Aspect Cloud Quality™
Administrator Guide

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Rev K
November 7, 2025

Contents

Revision History

The table below describes the revision history for Aspect Cloud Quality™ Administrator Guide.

Date	Description	Section
1/21/2022	Rev A, initial release	
2/16/2022	Rev B	
1/20/2023	Rev C	Rebranding
8/11/2023	Rev D	Added a new section and sub sections regarding Log In and Log Out of Alvaria Cloud Quality. • Log In / Log Out from Aspect Cloud View and Aspect Cloud Quality Updated the content for existing Status dropdown list. • Select a Status
10/6/2023	Rev E	Updated the Report By feature for the Evaluation Details Report. • Evaluation Detail Report Created new section for Evaluation Detail Report export to Excel. • Export the Evaluation Detail Report to Excel Updated MFA and WebRTC Log In. • Log In to Alvaria Cloud View - WebRTC

Date	Description	Section

2/2/2024	Rev F	Added new sub section and chapters. • Failure Conditions at Template Level • Task Management • System Downloads
5/31/2024	Rev G	Clean up and corrections across the guide. Replaced references to DVD-ROM with Alvaria Quality Installation media Screenshot update to show Work Type under section 9.3.4.1.4 and corrections across the guide. • Reporting in Workforce Engagement Management
6/20/2024	Rev H	Updated screenshots under sections 10.1, 11 and 12
10/4/2024	Rev I	Rebranding to Aspect
2/20/2025	Rev J	Updated chat icons in screenshots in Ch 3.
11/7/2025	Rev K	Update branding, Legal Notices, back cover Updated guide for consistency
6/7/2026	Rev L	Added PII Masking content

1. Quality Basics

This section describes the Quality function within Aspect Cloud Quality feature and provides an overview of how it operates.

1.1 What is Quality?

Aspect Quality Cloud allows you to capture agent screens, retrieve voice, screen, chat, email and SMS recordings using advanced search criteria, play the recordings back, and score the recordings for quality and training purposes.

1.1.1 System Benefits

Quality is an integral part of a contact center for managing customer satisfaction, agent morale, job satisfaction, and cost: the key concerns of every contact center manager.

The balancing act:

Customers

CostsAgents

1.1.2 Features

Quality features include:

- **Integration with My Account for provisioning Users and teams.**
- **Browser-based application.**

  Quality performs all functions with multiple browsers, so you have access to Quality from any desktop within a firewall.

  Note: Refer to the Product Release Note for latest supported browsers.
- **Access to all recorded interactions and metadata.**

  Quality will have access to all recorded voice and screen recordings and metadata, as well as chat, SMS, and email interactions and metadata.
- **Powerful search and access to saved interactions.**

  You can use Quality to perform simple search and retrieval functionality.
- **Flexible Quality Scoring.**

  You can use Quality to create custom scoring templates to evaluate each recording. You can define multiple scoring templates to meet the varying needs of a contact center business unit. Templates can have multiple sections, each with separately calculated scores, and several question types exist as part of the template creation wizard, so you can tailor the Quality scoring templates to existing processes.

1.1.3 Best Practices

Some of the many Quality Monitoring Best Practices supported by Quality include:

- **Creating an environment where customers highly value and respect agents.**

  With Quality, agents gain value as part of the big picture as they receive targeted feedback and participate directly in the quality improvement process.

- **Enabling front line leadership that is dedicated to agent development.**

  Managers can use Quality to provide ongoing feedback and coaching to agents.

- **Providing examples of excellent service to help agents learn.**

  Managers can select and review real examples by new and experienced agents alike.

- **Providing immediate feedback.**

  Without Quality, providing immediate feedback is challenging. With Quality, supervisors can review and evaluate calls, and can notify agents of new information within minutes of an interaction taking place.

- **Using Quality for agent development and motivation.**

  Agents can access feedback, scores, and recordings, so the agents involve themselves in the learning process: a true training vehicle. You can close skill gaps using Quality's agent interface.

- **Personalizing feedback.**

  Deliver the quality scores and feedback comments directly to the agent to give personalized feedback, even if you do not have time for frequent one-on-one meetings. The supervisor can direct specific feedback to an agent since that agent views only the feedback.

- **Using technology that is intuitive and easy to learn.**

  Quality is user-friendly. The web interface is intuitive and fits with the existing tools with which both agents and supervisors are typically familiar.

- **Using metrics that tie to the performance you want.**

  You can use Quality to tailor quality metrics to specific needs. Each call can have its own scorecard with its own unique criteria, or you can grade all calls with a common set of metrics. You can weigh each question and section of the scorecard based on the importance that you assign to each question and section in the overall score. The result is a way to reinforce an agent's behaviors and skills that impact customer loyalty and satisfaction.

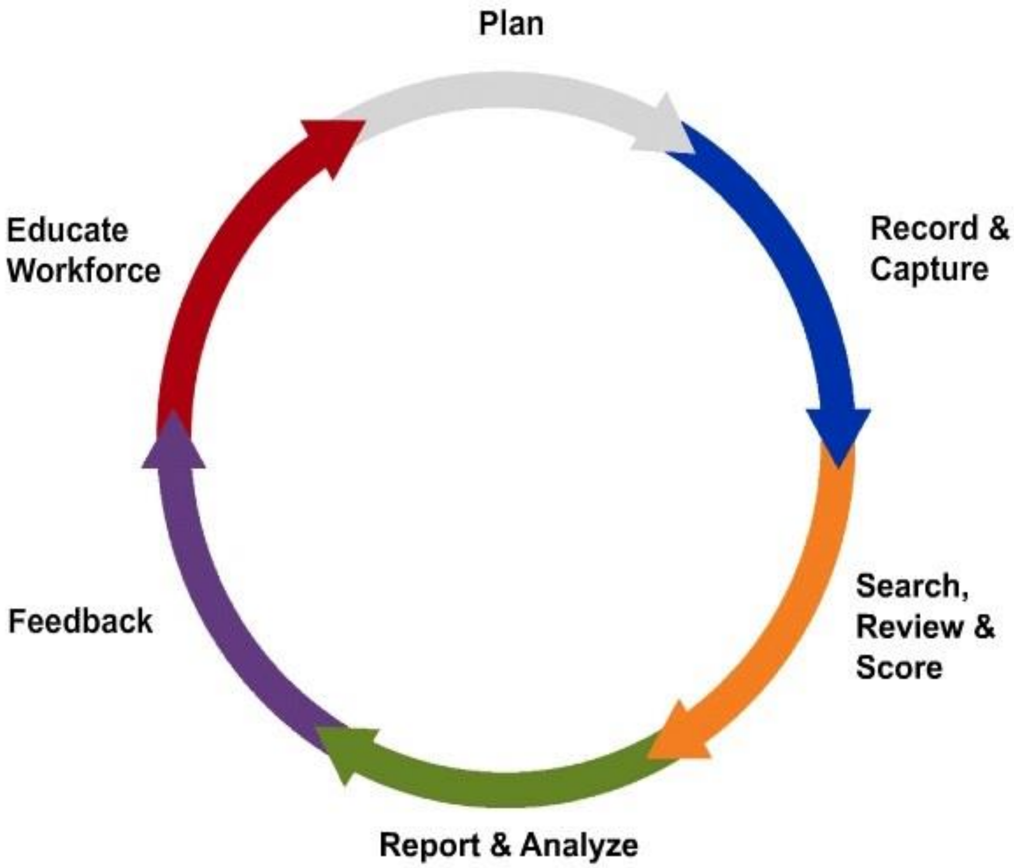
Note: To protect **Personally Identifiable Information (PII),** phone numbers and contact identifiers in search results and outcome pages are partially masked in the format XXXXXX[last 4 digits] (e.g., XXXXXX8190). This applies to all number types including ANI, DNIS, CLI, Calling Party Number, Called Party Number, and Contact Number. Masking is applied at the UI layer only — full data is preserved in the backend and is not affected. The last 4 digits remain visible to help identify the correct interaction. Masking behavior may vary by role (agent, mentor, or admin) based on User Profile settings. Cloud customers need to contact Aspect Support for configuration updates for masking.

1.2 Lifecycle

The introduction chapter describes how to use Quality in the different phases of the Quality lifecycle.

Note: The content in this Lifecycle section denotes the entirety of the Quality feature, including forthcoming capabilities in future releases of Cloud Quality.

This section briefly describes each phase of the lifecycle and the tasks that you perform appear with a reference to where the manual describes that task.



1.2.1 Phase 1 – Plan

A Quality Administrator must perform most of the data entry for the planning phase. Team Leads have significant input into how you should configure the system to ensure that it matches how you want to manage the call center.

Traditionally, the planning phase is where you define and prioritize the quality and logging initiatives. You identify the top priority issues facing the call center related to customer satisfaction, agent satisfaction, and costs (the balance impacting overall quality), and then you define the means to monitor and improve on those questions and issues. For call center monitoring, identifying the calls to review and score is a key step to focusing on the right issues and learning how to improve quickly. You enter the measurements in the scorecard templates that the system takes while reviewing each call. Team Leads have the right to review the calls for quality initiatives.

During the planning phase, the following Quality tasks occur. An asterisk (*) denotes any tasks that a Team Lead might perform.

1.2.1.1 Planning Tasks

- Provision users and data
- Create Work Types
- Define/edit scorecards*
- Create shared searches*

1.2.2 Phase 2 – Record and Capture

In this phase, everything you set up in the planning phase actually causes recordings to occur.

1.2.2.1 Record and Capture Tasks

- No tasks needed.

1.2.3 Phase 3 – Search, Review, Score

Once the system captures the recordings in Phase 2, the next phase can begin where you access, play back, and score recordings for quality and feedback purposes.

The Quality Search window is the launching pad for most work that takes place. From this page, you can build queries to obtain specific recordings of interest. A variety of data about each recording is visible, including call history, hold times, Work Types, ANI/CLI and DNIS information. You can access the voice recording and the window recordings if you are using the Quality Full Picture option.

In this phase, you can give agents the rights to score themselves to contribute to quality improvement. An agent’s scores are visible to the Team Lead, and the Team Lead can compare and search for calls where the two scores are not in sync.

You can allow multiple Team Leads to score the same calls.

1.2.3.1 Search, Retrieve, Score Tasks

- Build queries and perform searches
- Find agent flagged interactions
- Review call history details
- Play back recorded voice
- Score interactions and set flags (team review, agent review, peer review)
- Email immediate feedback
- Download recordings
- Assign Agent tasks

- Agent Self-Review
- Agent Self-Evaluation

1.2.4 Phase 4 – Report and Analyze

In this phase, you analyze the quality monitoring activity that has occurred over time for trends to spot areas where the agents have made improvements and where you need new quality initiatives.

You can run reports that focus on an individual agent's performance over time on different criteria, for example, types of calls or specific questions on a scorecard. Reports can also compare agents on a team or can compare different Team Leads' teams to see who is managing more effectively. Trends can help identify who consistently performs better on certain criteria to help identify ways that you can make further improvements across the entire center.

1.2.4.1 Report and Analyze Tasks

- Run Reports
- Review how an agent was scored against one or more interactions
- Review the average quality score of agents in a team for interactions
- View the average quality score of evaluated agents relative to the specified reporting frequency period

1.2.5 Phase 5 – Feedback and Education

During the feedback phase, typically agents can log into the Quality to automatically find interactions that they must review and then review the scores, comments, and recordings (if they exist).

You can prompt urgent reviews by emailing a link to the scorecard directly to the agent. When the agent clicks the link, the scorecard opens for immediate review of the comments.

1.2.5.1 Feedback and Education Tasks

- Email feedback
- Agent review, Team review, and Peer review flags
- Agent search and play back
- Filter on own interactions that need review via setting Agent = self
- Filter on team review interactions from last week (for training purposes)
- Agent self evaluation as two-way feedback mechanism

The remainder of this manual describes the specific steps of how to perform some of the key tasks for which an Administrator or Team Lead are responsible throughout the five major phases in the Aspect Quality lifecycle.

1.3 User Personas

Workforce Engagement Management - Aspect Quality supports the following types of personas (user roles).

- System Administrator
- Account Owner
- User Administrator
- Manager
- Team Lead
- Agent
- Developer

Each persona has rights and permissions to perform specific tasks in Quality. The following table describes the available tasks in Quality.

Task	Description
Audio Monitoring	The user can playback the audio for the interactions.
Self Review	The user can review their own interactions.
Self Evaluate	The user can score their own interactions.
View Reports	The user can review reports that other users already created in Quality.
Create Reports	The user can create new reports.
Create Monitoring Rules	The user can create business rules that determine how Quality records a call.
Create Scorecard Templates	The user can create scorecard templates.
Create Tasks	The user can create tasks. A task is a type of interaction, such as a non-recording option, which the user uses to evaluate the agent in general; the system does not associate a task with a recording.
Download Recordings	The user can download a recording to play back.
Export To Media	The user can export an audio or video recording to an external media for future viewing.
View Peer Review	The user can view an interaction that has been peer-evaluated.

Task	Description
Grant Peer Review	The user can flag an evaluation for peer review for the accessible interactions. users who have the View Peer
View All Evaluations	The user can view all evaluations for the accessible interactions.
Assign Evaluations	The user can assign an evaluation (created by the user) to other users.
Assign Recordings	The user can assign the interaction to other users temporarily.
Create/Edit Public Searches	The user can create or edit a query and save it as a Public search.

The following table is the list of tasks compared to which persona has the right to perform the task.

Rights	Pers na			
	User Administrator / Manager	Team Lead	Agent	Developer
Audio Monitoring	X	X	X	X
Self Review			X	X
Self Evaluations			X	X
View Reports	X	X		
Create Reports	X	X		
Create Monitoring Rules	X	X		
Create Scorecard Templates	X	X		
Create Tasks			X	X
Download Recordings	X	X	X	
View Peer Review			X	X
Grant Peer Review			X	X
View All Evaluations	X	X		
Assign Evaluations	X	X		
Assign Recordings	X	X		
Create/Edit Public Searches	X	X		

Note: Users of Workforce Engagement Management - Aspect Quality see the interface differently from one another based on these access rights.

For information on how to create users in Workforce Engagement Management - Aspect Quality, search for **My Account** in Aspect Active Learning.

2. Navigate to Aspect Cloud Quality

Navigating Aspect Quality in Workforce Engagement Management includes:

- Log In / Log Out from Aspect Cloud View and Aspect Cloud Quality
- Navigate to Aspect Cloud Quality
- Access the Administration Area
- My Account Widget

2.1 Log In / Log Out from Aspect Cloud View and Aspect Cloud Quality

Access to Aspect Cloud View requires the use of either Google Chrome or Microsoft Edge. After launching the browser, enter your company's domain information to initiate the login process.

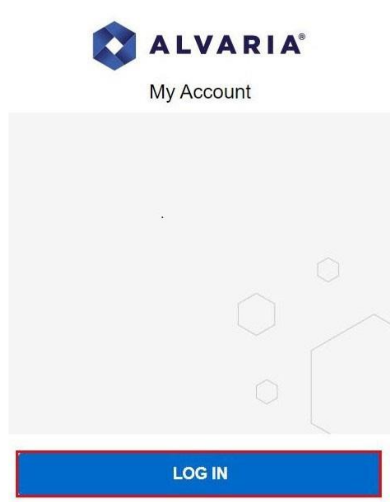
Note: See the latest *Aspect Cloud™ New Feature Update* document for browser compatibility requirements.

2.1.1 Log In to Aspect Cloud View

To log in to Aspect Cloud View, follow the below steps.

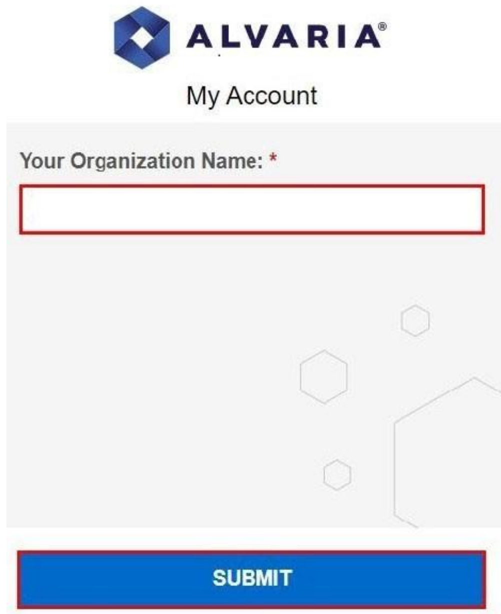
Aspect Cloud Quality services can be accessed in Public Cloud environments.

1. Open a browser and go to the URL for the Workforce Engagement Management product. The Log In page appears. Click the **LOG IN** button.

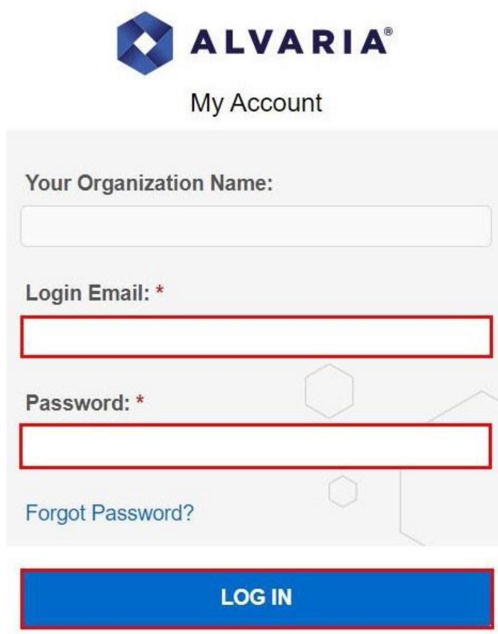


Note: You can save the URL as a Favorite in the browser or create a shortcut to the URL on the desktop.

2. Enter **Your Organization Name** and click the **SUBMIT** button.

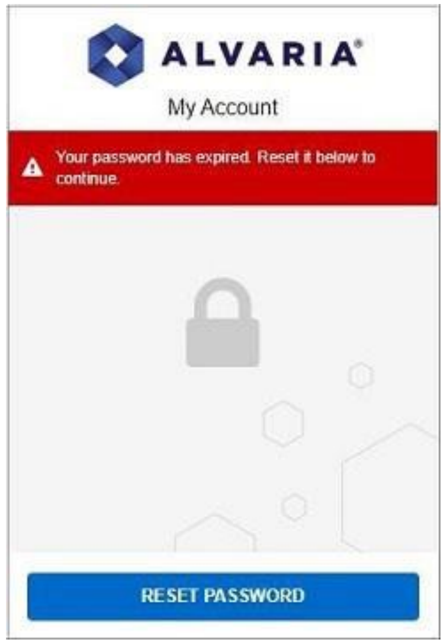


3. Enter the appropriate **Login Email** address and **Password** information and click the **LOG IN** button.



Note:

a. An error message appears when a user's login password has expired. You can reset the password by clicking on the **RESET PASSWORD** button.



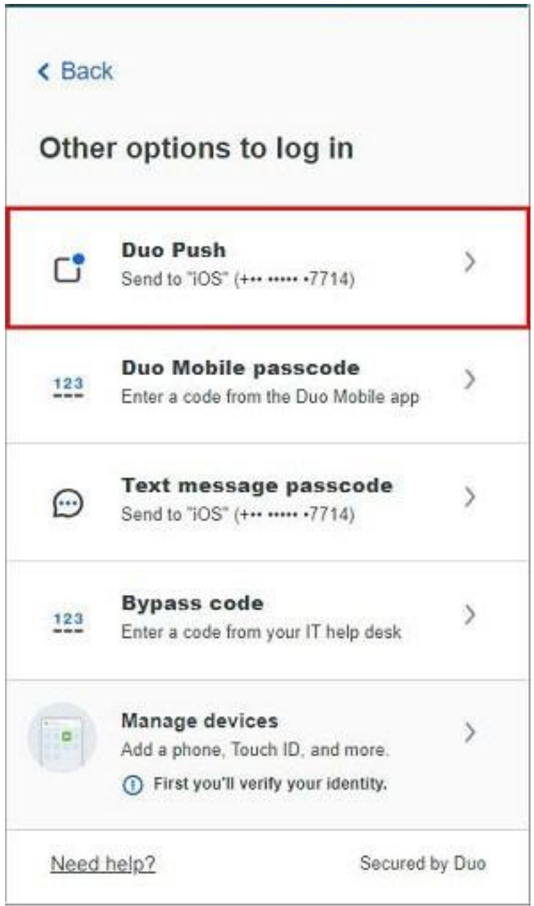
b. The user account will be locked if a wrong password is entered for four consecutive times within the span of 60 minutes during the login process. The user must follow one of the following ways to unlock the account.
   - The user must wait for 30 minutes for the account to get unlocked automatically.
   - The user can contact the administrator to change the password of the locked account. Once the password is successfully changed, the user can login with the updated password.
   - The user can change the password by clicking on the FORGOT PASSWORD link available on the login screen.

4. An additional Authentication prompt is shown to the user.

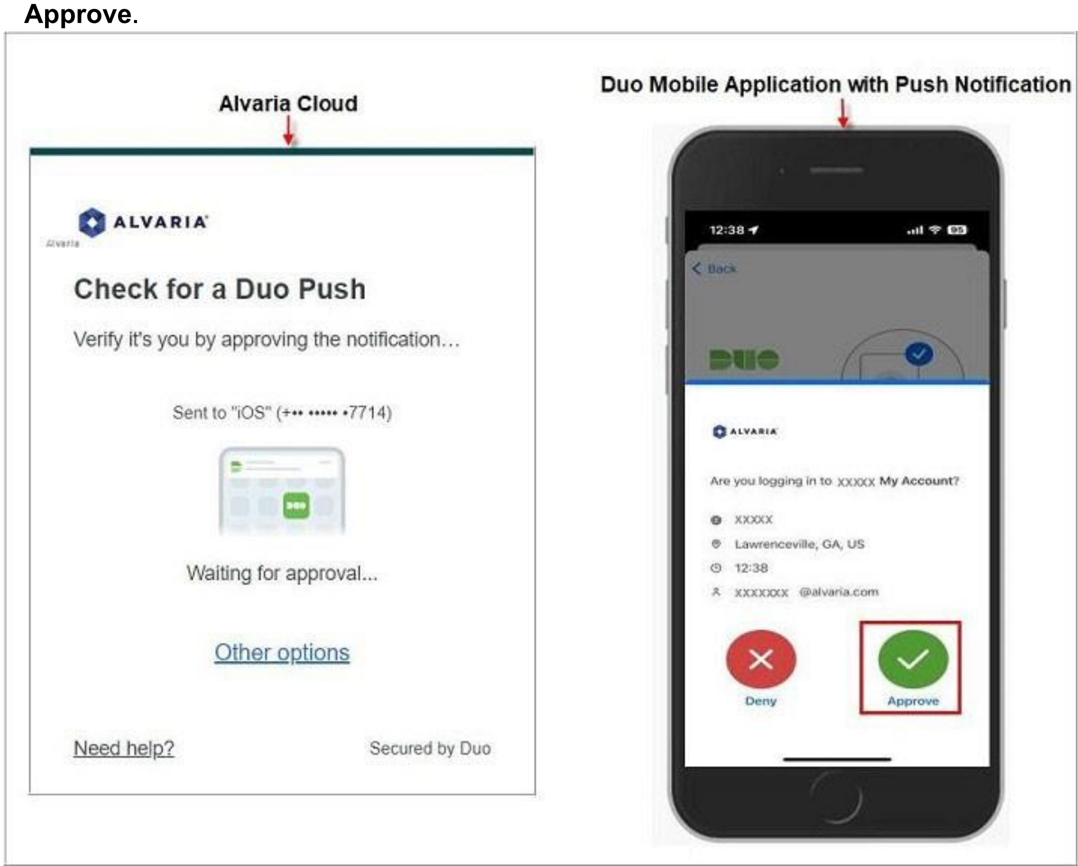
Note: Users must enroll in Multi-Factor Authentication (MFA) using the Duo application before MFA can be used for the first time. See Multi-Factor Authentication for more information.

The following are the available options to log in.

- **Duo Push**: A push notification with Deny and Approve options.
- **Duo Mobile Passcode**: A passcode is displayed in the Duo application.
- **Text Message Passcode**: A passcode is sent as a text message to the mobile number registered with the application.
- **Bypass Code**: A code provided by your IT help desk.
- **Manage Devices**: Allows you to manage the devices. See Manage Devices for MultiFactor Authentication for more information.



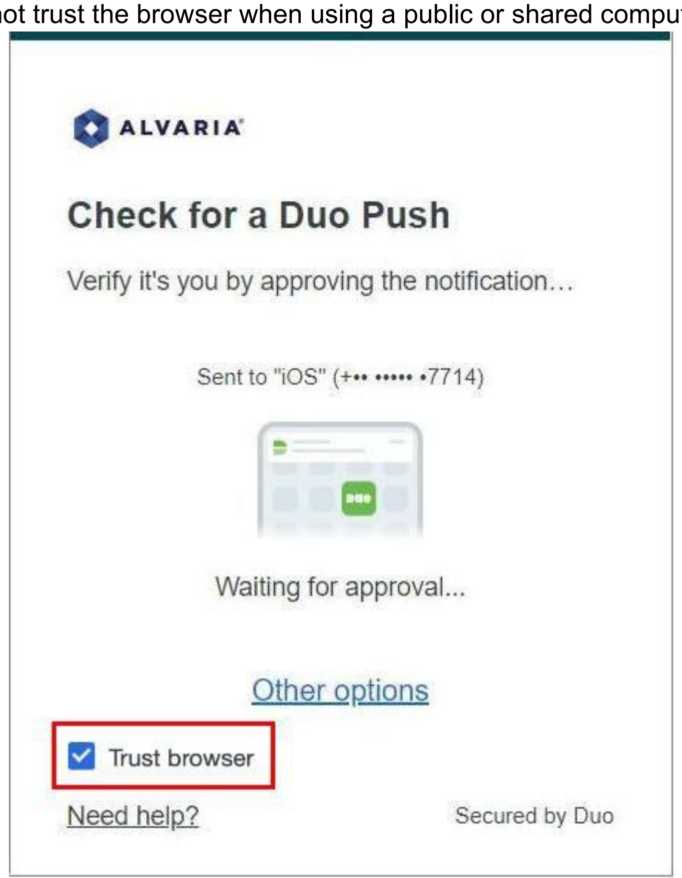
5. In this example, a Duo push notification is displayed in the mobile application. Click **Approve**.



6. The first time you approve the Duo authentication request, the **Trust this browser** window appears. The following are the available options.

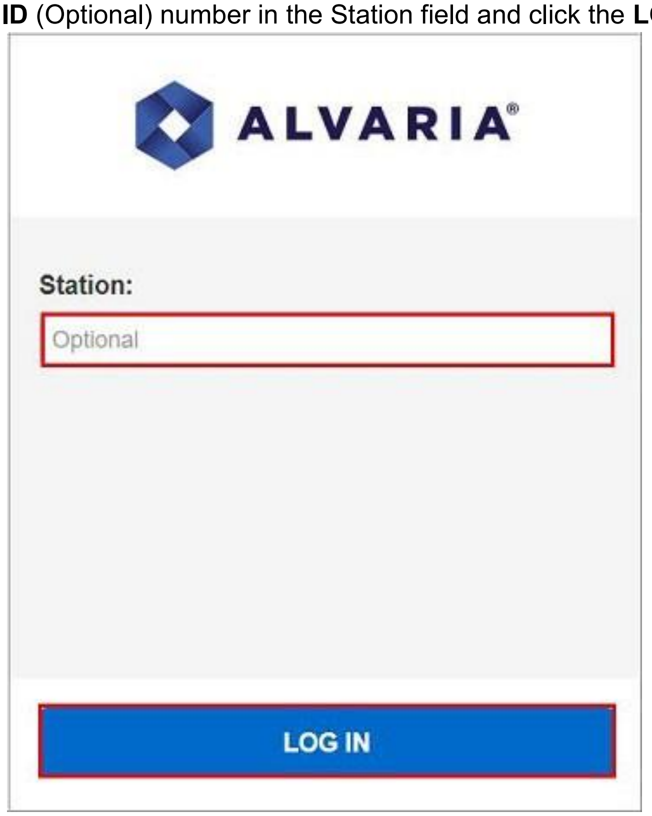
   c. **Yes, trust browser**: This creates a trusted browser session that will let you skip Duo authentication when you log in again with the same browser and device until that trust session expires. Once the trust session expires, Duo authentication will show the option to trust the browser again.

   Note: Do not trust the browser when using a public or shared computer.



   d. **No, do not trust browser**: This will not create a trust session and you will be prompted for Duo authentication when you login again. You won't be asked to trust that browser again for 14 days.
7. When the authentication is verified, the success window is displayed and automatically redirects to enter the **Station ID** (Optional).

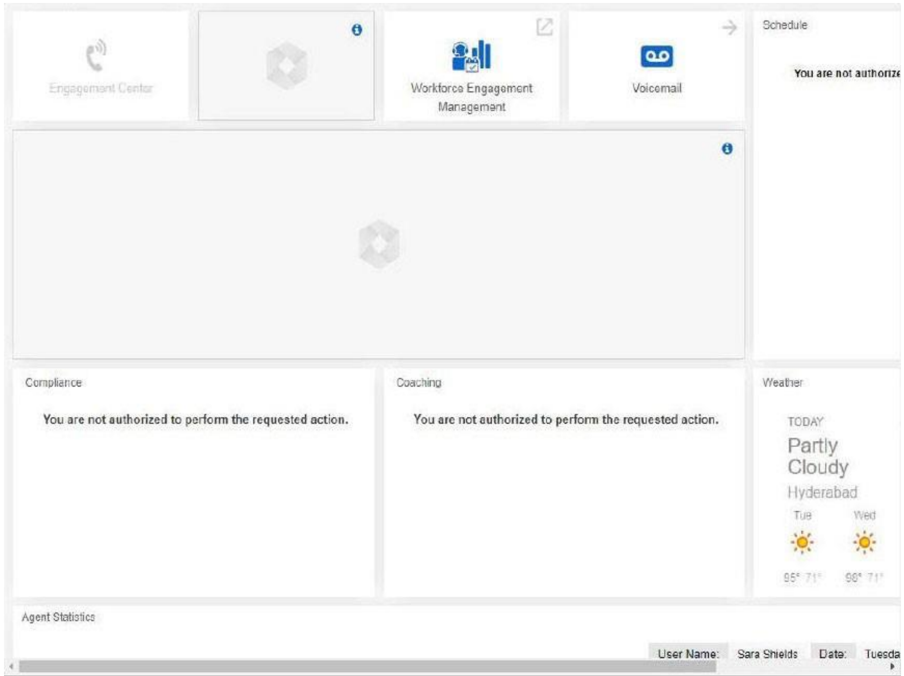
8. Enter a **Station ID** (Optional) number in the Station field and click the **LOG IN** button.



Note:

- Station ID numbers are used to connect to a SIP Phone device. Check with your team lead or manager if you do not have this information.
- You will not be able to view the Station screen if Inbound and Outbound Entitlements are disabled.

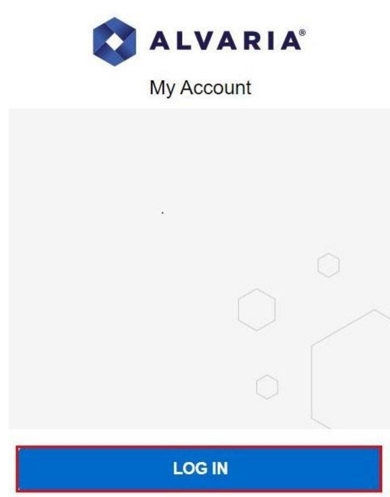
9. Based on your persona and responsibilities, the dashboard launches.



2.1.2 Log In to Alvaria Cloud View - WebRTC

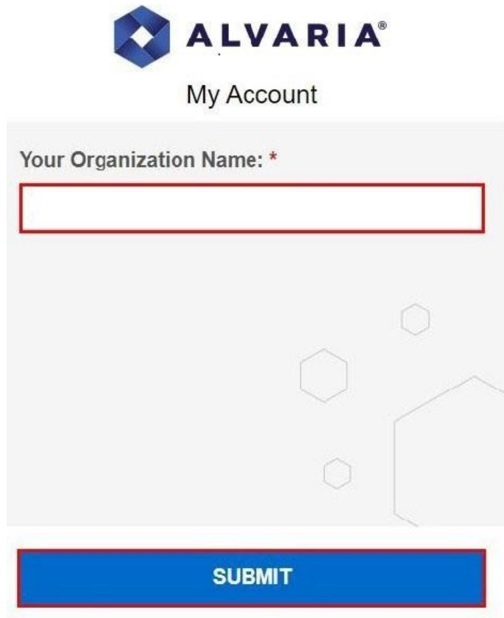
Note: The WebRTC is available only for the customers who purchased this feature.

1. Open a browser and go to the URL for the Workforce Engagement Management product. The Log In page appears. Click the **LOG IN** button.

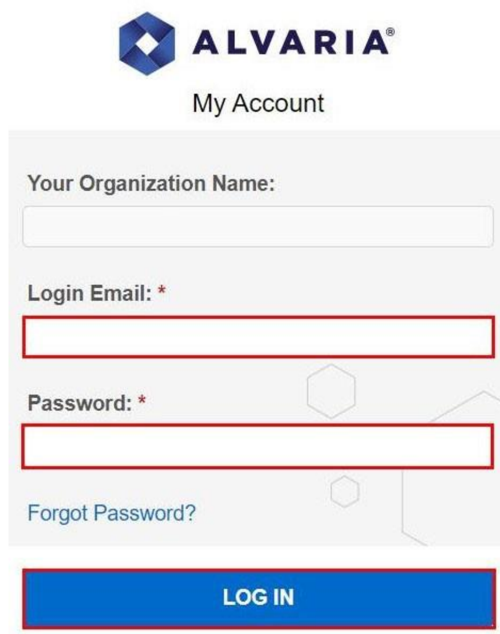


Note: You can save the URL as a Favorite in the browser or create a shortcut to the URL on the desktop.

2. Enter **Your Organization Name** and click the **SUBMIT** button.



3. Enter the appropriate **Login Email** address and **Password** information and click the **LOG IN** button.



Note:

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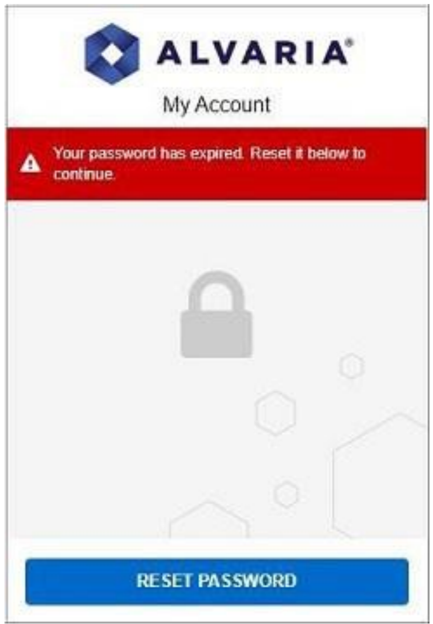

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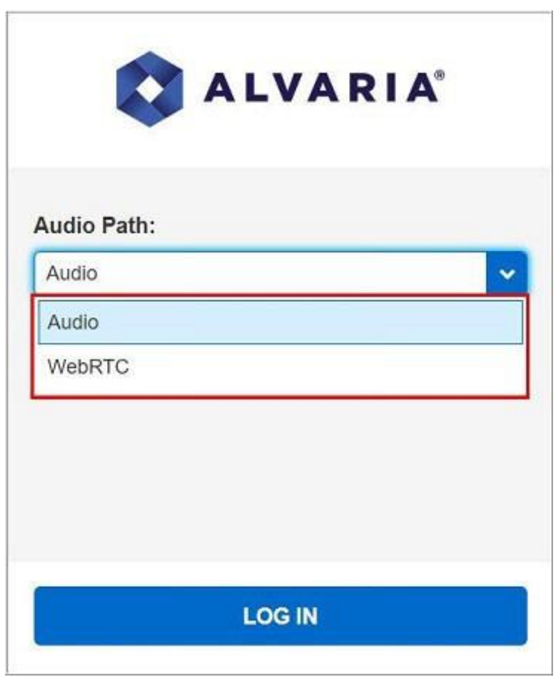
- The user can change the password by clicking on the FORGOT PASSWORD link available on the login screen.

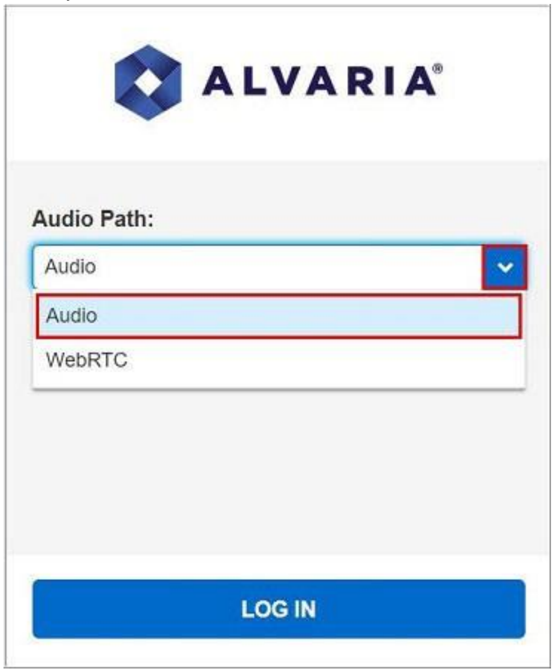
4. The Audio Path screen displays. You will be able to connect the Audio path using:

- **Audio (Station ID)**
- **WebRTC**

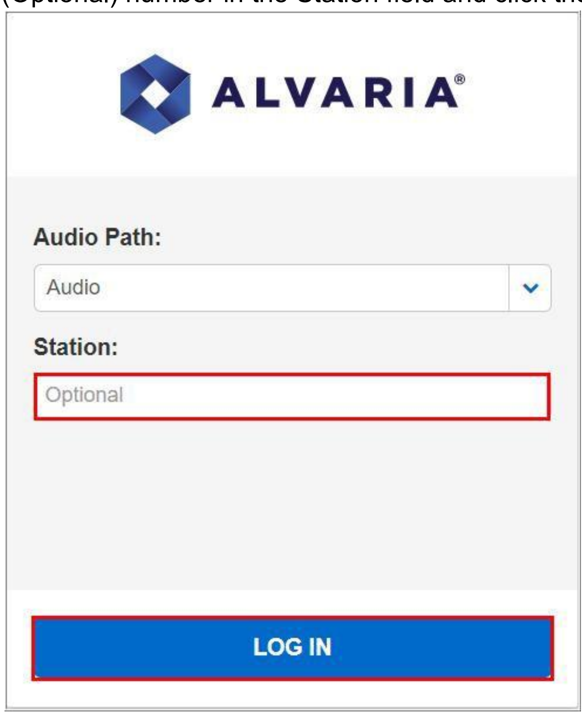


2.1.2.1 Connecting the Audio Path using Audio

1. Select **Audio** from the drop-down list.

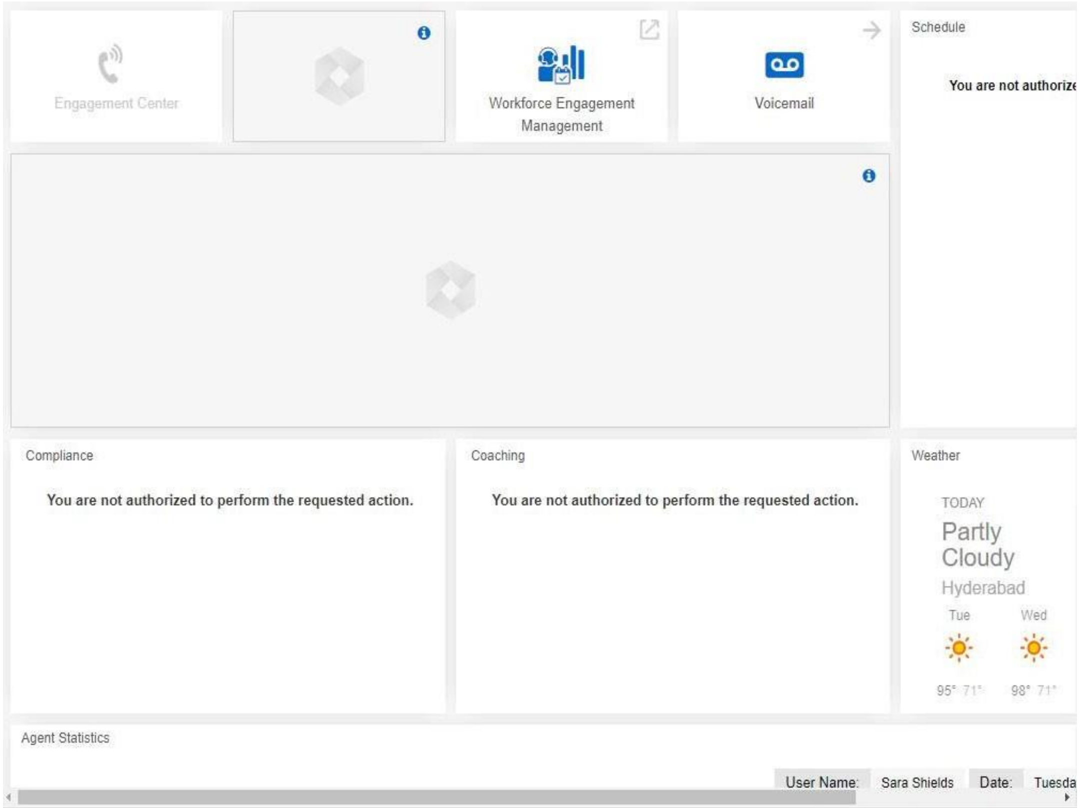


2. Enter a **Station ID** (Optional) number in the Station field and click the **LOG IN** button.

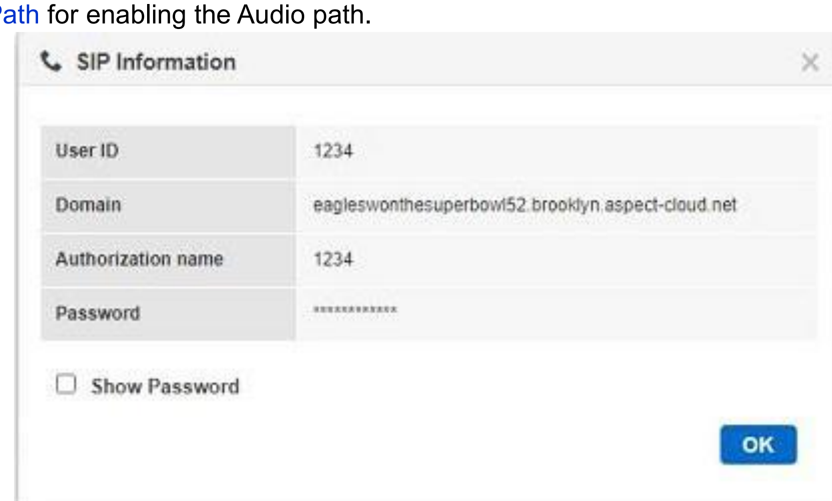


- Station ID numbers are used to connect to a SIP Phone device. Check with your team lead or manager if you do not have this information.
- You will not be able to view the Station screen if Inbound and Outbound Entitlements are disabled.

3. Based on your persona and responsibilities, the dashboard launches. Click the **Audio Path** icon.

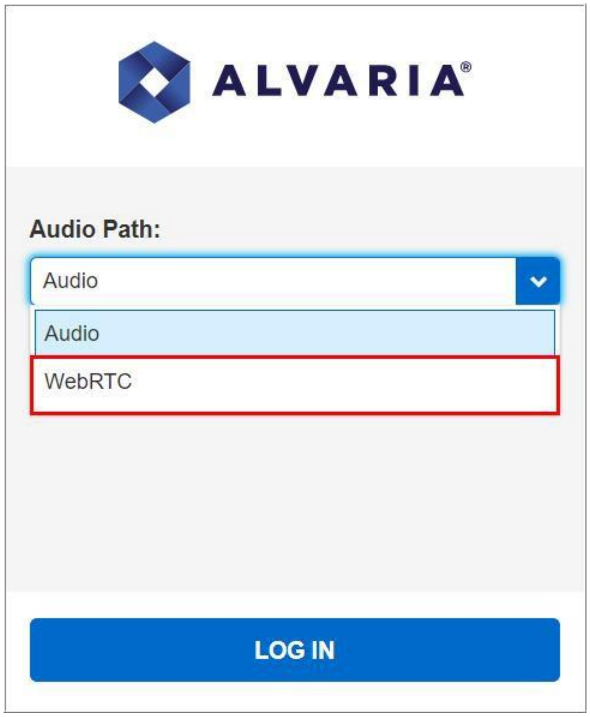


4. The SIP Information is displayed. Please follow the instructions outlined in Enable the Audio Path for enabling the Audio path.

