles. But, if you are configuring the Power User role, you most likely not select the Administrator, SMART User or SMART Power User, since Power Users do not configure SMART user accounts and only an Administrator should be able to grant an Administrator role.
5. In the Web Site, Reports, SMART and SMConfig tabs, select the permissions the role should have.
6. Click **Save**. The modifications are saved and the dialog box closes.

To add a new role:

1. In the top right corner of the SpeechMiner screen, select **Administrator**.
2. Select **Administer Roles**.
3. Click **New**.

4. In the **Role** text field, type a name for the role.
5. In the tabs select the required permissions.
6. Click **Save**.

To copy and modify a role.

1. In the top right corner of the SpeechMiner screen, select **Administrator**.
2. Select **Administer Roles**.
3. Click the **Copy** link associated with the role you want to copy.
4. Enter a name for the new role and click **OK**. The new role is added to the list.
5. Click the name of the new role. The role configuration dialog box opens.
6. Modify the permissions as required.
7. Click **Save**.

To delete a role:

1. In the top right corner of the SpeechMiner screen, select **Administrator**.
2. Select **Administer Roles**.
3. Click the **Delete** link associated with the role you want to delete.
4. Click **Yes**. The role is deleted.

Permalink

The Permalink feature enables you to save a network address for a particular item, such as a query or a report. This makes it easy to access the item again. After you select search criteria for a new interaction search, you can generate and save a Permalink to the query. After you copy the Permalink you can paste into the **Address** field of your browser. When you press **Enter**, the search form is opened with all of your search criteria specified. You can save the Permalink on your computer or as a favorite in your browser, or you can send it to other users by e-mail or IM. When you or the recipient want to run the search, you need only open the link in a browser.

In some cases, when you generate a Permalink, you can specify whether it can be accessed by anyone who has the link or only by SpeechMiner users who have permissions in the system for the item. In these cases, if you choose the latter option, users must provide their SpeechMiner username and password in order to access the item. When this option is not available, a SpeechMiner username and password are always required.

Permalinks can be created for a variety of item types, including specific interactions, interaction searches, 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.

To save a generated Permalink:

1. Select **Explore > Interaction Lists**.
2. Click the **Copy** link in the **Permalink** column for the list whose permalink you want to copy.
3. 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 will be required.

   Note: Allow Anonymous is dependent on specific permissions and is not available for all types of permalinks.
4. Copy the link:
   - When working with Internet Explorer, click **Copy & Close**.
   - When working with Chrome, manually select and copy the link and click **Close**.
5. Paste the link in a text file, the address field of your browser, an email message, and so on, as required.

Note: Most permalinks only enable users to open interactions that belong to partitions for which they have permissions. Some permalinks 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