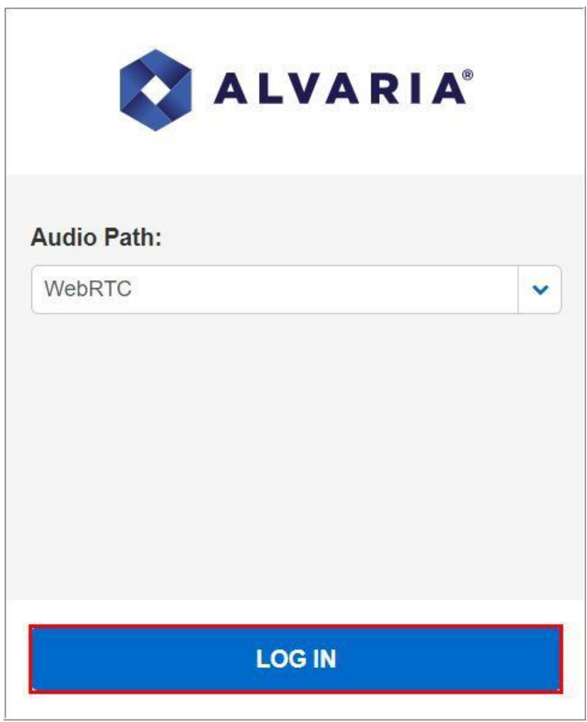


2.1.2.2 Connecting the Audio Path using WebRTC

1. Select **WebRTC** from the drop-down list.

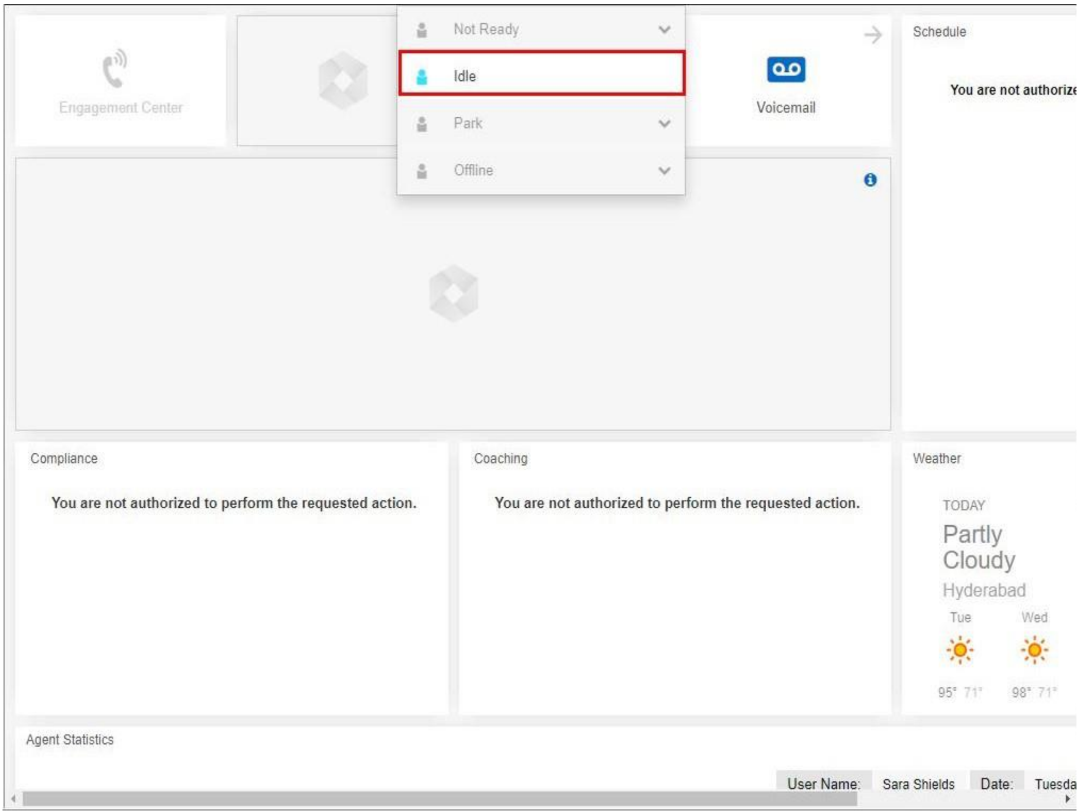


2. Click the **LOG IN** button.

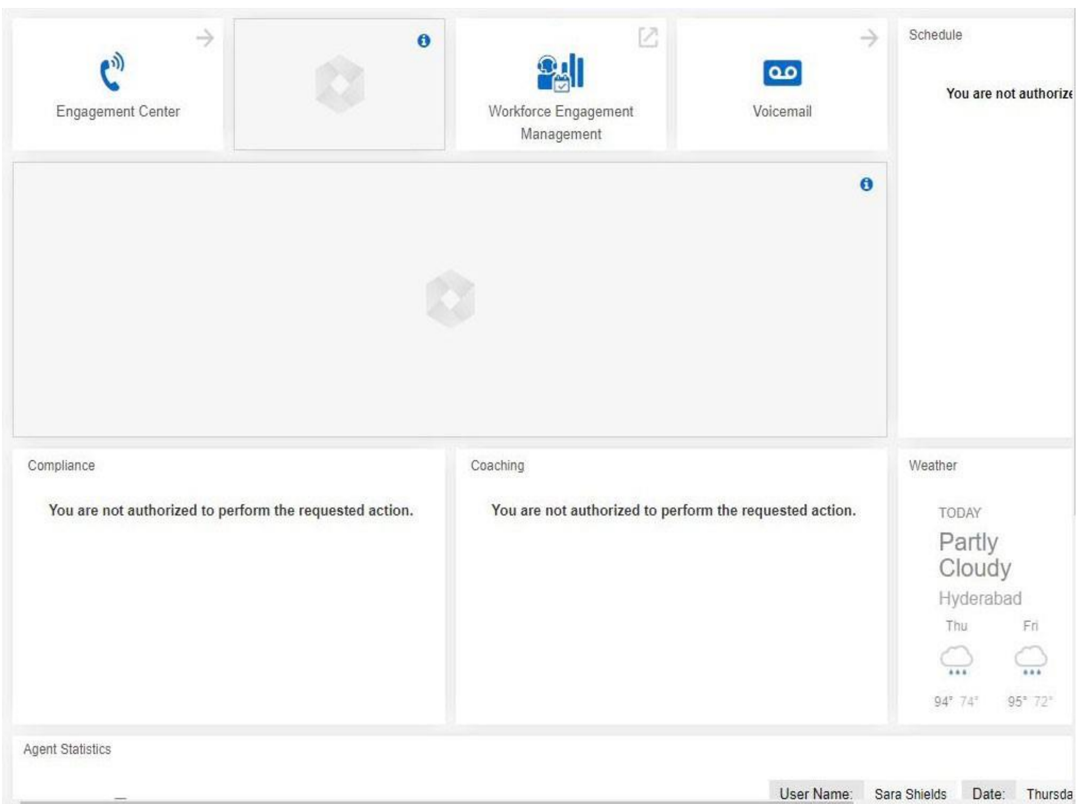


3. Based on your persona and responsibilities, the dashboard launches. Click the **Status** icon and change the user status to idle by clicking the **Idle** option.

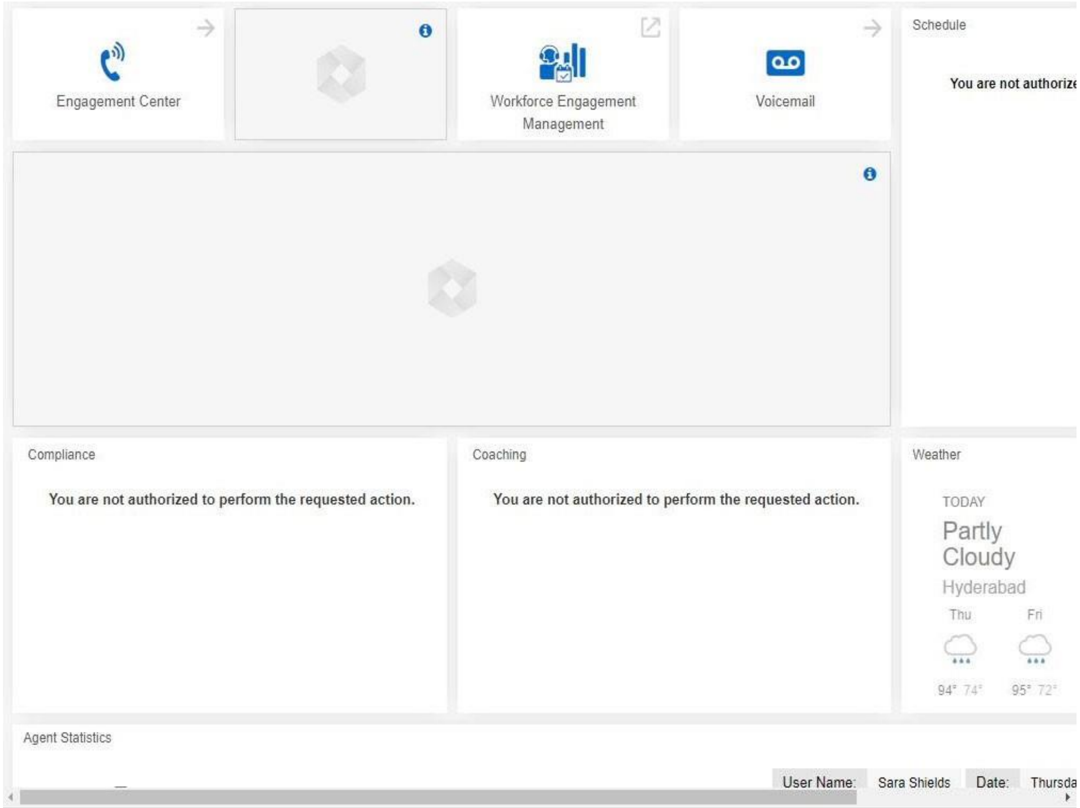
Note: The user must allow the Alvaria Cloud View site to access the Microphone.



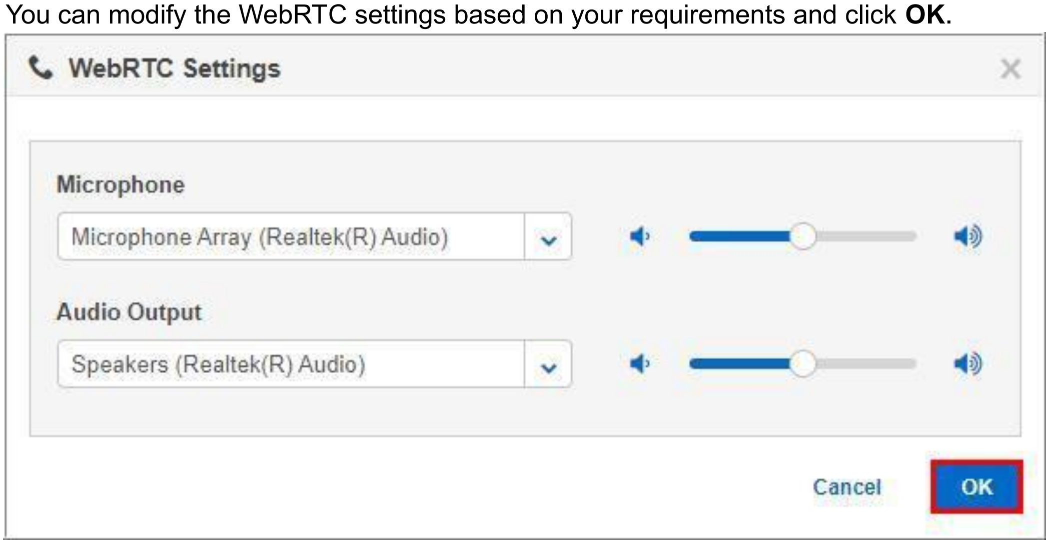
4. When changing the status to Idle, the Audio path will be automatically established and the user will now be able to make voice interactions.



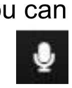
5. To modify the WebRTC Settings, click the **Audio Path** icon.



6. You can modify the WebRTC settings based on your requirements and click **OK**.

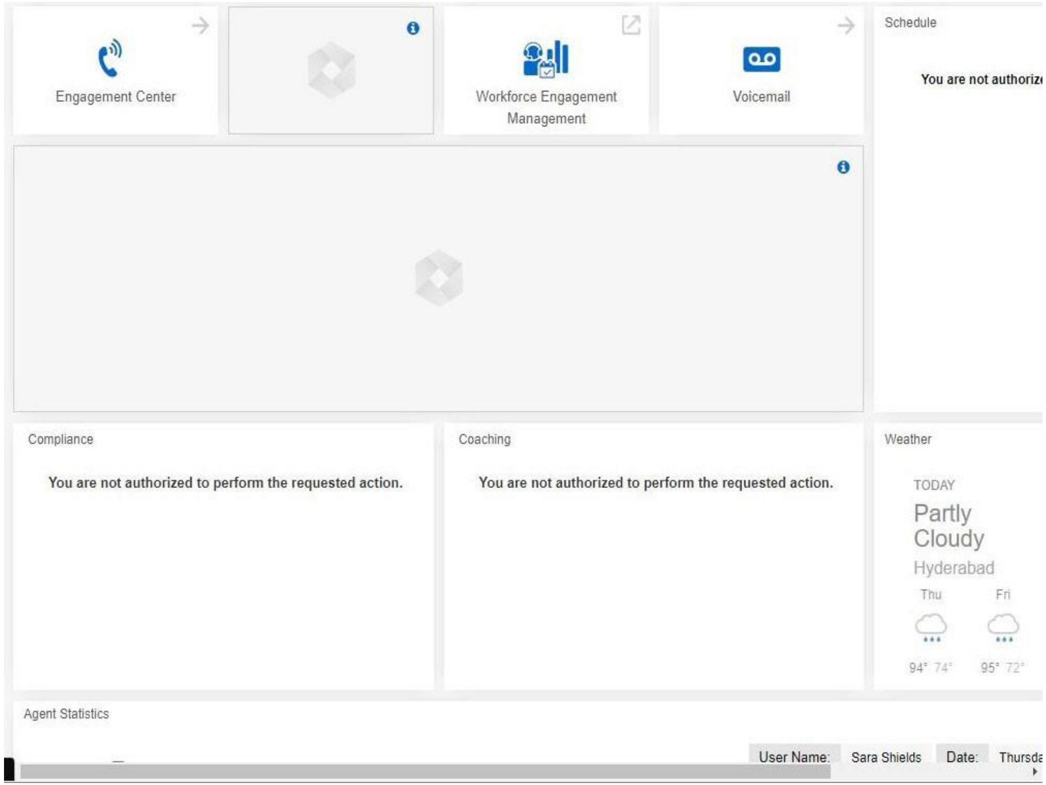


7. You can Mute/Unmute the active voice interaction by clicking on the **Microphone** icon.



a.: Unmute

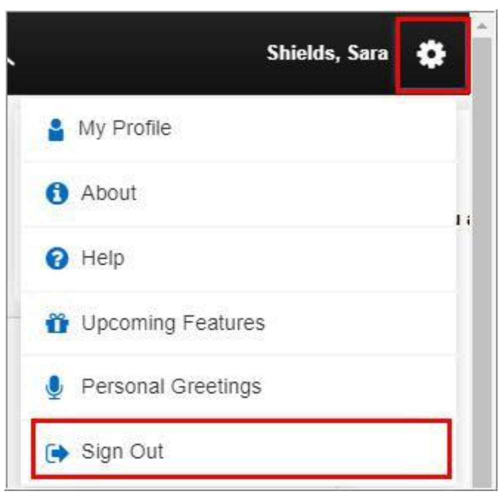
b.  : Mute



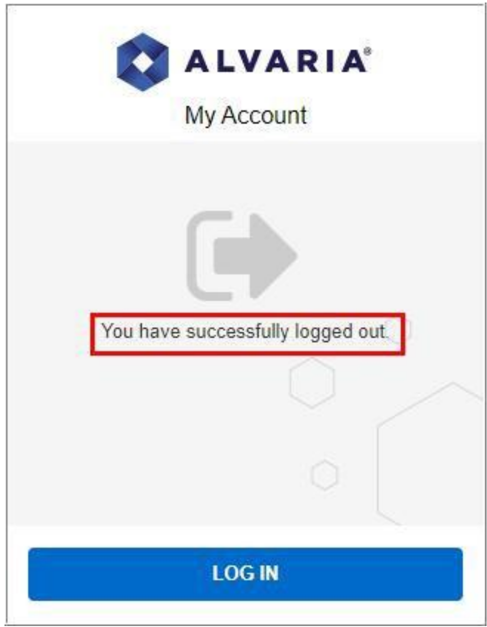
2.1.3 Log Out of Alvaria Cloud View

To log out of Alvaria Cloud View, follow the below steps.

1. Click the Alvaria Cloud View **Cog Wheel** icon located in the upper-right area of the window and click **Sign Out**.



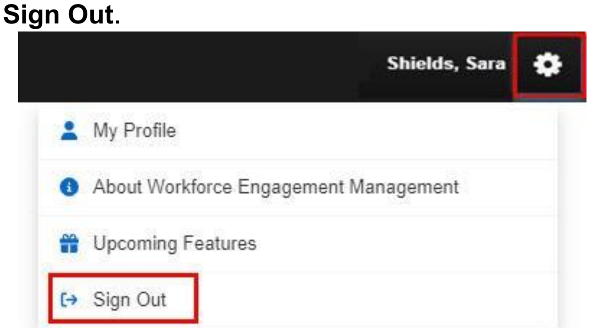
2. You have successfully logged out of the Alvaria Cloud View. You can Log in to the system by clicking on the **LOG IN** button.



2.1.4 Log Out of Aspect Cloud Quality

To log out of Aspect Cloud Quality, follow the below steps.

1. From the Workforce Engagement Management navigation bar, click **Cog Wheel Menu** button and select **Sign Out**.



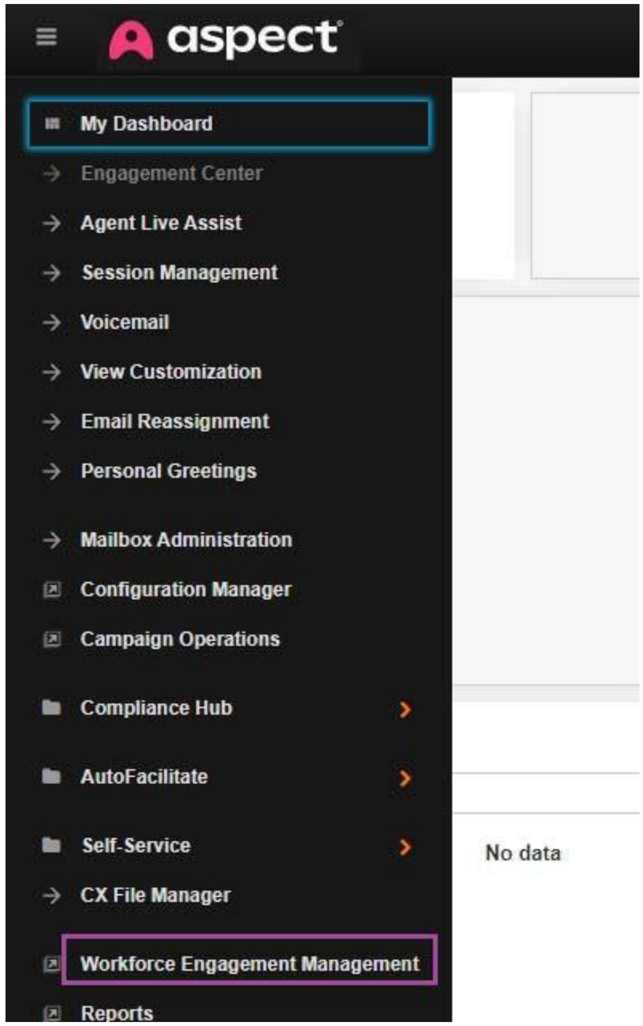
2. Close the browser to complete the sign out process.

   Note: If the user fails to close the browser, it may result in accessing and log in to user's account by others with the help of Back button.

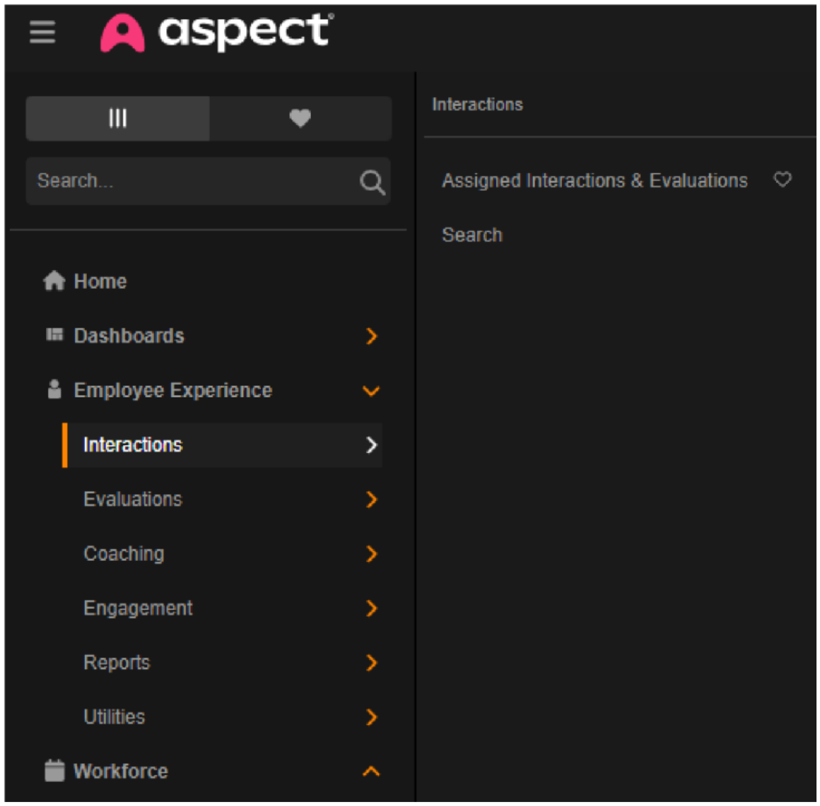
2.2 Navigate to Aspect Cloud Quality

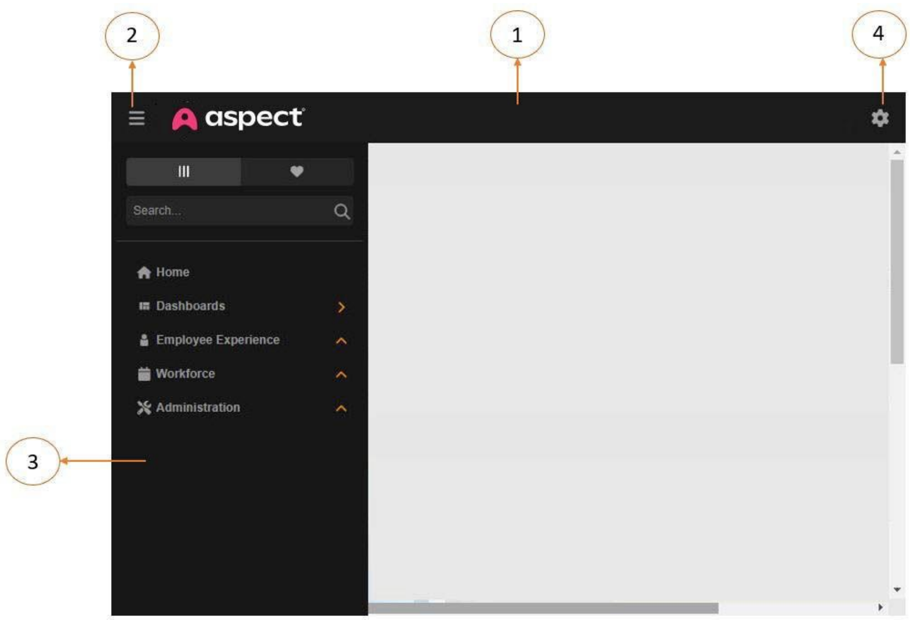
To log in to the Aspect Cloud Quality, follow the below steps.

1. Select **Workforce Engagement Management** either from the dashboard or from the Slider Drawer Navigation button.

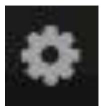


2. The Workforce Engagement Management dashboard opens.
3. To access the Aspect Quality features, from the Workforce Engagement Management Navigation bar, click **Employee Experience**. The Aspect Quality features display below the navigation bar.





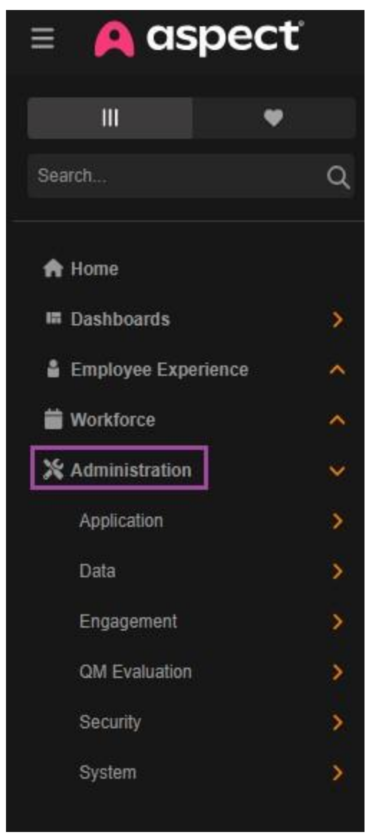
Item #	Name	Description
1	Navigation Bar	On this bar, you can select the Dashboard, the available Aspect product(s) from the Navigation menu, and the Action icon.

2	Slide Drawer Navigation menu 	On this menu, you can select the Dashboard, the available Aspect product(s).
3	Dashboard / Products	WEM Dashboard - Selected by default at login. Products - Shows the available WEM products currently installed and configured in the system.
4	Action menu/Cog Wheel Icon 	From the Action icon, you can access the following: • My Profile - displays your login profile. You can change language and culture settings. • About Workforce Engagement Management – shows the installed version of Workforce Engagement Management, lists the associated products (Performance, Quality, and Workforce) and whether those products are Configured, Connected, Authenticated, their version and any further information. • Sign Out – Click to log out of Workforce Engagement Management.

2.3 Access the Administration Area

To access the administration area, follow the steps below:

1. Go to the Navigation bar.
2. Click **Administration**.



The full range of administrator's access rights opens.

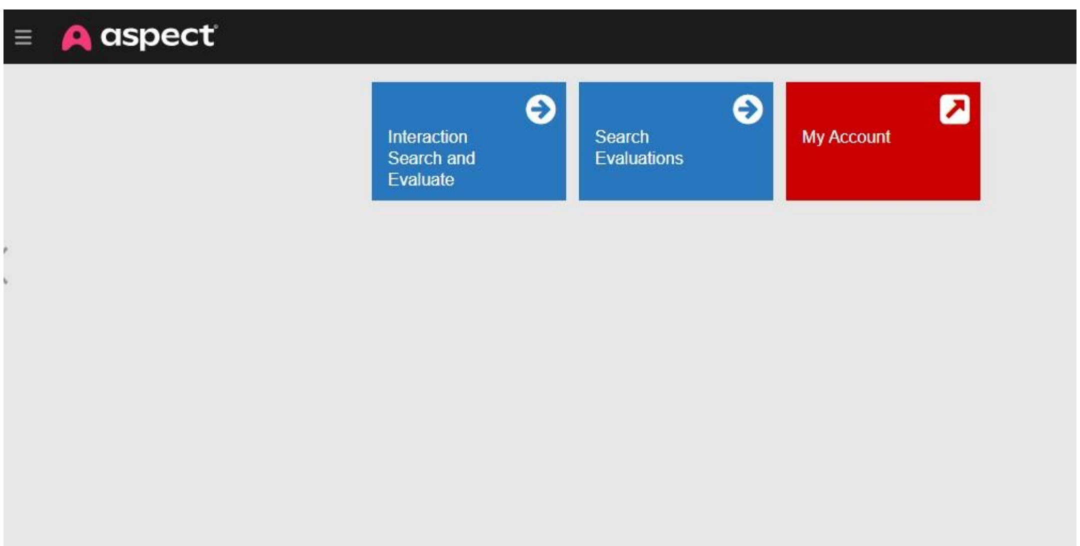
Note: The Quality modules listed may differ based on the license and security privileges.

The following table describes the **Quality** modules in the **Administrator** dashboard.

Feature	Description
QM Evaluation	**Evaluation Templates -** Users score interactions for training purposes, and the scored interactions are called evaluations. Evaluation templates are a group of standardized questions that users answer to score interactions. See Chapter 6, Evaluation Templates.
Security	• **Users -** Cloud users are the individual users on the Quality system. See Chapter 4, User Management.
System	• **Desktop Clients -** This feature allows you to see what versions of Desktop clients are running for your organization. See Chapter 11, Desktop Client. • **System Parameters -** In Workforce Engagement Management, Performance and Quality consist of various System Parameters. See Chapter 10, System Parameters. • **System Downloads -** The System Downloads section lists all the system files that can be downloaded. See Chapter 12, System Downloads.

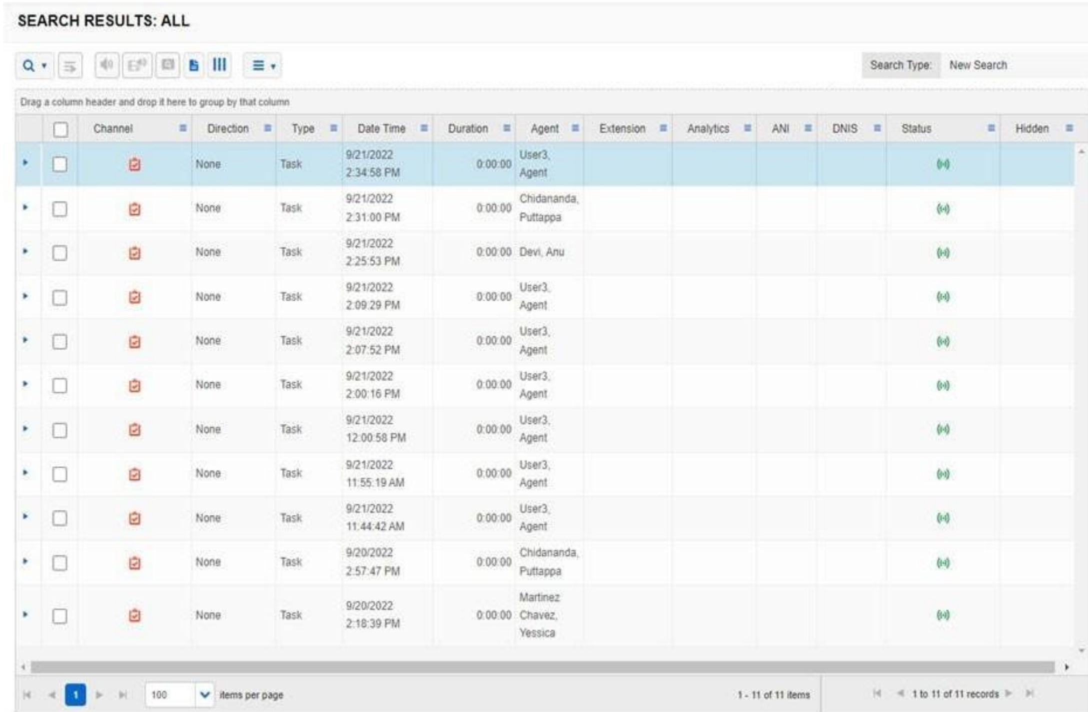
2.4 My Account Widget

The My Account widget is added on the Dashboard for Aspect Cloud Quality integrations such as with Amazon Connect or Twilio.The widget is the external link to the Alvaria My Account dashboard.



3. Search for an Interaction

Use the Quality Interaction Search feature to build queries to search for recordings for playback and review. The results are displayed in the Search Results window.



Note: As you navigate through the Interaction window, the system remembers the last search criteria that you entered and loads it, *only for the lifetime of the browser session.*

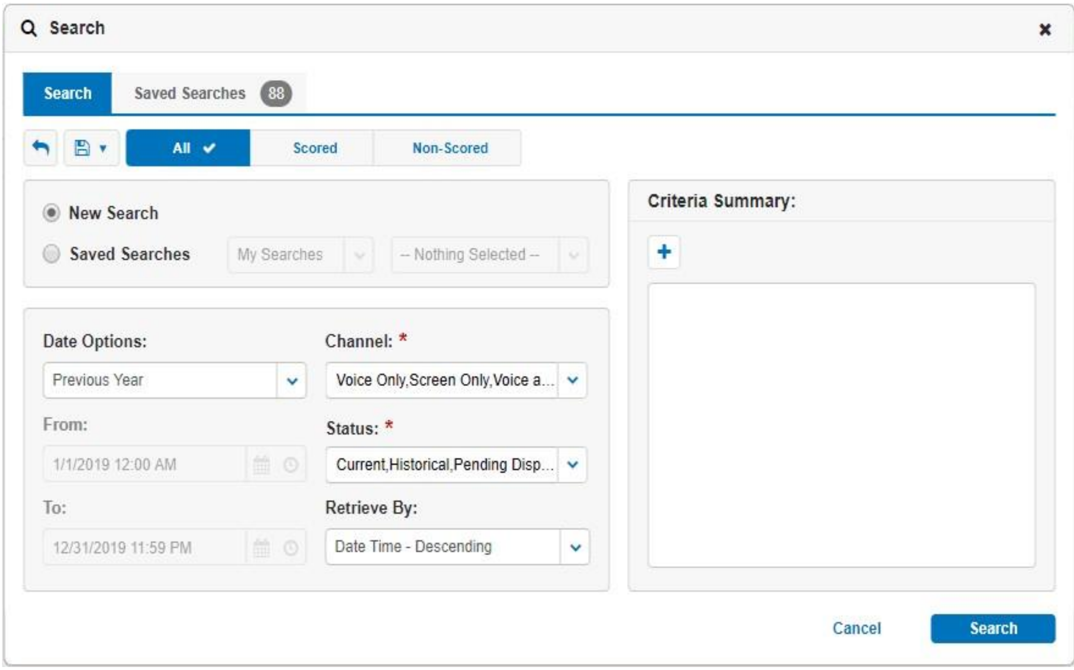
You can use single or multiple criteria for media searches.

From the Quality Search Results window, you can build queries to find recordings of interest. Data about each recording is visible, including call history, hold times, Work Types, ANI and DNIS information.

3.1 Performing a Search

In the Quality Search Results window, you can build queries to search for specific voice, chat,email or SMS recordings. You can use single or multiple criteria for media searches.

1. Go to **Navigation Menu** > **Employee Experience > Interaction** > **Search**. The Search window opens.



2. Perform the below steps as given:
   - Configure Search Results Grid
   - Select a Date Option
   - Select a Status
   - Select a Channel
   - Select Criteria
   - Add Criteria

   Note: If you are on either the Scored Interactions window, or the Search Results window, and you want to change criteria in the current search, select Search > Edit Search.

   Note: If you want to perform a *new* search, select Search > New Search.

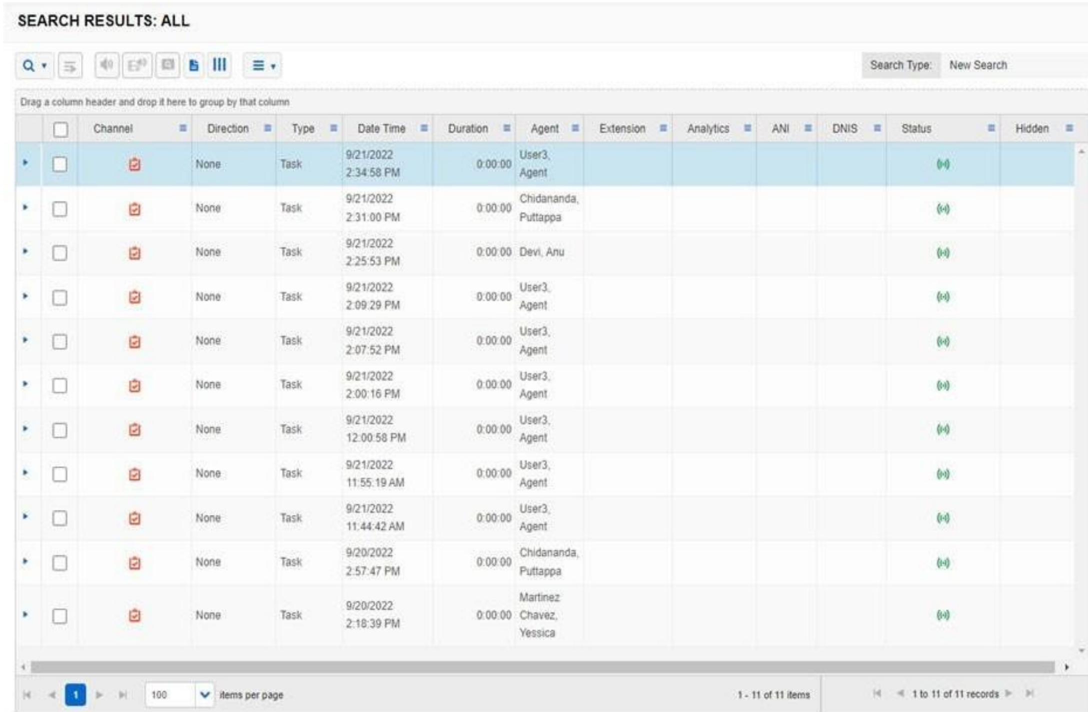
3. Click Search.

3.1.1 Configure Search Results Grid

In Aspect Quality, the user will select the Search Results grid option such as All or Scored or Non-Scored based on the requirements.

3.1.1.1 “All”

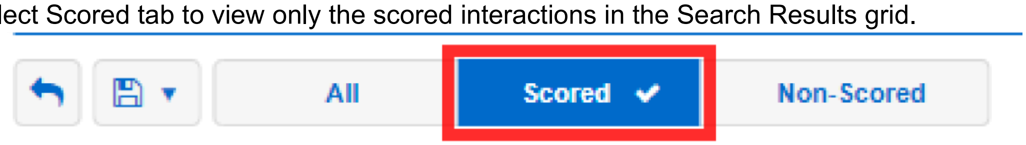
Select All to view scored and non-scored evaluations in the Search Results grid.



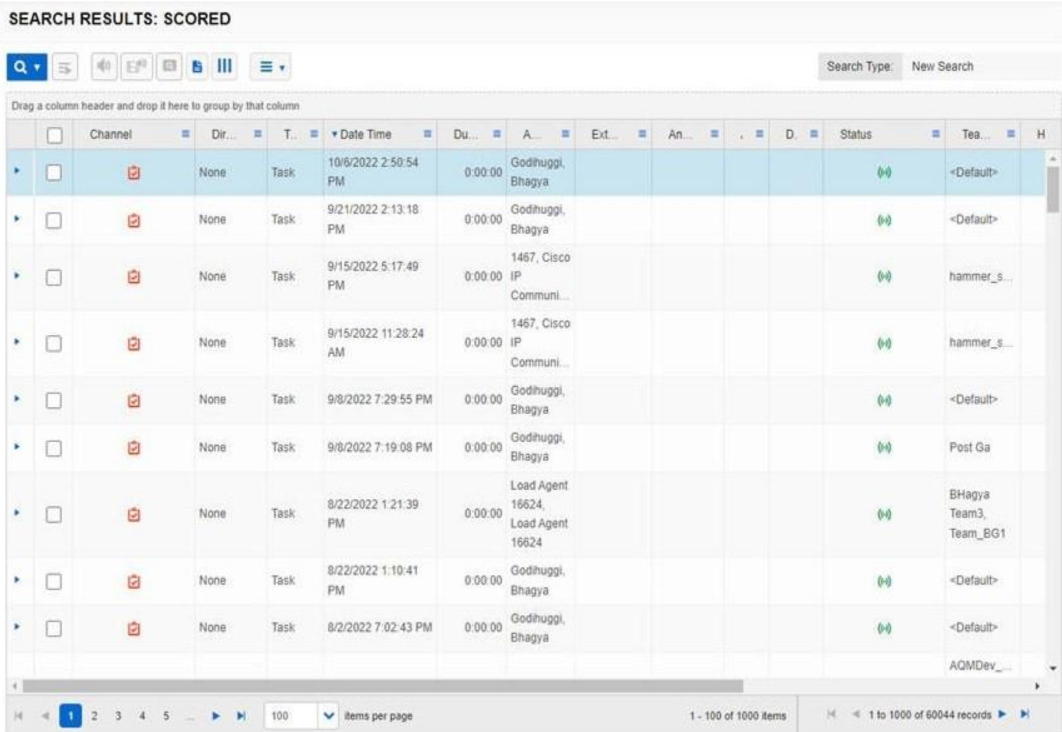
Note: The scored interactions are recognized by the [+] button on the first column.

3.1.1.2 “Scored”

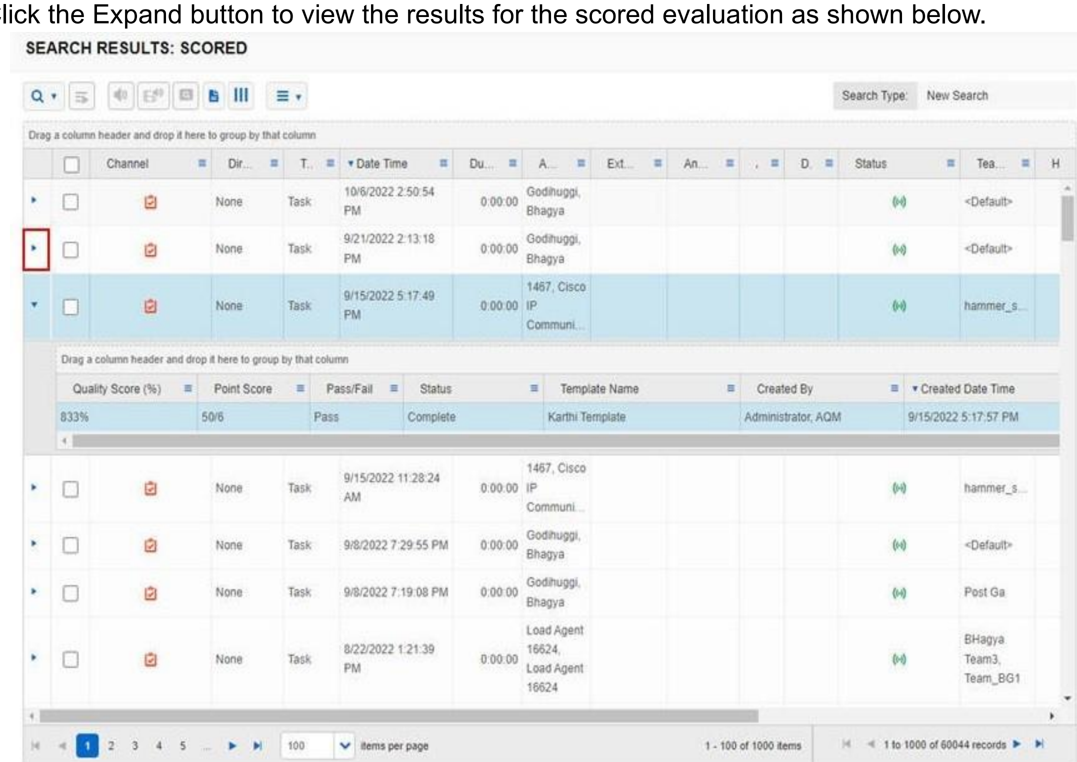
Select Scored tab to view only the scored interactions in the Search Results grid.



After selecting the required criteria from Select a Date Option, Select a Channel, Select a Status and Select Criteria fields, the Search Results: Scored will be appeared as shown below.

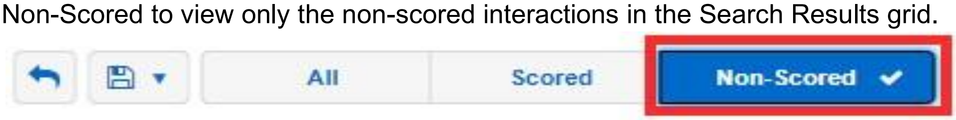


Click the Expand button to view the results for the scored evaluation as shown below.

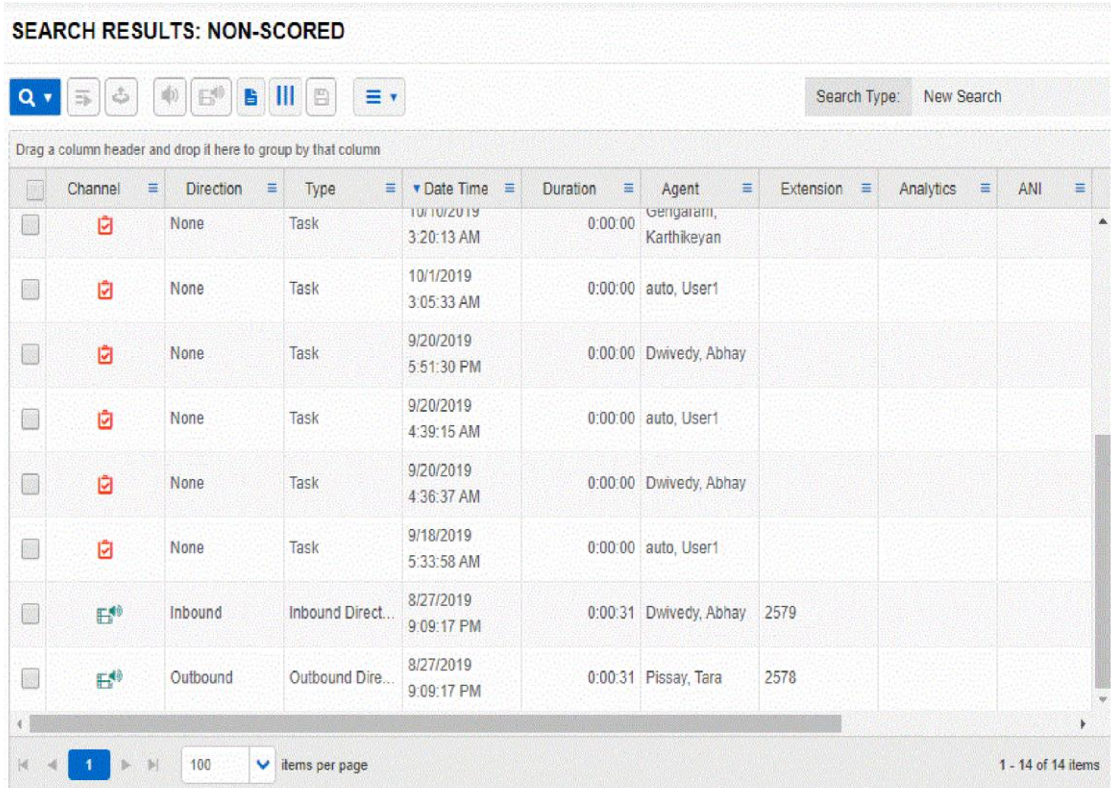


3.1.1.3 “Non-Scored”

Select Non-Scored to view only the non-scored interactions in the Search Results grid.

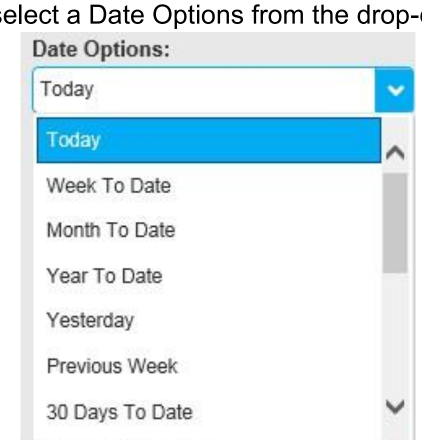


After selecting the required criteria from Select a Date Option, Select a Channel, Select a Status and Select Criteria fields, the Search Results: Non-Scored will be appeared as shown below.



3.1.2 Select a Date Option

In the Edit Search field, select a Date Options from the drop-down list.



From this drop-down list, you must select a date range. The following is a list of options in the drop-down list. Notice that as you select the date option from the drop-down list, the date range automatically populates in the From and To fields. You cannot change the From and To fields unless you select the Custom Date Range option from the drop-down list.

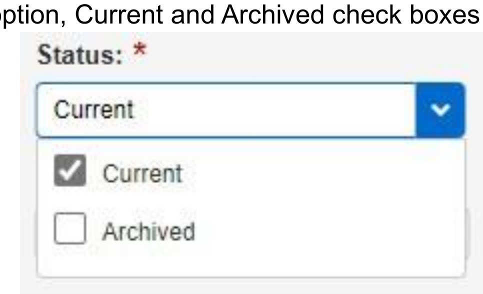
Date Option	Description
Today	Performs a search for the interactions only for today's date.

Week to Date	Performs a search for the interactions only for the current week, including today. The week begins on Sunday at 12:00 AM and ends on Saturday at 11:59 PM. For example, on 24 August 2014, if you perform a search and select the Week to date option, the results returned are interactions that occurred between 18 August 2014 12:00 AM and 24 August 2014 11:59 PM.
Month to Date	Performs a search for the interactions only for the current month, including today. The month begins on the first day of the month and ends on the last day of the month, or Today. For example, on 24 August 2014, if you perform a search and select the Month to date option, the results returned are interactions that occurred between 1 August 2014 12:00 AM and 24 August 2014 11:59 PM.
Year to Date	Performs a search for the interactions only for the current year, including today. The year begins on January 1, and ends on December 31, or Today. For example, on 24 August 2014, if you perform a search and select the Year to date option, the results returned are interactions that occurred between 1 January 2014 12:00 AM and 24 August 2014 11:59 PM.
Yesterday	Performs a search for the interactions for the day before Today. For example, on 24 August 2014, if you search using the Yesterday date option, the results returned are interactions that occurred between 23 August 2014 at 12:00 AM and 23 August 2014 11:59 PM.
Previous Week	Performs a search for interactions for the week prior to the current week. The week begins on Sunday at 12:00 AM and ends Saturday at 11:59 PM.
30 Days to Date	Performs a search for interactions for the last 30 days, including Today's date.
Date Option	**Description**
Previous Month	Performs a search for interactions for the month prior to the current month. The month begins on the first day of the month and ends on the last day of the month.
90 Days to Date	Performs a search for interactions for the last 90 days, including Today's date.
Previous 3 Months	Performs a search for interactions for three months prior to the current month. A month begins on the first day of the month and ends on the last day of the month. For example, in August, if you perform a search and select the Previous 3 Months date option, the results returned are interactions that occurred in the months of May, June, and July.
180 Days to Date	Performs a search for interactions for the last 180 days, including Today's date.
Previous 6 Months	Performs a search for interactions for six months prior to the current month. A month begins on the first day of the month and ends on the last day of the month. For example, in August, if you perform a search and select the Previous 6 Months date option, the results returned are interactions that occurred in the months of February, March, April, May, June, and July.

12 Months to Date	Performs a search for interactions for twelve months prior to the current date, including Today's date. For example, on 25 August 2014, if you perform a search and select the 12 Months to Date date option, the results returned are interactions that occurred between 1 September 2013 12:00 AM and 25 August 2014 11:59 PM.
Previous Year	Performs a search for interactions for the previous year. For example, on 25 August 2014, if you perform a search and select the Previous Year date option, the results returned are interactions that occurred between 1 January 2013 at 12:00 AM and 31 December 2013 at 11:59 AM.
Custom Date Range	When you select this option, the From and To fields become active. If you select the Date/Time icon, you can select the date range that you want to use, or you can type the date and time directly into the text box.

3.1.3 Select a Status

From the Status drop-down list, you can filter interactions based on the Status of the interaction by selecting any option, Current and Archived check boxes are available.



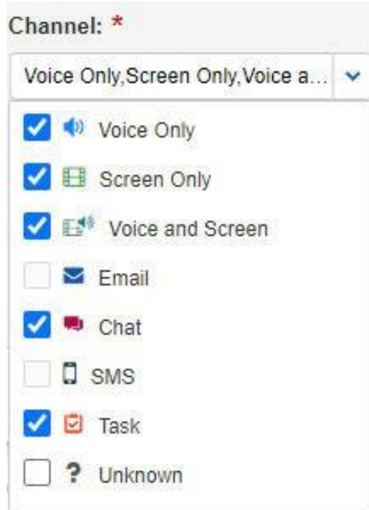
You must select at least one Status to perform a search. The options are described in the following table.

Status Option	Description
Current	The system either records calls in the Current state by using a business rule, or because the system is in Logging mode. Calls are also Current if the system is in Quality Monitoring with Caching mode and an agent or a Team Lead has specified to save the call beyond the pending period. This is the default for Workforce Engagement Management - Aspect Quality; you must select it. **Note:** The "Current" option will be always available by default.
Archived	The actual recording file is available for direct playback. You can still view any interactions and identify the file name. The Quality Administrator can specify the Archive directory.

Note: If a user has the Access Control List (ACL) of "Search Archive", the user can either search with Current or Archive and cannot search with both. If user selects both and search, a validation message will pop up as "You cannot select both Current and Archive."

3.1.4 Select a Channel

Every interaction that occurs between an agent and a customer happens by a channel. The channel is the medium used to complete the interaction; for example, a channel could be a phone call, a video call, an email, or a text.

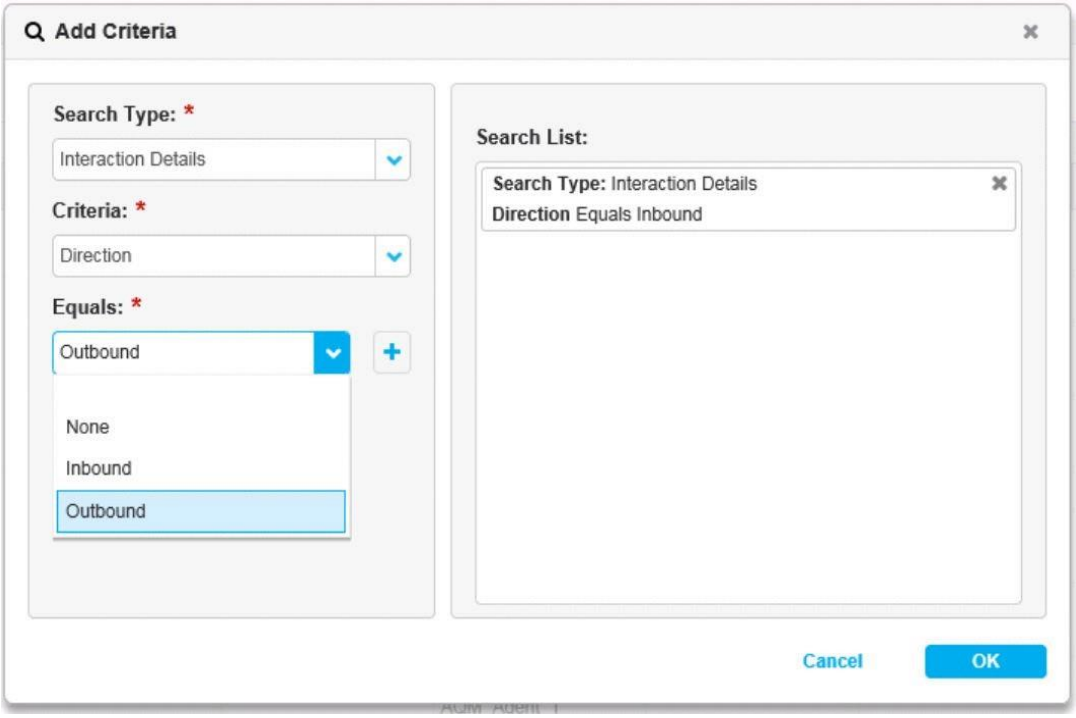


Note: Channels are only enabled for selection if you have an appropriate license installed.
From the Channel drop-down list box, you can select one or more check boxes by which you want to search. Each option is described in the following table.

Channel	Definition
Voice Only	Interactions that have only an audio/voice recording.
Screen Only	Interactions that have only a screen recording.
Voice and Screen	Interactions that have both voice and screen recording.
Email	Interactions via Email.
Chat	Interactions via chat.
SMS	Interactions via text.
Task	A placeholder for non-recording interactions that occurs internally. For example, a Task could be a placeholder for a performance evaluation for an agent.
Unknown	Any interaction from which the system cannot determine the port state.

3.1.5 Select Criteria

When you click Add Criteria +, the Add Criteria window opens.

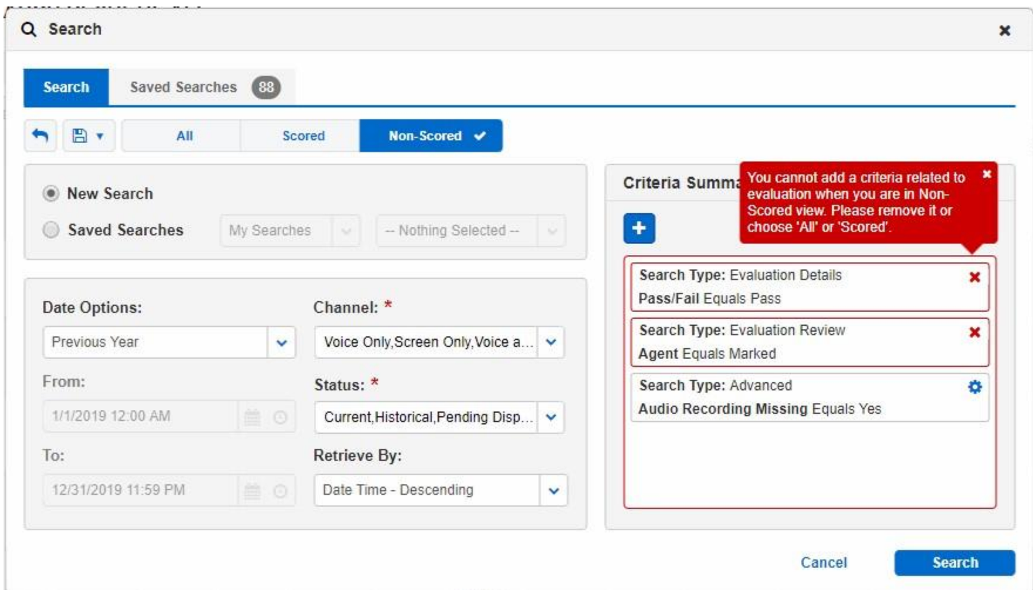


3.1.5.1 Search Types and Criteria

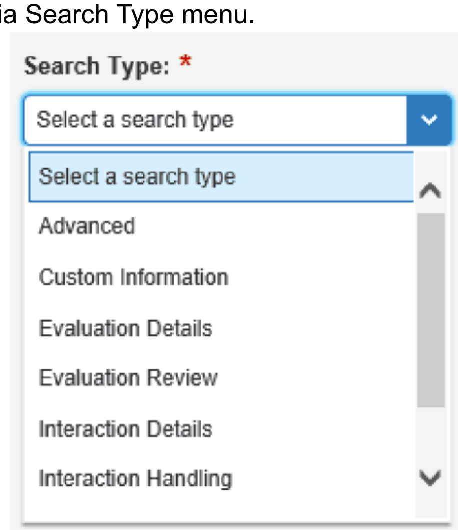
The following are the search types of criteria that you can add to your search.

Interaction Search	QM Evaluation
• Advanced	• Advanced
• Custom Information	• Custom Information
• Interaction Details	• Evaluation Details
• Interaction Handling	• Evaluation Review
• Interaction Statistics	• Interaction Details
• Recording Information	• Interaction Handling
	• Interaction Statistics
	• Recording Information

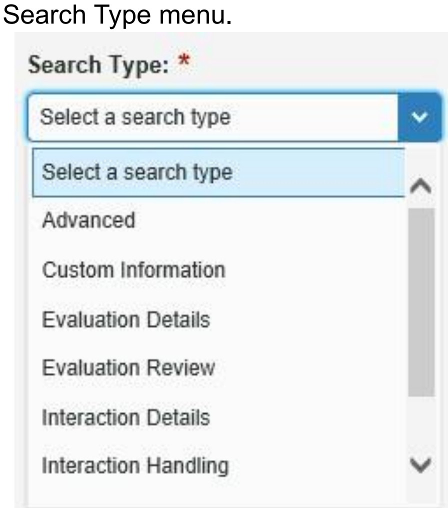
Note: Evaluation Details and Evaluation Review are available if the user has selected the **All** or **Scored** button in the Search dialog. When the user has selected **Evaluation Details** or **Evaluation Review** search type and toggled to **Non-Scored** button then click on Search, a **validation message** will be displayed under the Criteria Summary section as shown below.



The Interaction Search criteria Search Type menu.



The QM Evaluation criteria Search Type menu.



Depending on which search type you select, the criteria that displays is specific to that type.

3.1.5.1.1 *Advanced*

The Advanced criteria pertain to the criteria which are listed below.

Criteria Select this...	Description ...and these options display:
Audio Recording Ended Early	When a call recording is stopped in Aspect Quality (integrated with regular CTIPS switch) before the call ends in Unified IP. From the Equals drop-down list box, select • Yes • No Click on (+) to add the criteria under the Search List section.

Criteria Select this...	Description ...and these options display:
Audio Recording Expected	When Aspect Quality records audio, and the audio file status is available, deleted, failed during recording, failed during transfer or stored in separate storage disks. From the Equals drop-down list box, select • Yes (based on the above status) • No (Not recorded) Click on (+) to add the criteria under the Search List section.
Audio Recording Missing	When Audio Recording is expected and the audio filename is not updated in Aspect Quality database, the audio recording is considered as missing. From the Equals drop-down list box, select • Yes • No Click on (+) to add the criteria under the Search List section.
Audio Recording Silent	When voice content is not available in the recording. From the Equals drop-down list box, select • Yes • No Click on (+) to add the criteria under the Search List section.
Audio Recording Started Late	When audio recording is started in Aspect Quality (integrated with regular CTIPS switch) after the actual start of the call in Unified IP. From the Equals drop-down list box, select • Yes • No Click on (+) to add the criteria under the Search List section.

Host ID	It represents the Call ID of the switch. From the Show items with value that is drop-down list box, select • Contains • Ends with • Equals • Equals None • Starts with Then, in the Entry text box, type the Host Id by which you want to search.
Interaction ID	Aspect Quality creates a unique interaction ID for each interaction. From the Show items with value that is drop-down list box, select • Equals Then, in the Entry text box, type the Interaction Id by which you want to search. **Note:** An Interaction Id is represented as a GUID (Globally Unique Identifier).

Criteria Select this...	**Description ...and these options display:**
***Message ID	From the Show items with value that is drop-down list box, select • Equals • Greater than • Greater than or equals • Less than • Less than or equals • Not equals Then, in the Entry text box, use the arrow buttons or type the number by which you want to search.
Partial Audio Recording	When a recording started late or ended early than expected, those recordings are retrieved using this search criteria. From the Equals drop-down list box, select • Yes • No Click on (+) to add the criteria under the Search List section.
Phone Foul	When the Phone Foul happened during the conversation, those interactions are retrieved using this search criteria. From the Equals drop-down list box, select • Yes • No Click on (+) to add the criteria under the Search List section.

Screen Recording Expected	When Aspect Quality records screen, and the screen file status is available, deleted, failed during recording, failed during transfer or stored in separate storage disks. From the Equals drop-down list box, select • Yes • No Click on (+) to add the criteria under the Search List section.
Screen Recording Missing	When Screen Recording is expected and the screen filename is not updated in Aspect Quality database, the screen recording is considered as missing. From the Equals drop-down list box, select • Yes • No Click on (+) to add the criteria under the Search List section.

Criteria **Select this...**	**Description** **...and these options display:**
***Thread ID	From the Show items with value that is drop-down list box, select • Equals • Greater than • Greater than or equals • Less than • Less than or equals • Not equals Then, in the Entry text box, use the arrow buttons or type the number by which you want to search.
Transcript File Name	From the Show items with value that is drop-down list box, select • Contains • Ends with • Equals • Equals None • Starts with Then, in the Entry text box, type the file name by which you want to search.
Universal Media ID	Unique ID represents the call sequence number. From the Show items with value that is drop-down list box, select • Contains • Ends with • Equals • Equals None • Starts with Then, in the Entry text box, type the Universal Media ID by which you want to search.

Evaluation ID	Aspect Quality creates a unique evaluation ID for each evaluation. From the Show items with value that is drop-down list box, select • Equals Then, in the Entry text box, type the Evaluation Id by which you want to search. An Evaluation Id is represented as a GUID (Globally Unique Identifier).

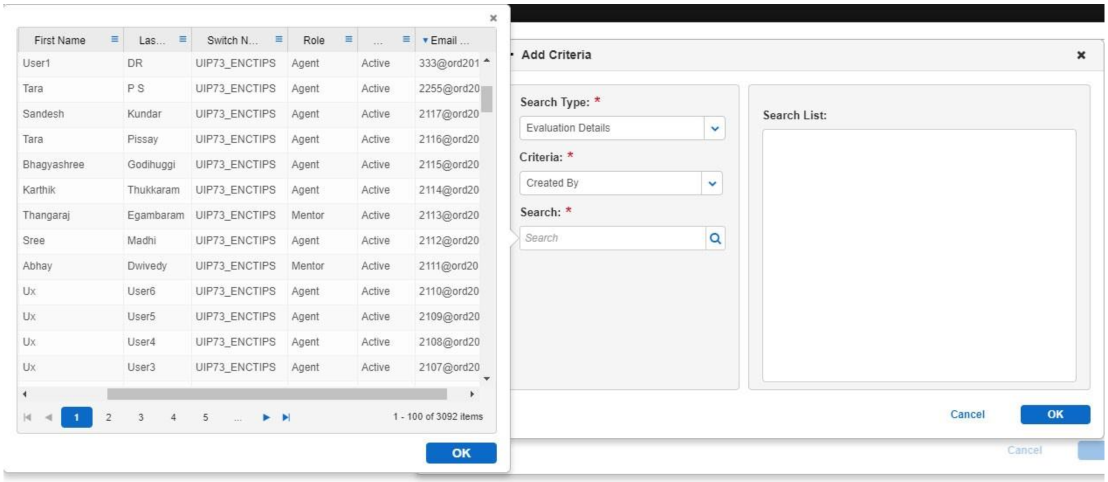
3.1.5.1.2 *Custom Information*

Custom Information are variable criteria made available to Quality through CTI. These criteria pertain to interaction metadata from the associated switch. The criteria that the custom information list displays is based on the customer CTI metadata.

Criteria **Select this...**	**Description** **...and these options display:**
<Custom Information>* *Variable metadata from CTI. Examples include: • Directory Number • Disposition Code	From the Show items with value that is drop-down list box, select • Contains • Ends with • Equals • Equals None • Starts with Then, in the Entry text box, type the custom information by which you want to search.

3.1.5.1.3 *Evaluation Details*

The Evaluation Details are criteria that pertain to the template name, whether the evaluation passed or failed, the number of percentage or point score, or the evaluation status.



Criteria Select this...	Description ...and these options display:
Assigned Evaluations	Evaluations which are assigned to you by other users will be available in this search criteria. **Note:** Evaluations are assigned from WEM UI under the Users tab. Select Shared with me from Equals drop-down, then click on (+) button.
Created By	Search text box. • You can search without entering any filter value. A table displays a list of users depending on the logged in user. • You can also search by typing the partial or complete Lastname or Firstname or UserName of the evaluation creator. • You can select only one user at a time. For more information on Search text box, see The Evaluation Details are criteria that pertain to the template name, whether the evaluation passed or failed, the number of percentage or point score, or the evaluation status.
Created Date Time	In the From and To fields, specify a date range. By default, the From date is set 30 days prior to the current date and the current date is set as the To date.
Pass/Fail	The Equals drop-down list box displays the options • N/A • Pass • Fail

Criteria Select this...	Description ...and these options display:

Percentage Score	From the Show items with value that is drop-down list box, select • Equals N/A • Equals • Greater than • Greater than or equals • Less than • Less than or equals • Not equals Then, in the Entry text box, type the percentage by which you want to search.
Point Score	From the Show items with value that is drop-down list box, select • Equals N/A • Equals • Greater than • Greater than or equals • Less than • equals • Not equals Then, in the Entry text box, type the point score by which you want to search.
Status	The Equals drop-down list box displays the options Draft or Complete.
Template Name	The Equals drop-down list box displays a list of accessible scorecard template names from which you can select. **Note:** By default, only Active templates will be displayed. Refer to Edit My Preferences on page 3-147, if you would like to see the Inactive templates along with the Active templates in the search criteria.
Do Not Show in Report	When the evaluation is used for training purposes, a checkmark will be displayed in this column. The Equals drop-down list box displays the options • Marked • Non Marked

Note: Only one user can be selected and added to the search list from the table.

The following table shows a list of users depending on the logged in user.

Users	List of Users
Administrator	All the active and inactive users available in the system.
Users	**List of Users**
Mentor	• Logged in user. • All the active and inactive users for which the logged in user has Team permission in the user profile. • Users who have shared the evaluations with the logged in user. **Note:** Evaluations can be shared through Agent, Team, and Peer Review.

Agent	• Logged in user. • Users who have shared the evaluations with the logged in user. **Note:** Evaluations can be shared through Agent, Team, and Peer Review.

Click Search to open a window with the following columns.

Column Name	Description
User Name	The user name configured in the Aspect Quality User Definition window.
First Name	The first name configured in the Aspect Quality User Definition window.
Last Name	The last name configured in the Aspect Quality User Definition window.
Switch Name	The switch name for which the user is configured.
Role	The role of the user configured in the Aspect Quality User Definition window (Agent or Mentor).
Status	User Status (Active or Inactive).
Email Address	The email address configured for the user.

3.1.5.1.4 *Evaluation Review*

The Evaluation Review is criteria that pertains to whether the agent or peer is required to review the evaluation.

Criteria Select this...	Description ...and these options display:
Agent	The Equals drop-down list box displays the options Marked or Not Marked. • Marked: Returns those interactions in which at least one of the evaluations is marked for Agent review. • Not Marked: Returns those interactions in which none of the evaluations are marked for Agent review.
Peer	The Equals drop-down list box displays the options Marked or Not Marked. • Marked: Returns those interactions in which at least one of the evaluations is marked for Peer review. • Not Marked: Returns those interactions in which none of the evaluations are marked for Peer review.
Criteria Select this...	**Description ...and these options display:**
Reviewed By Recorded Agent	Retrieves the recorded interaction based on whether the agent has or has not reviewed the agent's own evaluation. From the Equals drop-down list box, select • Yes • No Click on (+) to add the criteria under the Search List section.

Team	The Equals drop-down list box displays the options Marked or Not Marked. • Marked: Returns those interactions in which at least one of the evaluations is marked for Team review. • Not Marked: Returns those interactions in which none of the evaluations are marked for Team review.

3.1.5.1.5 *Interaction Details*

The Interaction Details are criteria that pertain to the agent's extension number, the switch on which the interaction was recorded, or the type of call.

Note: An email initiated by a customer is stored as an interaction in Aspect Quality, but it is not displayed in the Workforce Engagement Management UI. Only when the Agent replies to the customer email, is the interaction displayed for the users in the Workforce Engagement Management UI. Then, the Agent interaction contains the email conversation of both the Agent and the customer.

An email initiated by an Agent is displayed in the Workforce Engagement Management UI, and if the customer replies to the Agent's email, that email is stored as an interaction in Aspect Quality, but it is not displayed in the Workforce Engagement Management UI. If the Agent again replies to the same email, then an interaction displays in Workforce Engagement Management, and that interaction contains the Agent's reply and the customer's conversation.

Criteria Select this...	Description ...and these options display:
ANI (Automatic Number Identification)	ANI represents the calling phone number. From the Show items with value that is drop-down list box, select • Contains • Ends with • Equals • Equals None • Starts with Then, in the Entry text box, type the number by which you want to search.
Assigned Interactions	Interactions assigned to you by a peer will be available in Assigned Interactions. Select Shared with me from Equals drop-down, then click on (+) button.

Criteria Select this...	Description ...and these options display:

Criteria Select this...	Description ...and these options display:
***Customer Email Address	This criteria uses to find the interactions based on the registered email address of the customer. From the Show items with value that is drop-down list box, select • Contains • Ends with • Equals • Equals None • Starts with Then, in the Entry text box, type the registered email ID by which you want to search.
***Customer Name	This criteria uses to find the interactions based on the registered name of the customer. From the Show items with value that is drop-down list box, select • Contains • Ends with • Equals • Equals None • Starts with Then, in the Entry text box, type the registered name by which you want to search.
***Message Count	This criteria uses to find the interactions based on the message count. From the Show items with value that is drop-down list box, select • Equals • Greater than • Greater than or equals • Less than or equals • Not equals Then, in the Entry text box, type the number by which you want to search. **Note:** The number must be within the range of 1 to 10000.
Hidden	Hidden feature is only available when the user has Hide/Show Interactions right flagged in the user profile. From the Equals drop-down list box, select • Yes - Interactions which are reserved for Hide/Show Interaction • No - Interactions which are not reserved for Hide/Show Interaction. Click the (+) button to add the criteria under the Search List section.

DNIS (Dialed Number Identification Service)	DNIS represents the number that the caller dialed. From the Show items with value that is drop-down list box, select • Contains • Ends with • Equals • Equals None • Starts with Then, in the Entry text box, type the number by which you want to search.
Direction	Call direction for the agent. The Equals drop-down list box displays the list of interaction types. • None • Inbound • Outbound
Extension	Extension number of the device. From the Show items with value that is drop-down list box, select • Contains • Ends with • Equals • Equals None • Starts with Then, in the Entry text box, type the number by which you want to search.
Task Name	It is a non-recording evaluation. From the Show items with value that is drop-down list box, select • Contains • Ends with • Equals • Equals None • Starts with Then, in the Entry text box, type the number by which you want to search.
Type	Contains all of the interaction types. The **Equals** drop-down list box displays the list of interaction types. • ACD Call • Chat • IVR Call • Inbound Direct Call • Outbound Direct Call • Outbound Queued Call • Task • Unknown

3.1.5.1.6 *Interaction Handling*

Criteria **Select this...**	**Description** **...and these options display:**
Agent	Search text box. • You can search without entering any filter value. A grid displays a list of all active users associated with the active switch. • You can also search by typing the partial or the complete User name. **Note:** This option is only available for Team Lead/Manager and Account Owner.
Work Type	Search text box. • You can search without entering any filter value. A table displays a list of all active agent groups with their associated switch. • You can also search by typing the partial or the complete Agent Group name. **Note:** This option is only available for Administrators.
Application	Search text box. • You can search without entering any filter value. A table displays a list of all active agent groups with their associated switch. • You can also search by typing the partial or the complete Agent Group name. **Note:** This option is only available for Administrators.
Initial Work Type	• You can search without entering any filter value. A table displays a list of all active agent groups with their associated switch. • You can also search by typing the partial or the complete Agent Group name. **Note:** This option is only available for Administrators.
Team	Search text box. • You can search without entering any filter value. A table displays a list of all active teams with their associated switch. • You can also search by typing the partial or the complete Team name.

Example: When you select the **Agent** criteria and click **Search** in the **Search** field, the window that opens displays the following columns. You can resize any of the columns in the grid.

Us...	Fir...	La...	Sw...	Role	St...	E...
User.Chat...	User03	User	UIP ENCTIPS...	Agent	Inactive	User.Chat...
ericagac	Erica Nelida	Garcia de la Torre	PROD_UIP	Agent	Inactive	ericaga-c@herbal...
SOTemp108	Sales	Order Temp108	DR_UIP	Agent	Inactive	SOTemp1...
marivimo	Marivi	Moncayo	PROD_UIP	Agent	Active	marivimo...
luisagec	LUISA GERALDI...	GARCIA TORRES	DR_UIP	Agent	Active	luisage.c...
enriqueespc	Enrique	Espinosa Martin del	PROD_UIP	Agent	Inactive	enriquees...

Column Name	Description
First Name	The first name of the user configured in the Aspect Quality User Definition window.
Last Name	The last name of the user configured in the Aspect Quality User Definition window.
Switch Name	The switch name for which the user is configured.
Role	The role of the user configured in the Aspect Quality User Definition window (Agent or Mentor).
Status	The status of the Agent or Mentor (Active or Inactive)
Email Address	The email address configured for the user.

Note: By default, only Active users will be displayed. Refer to Edit My Preferences on page 3147, if you would like to see the Inactive users along with the Active users in the search criteria.

It is also applicable for the **Work Type**, **Application**, and **Team** criteria.

3.1.5.1.7 *Interaction Statistics*

The Interaction Statistics contain criteria that pertains to the time duration of the interaction.

Criteria Select this...	Description ...and these options display:
Duration	From the Show items with value that is drop-down list box, select • Equals • Greater Than • Greater Than or Equals • Less Than • Less Than or Equals • Not Equals Then, in the Entry text box, type the time (format: 00:00:00) by which you want to search.

Hold Count	The total number of times a call put on hold. From the Show items with value that is drop-down list box, select • Equals • Greater Than • Greater Than or Equals • Less Than • Less Than or Equals • Not Equals Then, in the Entry text box, type the time (format: 00:00:00) by which you want to search.
Maximum Hold Time	When a call put on hold and the hold time is maximum. From the Show items with value that is drop-down list box, select • Equals • Greater Than • Greater Than or Equals • Less Than • Less Than or Equals • Not Equals Then, in the Entry text box, type the time (format: 00:00:00) by which you want to search.
Criteria Select this...	**Description ...and these options display:**
Total Hold Time	When an agent places the call on hold multiple times, the sum of all hold duration is the Total Hold Time. From the Show items with value that is drop-down list box, select • Equals • Greater Than • Greater Than or Equals • Less Than • Less Than or Equals • Not Equals Then, in the Entry text box, type the time (format: 00:00:00) by which you want to search.

3.1.5.1.8 *Recording Information*

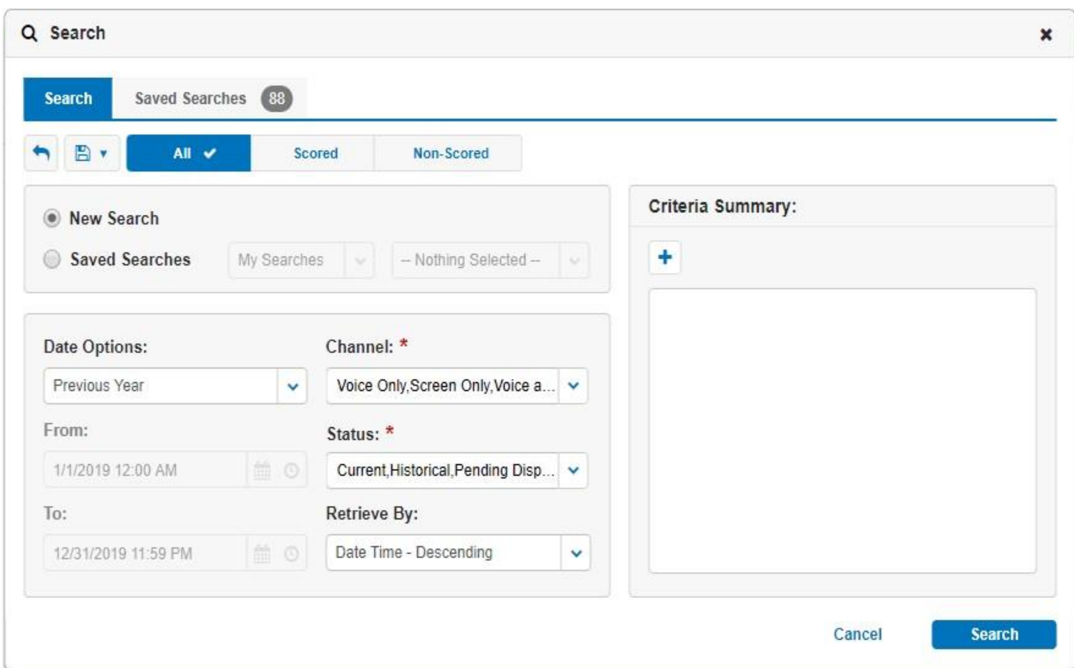
Criteria Select this...	Description ...and these options display:
Matched Rule	The rules that allow the interaction to be recorded. From the Equals drop-down list, select the rule based on the requirement.

Recording Reason	From the Contains drop-down list box, select any one or multiple options based on the requirement • Agent Requested • API Requested • Logging • Mentor Requested • Parent Monitored • Recording Rule matched
Terminal Number	From the Show items with value that is drop-down list box, select • Contains • Ends with • Equals • Equals None • Starts with Then, in the Entry text box, type the terminal number by which you want to search.

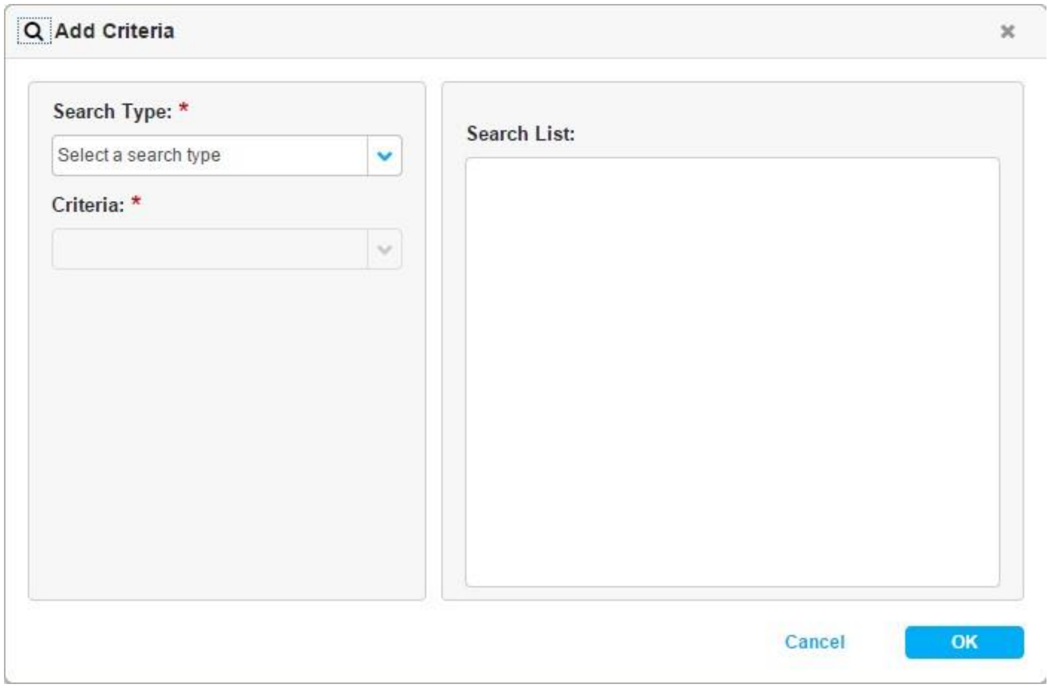
3.1.5.2 Add Criteria

To add criteria to a search, perform the following steps.

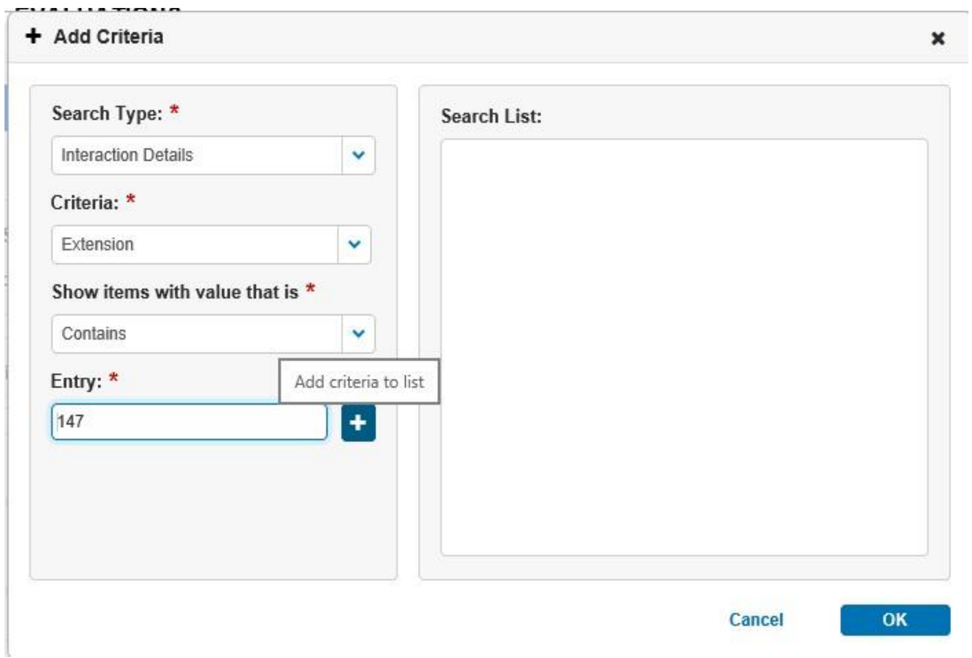
1. On the Search window, click Add Criteria  in the Criteria Summary.



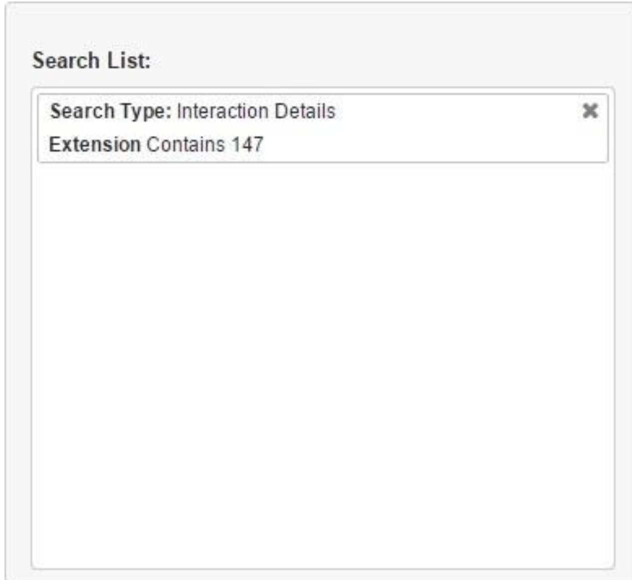
The Add Criteria window opens.



2. From the drop-down list, select a Search Type.
3. From the drop-down list, select Criteria.
4. Depending on the search type and criteria that you selected, based on the tables in Search Types and Criteria, select the remaining criteria and enter the remaining values.
5. Click Add criteria to list.

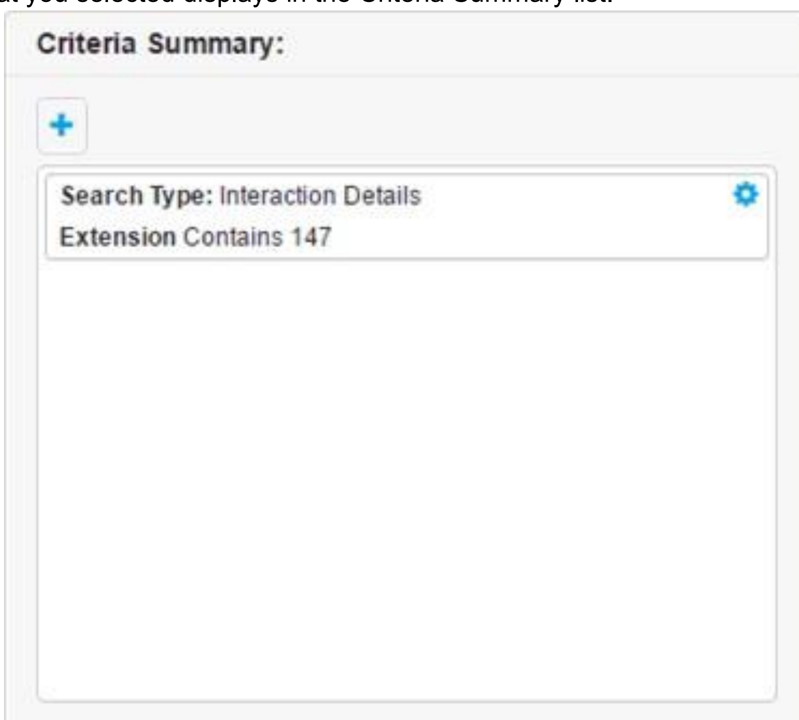


The criteria displays in the Search List.



Note: To remove the search criteria from the Search List, click X.

6. Click OK. The Add Criteria window closes, the Search window becomes active, and the criteria that you selected displays in the Criteria Summary list.



7. To continue adding criteria, click Add Criteria and repeat the steps in this procedure.

   Note: If you add different criteria, the search performs a logical AND operation. If you add the same criteria with different values, the search performs a logical OR operation.

8. When finished adding all the criteria, click OK. The Search Results displays with the results of the search in the list.

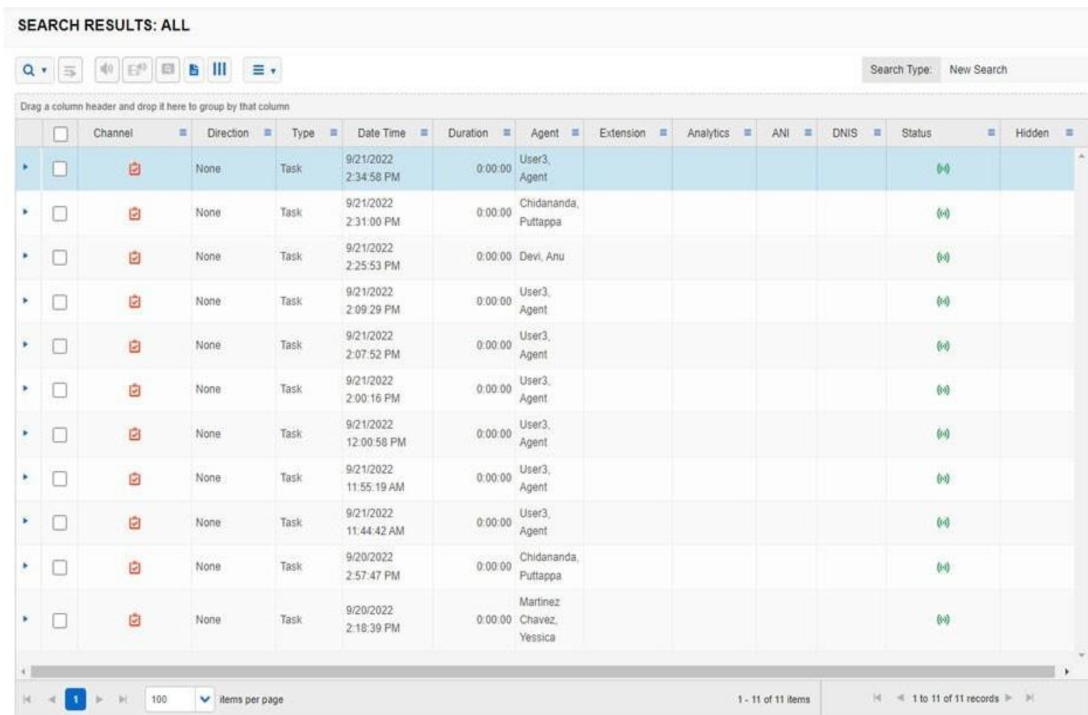
9. Click Search. The Search Results window opens.

   Note: For information about the search results, see Using the Search Results Window.

3.2 Using the Search Results Window

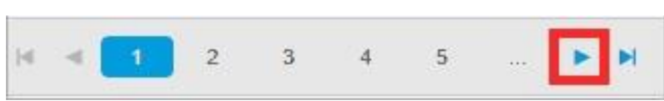
Once you have obtained the results from the search, you may want to arrange the information so that it is most useful to you. (To search for an interaction, see Performing a Search on page 3-40.) This includes understanding how to use the tools on the window, such as:

- Pagination
- Group Search Results
- Resize Columns
- Use the Search Results Menu



3.2.1 Pagination

By default, the system displays the interactions that you searched within a selected time period (refer Select a Date Option), based on the selected view such as All, Scored and NonScored (refer Configure Search Results Grid), and lists the most recent 1000 interactions. Each page displays 100 interactions at a time and if you want to view the next 100 interactions within the 1000 interactions, click the pagination controls at the bottom-left of the window as shown below.

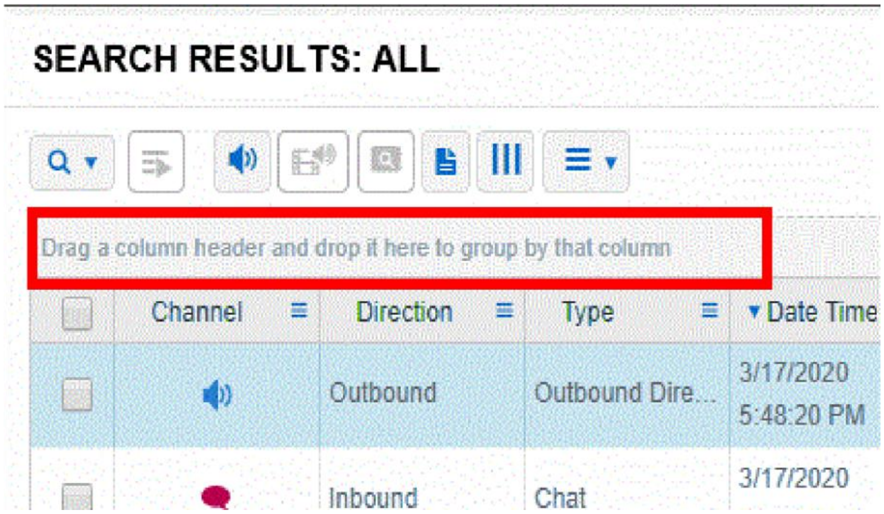


To view the next 1000 interactions, click the pagination controls at the bottom-right of the window.
Example: The administrator is searching with a date range from 1st Jan 2019 to 31st December 2019 and there are a total of 12397 records available in the database. To view the next 1000 records or the last 1000 records, click on the pagination controls as shown below.

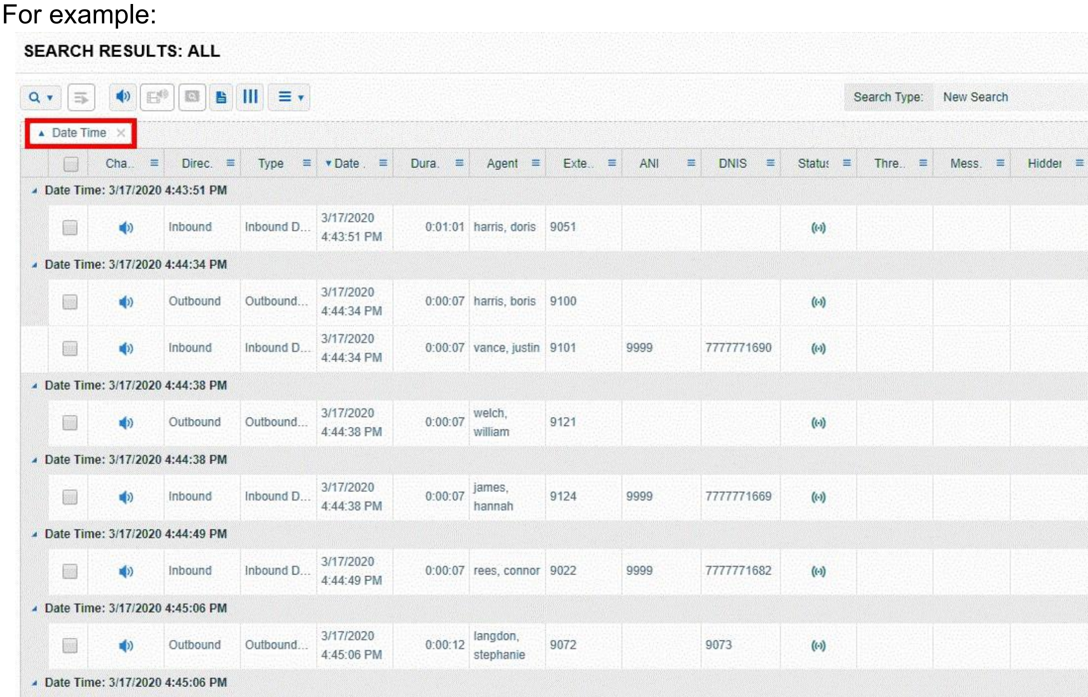
In this scenario, if you click on the icon, the last 397 records will appear. The pagination will be shown like “12001 to 12397 of 12397 records” at the bottom-right of the window.

3.2.2 Group Search Results

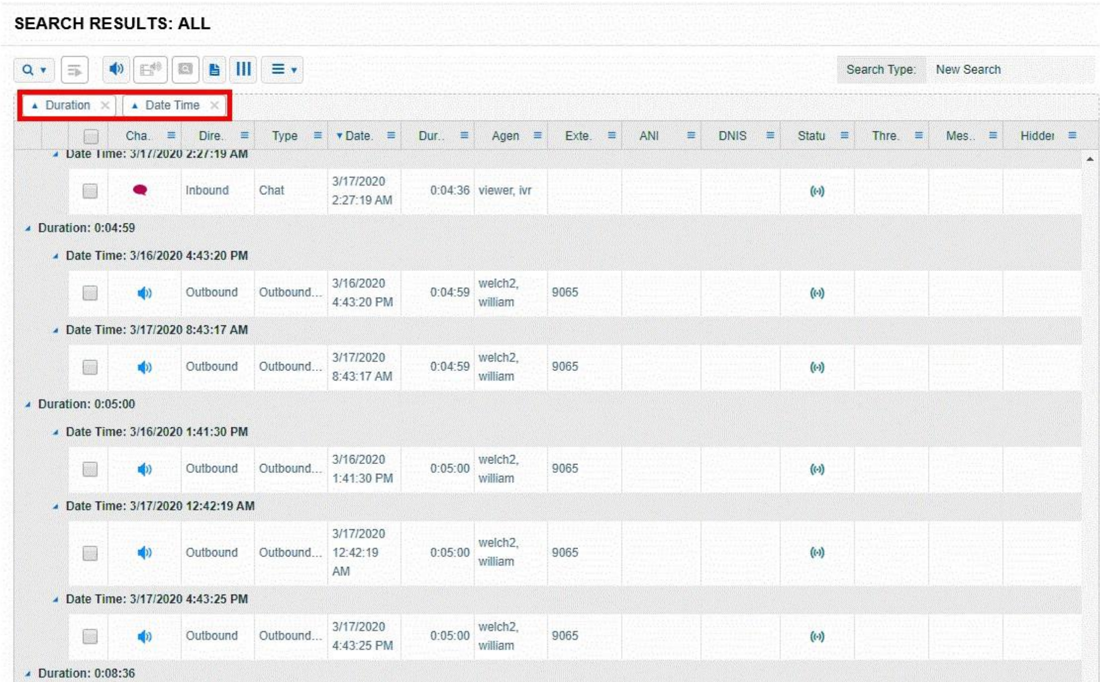
You can group data by column when you drag-and-drop the column from the table header to the top of the table where it says Drag a column header and drop it here to group by that column.



For example:



You can also group by multiple columns by dragging the next column into the same header.



To edit the grouping, click the X of the column that you want to remove from the group.

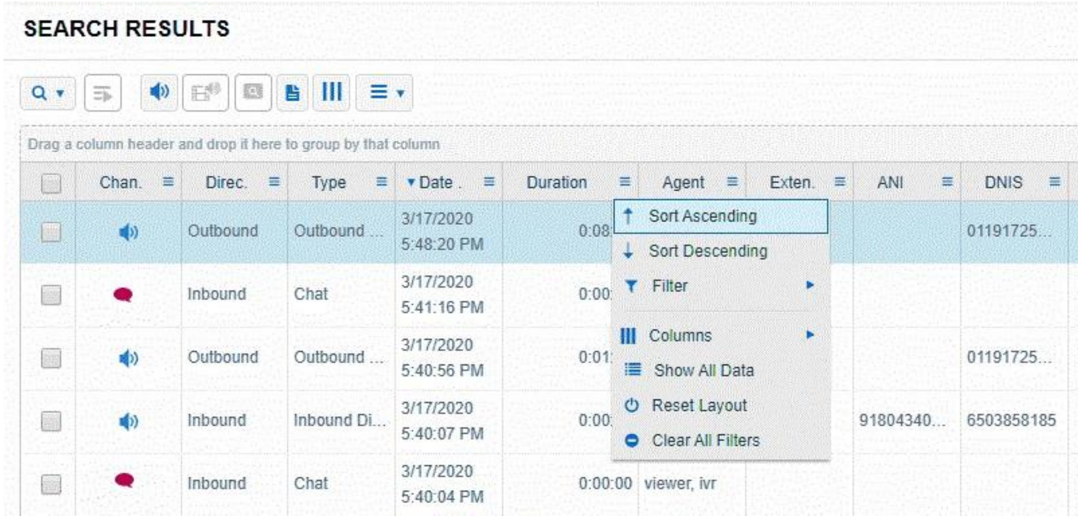
3.2.3 Resize Columns

If you cannot see the complete content of a column, you can resize the column so that you can see the complete content.

- To resize the column, hover the mouse on the right border of the column that you want to resize so that the mouse displays a double-sided arrow, then click-and-drag the column border.
- To automatically adjust the size of the column to the width which displays all of its content, double-click the right border of the column that you want to resize.

3.2.4 Use the Search Results Menu

Once you view a set of search results or scored interactions, you have access to a drop-down menu from the main menu icon next to each column name. You can use this menu to customize what columns display and how the data displays (grouped or not grouped, sorted ascending or descending). The Search Results or Scored Interactions windows retain the changes that you make to the window, and persists when you close the browser, or open a new instance of the browser.

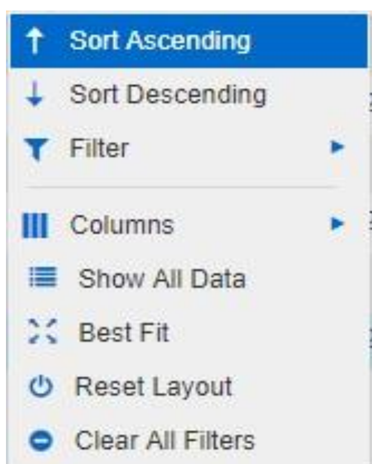


3.2.4.1 Sort Columns

By default, the system sorts the search results on the start date time of the interaction in descending order, so that all related interactions display on the first page.

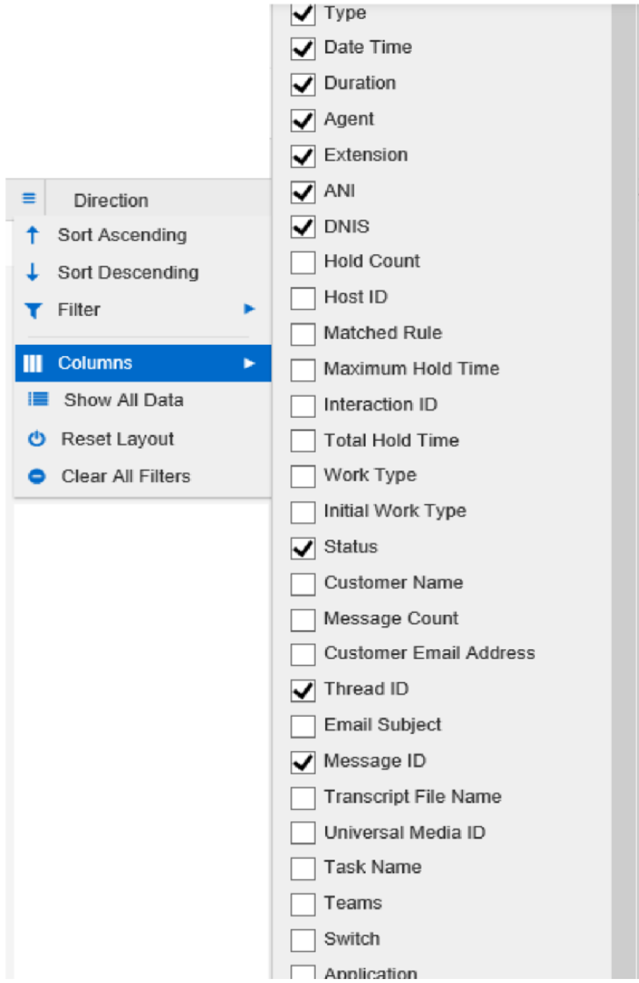
You can sort any of the columns that display in the search results, although only a default list of columns display.

To sort any column, click the main menu icon next to the column name, and the column menu opens. You can click Sort Ascending or Sort Descending, depending on how you want to sort your column.



3.2.4.2 Add or Remove Column Names

You can remove or add the columns that you want to view by clicking the column header option next to any column name and selecting Columns.



The Columns menu displays the name of each column. Select or deselect the check box(es) next to the column name that you want to view or remove.

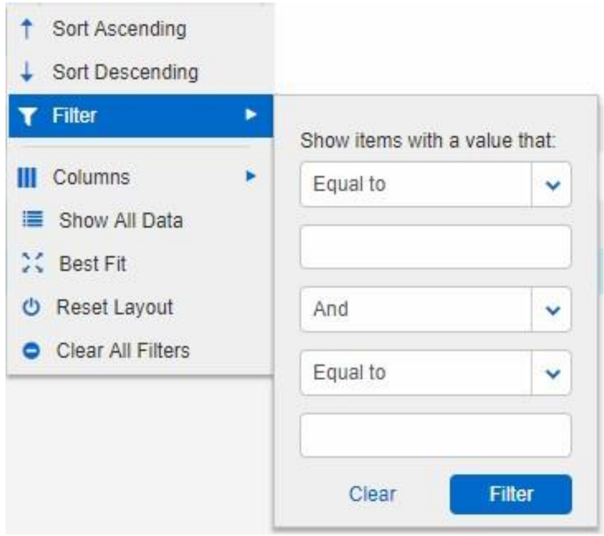
Note: For descriptions on each column name, see Column Names on page 3-96.

3.2.4.3 Filter Criteria

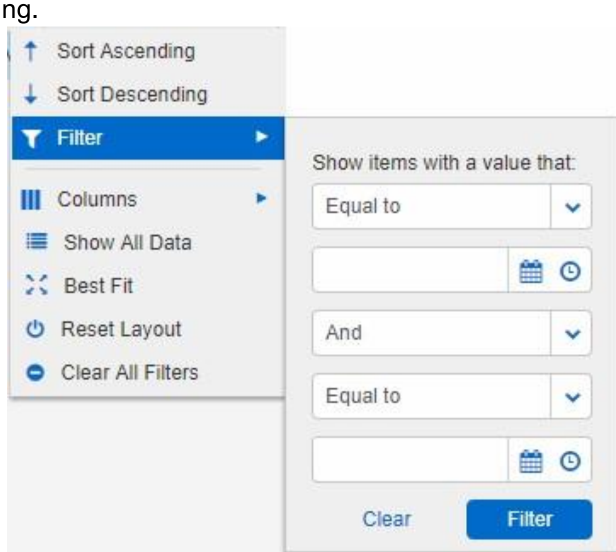
From the Search Results or Search Evaluations pane, you can narrow the search of the database by changing the criteria of a particular column. For more information on obtaining search results, see Chapter 3, Search for an Interaction.

To change the criteria of a column, perform the following steps.

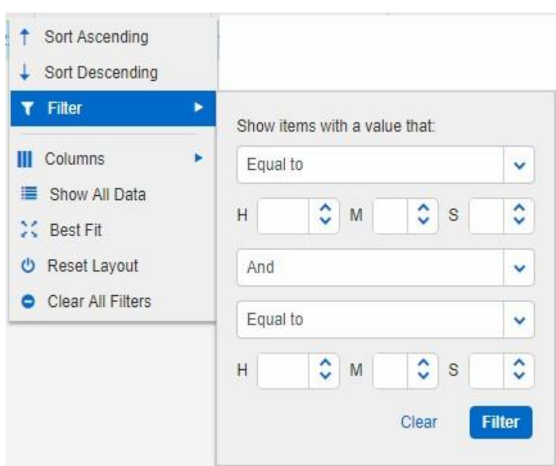
1. Click the main menu icon next to the column name of the criteria that you want to change.
2. Select Filter. Depending on which column you selected, a menu displays with the criteria that you can change.
   For example, if you want to change the criteria for the Channel, Direction, Agent, Extension, ANI, DNIS, or Status columns, the Filter drop-down list displays the following.



If you want to change the criteria for the Date/Time column, the Filter drop-down list displays the following.



If you want to change the criteria for the Duration column, the Filter drop-down list displays the following.



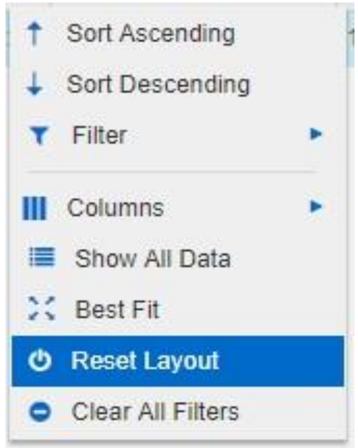
3. Change the Filter criteria.

Note: If you want to start with a blank Filter drop-down list box, click Clear.

4. Click Filter. The Search Results automatically update.

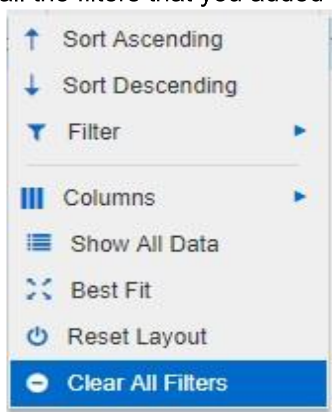
3.2.4.4 Reset Layout

Select Reset Layout to restore the table layout to the factory defaults.



3.2.4.5 Clear All Filters

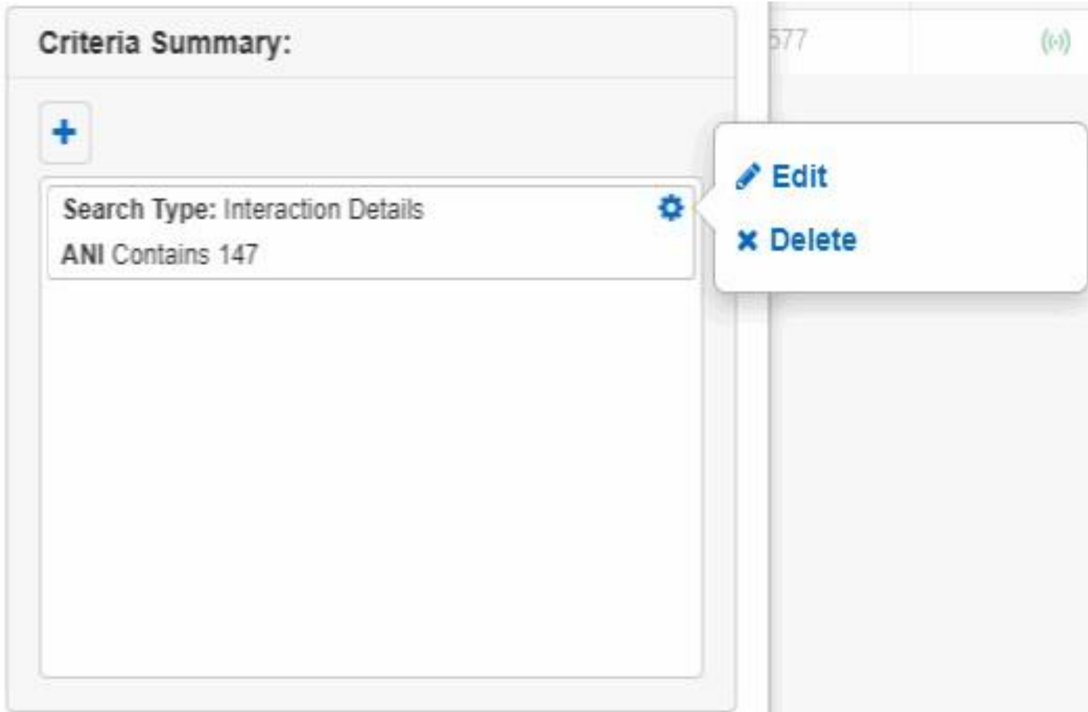
Select Clear All Filters to delete all the filters that you added to this search.



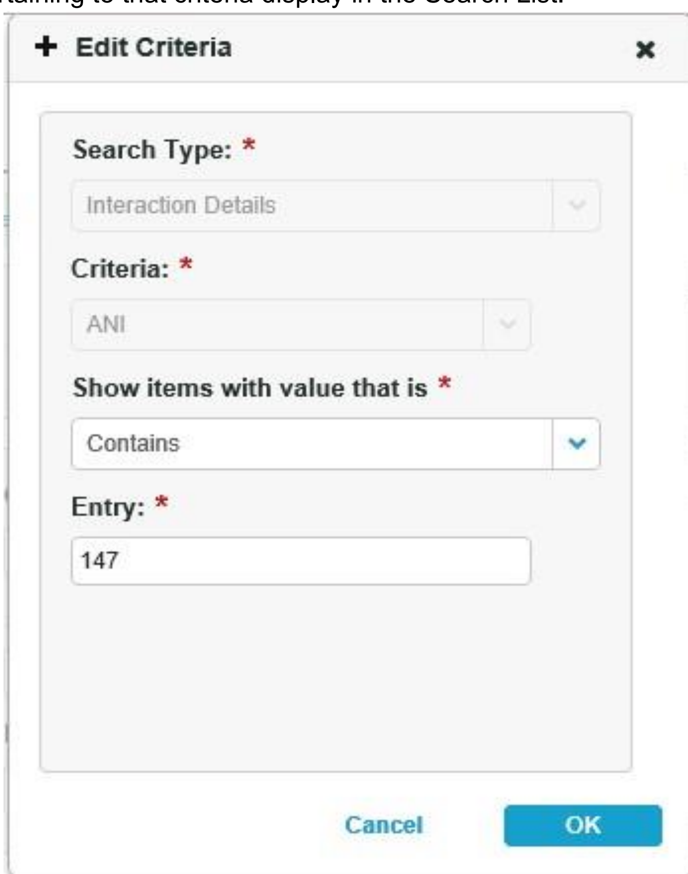
3.2.5 Edit or Delete Criteria

Follow the steps below to edit or delete the criteria in the Criteria Summary.

1. In the Criteria Summary list, in the criteria that you want to edit or delete, click Action > Edit or Action > Delete.



Clicking Action > Delete automatically deletes the criteria from the Criteria Summary list. Clicking Action > Edit displays the Edit Criteria window, with the Search Type, Criteria, and other fields pertaining to that criteria display in the Search List.



2. Modify the fields you want to change.

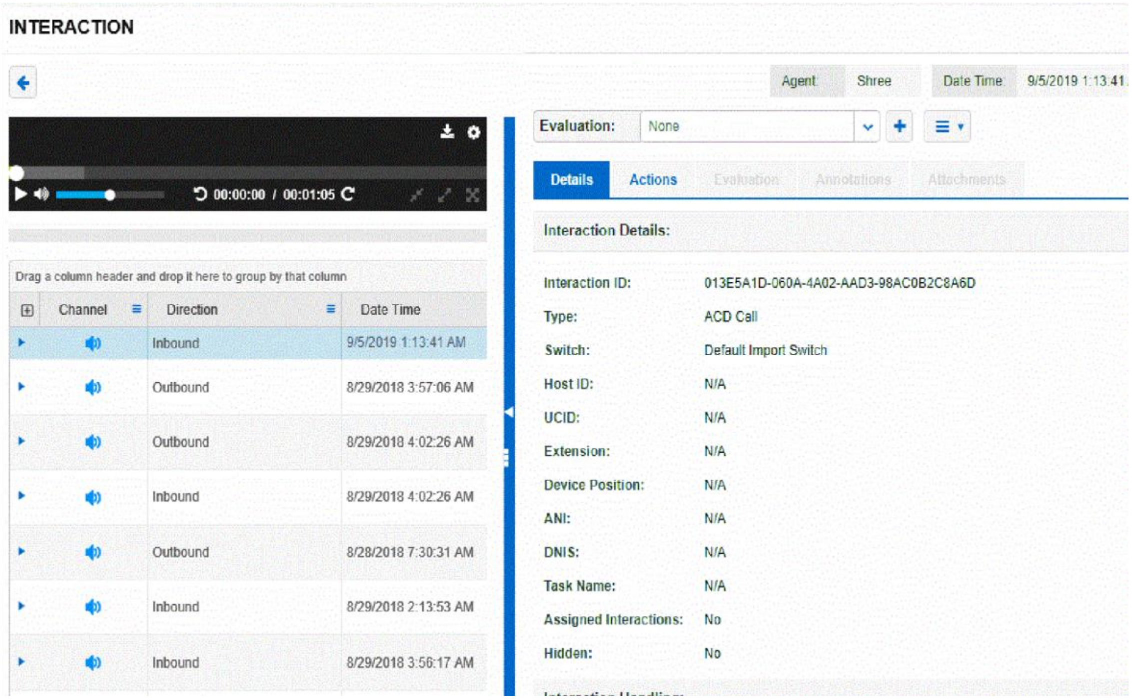
3. Click OK. The new criteria displays in the Criteria Summary pane.

   OR

   To cancel the update, click Cancel.

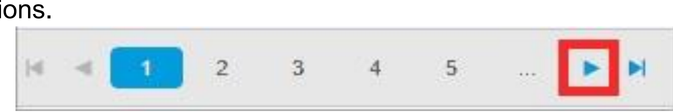
3.2.6 Interaction Window

When you select an interaction to review, or you create a playlist of interactions, the Interaction window opens. Any previously selected interaction in the Search window displays in the left pane below the Media Player in a table. The first interaction in the list is selected by default.



3.3 Viewing Search Results

Click on the pagination controls on the bottom-left of the search results window to control the viewing of the interactions.



To view the next 1000 interactions, click the pagination controls at the bottom-right of the window.

Example: The administrator is searching with a date range from 1st Jan 2019 to 31st December 2019 and there are a total of 12397 records available in the database. To view the next 1000 records or the last 1000 records, click on the pagination controls as shown below.

In this scenario, if you click on the  button, the last 397 records will appear. The pagination will be shown like “12001 to 12397 of 12397 records” at the bottom-right of the window.

Below is the table to view interactions by different personas:

Persona	Description

Account Owner	Account Owner can view all the available interactions.
Persona	**Description**
Team Lead / Manager	Team Lead or Manager can view all the interactions of the teams, which they manage.
Agent	Agent can view only their own interaction.

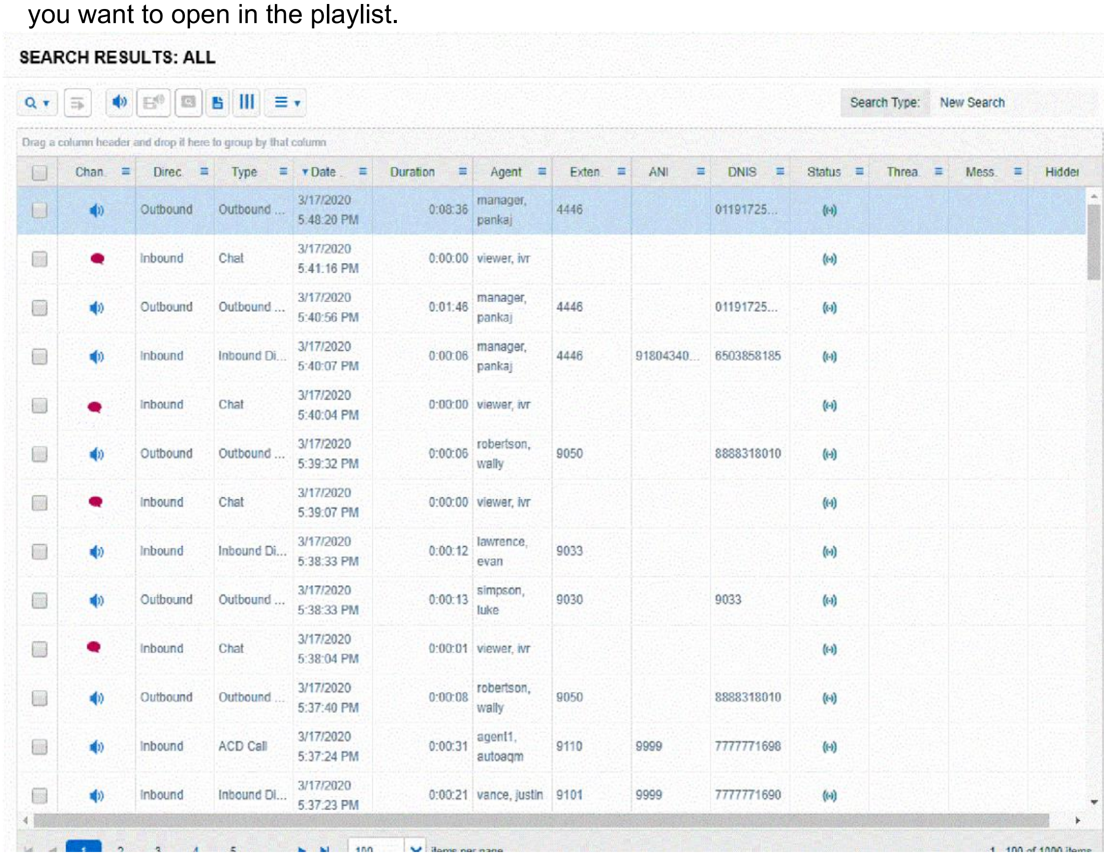
3.3.1 Create a Playlist

You can select more than one interaction, as a group, to listen to recordings. Selecting more than one interaction means that you are creating your own playlist.

In the following example, the procedure creates a playlist from the Interaction window.

To create a playlist, perform the following steps.

1. Begin by Performing a Search for the interactions to which you want to listen or view.
2. In the Search Results pane, in the left column, select the checkbox of the interactions that you want to open in the playlist.



Note: You can select up to ten (10) interactions for a playlist.

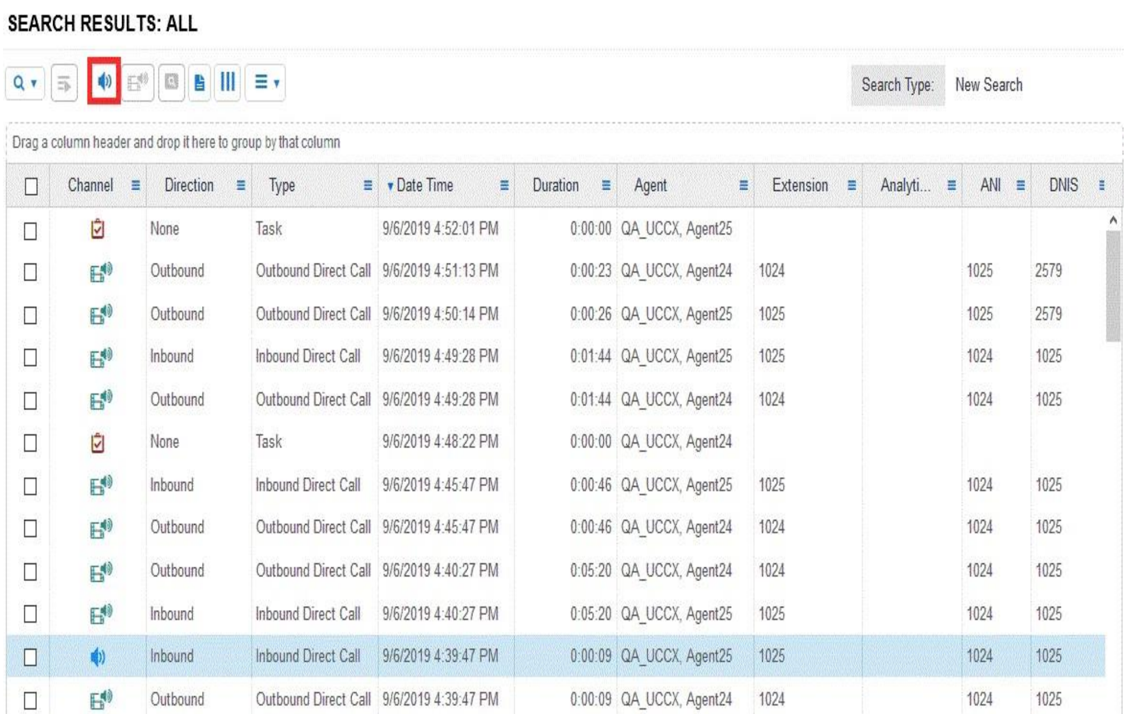
3. Click Create Playlist.

4. Depending on the type of interaction that you want to view, select the following option.
    - Quick View of Audio Interaction in the Media Player

3.3.1.1 Quick View of Audio Interaction

If the user wants to listen or download the recording, follow the steps below to listen an audio interaction or download the audio interaction.

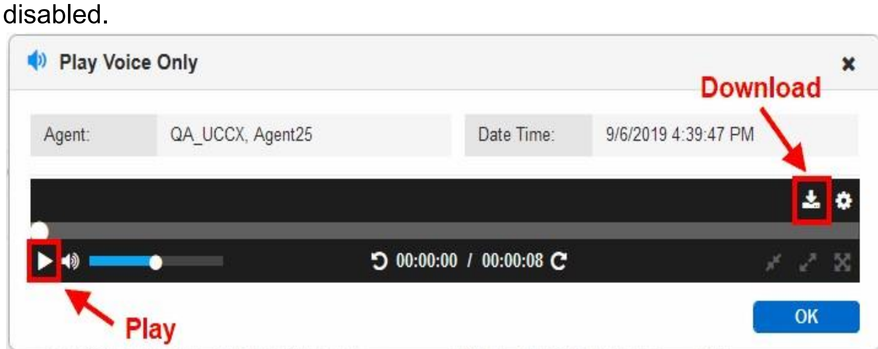
1. Select the audio interaction and click on the Play Voice Only button as shown below.



Note: After selecting the audio interaction, only the Play Voice Only button will be enabled as the interaction is voice interaction.

2. Click on Play button to listen the audio and click on Download button to download the media file as shown below.

Note: The user must have access to download the media if not, the Download button will be disabled.

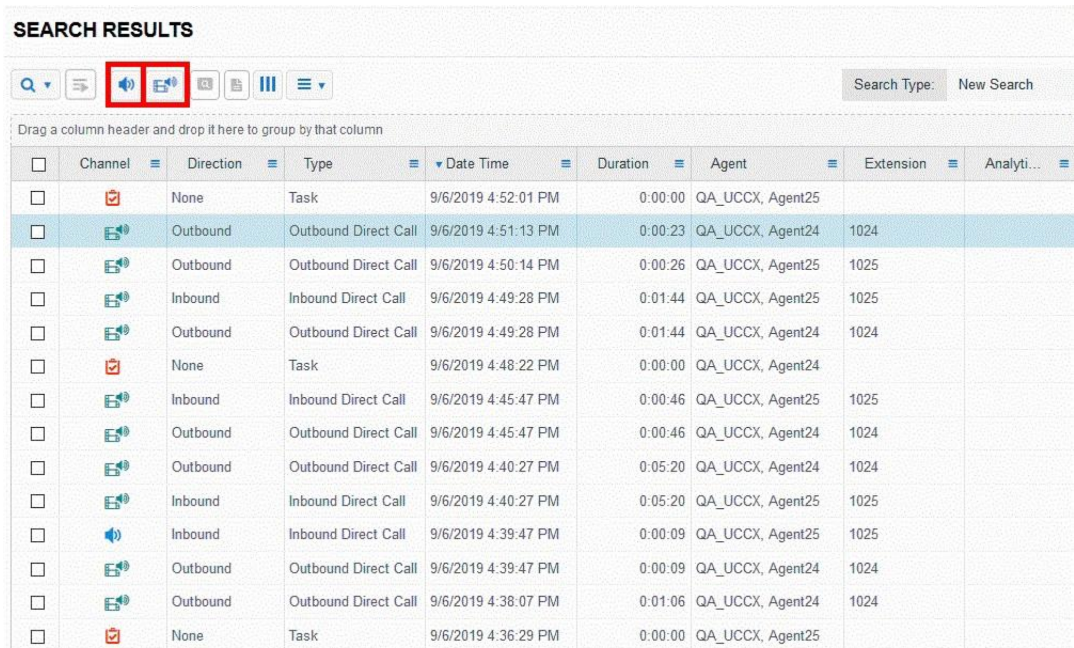


3. Click on OK button to close the Play Voice Only window.

3.3.1.2 Quick View of Voice and Screen Interaction

If the user wants to listen or download the recording, follow the steps below to listen or download the voice and screen interaction.

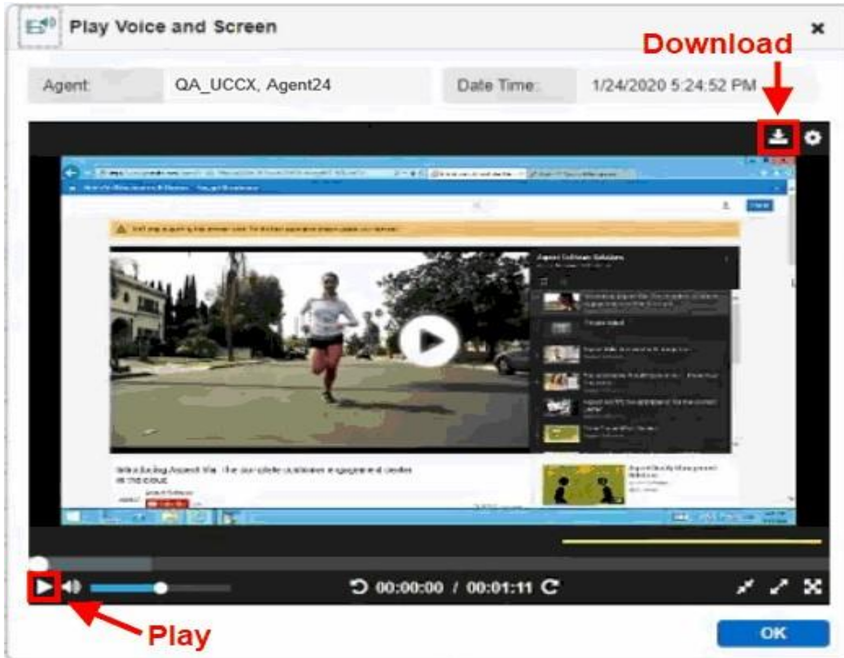
1. Select the voice and screen interaction as shown below.



Note:

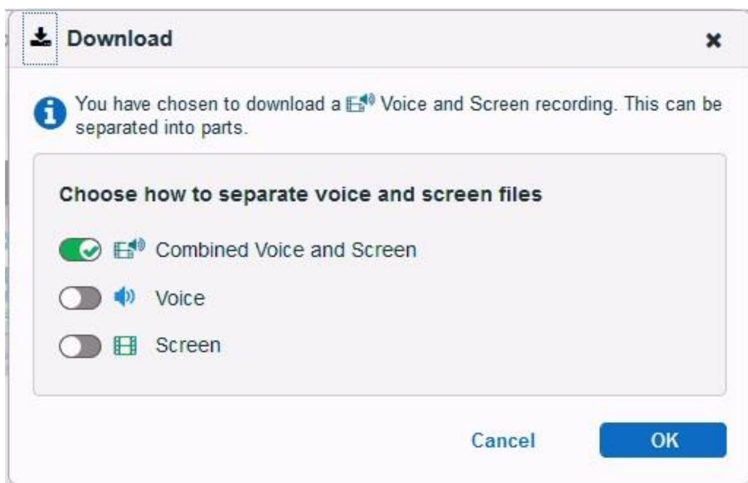
- After selecting the interaction, the Play Voice Only and Play Voice and Screen button will be enabled as the interaction is voice and screen interaction.
- When Voice and Screen interaction is expected but the Voice or audio is missing (- This icon is available under the Channel column for the interaction) then only the Play Voice and Screen button will be enabled and the Play Voice Only button will be disabled.
- When Voice and Screen interaction is expected but the Screen is missing (- This icon is available under the Channel column for the interaction) then only the Play Voice Only button will be enabled and the Play Voice and Screen button will be disabled.

2. Click on the Play Voice Only button to listen only audio as shown in step 2, Quick View of Audio Interaction or click on the Play Voice and Screen button. The Play Voice and Screen window appears as shown below.



3. Click on Play button to listen and view the interaction
4. Click on Download button to download the media file. The Download window appears as shown below.

   Note: The user must have access to download the media if not, the Download button will be disabled.



Note:

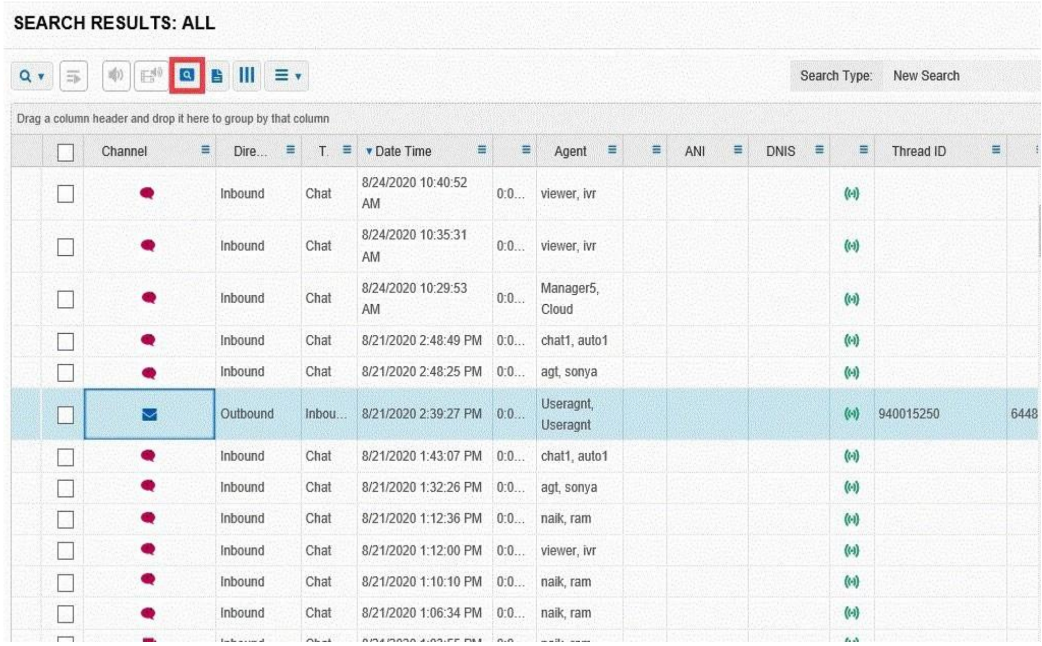
- Toggle-on the Combined Voice and Screen button to download the screen file with audio.
- Toggle-on the Voice button to download only audio file.
- Toggle-on the Screen button to download only screen file.

5. Click on OK button to complete the download.

3.3.1.3 Quick View of Email Interaction

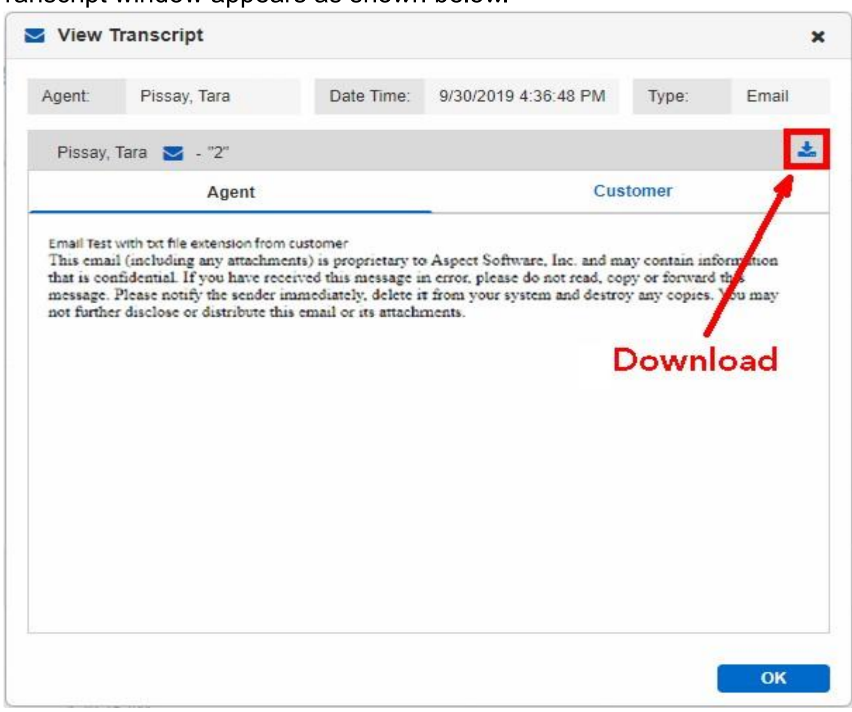
If the user wants to view or download the email interaction, follow the steps below.

1. Select the email interaction and click on the View Transcript button as shown below.



Note: After selecting the email interaction, only the View Transcript button will be enabled.

2. The View Transcript window appears as shown below.



3. Click on the Download button to download the interaction.

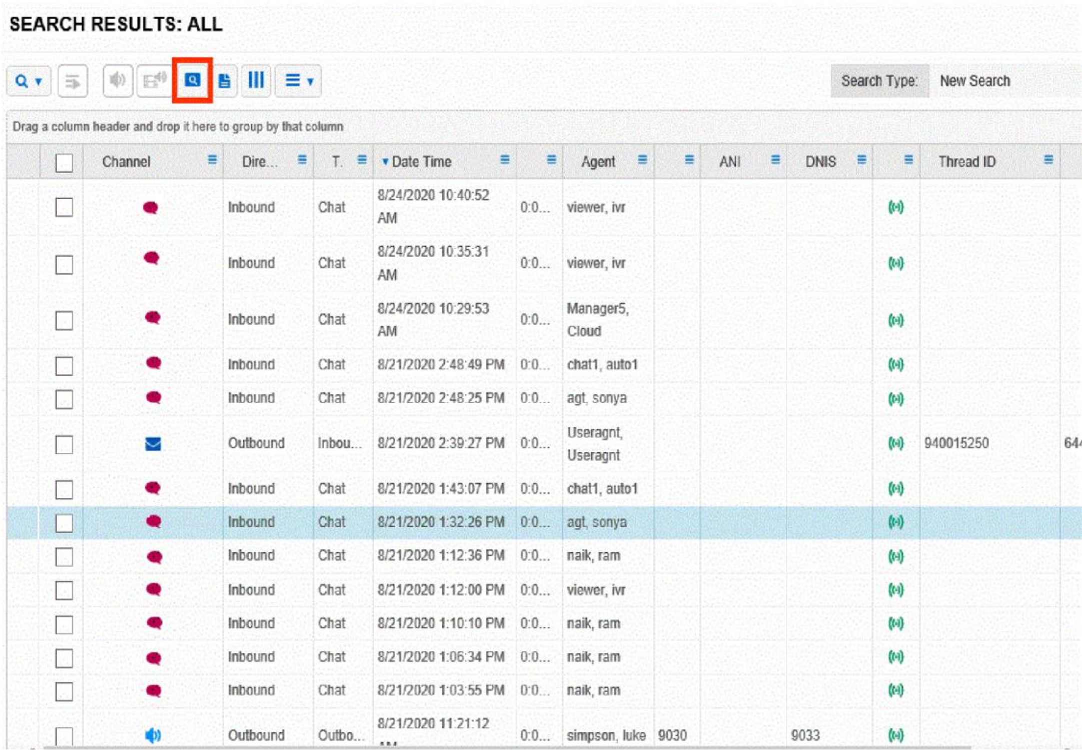
   Note: The user must have access to download the Email interaction if not, the Download button will be disabled.

4. Click OK button to close the View Transcript window.

3.3.1.4 Quick View of Chat Interaction

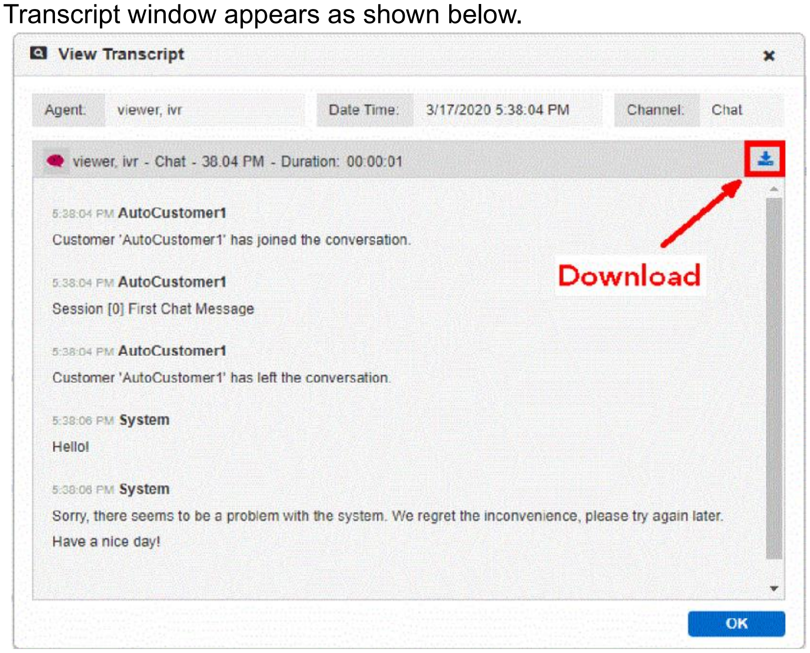
If the user wants to view or download the chat interaction, follow the steps below.

1. Select the chat interaction and click on the View Transcript button as shown below.



Note: After selecting the chat interaction, only the View Transcript button will be enabled.

2. The View Transcript window appears as shown below.



3. Click on the Download button to download the interaction.

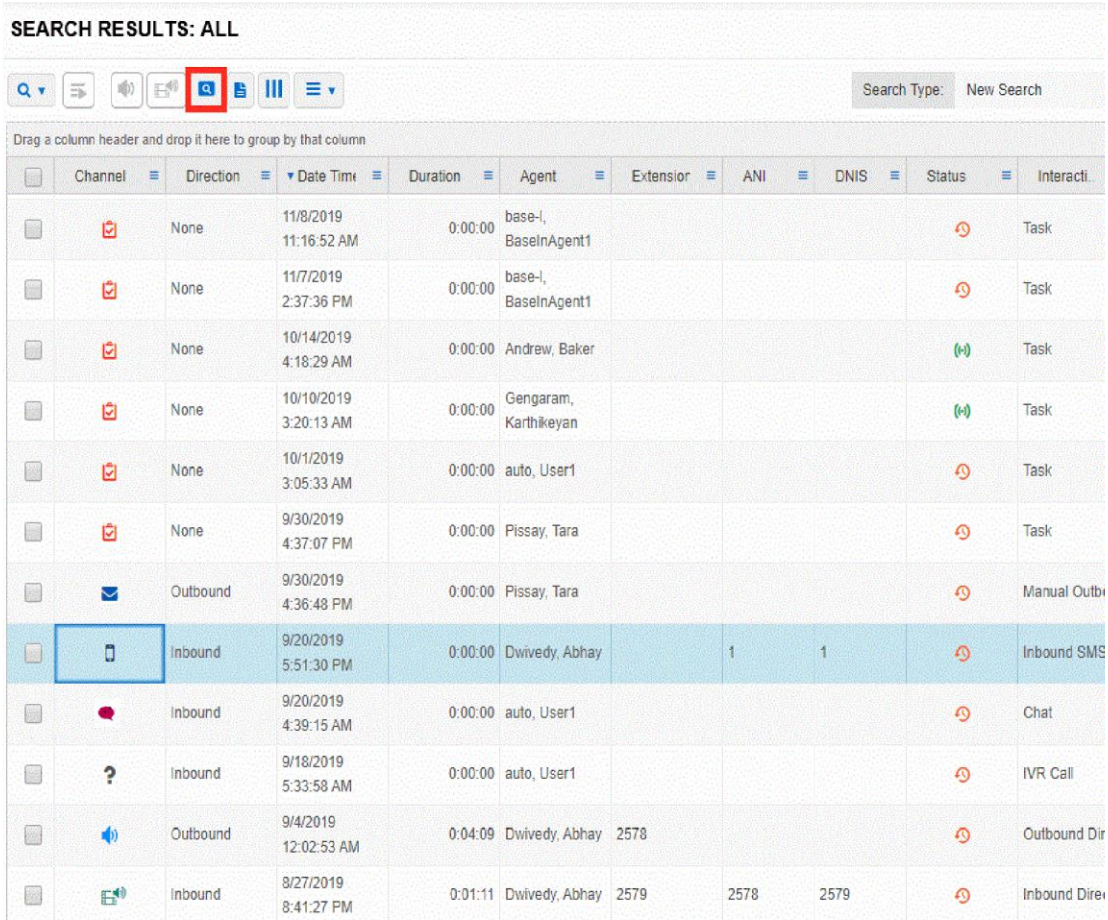
   Note: The user must have access to download the Chat interaction if not, the Download button will be disabled.

4. Click OK button to close the View Transcript window.

3.3.1.5 Quick View of SMS Interaction

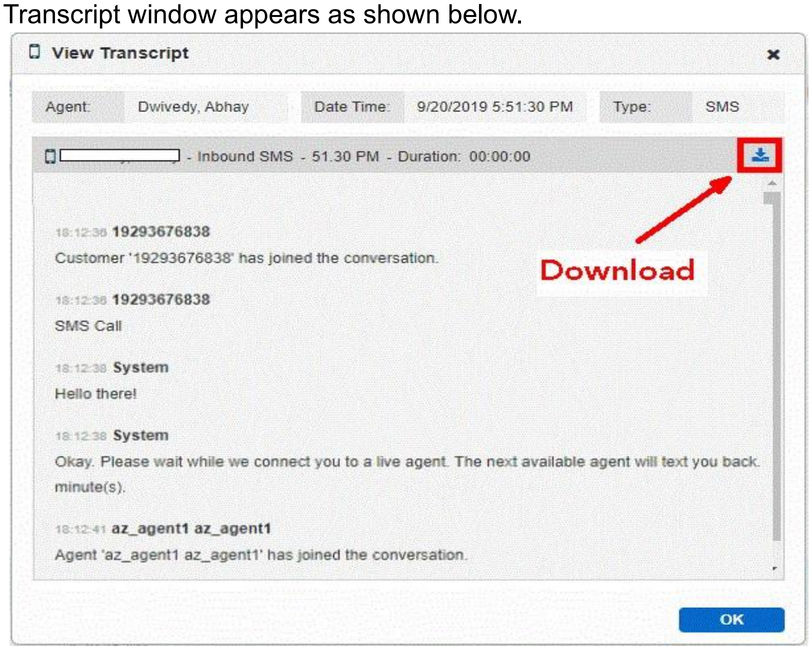
If the user wants to view or download the SMS interaction, follow the steps below.

1. Select the SMS interaction and click on the View Transcript button as shown below.



Note: After selecting the SMS interaction, only the View Transcript button will be enabled.

2. The View Transcript window appears as shown below.



3. Click on the Download button to download the interaction.

   Note: The user must have access to download the SMS interaction if not, the Download button will be disabled.

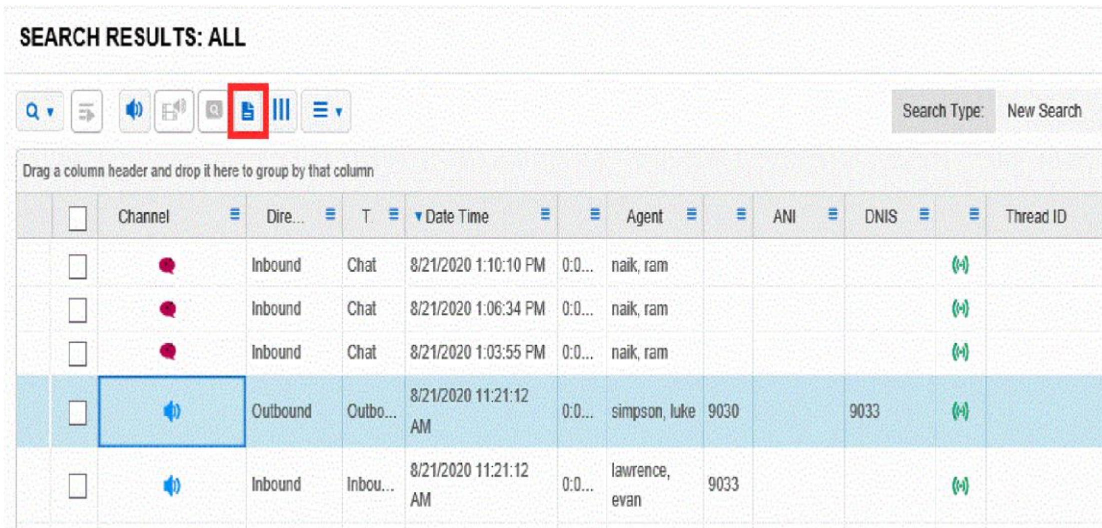
4. Click OK button to close the View Transcript window.

3.3.2 View Interaction Details

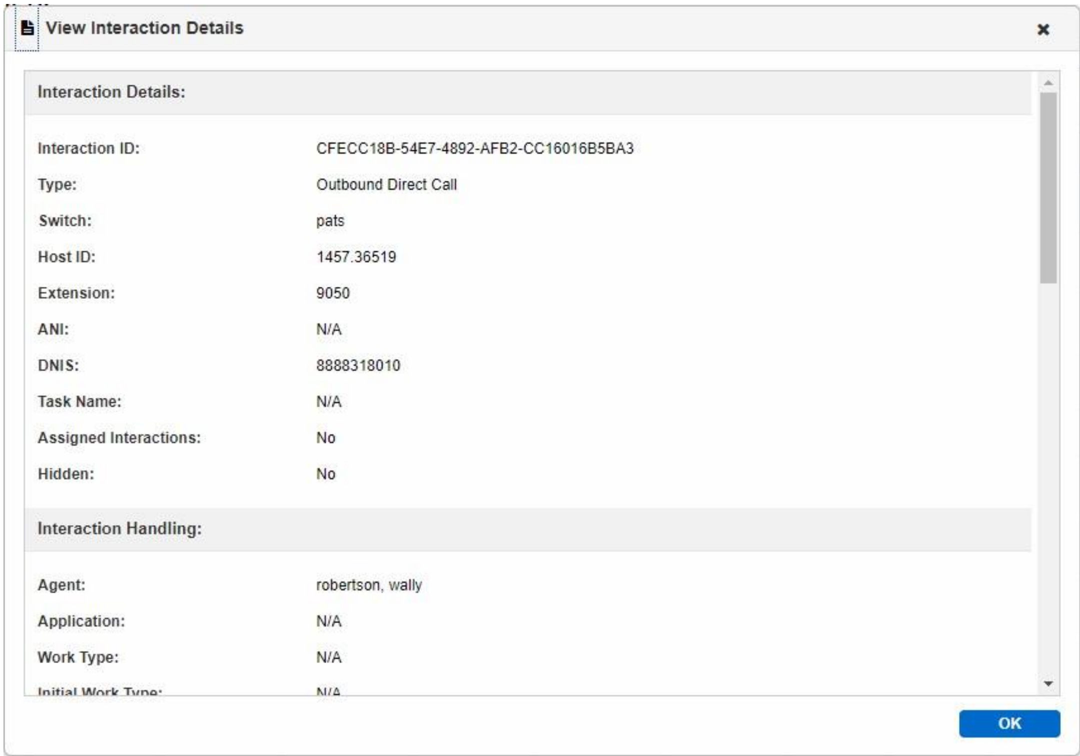
If you want to view only the metadata of the interaction without going away from the Search Results page, then you can select the "View Interaction Details" button which will open the interaction metadata in a dialog.

Follow the steps below to view the metadata such as Interaction Details, Interaction Handling, Interaction Statistics, Recording information, Archiving Information and Custom Information for an interaction.

1. Select the interaction and click on View Interaction Details button as shown below.



2. The View Interaction Details window appears as shown below. Scroll down to view the details such as Interaction Details, Interaction Handling, Interaction Statistics, Recording information, Archiving Information and Custom Information.

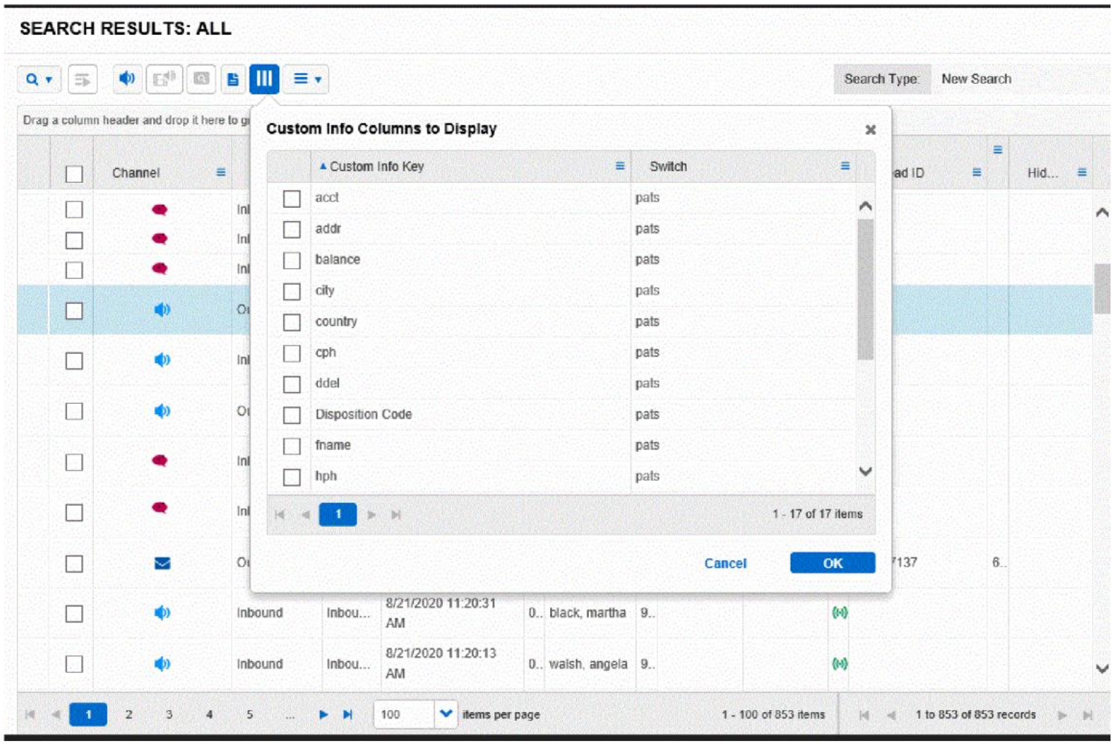


3. Click OK button to close the View Interaction Details window.

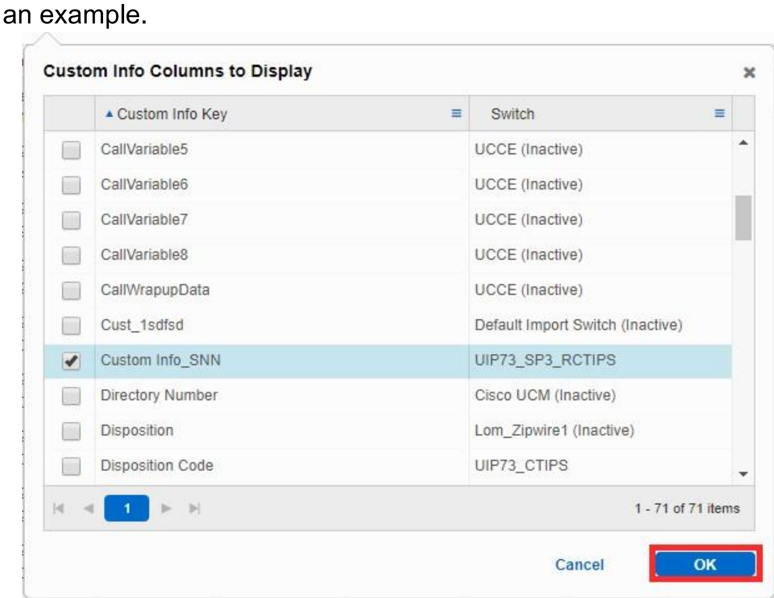
3.3.3 Custom Info Column to Display

Follow the steps below to view one or more Custom Info columns in the Search Results grid. These custom info columns can be used for additional filtering.

1. Click on the  button to add one or multiple custom info columns. The list of Custom Info Key and Switch are displayed, as shown below.

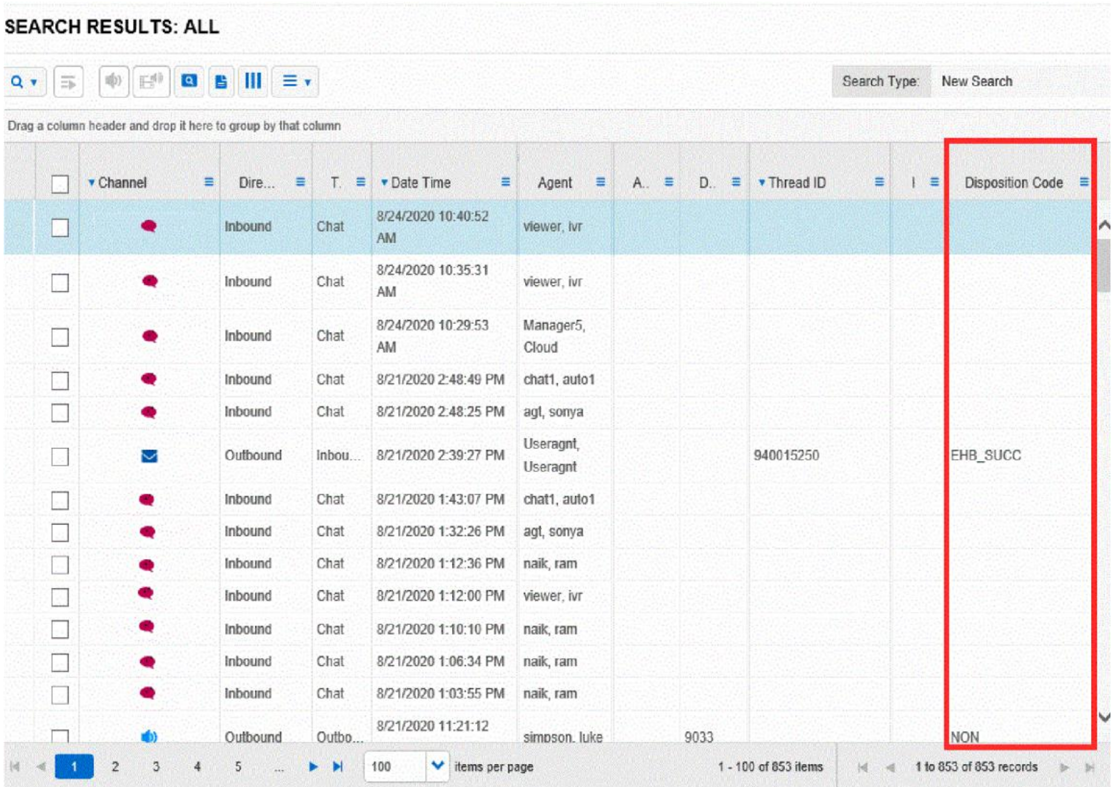


2. Click on the check box to select the Custom Info Key and the adjacent Switch, as shown below. Click OK to add the custom info column in the search grid. Ex: Disposition Code is taken as an example.



Note: Select multiple check box to add multiple custom info columns in the Search Results grid. If you want to multi-select, then drag or use CTRL button in your keyboard and click (You can click anywhere in the row) on the rows that you want to choose.

3. The Custom Info column is added to the search grid, as shown below.



3.3.4 Interaction Menu

The Interaction Menu consists of multiple features such as Show or Hide Interaction, Assigned Interactions, Export Media, Collapse All, Save as my default view, Delete which help you to do various activities with interactions on the Search Results grid.

Note: Interaction Menu will always appear regardless of any user profile right/permission for the user.

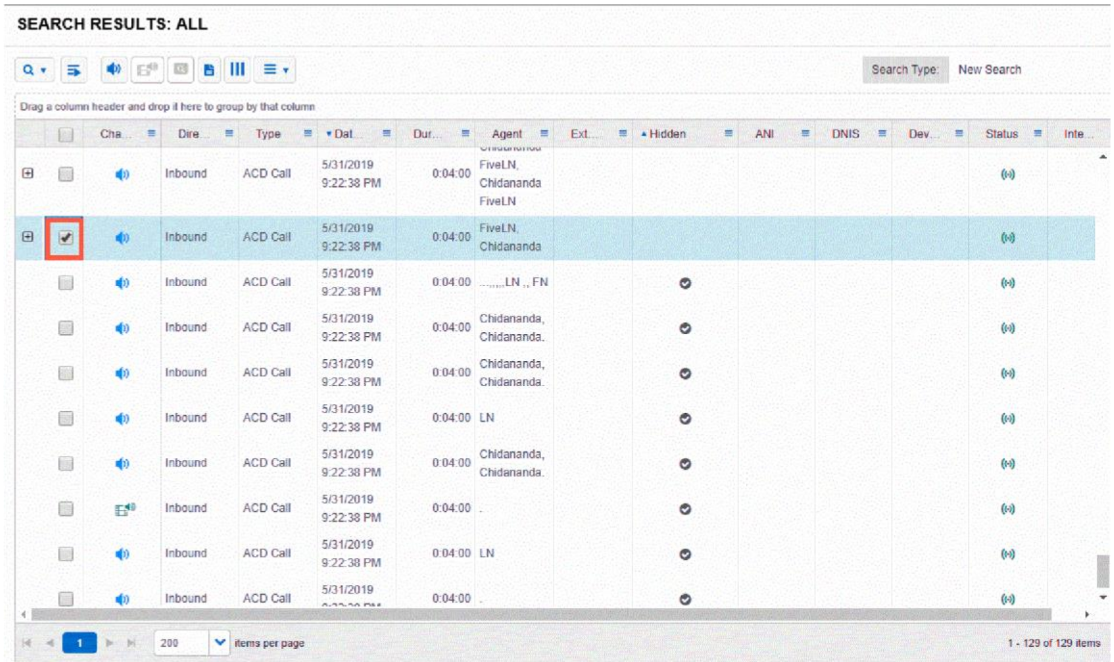
3.3.4.1 Show or Hide Interaction

This feature is only accessible when the user has Hide/Show interaction right/permission for the user profile.

3.3.4.1.1 *Hide Interaction*

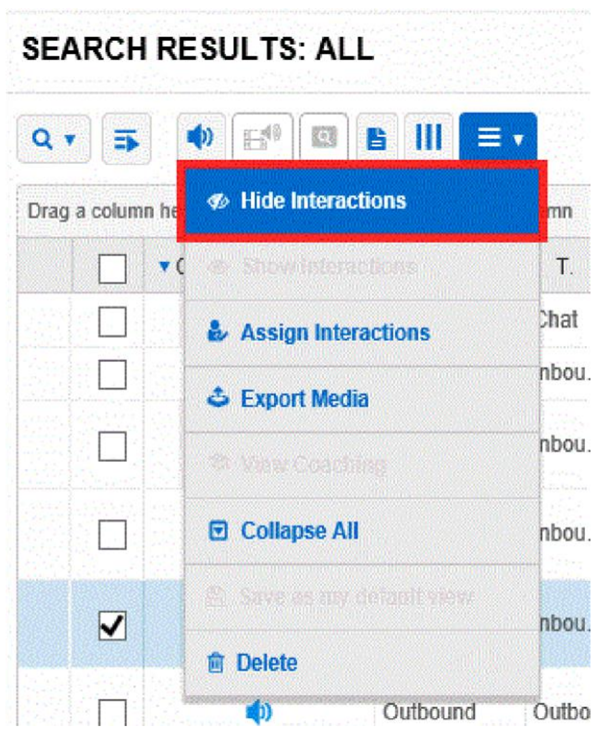
The user wants to hide an interaction from others. For example, when the recording interaction consists of data which you do not want others to see. Follow the steps bellow to hide an interaction from others.

1. Click on the check box for the interaction which needs to be hidden, as shown below.

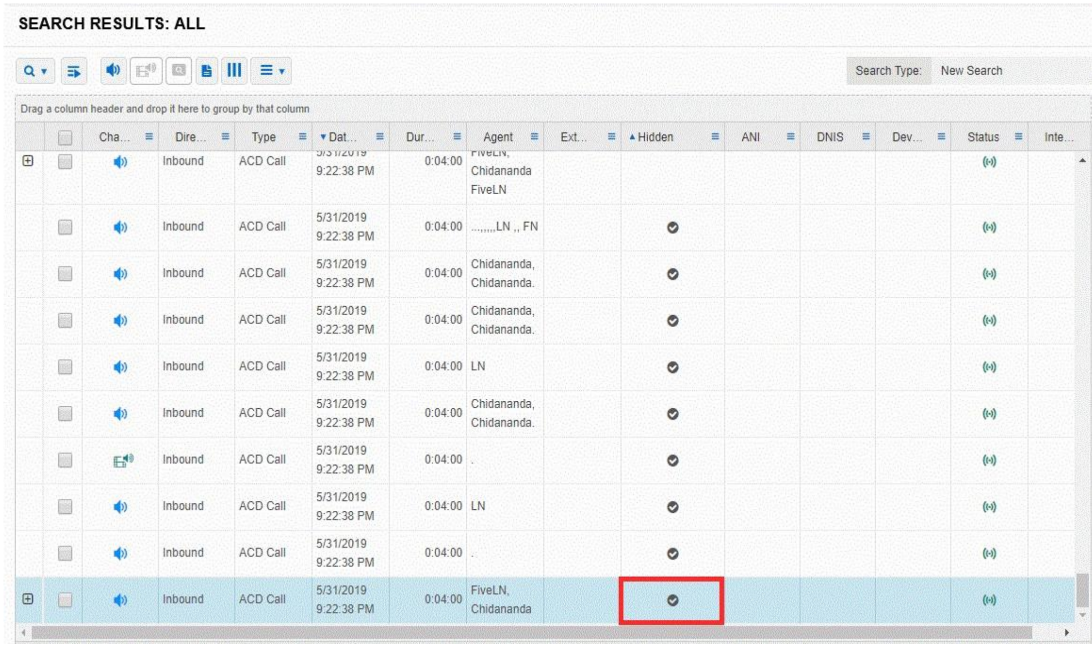


Note: Select multiple checkboxes to hide multiple interactions.

2. Click on the button and select Hide Interactions to hide the interaction, as shown below.



3. The interaction is marked hidden under the Hidden column, as shown below.

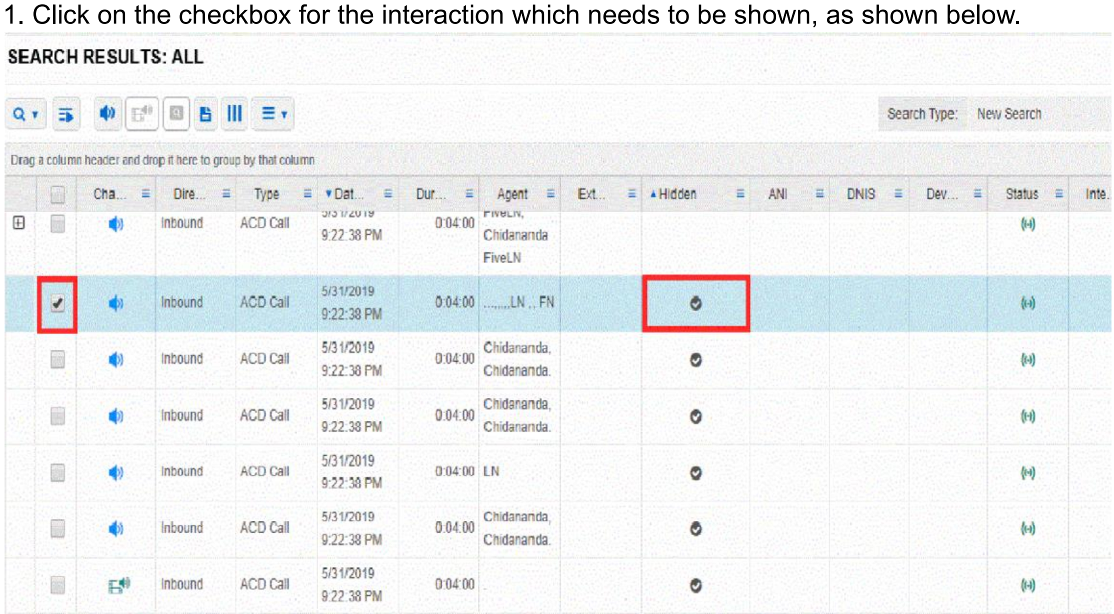


Note: When multiple interactions are selected and the selected interactions consist of both hidden and shown interactions, then only the shown interactions will be hidden.

3.3.4.1.2 *Show Interaction*

The user wants to show an interaction to others. Follow the steps bellow to show the interaction.

1. Click on the checkbox for the interaction which needs to be shown, as shown below.

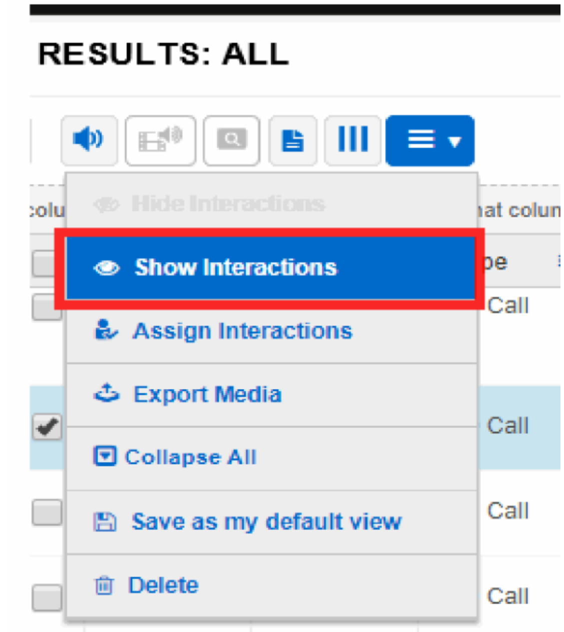


Note:

- The interaction is marked hidden under the Hidden column

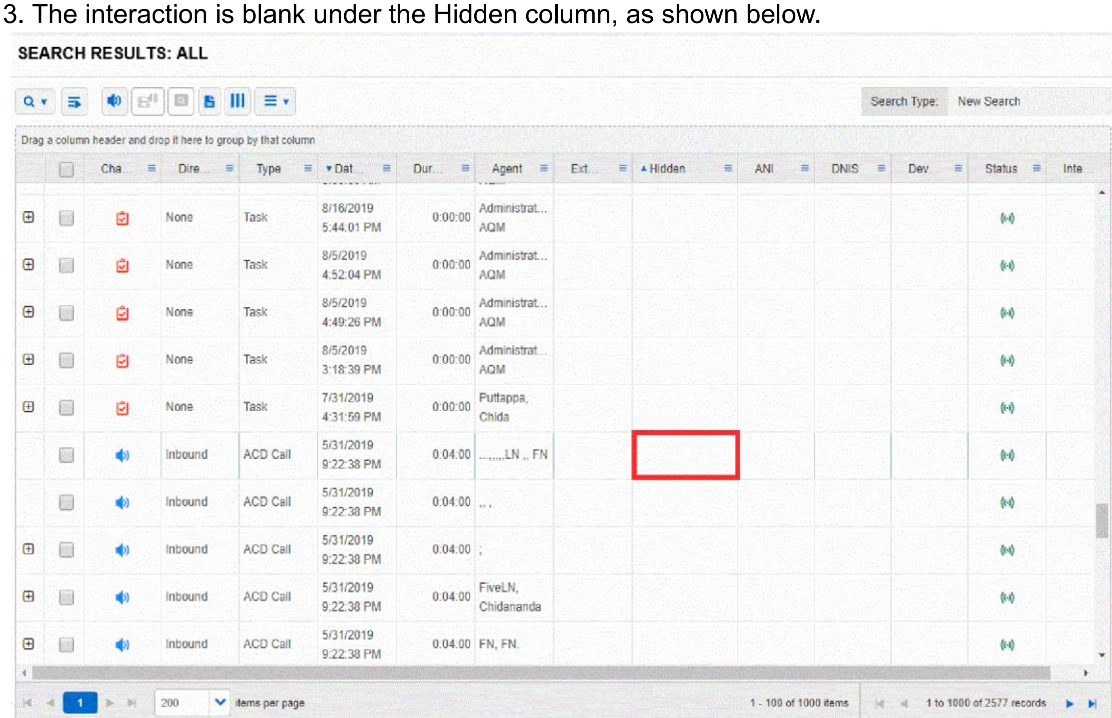
- Select multiple checkboxes to “show” multiple hidden interactions. 2.

 button and select Show Interactions.



Click on the

3. The interaction is blank under the Hidden column, as shown below.

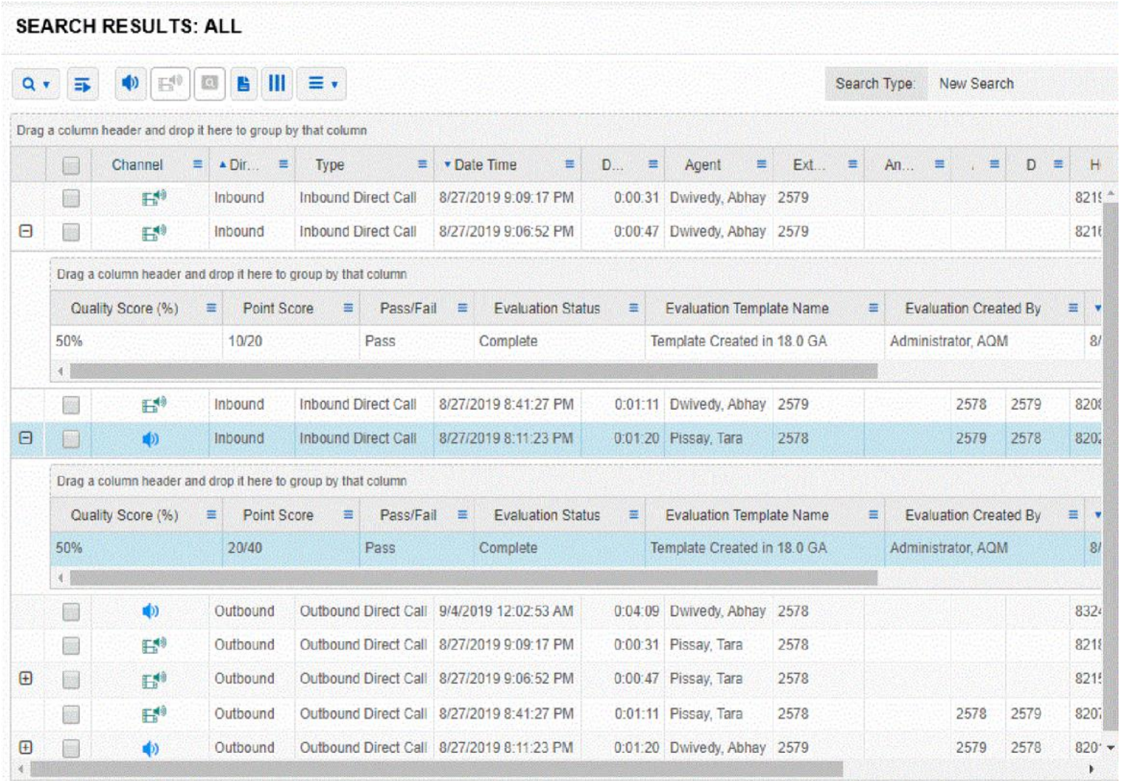


Note: When multiple interactions are selected and the selected interactions consist of both hidden and shown interactions, then only the hidden interactions will be shown.

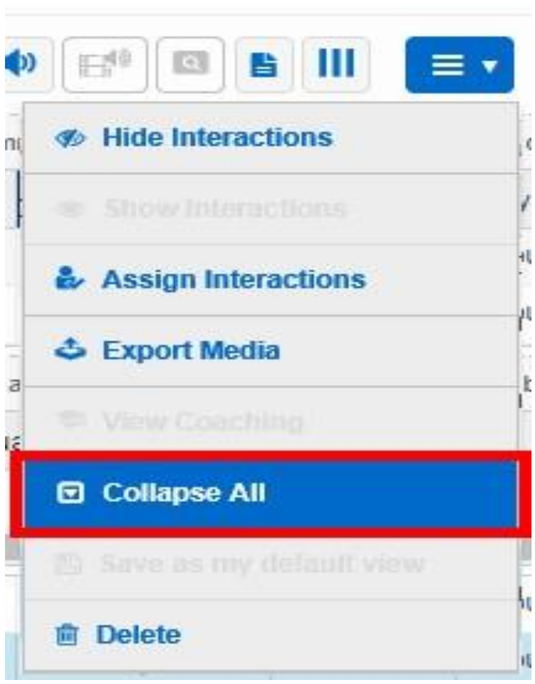
3.3.5 Collapse All

When nested grids are expanded on the SEARCH RESULTS window (either in SEARCH RESULTS: ALL or SEARCH RESULTS: SCORED), Collapse All option allows you to collapse all of the expanded nested grids. Refer Configure Search Results Grid and the below screenshot of the expanded nested grids.

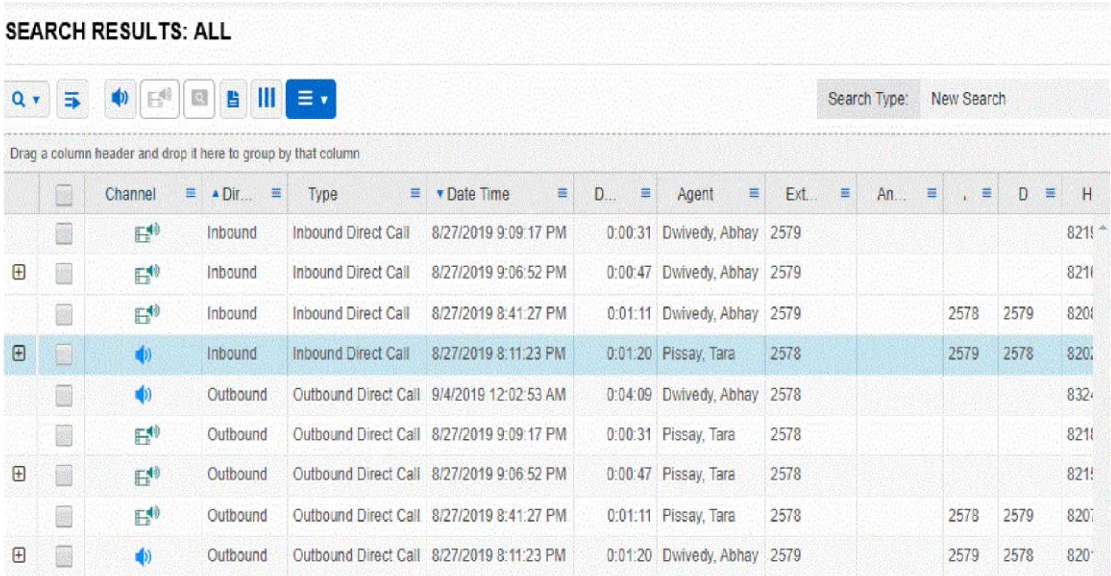
Note: Collapse All option is disabled in SEARCH RESULTS: NON-SCORED window.



1.To collapse all of the expanded nested grids, click on ≡ ▾ button and select Collapse All.



2. The expanded nested grids are collapsed as shown below.



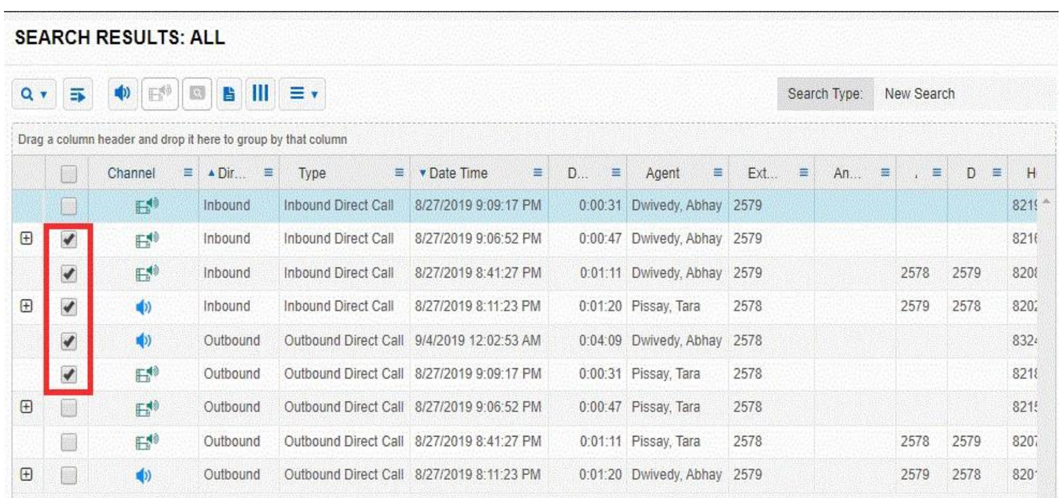
3.3.6 Delete Interactions

This feature allows you to delete one or multiple interactions at a time.

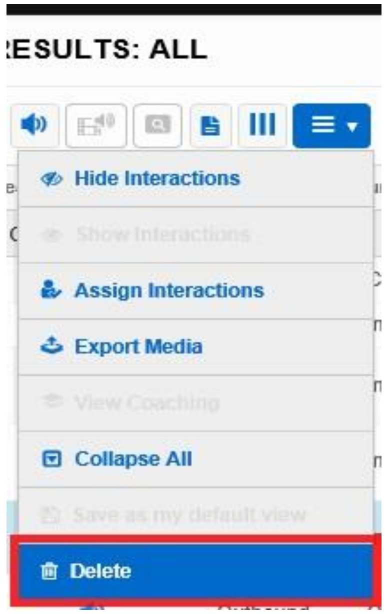
Note:

- This feature **is not available** only for Aspect Cloud Quality with Amazon Connect.
- By default, the account owner has access to the Delete Interactions right in the user profile.

1. To delete multiple interactions, click on the checkbox for the interactions which need to delete, as shown below.



2. Click on button and select Delete as shown below.

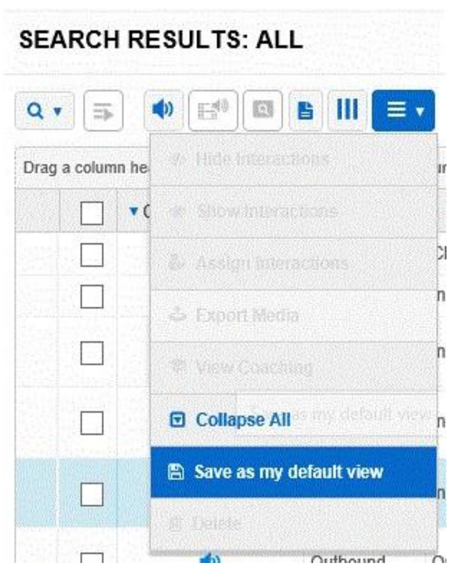


Note: Related evaluations for the selected interactions will also be deleted.

3. Click YES to delete the interaction and related evaluations or click NO to return.

3.3.7 Save as Default View

In Aspect Quality, if the user customizes the grid and the user wants to save that as a default grid view, then click on button and select Save as my default view to persist the customize in database. So, when the user uses a different machine to login to Workforce Engagement Management he/she will be able to see the same grid layout what he/she saved earlier. If you save, system will save all the custom info columns what you selected.



3.3.8 Column Names

When the Interactions window opens, if the list of interactions exceeds the visible area, you can use the scroll bars to navigate to the appropriate interaction. You can use common table functionality such as grouping, filtering, sorting, and column resizing in this area.

The following table describes the column names in the search results.

Note: *Coaching, Score, and To Review only display in the Scored Interactions pane, not in the Search Results pane.

To add a column to the search results, see Add or Remove Column Names on page 372.

Column Name	Description
Channel	The medium used to complete an interaction, such as Voice Only, Screen Only, Voice and Screen, Email, Chat, SMS, Voice Mail, Task, or Unknown.
Direction	The direction of the interaction, which can be None, Inbound, or Outbound.
Date Time	The start date and time of the interaction.
Duration	The length of time of the interaction.
Agent	The agent who handled the interaction.
Extension	The extension of the agent who handled the interaction.
Quality Score	The evaluation score in percentage.
Point Score	The evaluation score in "Total Points earned/Total Points Possible". Example: 5/10 (earned 5 points out of 10 possible points).
Pass/Fail	The evaluation score in Pass/Fail format.
To Review	Agent, Team or Peer will be shown.
Evaluation Status	The status of an evaluation.
Evaluation Template Name	Name of an evaluation template.
Evaluation Created By	The creator of the evaluation.
Assigned Evaluation	Evaluations which are assigned to you by other users will be available in this search criteria.
Evaluation Created Date Time	The date and time when the evaluation is created.
Reviewed By Recorded Agent	The review status of the evaluation which is assigned to the recorded agent.
ANI	If available from the switch, the caller ID or ANI.
DNIS	If available from the switch, the DNIS or DID (called number indicator).
Hold Count	The total number of Holds that occurred during the interaction.
Host ID	The identifier of the entity as known by the ACD or PBX.

Column Name	Description
Matched Rule	A recording rule that the system matched at the time of recording. The system returns from a search only calls that matched the recording rule when you enabled it.
Maximum Hold Time	The maximum duration of the hold in the interaction. If there is more than one hold, the system identifies the maximum duration of the hold out of all of the holds in the interaction.
Interaction ID	The ID of the interaction which is stored in the database.
Total Hold Time	The Total Hold Time duration in a call.
Work Type	The work type of the interaction such as audio, chat, SMS, and so on.
Initial Work Type	The initial work type of the interaction such as audio, chat, SMS, and so on.
Status	The status of the interaction such as Complete or Draft.
Customer Name	The name of the customer associated with a chat interaction. **Note:** Customer Name criteria only displays when you have a Chat license.
Message Count	The total number of SMS interactions.
Customer Email Address	The Email address of the customer associated with a chat interaction. **Note:** Customer Email Address criteria only displays when you have a Chat license.
Thread ID	The identification number for the email thread.
Email Subject	The subject of the email interaction.
Message ID	The identification number for the email thread.
Transcript File Name	There are three types of Transcript files such as Chat, SMS and Email. The Transcript File Name will be displayed in a specific way for Chat, SMS and Email. Example: • Chat - chat/2020/09/02/09/ab48a17e-7015-4571-9e6a7d6597cae5e3.json • SMS - sms/2020/09/02/09/d265f317-00d1-4ba8-8a27ee5073946c1b.json • Email - email/2020/09/02/09/0559-6e54/130-0
Universal Media ID	The ID which is stored in the database.
Task Name	The Task Name which is stored in the database.
Teams	The team which is stored in the database.
Switch	The switch on which the agent or agent group resides.

Application	Search text box. • You can search without entering any filter value. A table displays a list of all active work types with their associated switch. • You can also search by typing the partial or the complete Agent Group name.
Terminal Number	The terminal number of the agent who accepted the interaction.

Column Name	Description
Recording Reason	The reason for the recording such as Agent Requested, API Requested, and so on.
Audio Recording Expected	If audio recording is expected, then the checkmark is shown on the column. Otherwise, the column is blank.
Screen Recording Expected	If screen recording is expected, then the checkmark is shown on the column. Otherwise, the column is blank.
Interaction Assigned To Me	If the interaction is assigned to you, a checkmark will be displayed.
Audio Recording Started Late	If audio recording is started late than the actual call start, then checkmark is shown on the column. Otherwise, the column is blank.
Audio Recording Ended Early	If audio recording is ended earlier than the actual call end, then checkmark is shown on the column. Otherwise, the column is blank.
Audio Recording Silent	If the audio recording does not have audio content, then check-mark is shown on the column. Otherwise, the column is blank.
Audio Recording Missing	If audio recording is expected and the audio file name is not updated, then check mark is shown on the column. Otherwise, the column is blank.
Screen Recording Missing	If screen recording is expected and the video file name is not updated, then check mark is shown on the column. Otherwise, the column is blank.
Partial Audio Recording	If audio recording is either started late or ended early or both, then check mark is shown on the column. Otherwise, the column is blank.
Hidden	If the interaction is hidden, a check mark will be displayed.
Phone Foul	When the Phone Foul happened during the conversation, those interactions are retrieved using this search criteria. From the **Equals** drop-down list box, select • Yes • No Click on **(+)** to add the criteria under the Search List section.

Evaluation ID	Aspect Quality creates a unique evaluation ID for each evaluation. From the Show items with value that is drop-down list box, select • Equals Then, in the Entry text box, type the Evaluation Id by which you want to search. An Evaluation Id is represented as a GUID (Globally Unique Identifier).

3.3.8.1 Media

The following table describes the Media icons in the search results.

Media Icon Name	Icon	Description
Audio		Indicates that the recording is audio only.

3.3.8.2 Status

The following table describes the Status icons in the search results.

Note: In this release, Current is the only available status.

Media Icon Name	Icon	Description
Current		The system either records calls in the Current state by using a business rule, or because the system is in Logging mode. Calls are also Current if the system is in Quality Monitoring with Caching mode and an agent or a Team Lead has specified to save the call beyond the pending period. An agent can score recordings that the system sets as Current, but a Team Lead must flag a recording before an agent can score it.
Historical		The actual recording file is available for direct playback. You can still view any interactions and identify the file name. The Quality Administrator can specify the Historical directory.
Archived		The actual recording file is available for direct playback. You can still view any interactions and identify the file name. The Quality Administrator can specify the Archive directory.
Media Icon Name	**Icon**	**Description**

Pending Disposition		Recordings are pending if they did not match a business rule and no agent or Team Lead has indicated the system should save the recordings beyond the pending period. All calls that are still pending after the pending period has elapsed have both the recording and the database record deleted. Calls can only be in the pending state if the system is in the Quality Monitoring with Caching mode for recording. In this mode, the system records all calls and places the calls in the Pending state if they do not match a business rule. This call is waiting for a Team Lead to review a recording to determine if the system should keep or discard the recording. A Team Lead reviews and marks the recording for deletion, or makes the recording Active. **Note:** This is for future release.

3.3.8.3 Channels

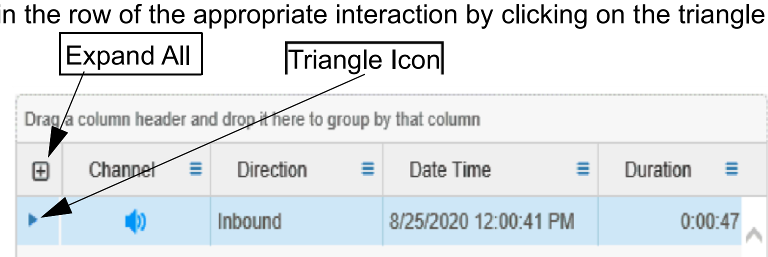
The following table describes the Channel icons in the search results.

Channel Icon Name	Icon	Description
Voice Only		Interactions that have only an audio/voice recording
Voice and Screen		Interactions that have voice and screen recording both
Missing Voice or audio in Voice and Screen interaction		Voice and screen interactions that have only the screen recording, but the voice or audio is missing
Missing Screen in Voice and Screen interaction		Voice and screen interactions that have only the voice or audio recording, but the screen is missing
Channel Icon Name	**Icon**	**Description**

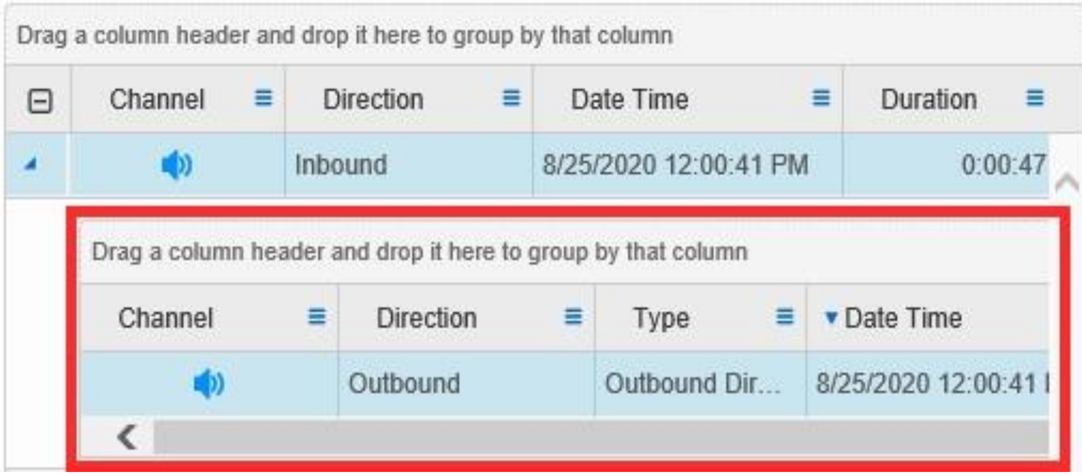
Email		Interactions that have the email transcript between the customer and agent
Chat		Interactions that have the chat transcript between the customer and agent
SMS		Interactions that have the SMS (text) transcript between the customer and agent
Task		Interactions that have only a task
Unknown		Any interaction from which the system cannot determine the port state.

3.3.9 Related Interactions

In the Search results, if you have an interaction that has related interactions, those related interactions are linked to the main interaction in the Playlist. You can view the related interactions in the row of the appropriate interaction by clicking on the triangle icon.



The related interactions display in a table that drops down over the Interaction window.



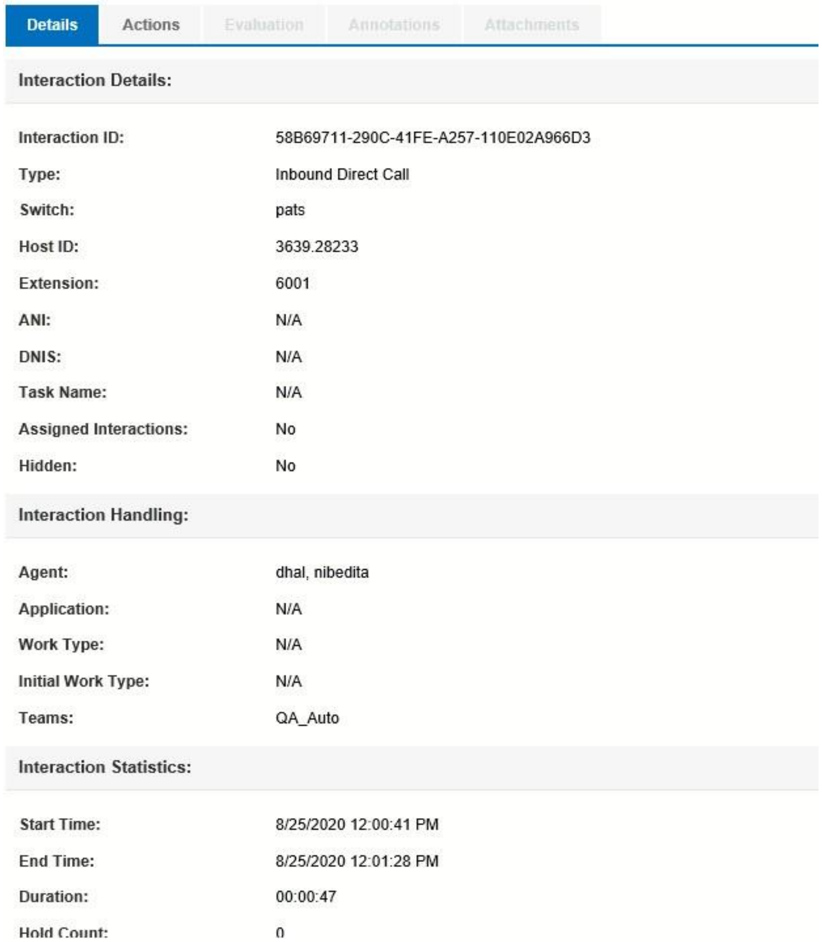
The same functionality features such as grouping, filtering, sorting, and column resizing apply to this related interactions table.

3.4 Interaction Results Tabs

The interaction pane contains information about the current, selected interaction. The tab available is the Details Tab.

3.4.1 Details Tab

The Details tab displays the information related to the interaction that you have open.



The Details tab provides the following information.

- Interaction Details
- Interaction Handling
- Interaction Statistics
- Archiving Information

3.4.1.1 Interaction Details

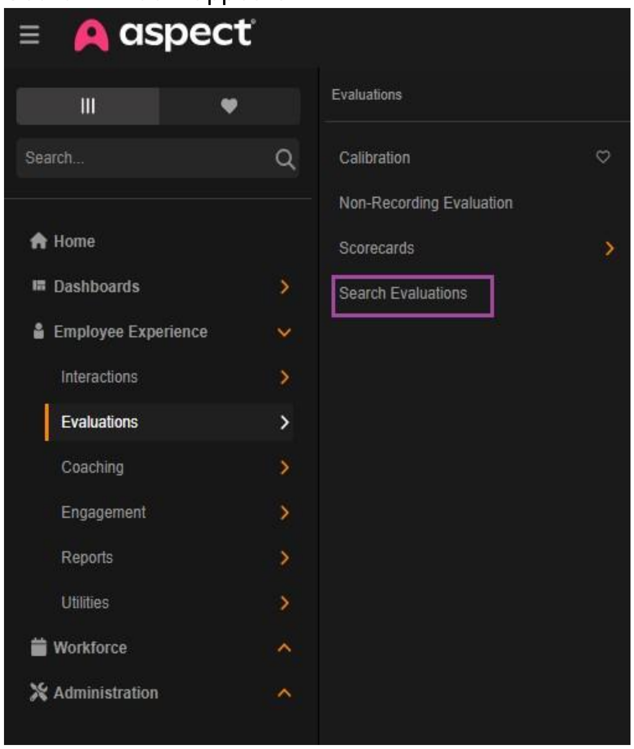
Criteria	Description
Interaction ID	Identification number of the interaction.
Type	The type of the interaction.
Switch	The switch on which the agent or Work type resides.
Host ID	The identifier of the entity.
Extension	The agent's extension number.
ANI	The caller ID.

DNIS	The Direct Inbound Dialer (called number indicator).
Task Name	Non-recording evaluation
Assigned Interactions	If the interaction is assigned, then Yes otherwise No.
Hidden	If the interaction is hidden, then Yes otherwise No.

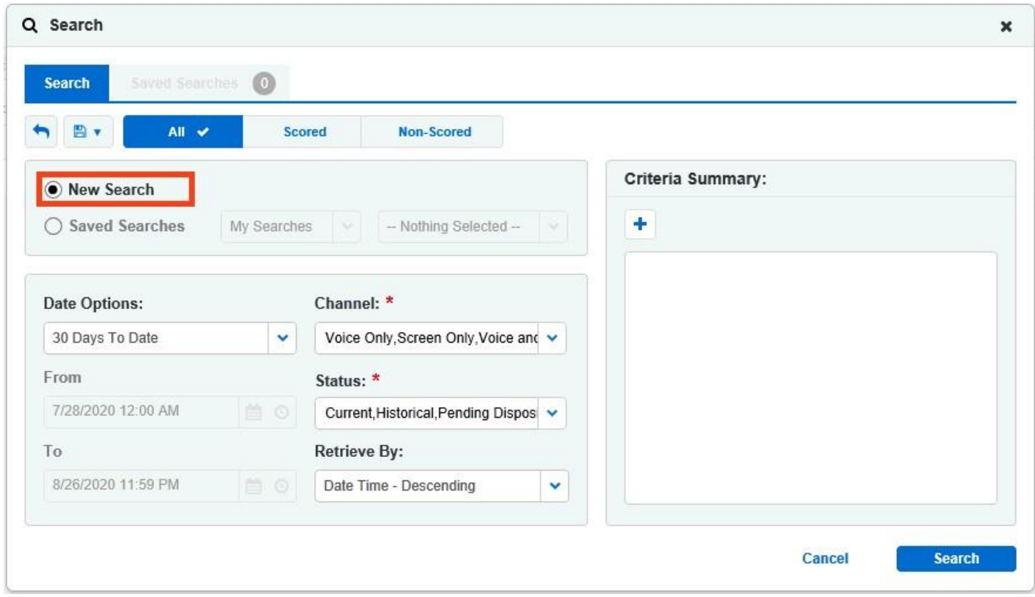
3.4.1.2 Search the Interaction

This section describes how to search the interaction based on Task Name. To search follow the steps below.

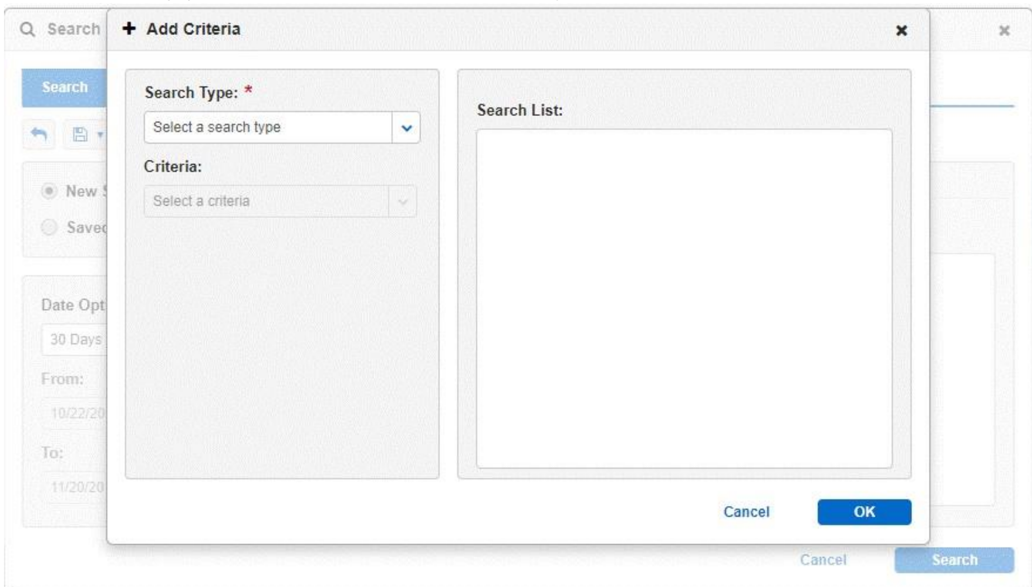
1. Login to the system.
2. Go to Navigation menu > Employee Experience > Evaluations > click on Search Evaluations. The Search window appears.



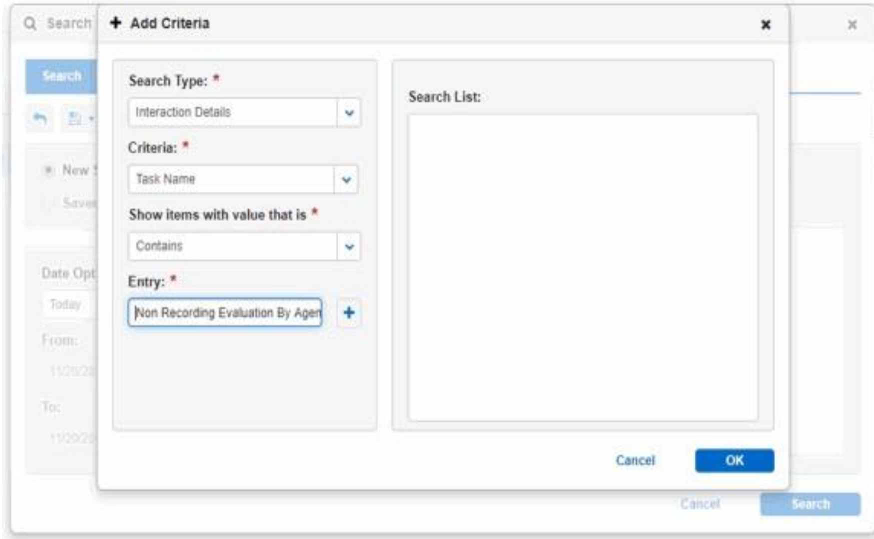
3. Click on New Search as shown below.



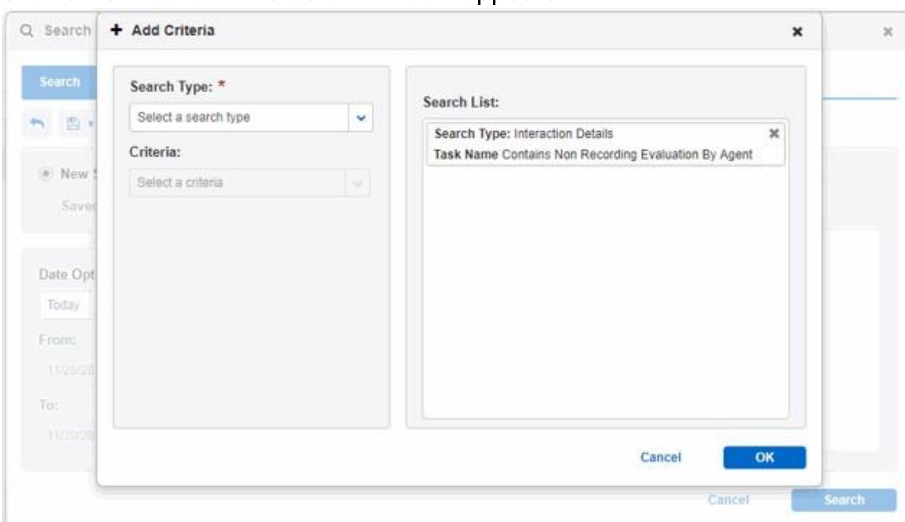
4. Click on Add (+) button under Criteria Summary. The below window appears.



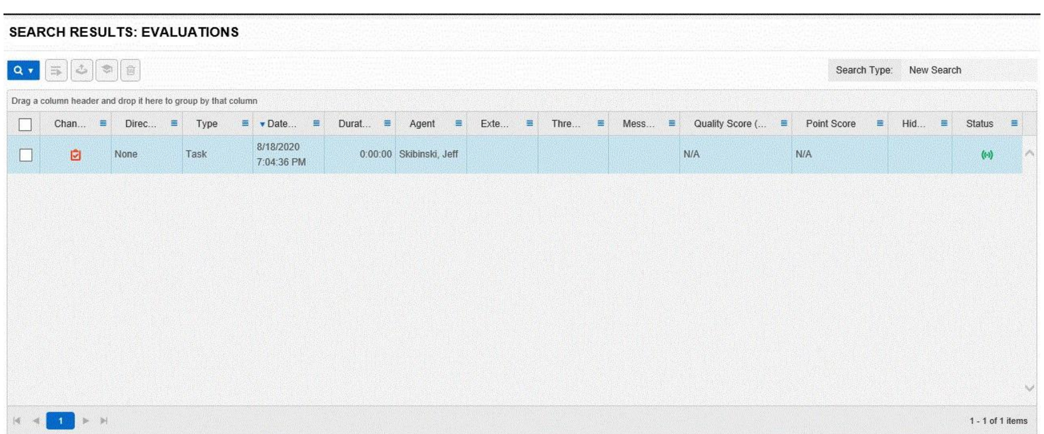
5. Click on the Search Type drop-down list and select Interaction Details.
6. Select the Criteria as Task Name.
7. Enter the mandatory fields (*) based on the requirement and click on Add (+) button.
8. The selected search type with Task Name will display under Search List.



9. Click on OK button. The below window appears.



10. Click on OK then select Search to view the search in Scored Interaction window as shown below.



3.4.1.3 Custom Information

Custom Information are variable criteria made available to Quality through CTI. These criteria pertain to interaction metadata from the associated switch. The criteria that the custom information list displays is based on the customer CTI metadata.

Criteria Select this...	Description ...and these options display:
<Custom Information>* *Variable metadata from CTI. Examples include: • Directory Number • Disposition Code	From the Show items with value that is drop-down list box, select • Contains • Ends with • Equals • Equals None • Starts with Then, in the Entry text box, type the custom information by which you want to search.

3.4.1.4 Interaction Handling

Criteria	Description
Agent	The final agent from which the agent took the interaction. Agent is the agent from which the agent intercepted the interaction; it may not necessarily be the agent to which the system initially announced the interaction (for example, it may have escalated to other agents).
Application	Search text box. • You can search without entering any filter value. A table displays a list of all active agent groups with their associated switch. • You can also search by typing the partial or the complete Agent Group name.
Initial Work Type	The initial work type of the interaction such as audio, chat, SMS, and so on.
Team	The agent is a member of the team.
Work Type	The work type of the interaction such as audio, chat, SMS, and so on.

3.4.1.5 Recording Information

Criteria	Description
Matched Rule	A recording rule that the system matched at the time of recording. The system returns from a search only calls that matched the recording rule when you enabled it.
Recording Reason	The reason for the recording. Possible values include Agent Requested, Team Lead Requested, and API Requested.
Terminal Number	The terminal number of the agent who accepted the interaction.

3.4.1.6 Interaction Statistics

Criteria	Description

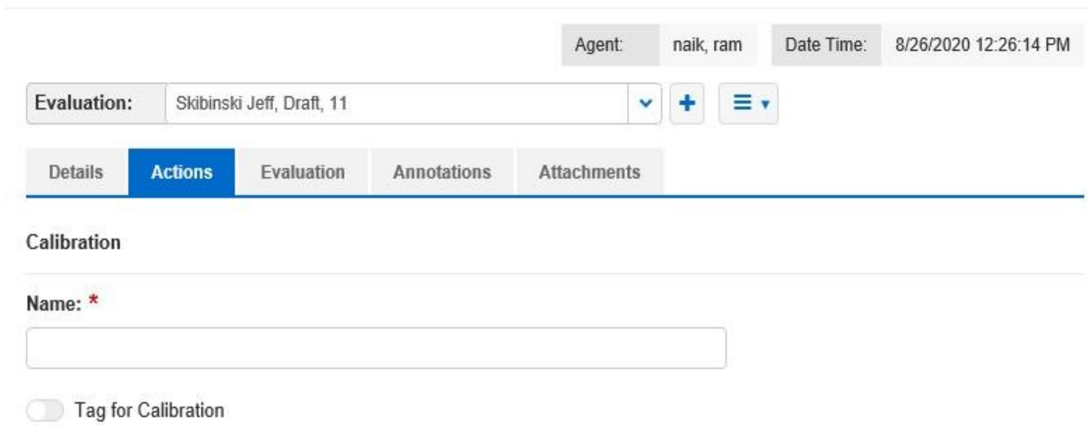
Duration	The length of time of the interaction.
Hold Count	The total number of Holds that occurred during the interaction.
Maximum Hold Time	The maximum duration of the hold in the interaction. If there is more than one hold, the system identifies the maximum duration of the hold out of all of the holds in the interaction.
Total Hold Time	The total duration of the Hold time in the interaction. For example, there are 2 Holds and each Hold had a duration of 10 seconds, then the Total Hold Time is 20 seconds.

3.4.1.7 Archiving Information

Criteria	Description
Status	Displays the current status of the interaction. Possible values are Active, Pending Disposition, Historical, Archive, or Burnt to Media.
Protected	Displays if the Protected flag is marked in any one of the interactions of the interaction.

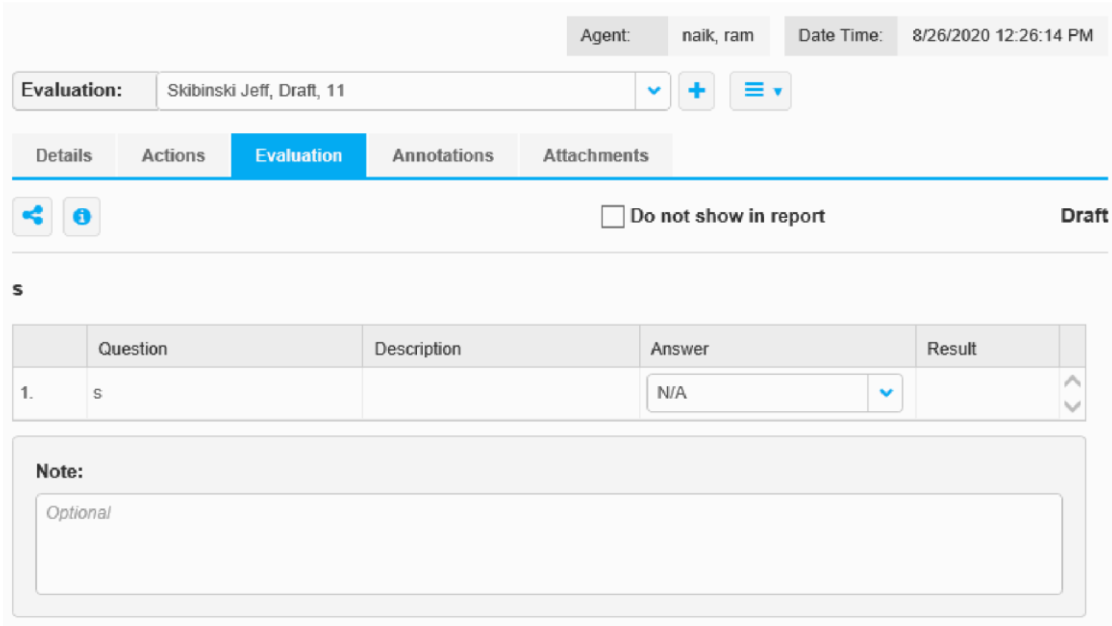
3.4.2 Action Tab

The Actions Tab allows to provide a name for the calibration.



3.4.3 Evaluation Tab

The Evaluation tab provides a snapshot of the evaluation for that interaction.



Note: If the loaded interaction does not have an accessible evaluation, then the Evaluation tab is inactive.

From this tab, you can also email or print the evaluation.

3.4.4 Annotations Tab

If there are comments about the interaction, you can listen to them using the Annotations tab.

Note: If the loaded interaction does not have any accessible evaluation, the Annotations tab is inactive. It is also inactive if the loaded interaction type is a Task.

To view a comment in the Annotations tab, from the media player, click the Comments marker of the comment that you want to view.

3.4.5 Attachments Tab

If there attachments with an interaction, you can view or save the attachments.

Note: If the loaded interaction does not have an accessible scorecard, then the Attachments tab is inactive.

You can see that there are attachments to view even if you are not on the Attachments tab. The number on the tab next to the word Attachments denotes the number of attachments in the Attachments tab.

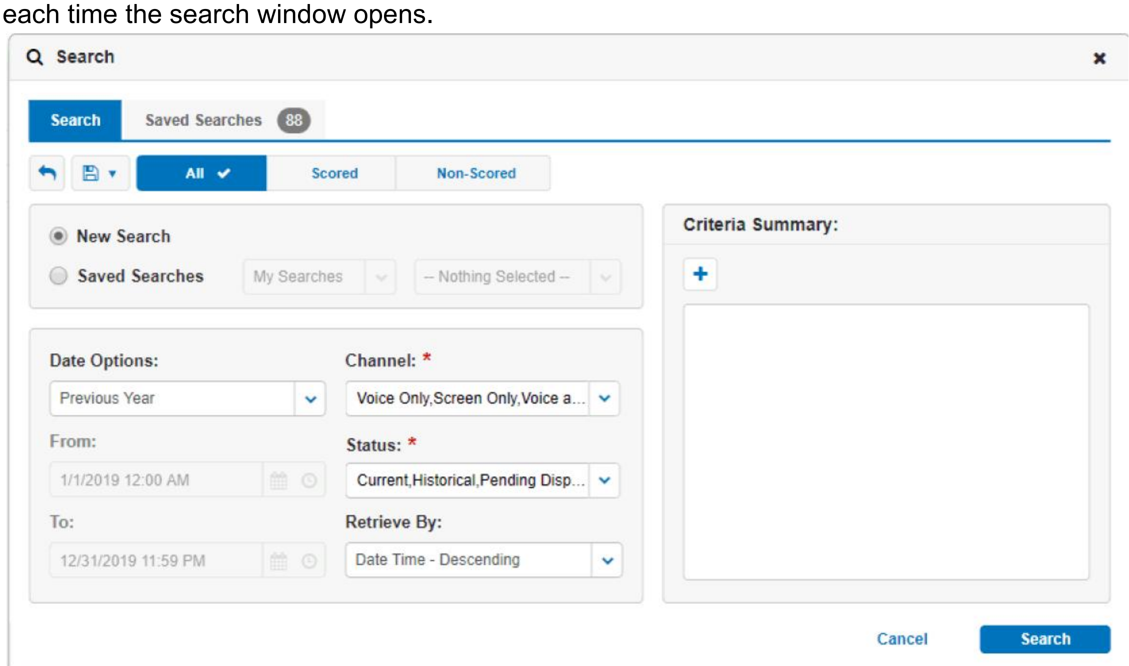
If Attachments exist, the list displays with the following information.

Columns	Description
Attachment	The file name of the attachment.
Description	A description of the attachment.
Added By	The name of the person who added the attachment to the interaction.
Date Added	The date and time that the person added the attachment to the interaction. The format of the date and time is based on the browser locale.
View or Save Attachment 	Click the icon to Delete, Download, or Edit the description of the attachment. **Note:** If you are not the owner of the evaluation, but other users provide you with access to the evaluation, then the Download icon displays instead of the cog wheel icon.

3.5 Saving Searches

You can save searches and access saved searches on both the Interaction Search and the Scored Interaction Search windows. However, the saved searches are unique to each screen; therefore, for example, if you created a search and saved it in Scored Interaction Search, that saved search does not display in Interaction Search.

In the Search window, you can save and share a search query with date options, channels, and criteria. Using saved searches removes the need to recreate common search queries each time the search window opens.



The Search tab contains all the search controls that you use to build and save a search query.

The New Search option on the Search tab is always active; select New Search to clear the current search from the screen, revert the fields to their default state, and begin a new search.

Note: To create a search, see Performing a Search on page 3-40.

You can only access the Saved Searches tab, or the Saved Searches option on the Search tab, when you have one or more saved searches. The tab title contains a number that indicates the number of saved searches available.

3.5.1 Saved Search Types

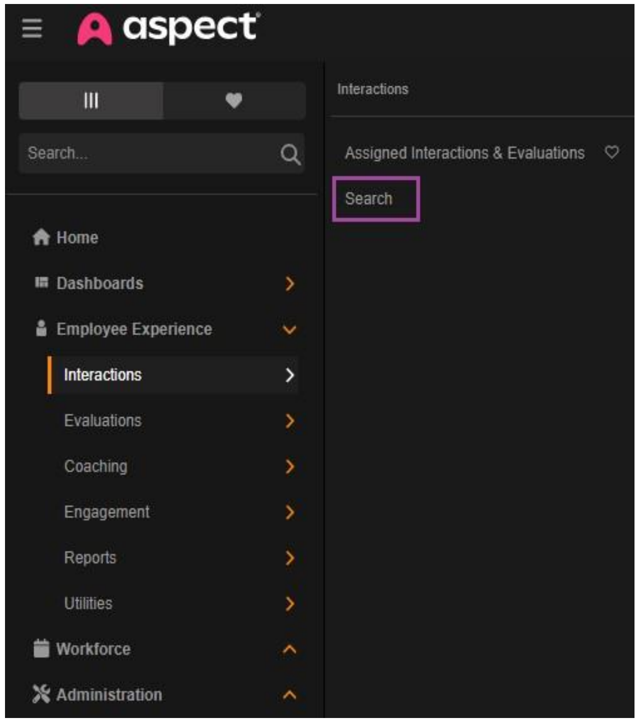
Saved searches are defined as:

Saved Search Type	Definition
My Searches	Private searches created by the user and not shared with any user profile.
Shared	Searches created by the user which have been shared with one or more user profiles.
Shared with me	Searches created by another user and shared with the user profile of the user. For these saved searches, most of the on-screen search query controls are disabled and read-only. The only exception is the date option whereby permission to modify the date range is assigned during the saving of a shared search.

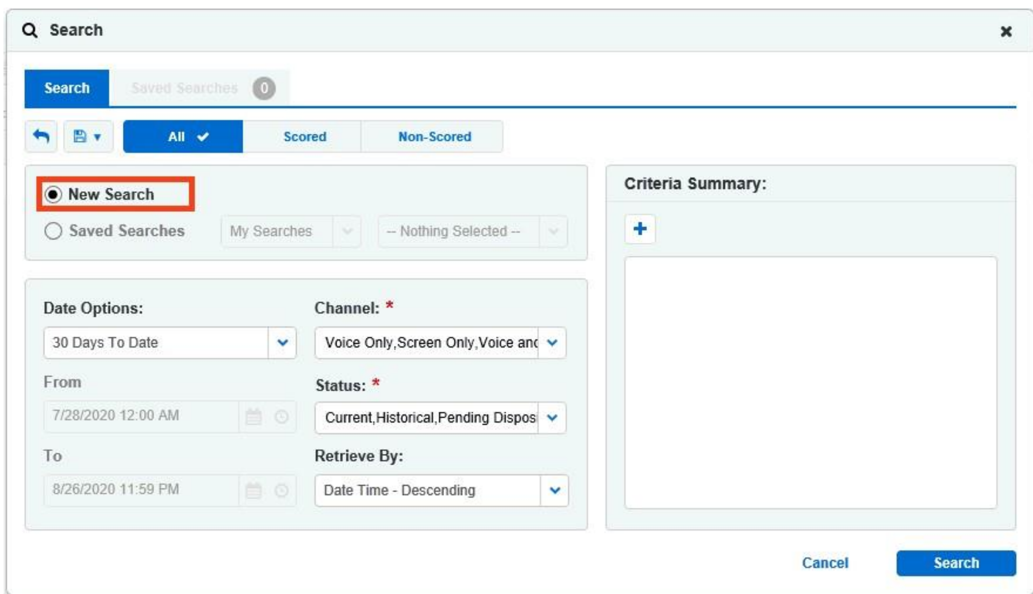
3.5.2 Save a Search as Private

This section describes how to save a search based on task name. Follow the steps below to save a search.

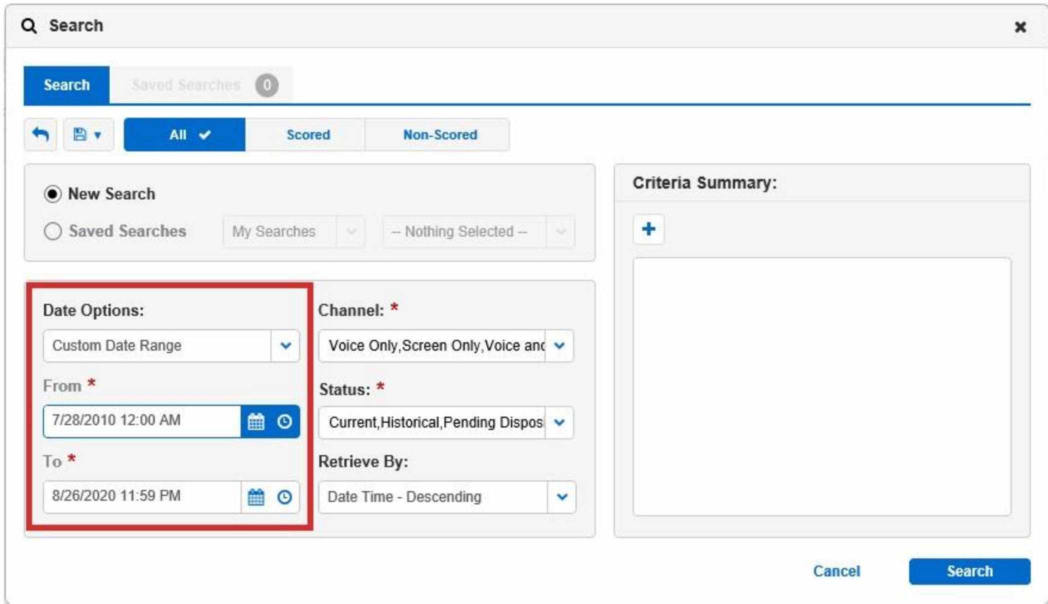
1. Login to the system.
2. Go to **Navigation menu > Employee Experience > Interactions >** click on **Search**. The Search window appears.



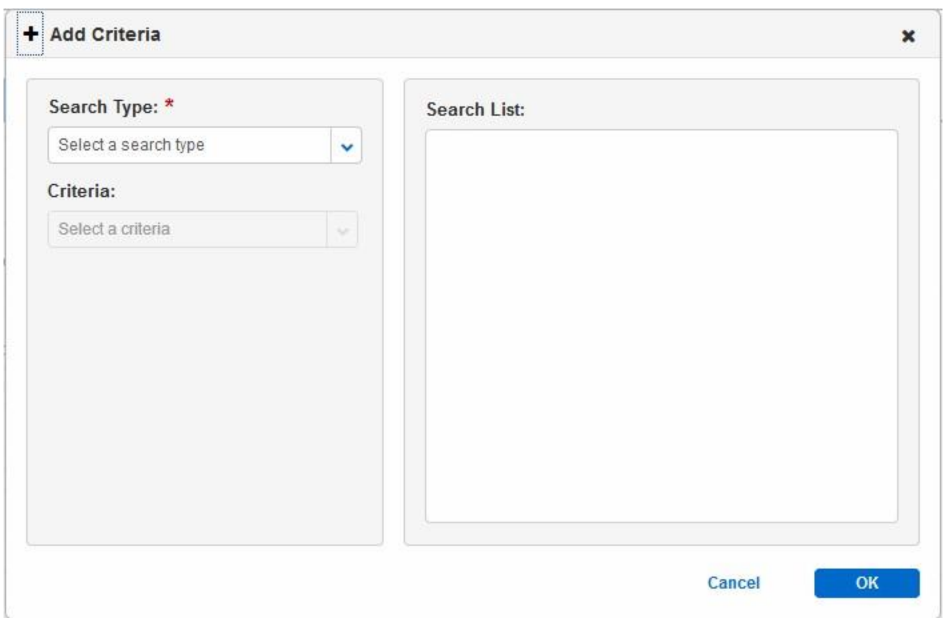
3. Click on New Search as shown below.



4. Go to Date Options drop-down list, select the Custom Date Range and choose the date based on the requirement. Refer the below window.



5. Click on Add (+) button under Criteria Summary. The Add Criteria window appears as shown below.

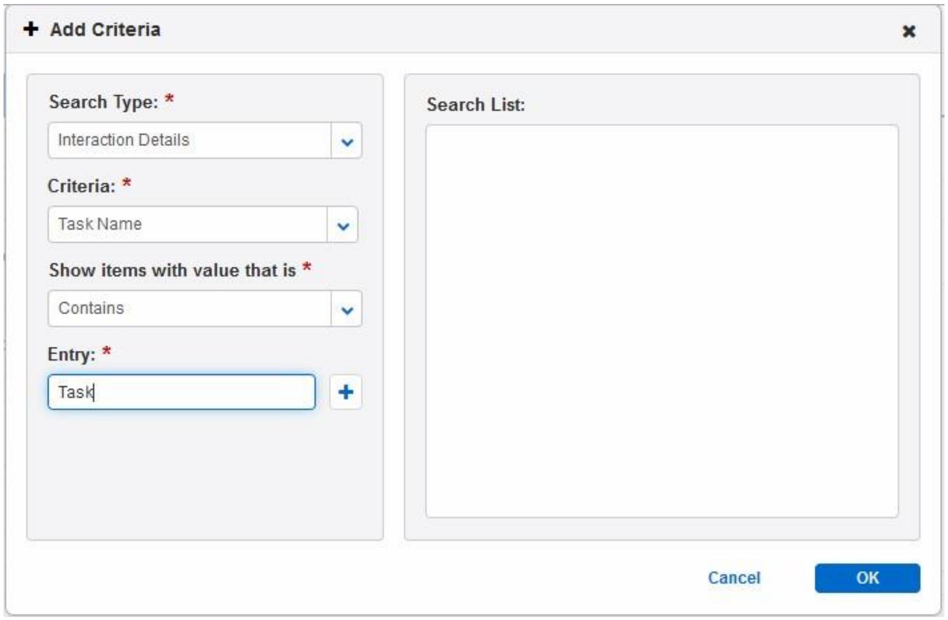


6. Click on the Search Type drop-down list and select Interaction Details.

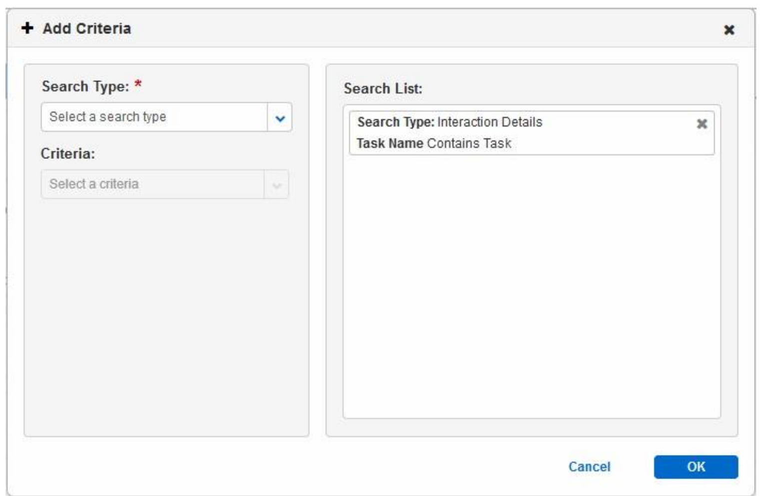
   Note: To select other Search Types, see Search Types and Criteria on page 3-49.

7. Select the Criteria as Task Name.

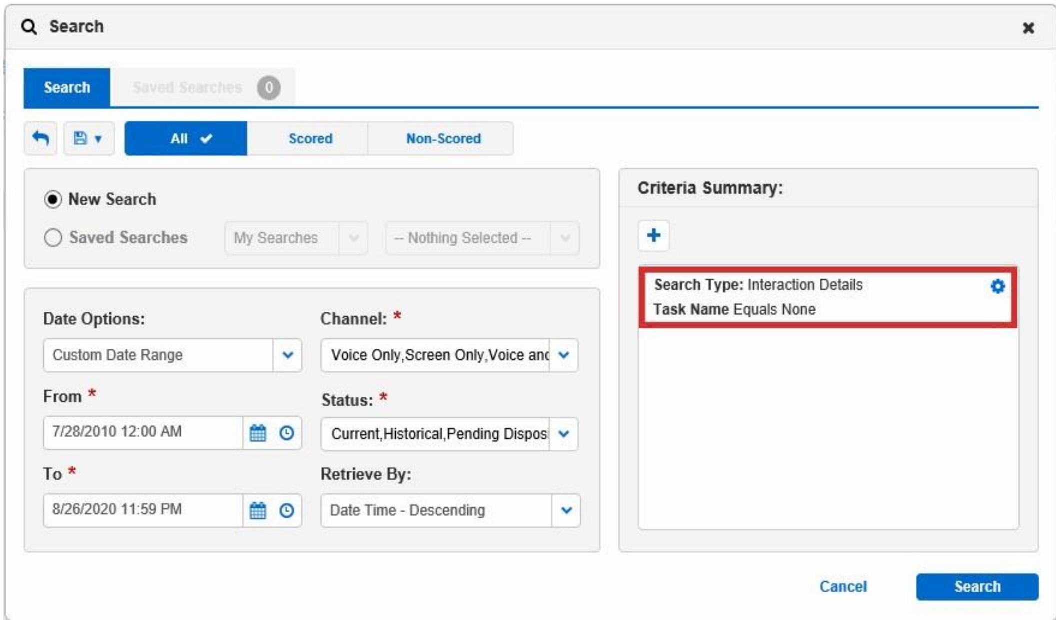
8. Select the Show items with value that is as Contains.
9. Click on the Entry field and type Task. Refer the window as shown below.



10.Click on Add (+) button which is available next to the Entry field. The following window appears as shown below.



11.Click on OK button. The Search window appears with the search criteria under the Criteria Summary section. Refer the Search window as shown below.



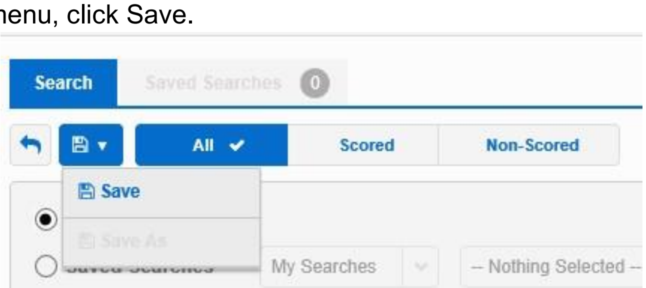
12.Click on Search button. The Search results window appears as shown below.

Note: The Task Name column is added to the grid as highlighted on the above screenshot.

13.Click on the Search button from the top-left corner and select Edit Search as shown below.

The Search window appears with the search criteria.

14.From the Save menu, click Save.

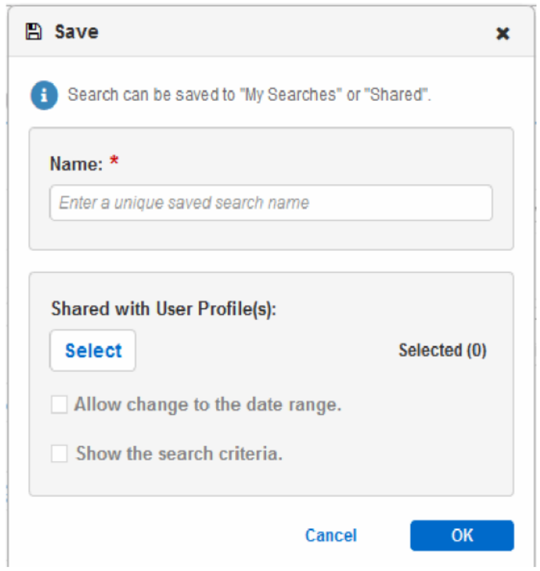


The Save menu has the following options:

Save Options	Description
Save	• For a New Search, the new search query is saved • For a Saved Searches, the saved search is updated.
Save As	To save a Saved Search as a new saved search, select the Save As option.

Note: Neither Save menu options are available if the active saved search is a *Shared with me* saved search, because as a Shared-with-me user, you do not have ownership of that saved search.

The Save window appears as shown below.

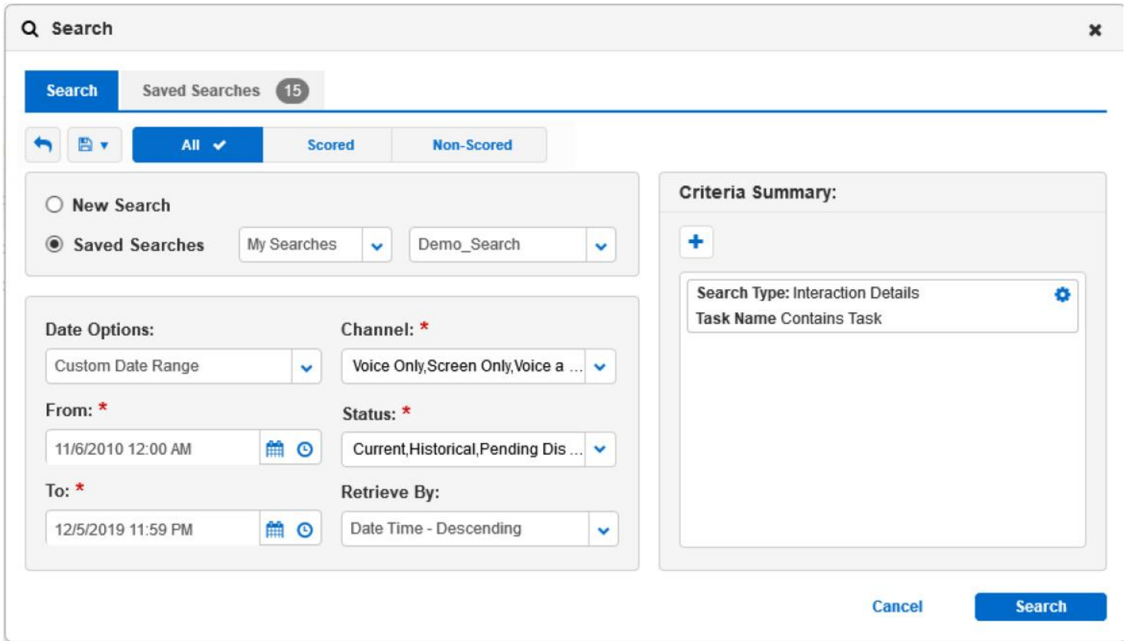


15.In the Name text box, type a name for the search. Ex: Demo_Search.

Note: The saved search Name must be unique to the your saved search list; you can type up to 50 characters.

Since this is a Private saved search, do not select anything in the Shared with User Profile(s) section of the window.

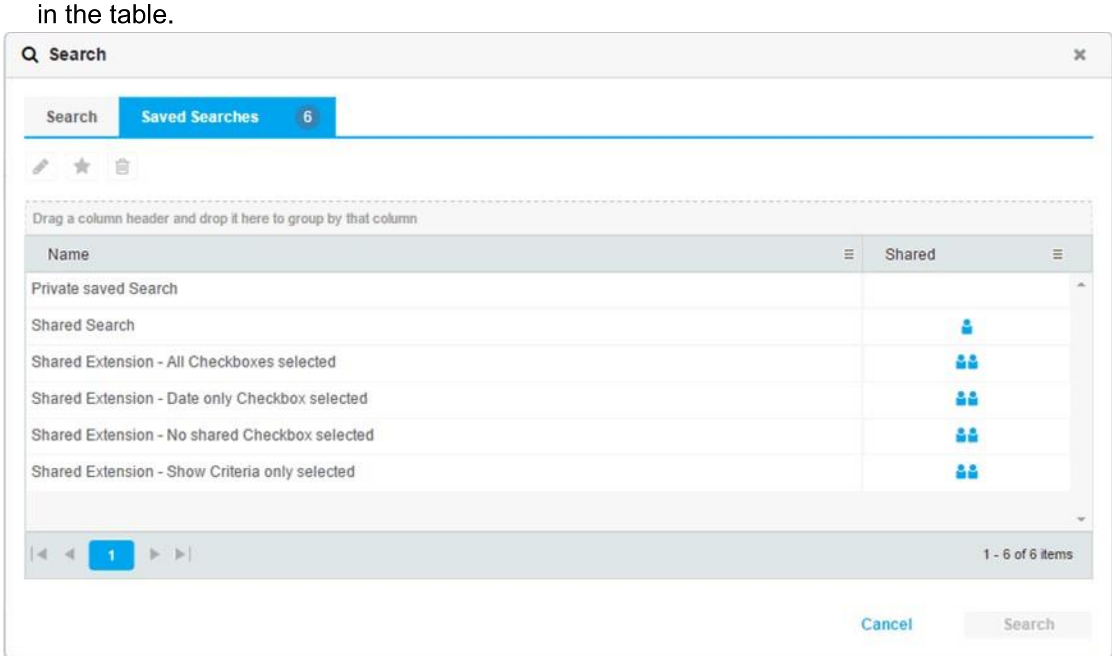
16.Click OK. The Save window closes and the Search window is active.
When you save a Private search, the Saved Searches option in the Search tab is selected along with the My Searches drop-down list box. The newly added saved search becomes the selected saved search drop down item.



3.5.3 View Saved Searches

To view a saved search, perform the following steps.

1. On the Search window, select the Saved Searches tab. The list of saved searches display in the table.



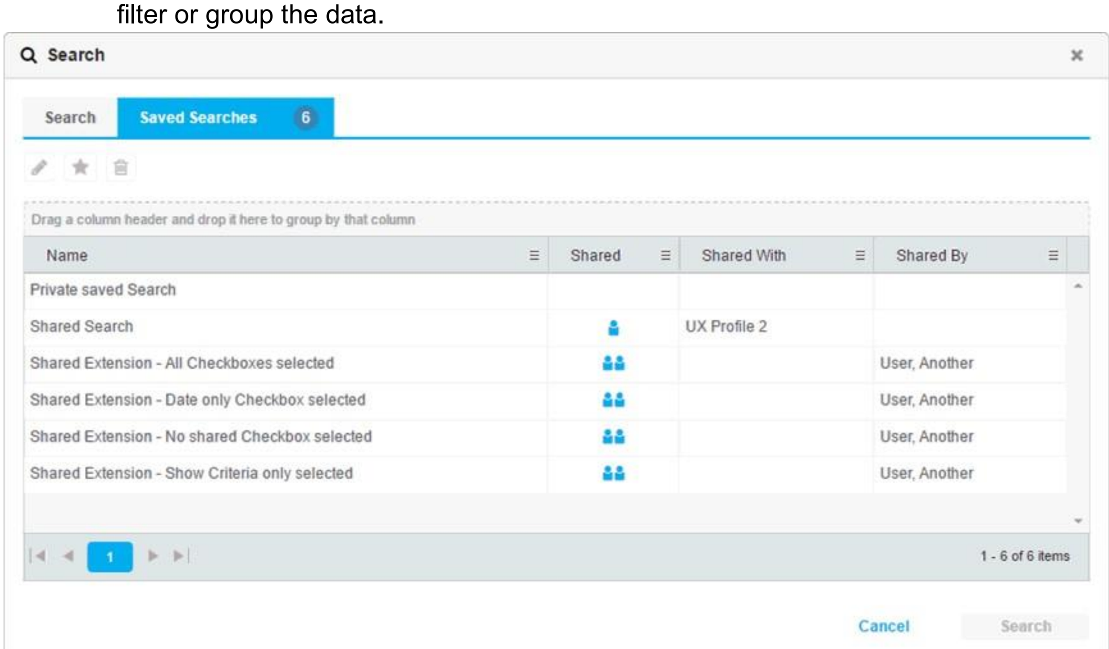
Note: The Saved Search tab is active only if you have access to one or more saved searches.

The Shared column icons are defined in the following table.

Shared Type	Icon	Description

My Searches	None	Private searches created by the user and not shared with any user profile.
Shared		Searches created by you that you have shared with one or more user profiles. **Note:** When you mouse over the icon, the tool tip displays the user profile with whom you shared the search. You can also see this information in the Shared By column.
Shared with me		Searches created by another user and shared with you. For these saved searches, most of the on-screen search query controls are disabled and read-only. The only exception is the date option, if the owner of the saved search gives you permission to modify the date range. **Note:** When you mouse over the icon, the tool tip displays the name of the user who shared the search with you. You can also see this information in the Shared By column.

Note: You can display the Shared With and Shared By values in separate columns, which are both hidden by default, by right-clicking the table and selecting Shared With and Shared By. When the columns display, you can use the columns to filter and group data by clicking on the main menu icon next to the column title by which you want to filter or group the data.



2. In the table list, select a saved search. The Search tab opens with the saved search criteria in the window.
3. When you are finished viewing the saved search, click Cancel.

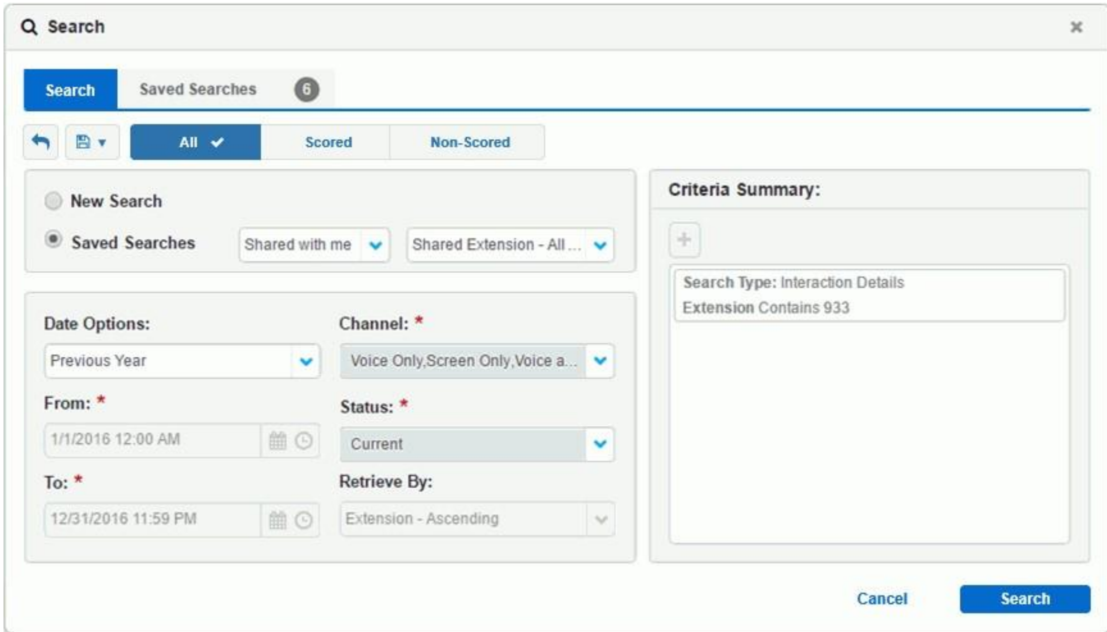
   OR

   To edit, delete, or run a saved search, or to make a saved search a default search, see Administer a Saved Search on page 3-122.

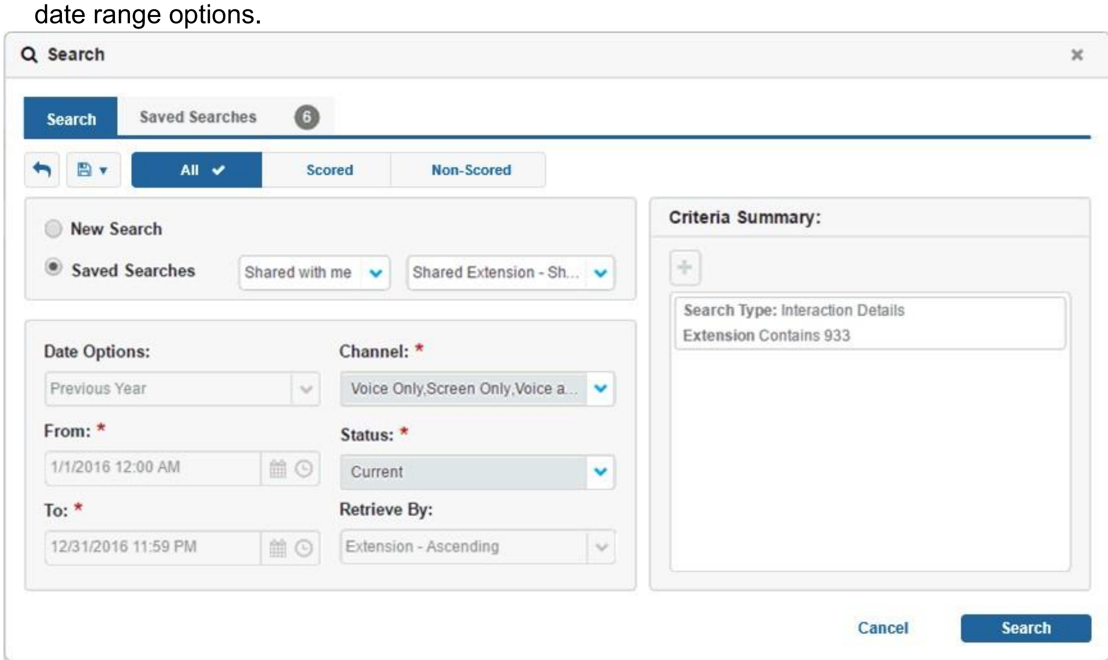
   Note: For more information on a saved search that an owner shared with you, see View a Shared-with-me Search.

3.5.3.1 View a Shared-with-me Search

The following screen shot is an example of a search shared by its owner, who selected a user to view the saved search criteria and to modify the date range options.



The following screen shot is an example of a search shared by its owner, who selected a user to view the saved search criteria, but did not give the user permission to modify the date range options.



3.5.4 Administer a Saved Search

Once you have saved a search, you can edit it, delete it, or set/unset it as the default search. To administer any one of these actions, perform the following steps.

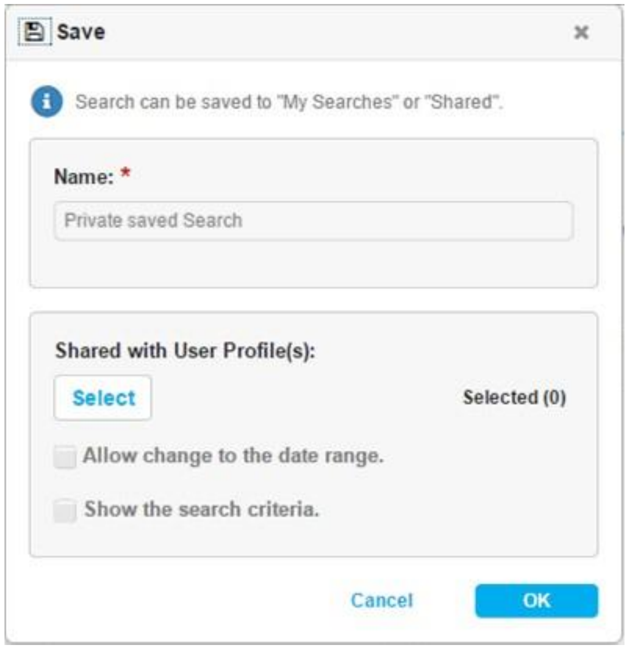
Note: You can only administer searches that you own; you cannot modify searches that another user shared with you, other than to set the search as your default search.

1. From the Search window, select the Saved Searches tab. The list of saved searches displays in the table.
2. From the list of saved searches, select a saved search that you own and want to modify. The Search window opens with the data for that saved search.

   The following table describes the icons that are active, once you select a saved search.

Icon	Icon Name	Description
	Edit	If you are the owner of the saved search, click this icon to edit the search. The Search tab opens, and the saved search criteria of the search that you selected, displays.
	Set/Unset as Default	You can set a saved search to be the default saved search. Therefore, when you first launch the Search window of the current session, the default search displays with all search data pertaining to the search query; in this instance, the Search window does not display. **Note:** A star icon in the Name column indicates the current assigned default saved search. Subsequent launching of the Search window during your session does not automatically load the default search; instead, the Search window with the last search query criteria opens. You can have only one default Interaction search and one default Scored Interaction search. The default search is not restricted to saved searches that you own; you can set any saved search displayed in the grid as the default saved search, including those searches that another user shared with you.
	Delete	You can delete the saved search if you are the owner of the selected saved search. When you click Delete, a warning window opens, so that you can confirm that you want to delete the saved search. **Note:** Deleting a shared search removes the search from any previously-associated user profiles.

3. Adjust the search criteria as needed (for more information on the criteria, see Performing a Search).
4. When you are finished making changes, click the Save icon and select Save. The Save window opens and the saved search name is inactive; you cannot change it.



5. Click OK. The saved search is updated with the modifications.
6. To run the search query after changing it, on the Saved Searches tab, from the list, select the saved search and click Search.

   Note: The Search button is active when you select a search in the list.

   OR

   Double-click the row of the saved search that you want to run.

The Current Search name and Search Type display above the Search Results table.

3.6 Export Media

The ability to export media and or metadata is permitted if a user has the Export To Media user profile permission selected. When selected, the following Export features are available:

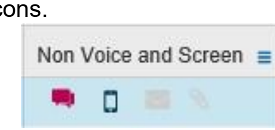
- An Export Media button is visible in both the Interaction and Scored Interaction Search Results windows. This button launches the Export window, where users can save the selected interactions as an export job.
- The Select/Deselect check box on the Interaction and Scored Interaction search table is available for users to select or deselect multiple interactions at once, and is located in the top left cell of the Search Results table.
- A View Export Jobs navigation menu allows users to administer export jobs (that they have privilege to access).

3.6.1 Exporter Changes

Changes to the Exporter feature from Aspect Quality are outlined in the following table.

Functionality/ Feature Change	Aspect Quality
Export window	Look and feel of the Export window is changed. **Note:** See Create an Export Job on page 3-126.
Export functionality	User can select what to export in the Export window. Voice option – Displays only when the user selects Voice Only interactions. • Voice option ON – Exports the media file for all the voice interactions that the user selects • Voice option OFF – Does not export the media file for the voice interactions that the user selects. Voice and Screen Combined Interactions section – Displays only when the user selects Voice and Screen interactions. • Voice and Screen as one file option ON – exports voice and screen as a combined file. • Voice option ON – exports only voice as a separate file. • Screen option ON – exports only screen as a separate file. • Non Voice and Screen ON - exports only non voice and screen as a separate file. • Voice and Screen as one file option OFF – does not export voice and screen as a combined file. • Voice option OFF – does not export voice as a separate file. • Screen option OFF – does not export screen as a separate file. • Non Voice and Screen OFF - does not export non voice and screen as a separate file.

Functionality/ Feature Change	Aspect Quality
Export Evaluations	• User can export evaluations separately. • User can export metadata separately. • User can export both together by selecting both the Evaluations and Metadata options. **Note:** See Export a Job for Search Evaluations on page 3-131.
Export Job Grid columns	

	Multi Part Files column is removed.
	Column is renamed as Metadata. **Note:** No change for the data appearing under the column.
	Column is renamed as Evaluations. • No change for the data appearing under the column.
	Column is renamed as Voice and Screen. • This column provides information about which interaction that the user selects to export. • 3 icons always display: *Voice*, *Screen*, and *Voice and Screen*. • Icons status are enabled or disabled depending upon which option that the user chooses to export in the window. • For example, if the user selects to export *Voice*, and any one option from the *Voice and Screen as one file* options, the *Voice* and *Voice and Screen* icons are enabled, and the *Screen* icon is disabled. • Voice and Screen column displays the following icons. 
Functionality/ Feature Change	**Aspect Quality**
	This column provides information about which interaction that the user selects to export. • 4 icons always display: *Chat, SMS, Email and attachment.* • Icons status are enabled or disabled depending upon which option that the user chooses to export in the window. • For example, if the user selects to export *Chat*, and any one option from the *Non Voice and Screen such as SMS*, the *Chat and SMS icons* are enabled, and the *Email and attachment* icons are disabled. Non Voice and Screen column displays the following icons. 

3.6.2 Create an Export Job

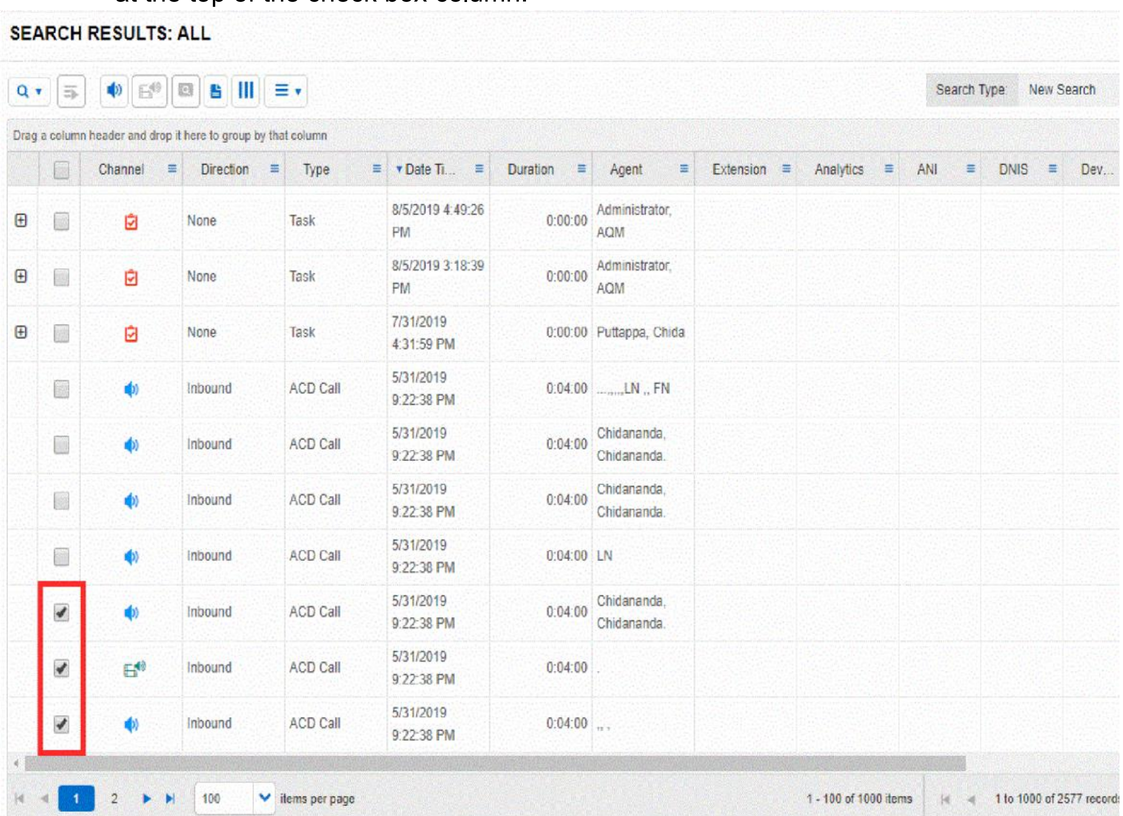
An export job can contain different interaction channel types, and selected options are applicable against all selected interactions. Therefore, based on business requirements, you may want to export interactions based on their channel type using multiple export jobs. For example, you can export Voice channels versus Screen channels into two separate export jobs.

You must select at least one interaction to create an export job. The Export Media button is active when you select one or more interactions. Depending on user permissions, an administrator can select and export up to 1000 interactions, whereas all other users are limited to 300 interactions.

To create an export job, perform the following steps.

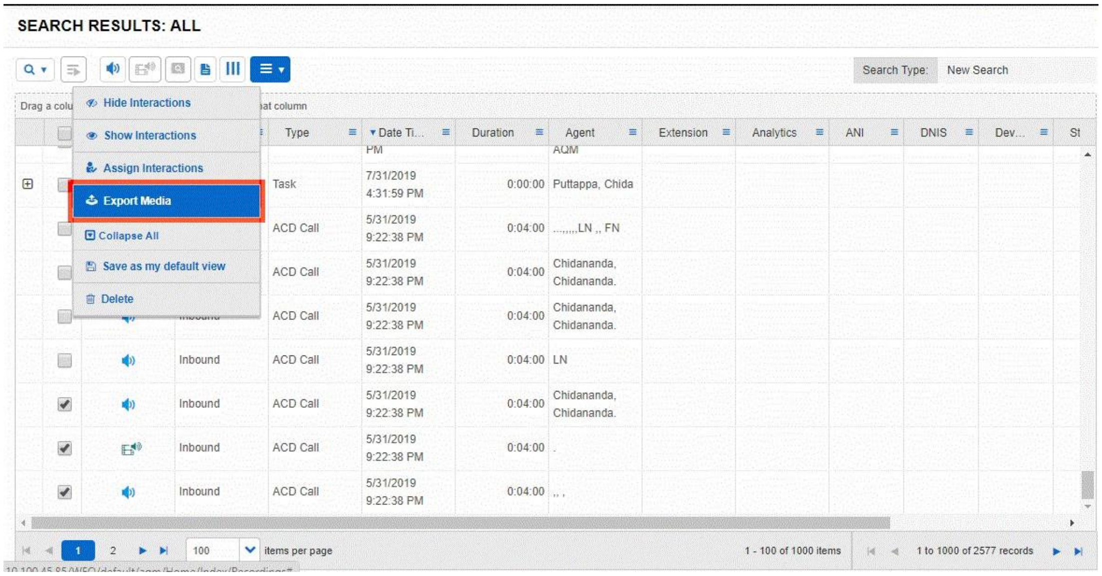
1. Log in to VUE as an Administrator and go to Navigation Bar > Workforce Engagement Management.
2. Search for an interaction (see Performing a Search on page 3-40).
3. Select an interaction (or interactions) by clicking the check box(es) next to the interaction(s) that you want to export.

Note: You can select all of the interactions on the page if you click the Select All check box at the top of the check box column.

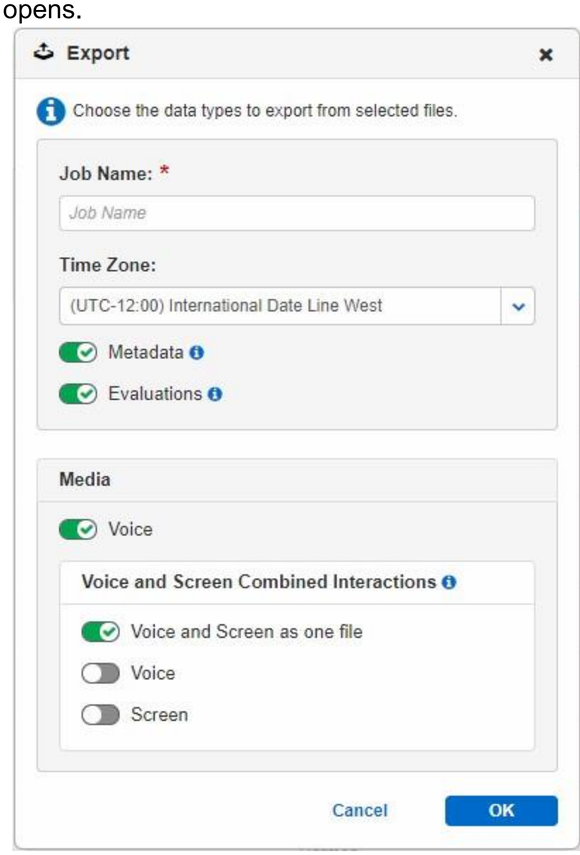


Navigating between pages retains the selected interactions of the active page.

4. Click on the  button and select Export Media from the list.



The Export window opens.



Note: In this example procedure, no Voice and Screen (combined) interactions were selected in the Search Results table. For information on how to export jobs with Voice and Screen interactions, see Export a Job for Search Evaluations on page 3131.□

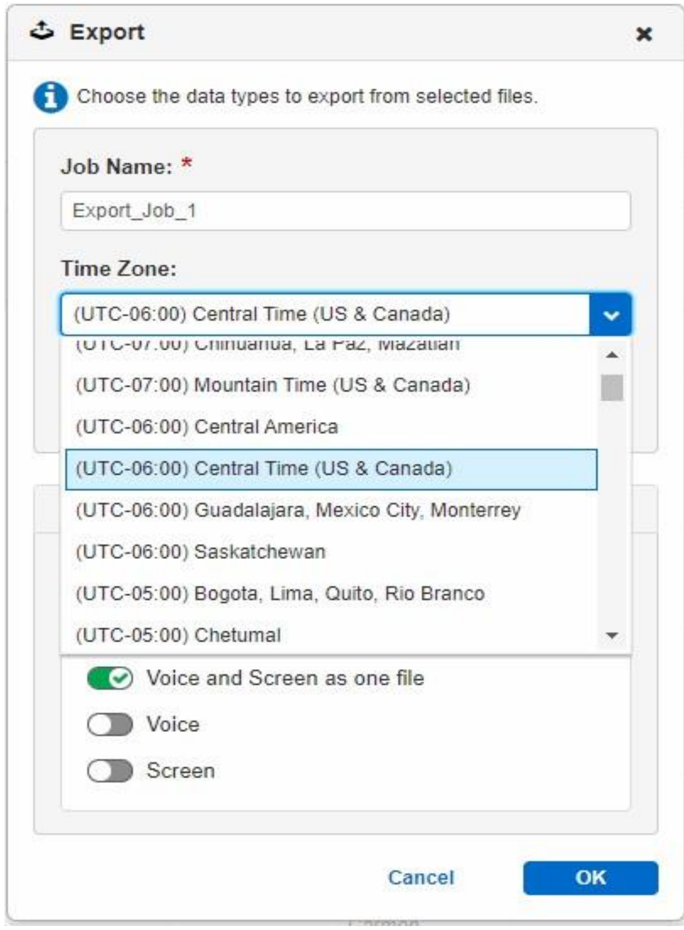
□

Also, in this example procedure, no Search Evaluations were selected in the Search Results table. For information on how to export jobs with Search Evaluations, see Export a Job for Search Evaluations on page 3-131.

5. On the Job Name text box, type a name up to 100 characters.

Note: All fields marked with a red asterisk (*) are required.

6. Click on the drop-down of Time Zone field and select the timezone based on your requirement, as shown below.



7. If you want to export the metadata for the selected interaction(s), select the Metadata option.

   OR

   If you do not want to export the metadata for the selected interaction(s), do not select the Metadata option.

8. If you want to export the media for the selected interaction(s), in the Media section of the window, you can select any combination of options as described in the following table.

Option	Description
Voice	Select this option to export Voice interactions.
Screen	Select this option to export Screen interactions.
Option	Description

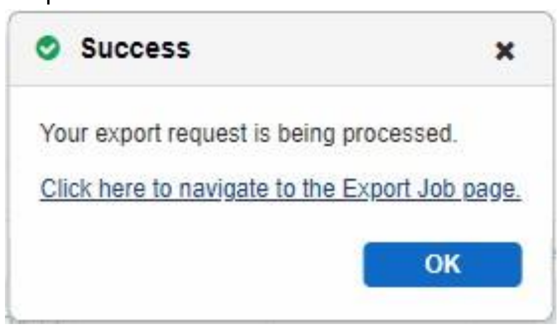
Voice and Screen Combined Interactions	If the interaction you want to export contains a media file with both Voice and Screen recorded together, then you can select one of the following options. • Voice and Screen as one file - select this option to export the interaction as one file • Voice - select this option to export only the Voice portion of the interaction in a file separate from the Screen portion. • Screen - select this option to export only the Screen portion of the interaction in a file separate from the Voice portion.

9. To submit the export job for processing, select OK.

Note: Until this point in the procedure, you can click Cancel to cancel the export job. A Warning window opens to verify that you do want to cancel the export job.

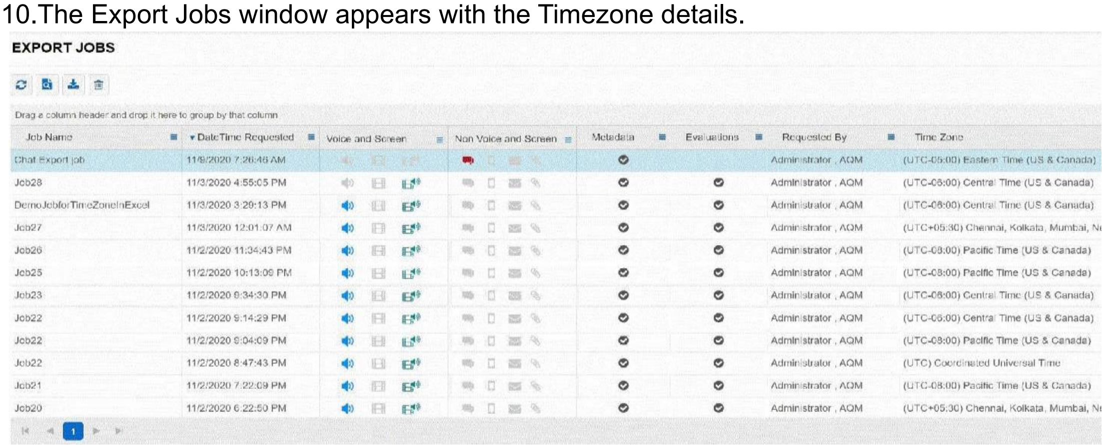
The export job is assigned a Pending status.

The Success window opens, indicating that the export job is being processed. In addition, a link to the View Export Jobs page is included, which, when you click it, launches a new browser tab of the Export Jobs window.



If an error occurred while saving the export job, an appropriate error window opens.

10.The Export Jobs window appears with the Timezone details.



Note: For information about the data in the columns of the Export Job table, see the row named Export Job Grid columns, in the table in the section called Exporter Changes on page 3-124.

3.6.3 Export a Job for Search Evaluations

When exporting a job for scored interactions (an evaluation), you can export associated evaluation metadata.

To create an export job for scored interactions, perform the following steps.

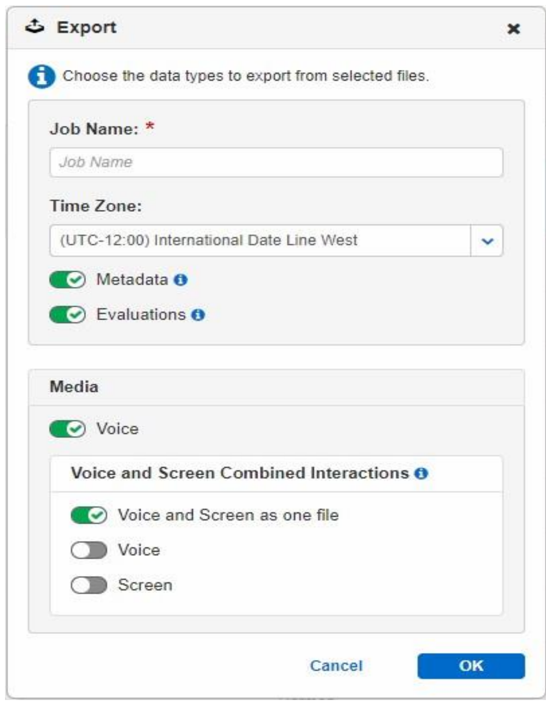
1. Log in to Workforce Engagement Management as an Administrator.

2. Search for a scored interaction (see Performing a Search on page 3-40).
3. Select an interaction (or interactions) by clicking the check box(es) next to the interaction(s) that you want to export.

   Note: You can select all of the interactions on the page if you click the Select All check box at the top of the check box column.

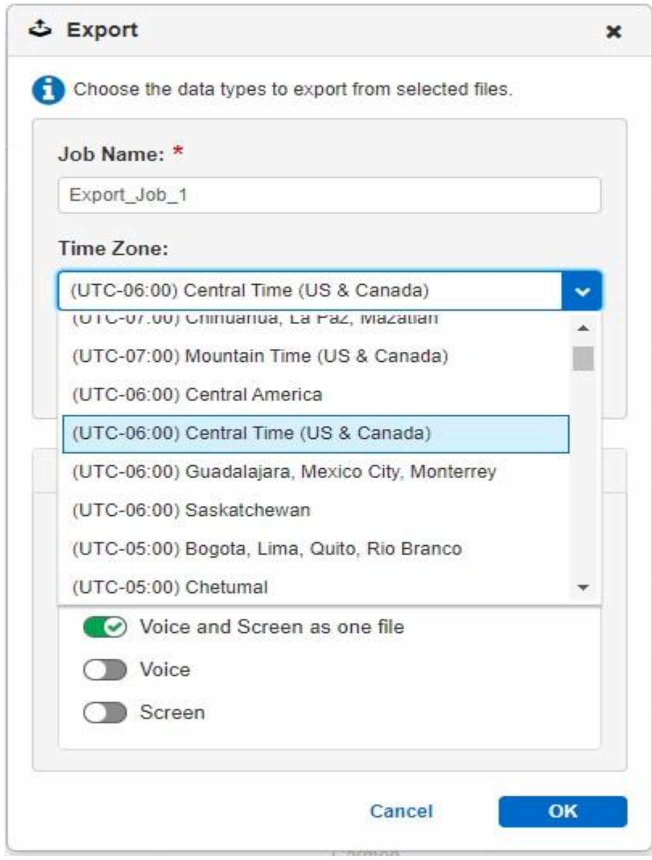
   Navigating between pages retains the selected interactions of the active page.

   If you select more than 10 interactions, the Playlist button becomes inactive because a Playlist can only contain 10 interactions; a tool tip displays to remind you. However, if a user does not have the Export To Media permission, but selects more than 10 interactions, a warning window opens, since for this user, creating a Playlist is the only actionable option from the table.
4. Click Export Media  button.
   The Export window opens.



5. In the Job Name text box, type a name up to 100 characters.

   Note: All fields marked with a red asterisk (*) are required.
6. Click on the drop-down of Time Zone field and select the timezone based on your requirement, as shown below.



7. If you want to export metadata, select the Metadata option.
8. If you want to export the evaluations for the selected interaction(s), select the Evaluations option.
9. If you want to export the media for the selected interaction(s), in the Media section of the window, you can select any combination of options as described in the following table.

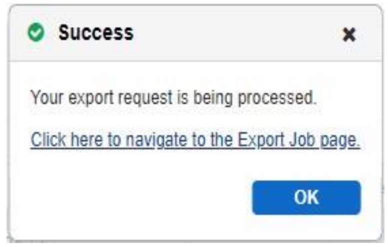
Option	Description
Voice	Select this option to export Voice interactions.
Screen	Select this option to export Screen interactions.
Voice and Screen Combined Interactions	If the interaction you want to export contains a media file with both Voice and Screen recorded together, then you can select one of the following options: • Voice and Screen as one file - select this option to export the interaction as one file • Voice - select this option to export only the Voice portion of the interaction in a file separate from the Screen portion. • Screen - select this option to export only the Screen portion of the interaction in a file separate from the Voice portion.

10. To submit the export job for processing, select OK.

Note: Until this point in the procedure, you can click Cancel to cancel the export job. A Warning window opens to verify that you do want to cancel the export job.

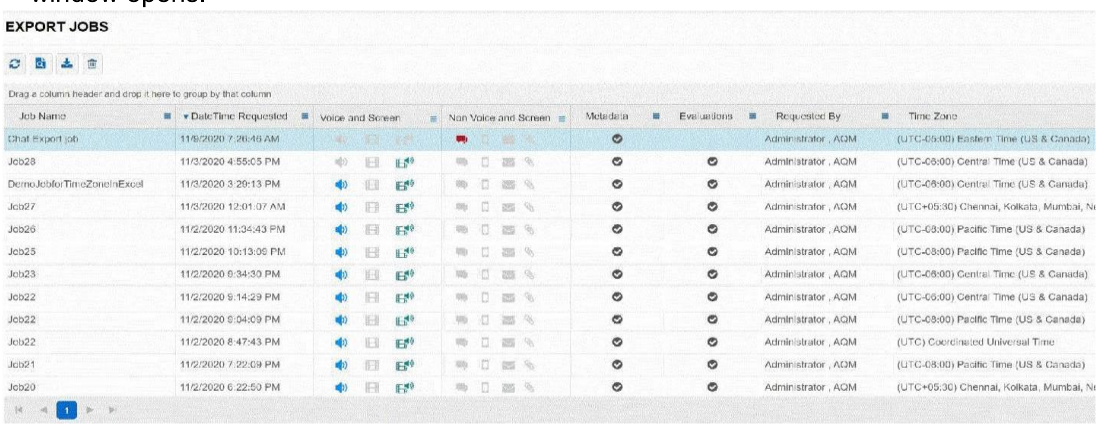
The export job is assigned a Pending status.

The Success window opens, indicating that the export job is being processed. In addition, a link to the View Export Jobs page is included, which, when you click it, launches a new browser tab of the View Export Jobs window.



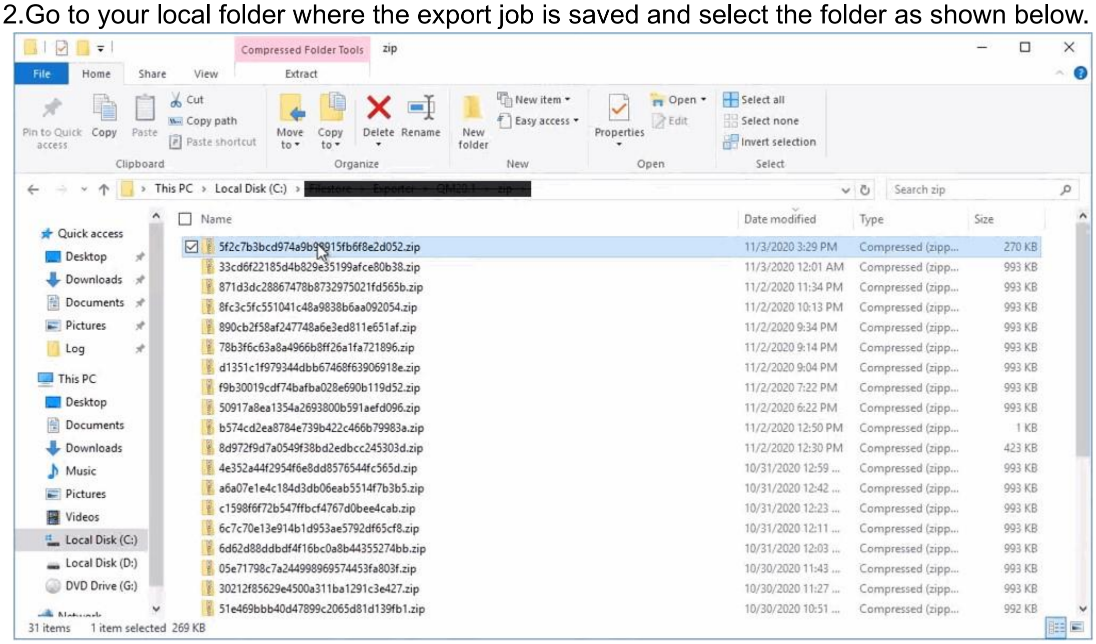
If an error occurred while saving the export job, an appropriate error window opens.

11. On the Success window, click OK and the Success pop-up will close. The Export Jobs window opens.

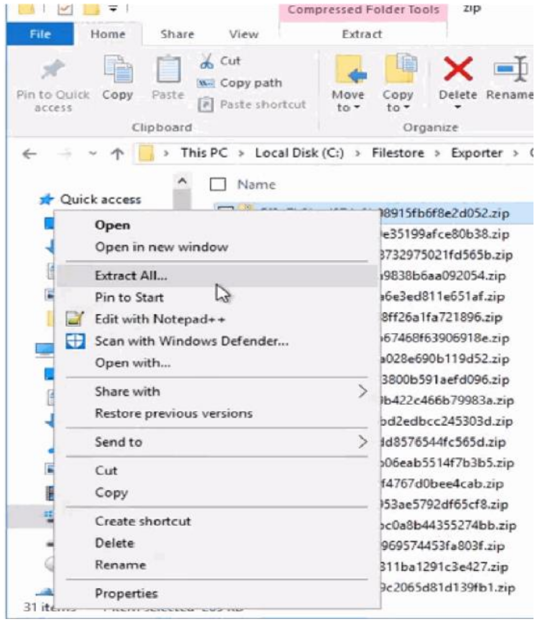


Note: For information about the data in the columns of the Export Job table, see the row named Export Job Grid columns, in the table in the section called Exporter Changes on page 3-124.

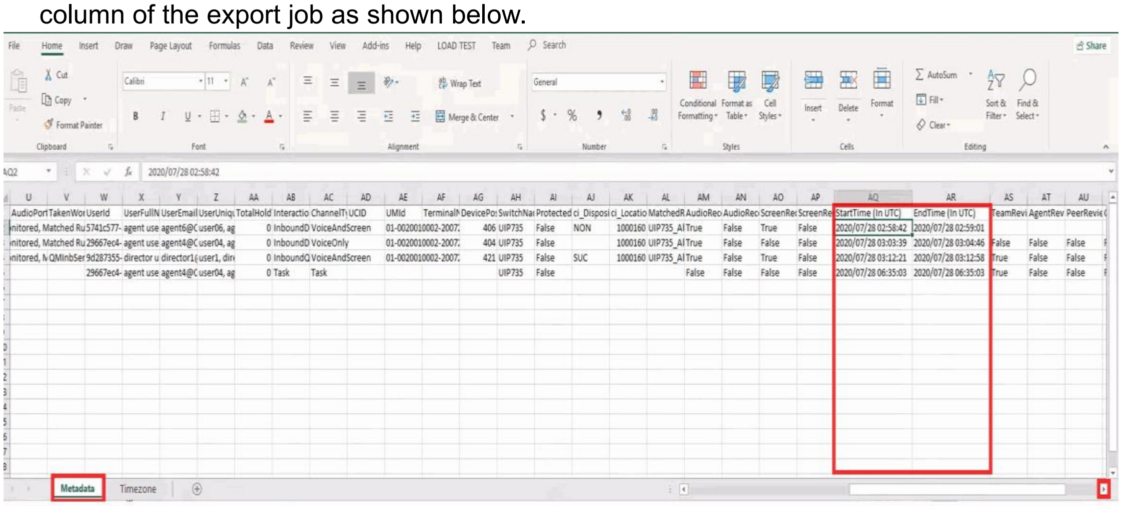
12. Go to your local folder where the export job is saved and select the folder as shown below.



13. Extract All the .zip folder as shown below and open the spreadsheet.

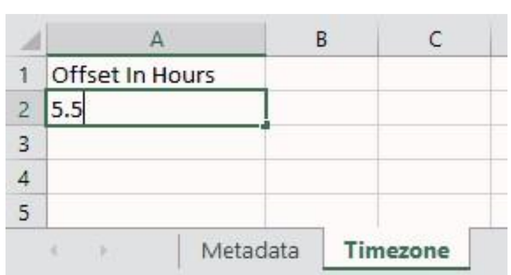


14.On the Metadata tab, the Start Time and End Time columns reflect the time according to the selected timezone, and scroll right to find the Start Time (In UTC) and End Time (In UTC) column of the export job as shown below.



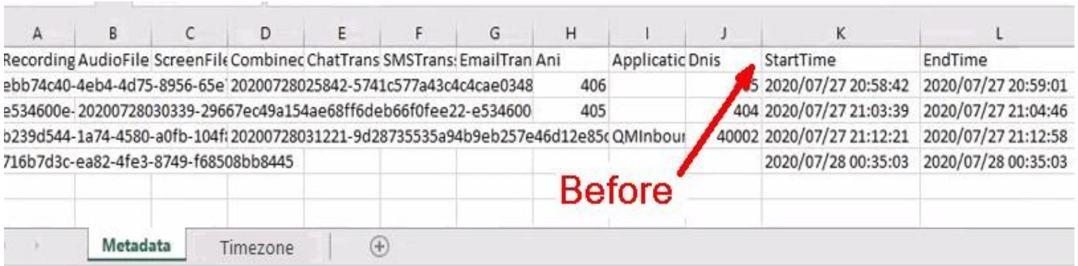
Note: By default, the Start Time (In UTC) and End Time (In UTC) columns are hidden on the exported spreadsheet.

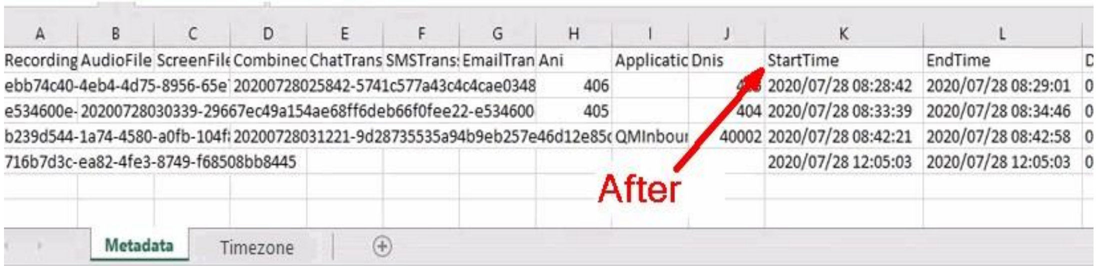
15.On the TimezoneOffset tab, type the hours manually to change the Start and End Time as shown below.



Note: The time will be changed based on the Start Time (In UTC) and End Time (In UTC).

16.The time on the Start Time and End Time columns are changed, as shown below.

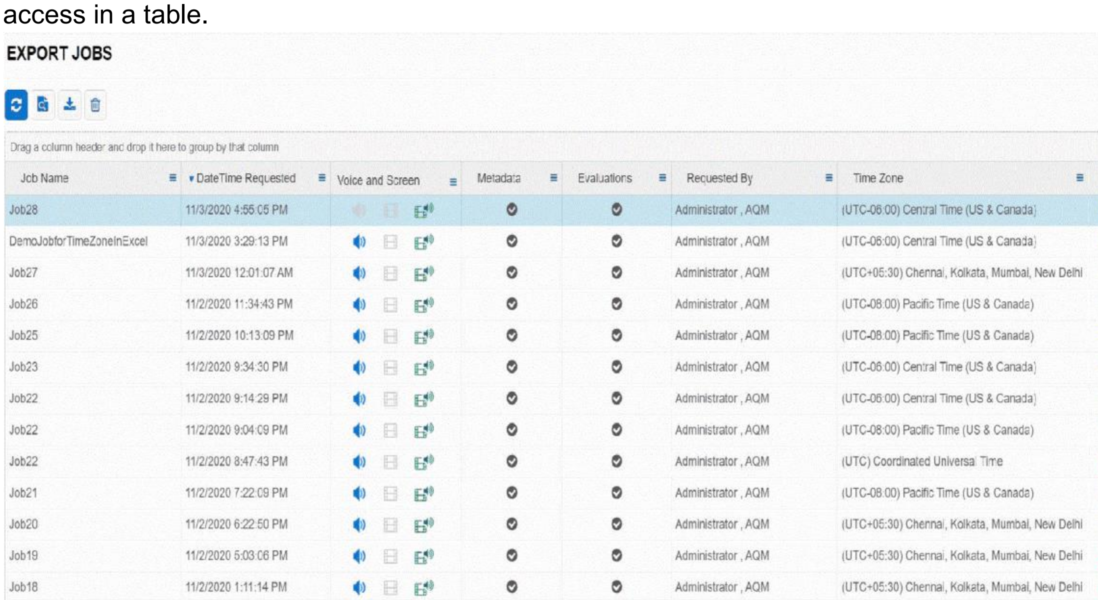




3.7 View Export Jobs

You can access the **View Export Jobs** navigation menu under the **Employee Experience > Utilities > Quality** header if you have the Export To Media permission.

When you click View Export Jobs, the exporter loads all active exported jobs that you can access in a table.


EXPORT JOBS

Drag a column header and drop it here to group by that column

Job Name	DateTime Requested	Voice and Screen	Metadata	Evaluations	Requested By	Time Zone
Job28	11/3/2020 4:55:05 PM				Administrator , AQM	(UTC-06:00) Central Time (US & Canada)
DemoJobforTimeZoneInExcel	11/3/2020 3:29:13 PM				Administrator , AQM	(UTC-06:00) Central Time (US & Canada)
Job27	11/3/2020 12:01:07 AM				Administrator , AQM	(UTC+05:30) Chennai, Kolkata, Mumbai, New Delhi
Job26	11/2/2020 11:34:43 PM				Administrator , AQM	(UTC-08:00) Pacific Time (US & Canada)
Job25	11/2/2020 10:13:09 PM				Administrator , AQM	(UTC-08:00) Pacific Time (US & Canada)
Job23	11/2/2020 9:34:30 PM				Administrator , AQM	(UTC-06:00) Central Time (US & Canada)
Job22	11/2/2020 9:14:29 PM				Administrator , AQM	(UTC-06:00) Central Time (US & Canada)
Job22	11/2/2020 9:04:09 PM				Administrator , AQM	(UTC-08:00) Pacific Time (US & Canada)
Job22	11/2/2020 8:47:43 PM				Administrator , AQM	(UTC) Coordinated Universal Time
Job21	11/2/2020 7:22:09 PM				Administrator , AQM	(UTC-08:00) Pacific Time (US & Canada)
Job20	11/2/2020 6:22:50 PM				Administrator , AQM	(UTC+05:30) Chennai, Kolkata, Mumbai, New Delhi
Job19	11/2/2020 5:03:06 PM				Administrator , AQM	(UTC+05:30) Chennai, Kolkata, Mumbai, New Delhi
Job18	11/2/2020 1:11:14 PM				Administrator , AQM	(UTC+05:30) Chennai, Kolkata, Mumbai, New Delhi

The Export Jobs window does not contain a filter window and when the page is launched it automatically loads the active export jobs based on your permissions. Manually deleted or expired jobs are not displayed.

The following table describes the columns on the Export Jobs window.

Column	Description
Job Name	The job name entered when saving the export job. **Note:** Job names are not unique.
DateTime Requested	This is the saved date time of the export job.
Voice and Screen	A check mark icon to indicate that Voice and Screen was selected when saving the export job.
Non Voice	A check mark icon to indicate that Non Voice and Screen was selected when saving the export job.
Metadata	A check mark icon to indicate that Export metadata was selected when saving the export job.
Evaluations	A check mark icon to indicate that Export metadata and evaluation data where available option was selected when saving the export job; only selectable from the Scored Interaction Export window.
Requested By	The name of the user who saved the export job.
Job ID ▯ (Hidden column)	The unique identifier of the export job.
Time Zone	The time zone of the exported job.
Status	A job can have one of five possible states. Refer to the next table for further information.

The following table describes the export job states.

Status	Description
	Pending. The export job has been received and is currently being processed.
	Failed. An error has occurred processing all interactions in the export job. A detailed description of the failed interactions is accessible in the Details window, or you can contact your administrator to troubleshoot this issue.

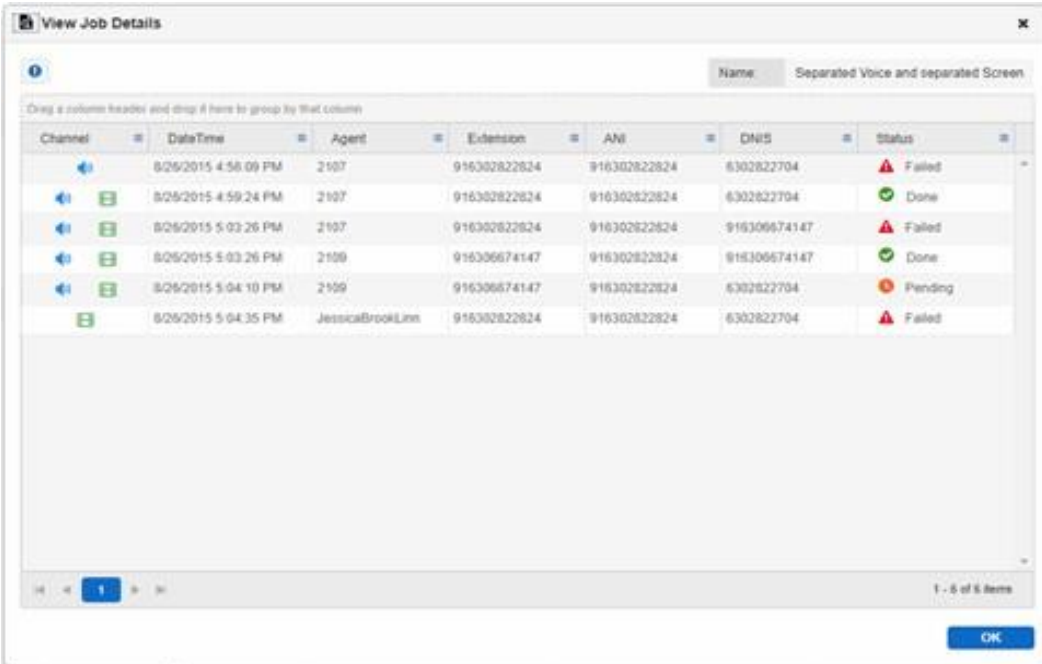
	Done. The export process has completed successfully. The export job is available for download.
	Done with Failures. The export process has completed but some items have failed to export. A detailed description of the failed interactions is accessible in the Details window, or you can contact your administrator to troubleshoot this issue. The export job is available for download and contains the successfully exported items. **Note:** This state is not applicable to table items in the View Job Details window.

The export job grid supports single row selection. With each selected row, where applicable, you can execute the following actions.

Action	Description
	Refresh. When you select this action, the export grid is refreshed to reflect the latest export job items. This action is always enabled.
Action	**Description**
	View Details. When you select this action, a window opens with a detailed view of each interaction in the selected export job. This action is always enabled.
	Download. When you select this action, the selected export job downloads as a single compressed (Zip) file. This action is only available to export jobs with a status of Done and Done with Failures.
	Delete. When you select this action, you can confirm if you want to delete the selected export job. This action is always enabled.

3.7.1 Export Details

To view the interaction details of an exported job, select (highlight) the job row item that you want to view and click View Details. The View Job Details window opens.



Each interaction or scorecard in the exported job is an individual row item. The same states display in each detail row.

The following table describes the columns on the View Job Details window.

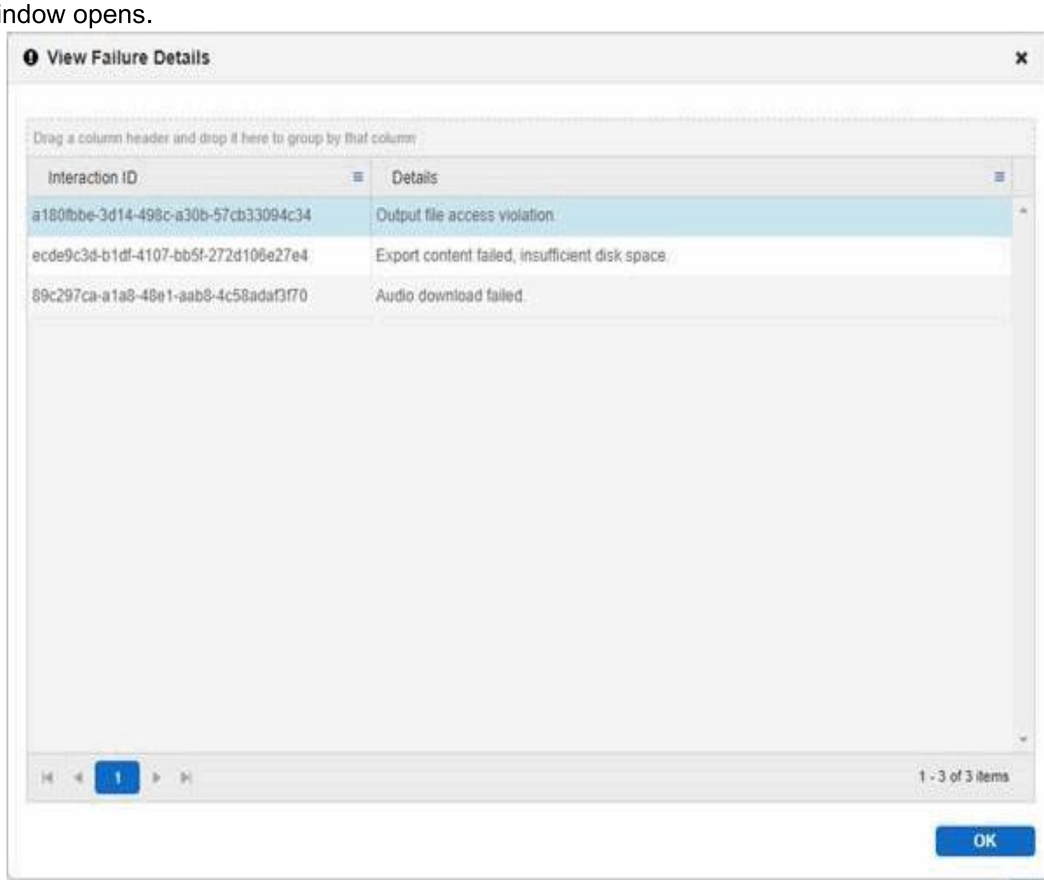
Column	Description
Channel	The channel associated with the interaction. This is represented by the corresponding channel icon used in the (Scored) Interaction search screen. If the interaction channel is a Voice and Screen channel, up to 3 icons may be displayed in this column. This would represent each of the separated channel options selected when the export job was saved (for example, combined option, voice only option, screen only option).
DateTime	The interaction date and time.
Agent	The agent associated with the interaction.
Extension	The extension associated with the interaction.
ANI	The Automatic Number Identification (ANI) associated with the interaction.
DNIS	The Dialled Number Identification Service (DNIS) associated with the interaction.
UMID	The Universal Media ID (UMID) associated with the interaction. This column is only available on Aspect Cloud deployments.
EvaluationID (hidden column)	The unique identifier of the scored interaction.

InteractionID (hidden column)	The unique identifier of the interaction. If this is a scored interaction, the same Interaction ID may exist across other details rows to indicate related scored interactions.
Status	A job interaction can have one of four possible states. Refer to the states table in View Export Jobs on page 3-136. **Note:** The Done with Failures state is not applicable to the View Job Details window.

3.7.2 View Failure Details

If one of more details are in either a Failed or an Unknown state, the Information button at the top of the View Job Details window is enabled.

To view the information about the failed export job, click Information. The View Failure Details window opens.



The View Failure Details window outlines the error associated with each export detail row.

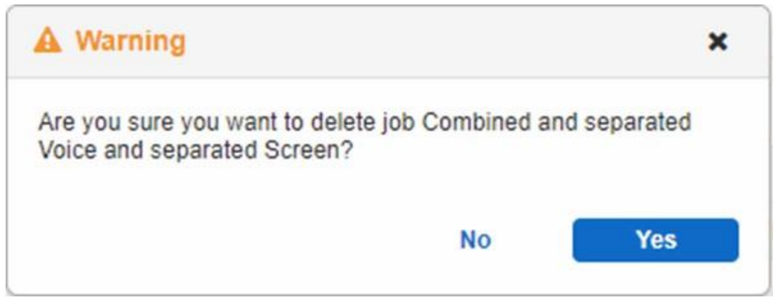
The following table describes the columns in the View Failure Details window.

Column	Description
Interaction ID	The unique identifier of the interaction. If this is a scored interaction, the same Interaction ID may exists across other rows to indicate related scored interactions.

Details	This column outlines the export error that occurred against the interaction.

3.7.3 Delete an Export Job

To delete an export job, in the Export Jobs window, select (highlight) a job row and click Delete. A Warning window opens. The following screen shot is an example of that Warning window.



On the Warning window, if you select No, the window closes and no action occurs. If you select Yes, the system flags the export job to be deleted and it no longer displays in the export job list. When you delete an export, it remains accessible for reporting purposes.

3.7.4 Download an Export Job

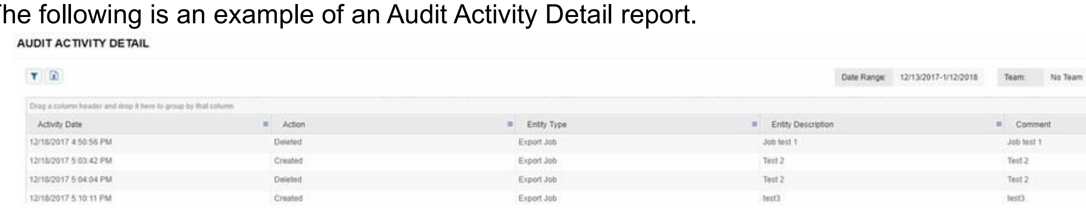
To download an export job, in the Export Jobs window, select (highlight) a job row and click Download.

Depending on your browser type, a Save as window opens, on which you can select the location to which the download is saved; otherwise the export job is saved to the browser's Download directory.

3.7.5 Export Audit Activity Details

Export actions such as Add, Delete, Download are logged against export jobs when an action is carried out. These audits can be reviewed in the Audit Activity Details report.

The following is an example of an Audit Activity Detail report.



3.8 Deleting Multiple Evaluations

This section describes the procedure to delete multiple evaluations in the Search Evaluations window. This feature helps the Administrator to delete one or more evaluations from the Scored

Interactions window instead of navigating to the Evaluation window to delete a specific evaluation.

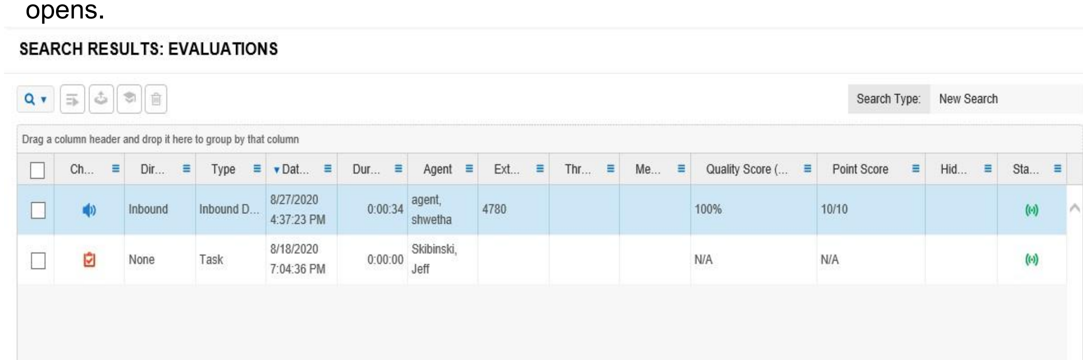
- If the Administrator or owner of the evaluations wants to view the details of the evaluation and delete a specific evaluation, select the Delete menu in the Evaluation window to delete the specific evaluation.
- If the Administrator wants to delete the evaluations in bulk, then define the criteria in the Scored Interactions window. In the Scored Interactions table, select the evaluations that you want to delete and click Delete.

3.8.1 Delete Evaluations in Search Evaluations Window

1. Log in to Workforce Engagement Management as an Administrator.

   Note: Only the Administrator can see the Delete button in the Scored Interactions window.

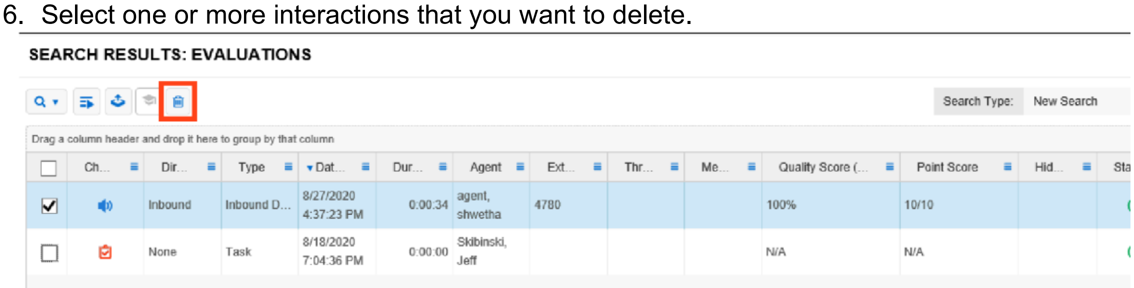
2. On the Navigation menu, click Employee Experience.
3. Under Evaluations, click the Search Evaluations link. The Scored Interactions window opens.



4. Define the search criteria.
5. The user can identify the details of the evaluation from the following columns in the Search Evaluations table:

- Evaluation Template Name
- Evaluation Created By
- Score
- Evaluation Status

6. Select one or more interactions that you want to delete.

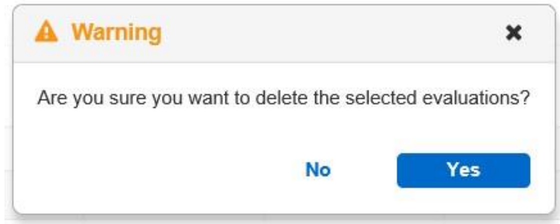


Once the evaluations are selected in the table, the Delete button gets enabled.

7. Click Delete. A warning message opens.

   Note:

   - If one or more selected interactions are Non-Protected, the following warning message opens.



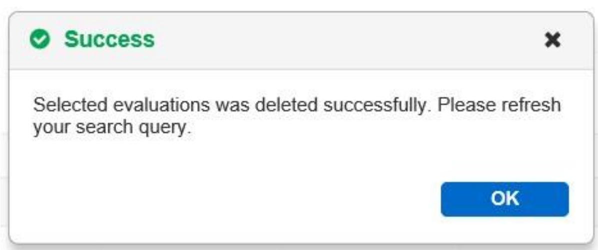
   - If one or more selected interactions are Protected, the following warning message opens.

8. To delete the evaluations, click Yes.

   Note:

   - If the selected interaction has only one evaluation and you delete it, the interaction is no longer displayed in the Scored Interactions window. You can find the interaction on the Search Results window.
   - If the selected interaction has two evaluations and you delete one, the interaction is displayed in the Scored Interaction window for the existing evaluation.
   - If any evaluation has Assign Coaching, then the system removes the evaluation reference link in the coaching that is assigned. (To check the reference, refer to step 12 under Assign Coaching.)

9. Once you delete the evaluation, the Success window opens.



Note: The window is not refreshed automatically. Click Edit Search and search again to refresh the search results.

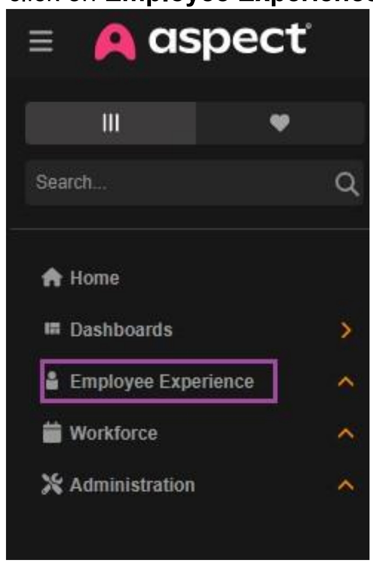
10. Click OK to close the Success window.

3.9 My Preferences

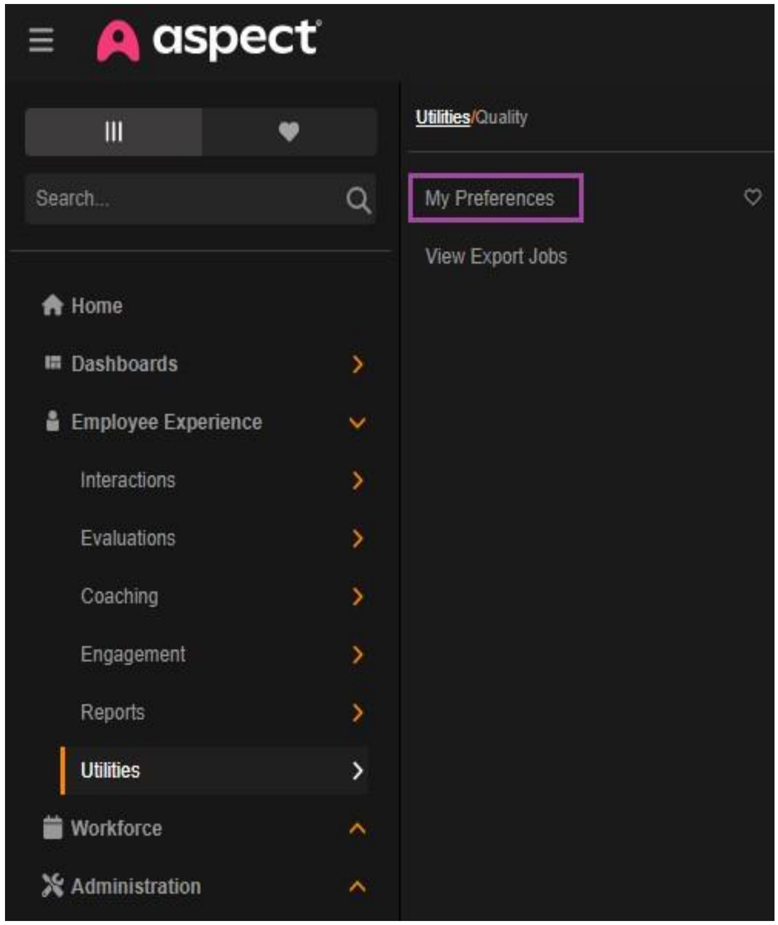
My Preferences window allows you to show inactive details of User, Work Type, Evaluation Template, Application and Team in Report definition and search criteria based on the preference of the logged-in user. Follow the steps below to go to My Preferences window.

Note: By default, inactive Users, Work Type, Evaluation Template, Application and Team will not be displayed in Search Criteria and Reports, and if you wish to view them, you have to turn on the preference. These settings apply only to you and not across the system.

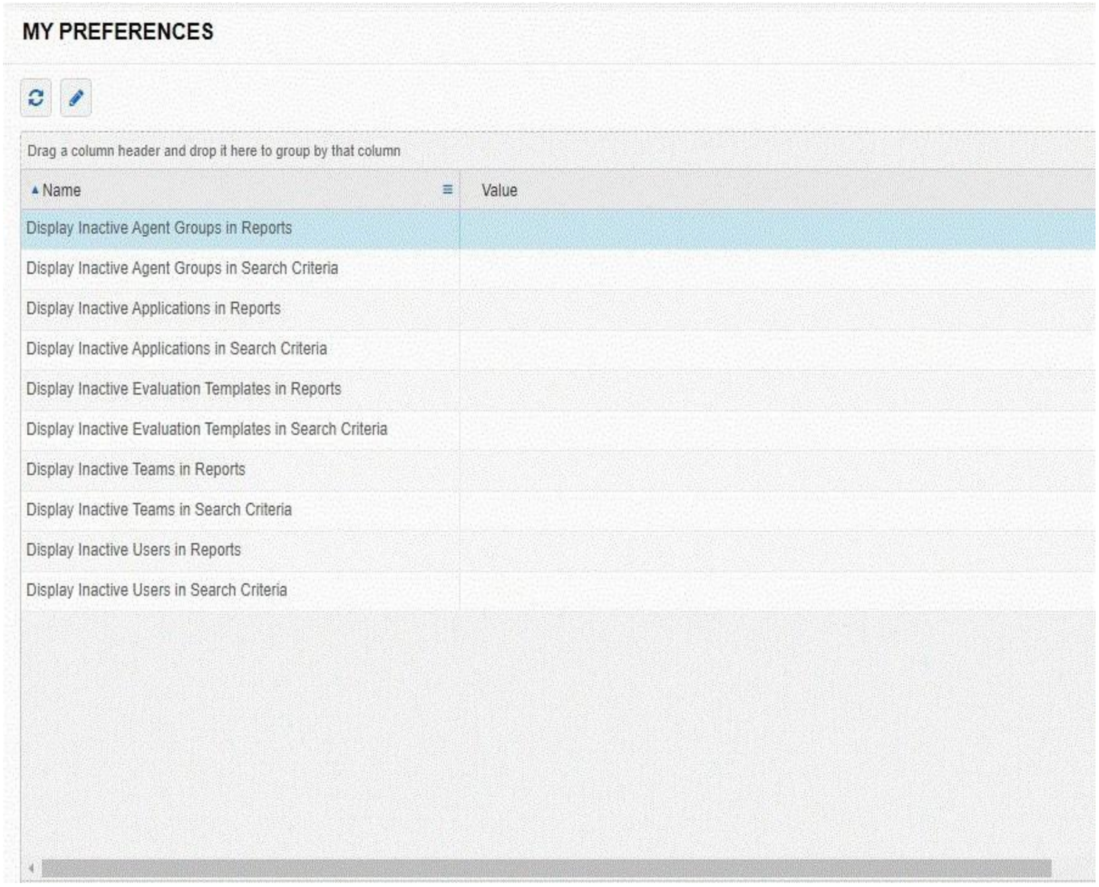
1. Go to Workforce Engagement Management.
2. Go to **Main Menu** and click on **Employee Experience.**



3. Under **Utilities**, select **Quality**, then click on **My Preferences**.



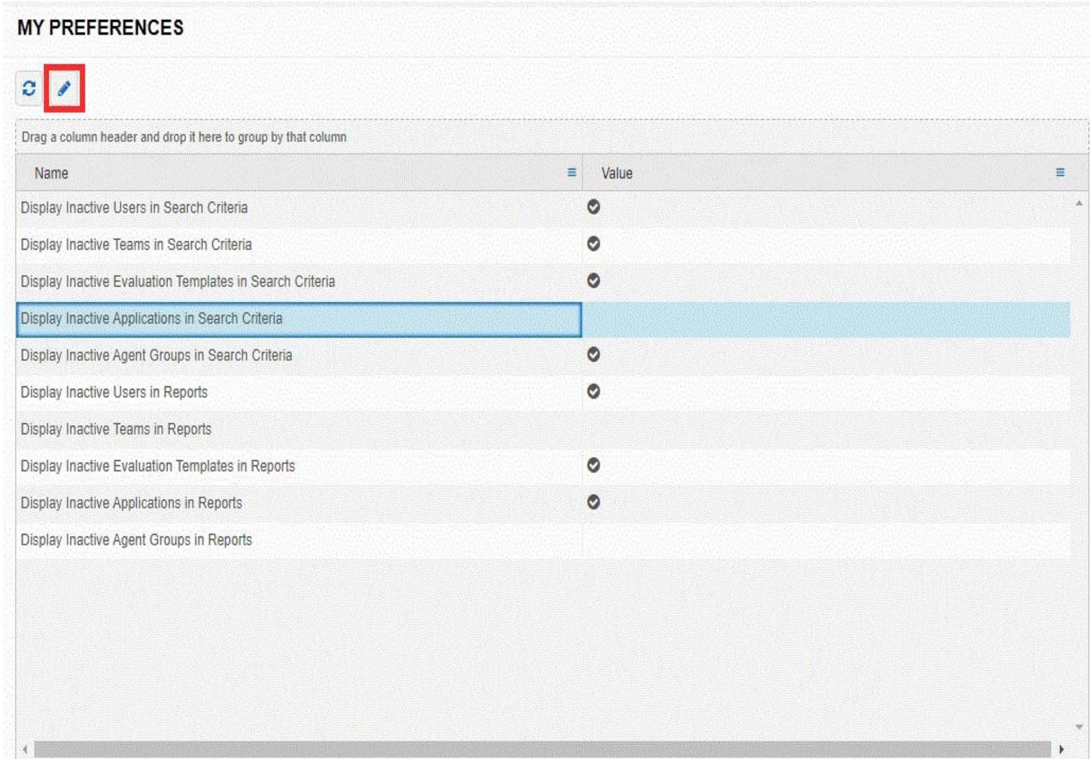
4. The MY PREFERENCES window appears.



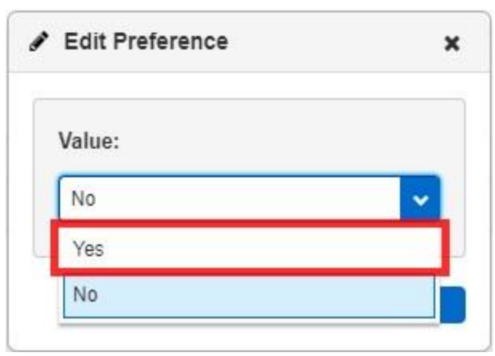
3.9.1 Edit My Preferences

When you want to edit the value of MY PREFERENCES, follow the steps below.

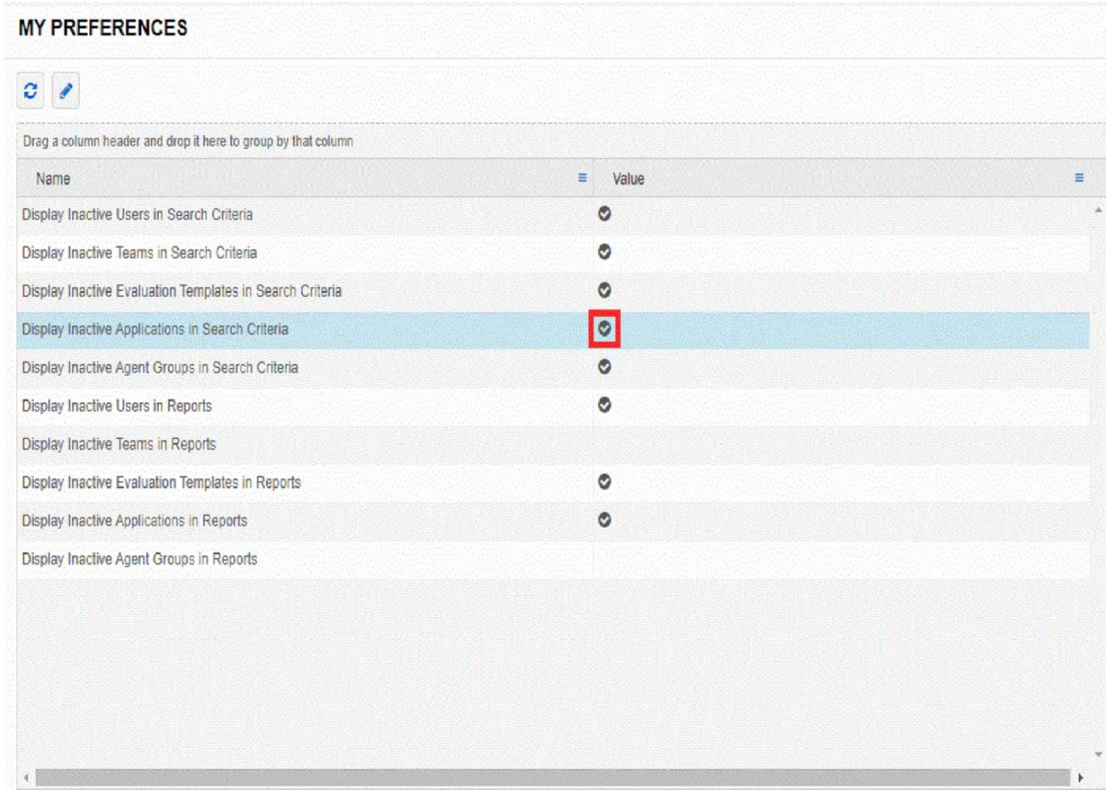
1.Select the preference row and click on the Edit button.



2. The Edit Preference pop-up appears. Click on the drop-down list of Value field and select Yes as shown below.



3. Click Save to go back to the MY PREFERENCES window and the check mark is shown under the Value column, as shown below.



Note: If you change the value for any preference, then all the users must log out and log in to Workforce Engagement Management UI to effect the changes.

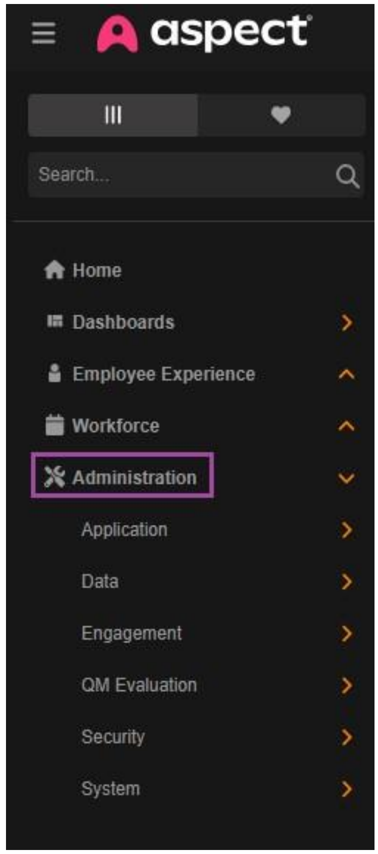
4. User Management

User Management is a feature from the Aspect Quality component of Aspect Cloud that an administrator uses Monitoring Permission to manage user's speech permission.

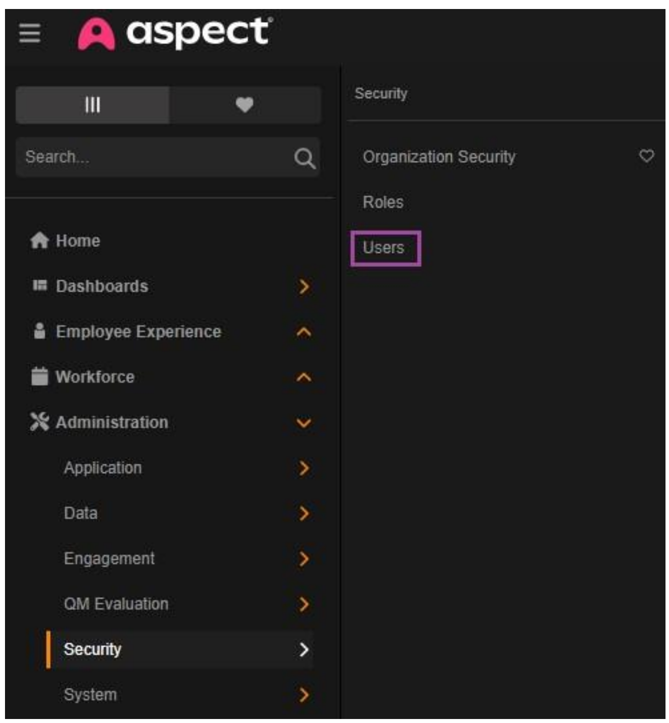
4.1 Listing Users

Follow the steps below to allow or not allow the Speech permission for a user.

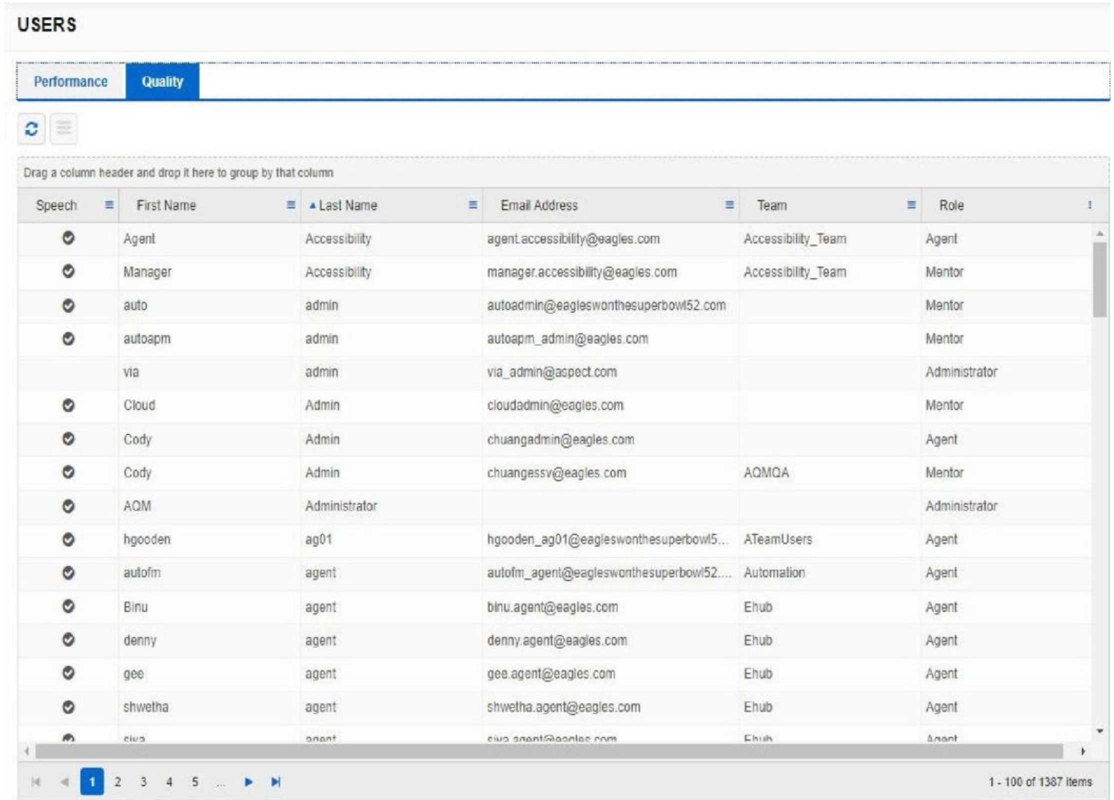
1. Go to **Main Menu** and select **Administration**.



2. Click on **Security** and select **Users** as shown below.



3. The **Users** screen appears which will list all the active users in the system by default.



Speech	First Name	Last Name	Email Address	Team	Role
✓	Agent	Accessibility	agent.accessibility@eagles.com	Accessibility_Team	Agent
✓	Manager	Accessibility	manager.accessibility@eagles.com	Accessibility_Team	Mentor
✓	auto	admin	autoadmin@eagleswonthesuperbowl52.com		Mentor
✓	autoapm	admin	autoapm_admin@eagles.com		Mentor
	via	admin	via_admin@aspect.com		Administrator
✓	Cloud	Admin	cloudadmin@eagles.com		Mentor
✓	Cody	Admin	chuangadmin@eagles.com		Agent
✓	Cody	Admin	chuangessv@eagles.com	AQMQA	Mentor
✓	AQM	Administrator			Administrator
✓	hgooden	ag01	hgooden_ag01@eagleswonthesuperbowl5...	ATeamUsers	Agent
✓	autofm	agent	autofm_agent@eagleswonthesuperbowl52....	Automation	Agent
✓	Binu	agent	binu.agent@eagles.com	Ehub	Agent
✓	denny	agent	denny.agent@eagles.com	Ehub	Agent
✓	gee	agent	gee.agent@eagles.com	Ehub	Agent
✓	shwetha	agent	shwetha.agent@eagles.com	Ehub	Agent

The header bar icons function as follows:

Icons	Description
Refresh	Refreshes the users grid with latest user changes. Instead of click on the browser refresh button, click on Refresh button which will refresh only the grid data and not the page
Monitoring Permissions	Change the Speech permissions for one or more than one user.

Users grid contains information as displayed in the below table.

Users Grid Attributes Details:

Column Name	Description	Default Column
Speech	If Speech is available for the user a checkmark will be displayed under “Speech” column	✓
First Name	Displays first name of the user	✓
Last Name	Displays last name of the user	✓
Email Address	• Displays Email address of the user • If an email address does not exist, then the field will blank	✓

Users Grid Attributes Details:

Column Name	Description	Default Column
Team	Displays the Team name of the user	✓
Role	Displays Role of the user from the below list • None • Agent • Mentor • Administrator	✓

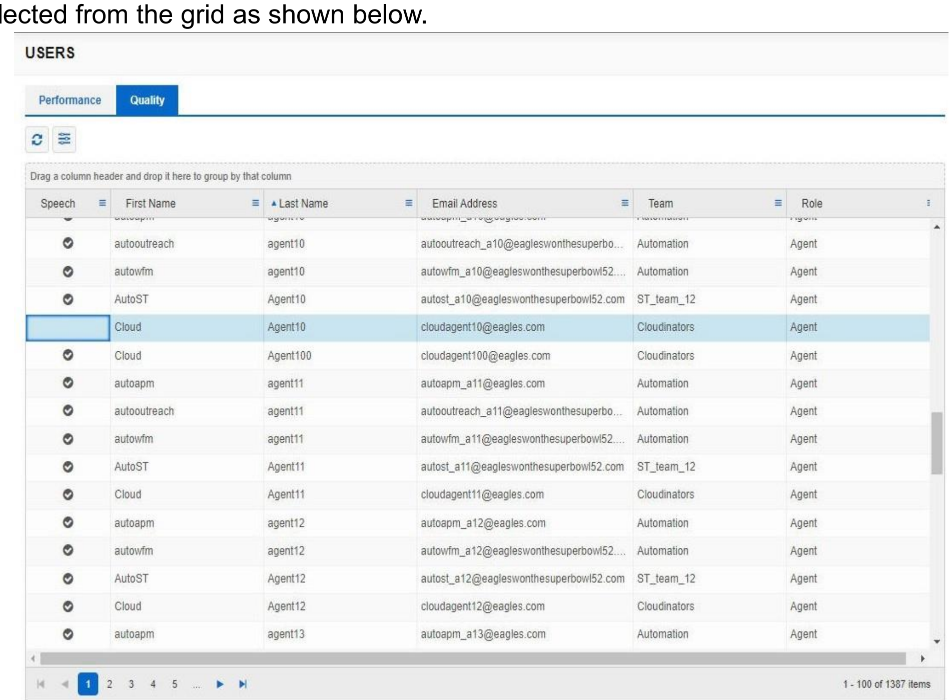
Note:

- Displays all the active users available in the system by default.
- Grid will be sorted on Last Name by default.
- The grid is customizable until the user signs out from the WEM or reset the grid layout.
- Up to 100 users will be displayed per page.

4.2 Monitoring Permission

The user is allowed to click on **Monitoring Permission** button to update Speech status.

1. Select the user to enable Monitoring Permission. **Ex:** Cloud is selected from the grid as shown below.

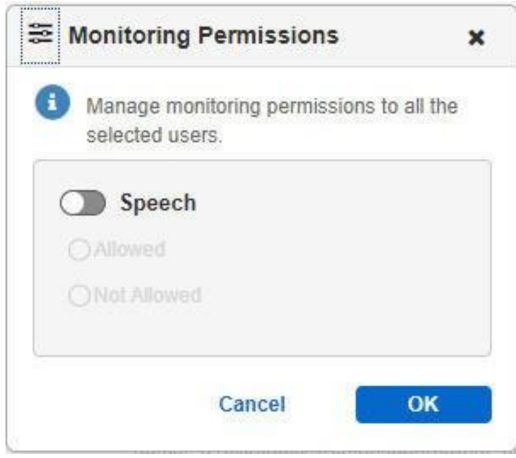


Speech	First Name	Last Name	Email Address	Team	Role
✓	autooutreach	agent10	autooutreach_a10@eagleswonthesuperbo...	Automation	Agent
✓	autowfm	agent10	autowfm_a10@eagleswonthesuperbowl52....	Automation	Agent
✓	AutoST	Agent10	autost_a10@eagleswonthesuperbowl52.com	ST_team_12	Agent
	Cloud	Agent10	cloudagent10@eagles.com	Cloudinators	Agent
✓	Cloud	Agent100	cloudagent100@eagles.com	Cloudinators	Agent
✓	autoapm	agent11	autoapm_a11@eagles.com	Automation	Agent
✓	autooutreach	agent11	autooutreach_a11@eagleswonthesuperbo...	Automation	Agent
✓	autowfm	agent11	autowfm_a11@eagleswonthesuperbowl52....	Automation	Agent
✓	AutoST	Agent11	autost_a11@eagleswonthesuperbowl52.com	ST_team_12	Agent
✓	Cloud	Agent11	cloudagent11@eagles.com	Cloudinators	Agent
✓	autoapm	agent12	autoapm_a12@eagles.com	Automation	Agent
✓	autowfm	agent12	autowfm_a12@eagleswonthesuperbowl52....	Automation	Agent
✓	AutoST	Agent12	autost_a12@eagleswonthesuperbowl52.com	ST_team_12	Agent
✓	Cloud	Agent12	cloudagent12@eagles.com	Cloudinators	Agent
✓	autoapm	agent13	autoapm_a13@eagles.com	Automation	Agent

Note:

- The **Speech** column is blank as Monitoring Permission is not enabled for the Cloud.
- **Monitoring permissions** - Multi-row selection is allowed to update more than one user.

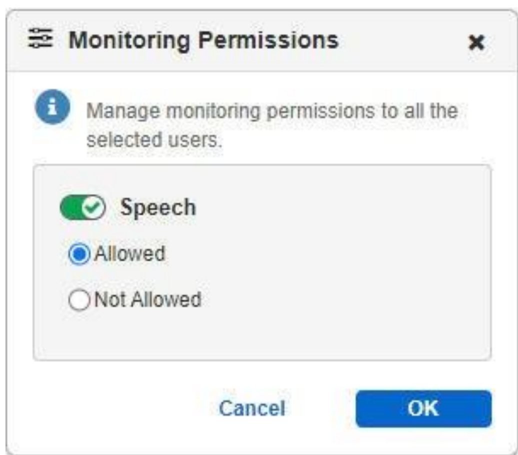
2. Click on **Monitoring Permissions**  button and the **Monitoring Permissions** dialogue appears as shown in the below screen shot.



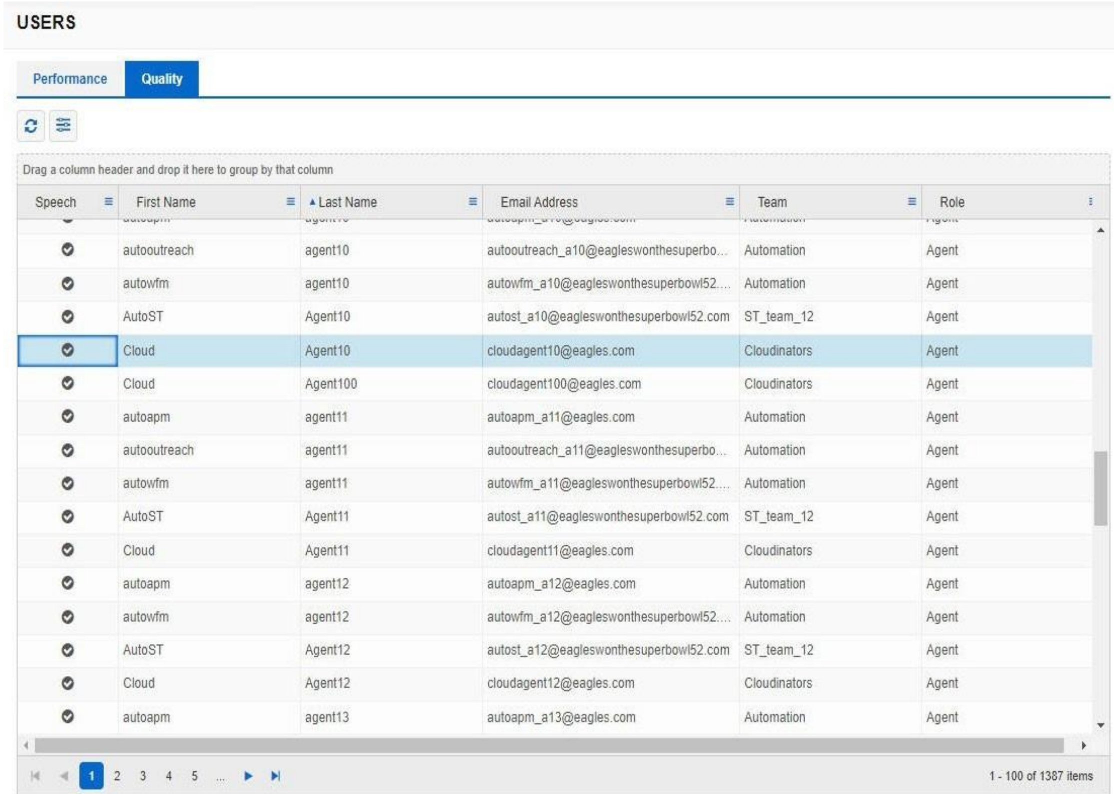
Note:

- By default, **Speech** toggle button is in OFF state.
- Clicking on OK button in Monitoring Permissions dialogue will not update any changes to selected users.

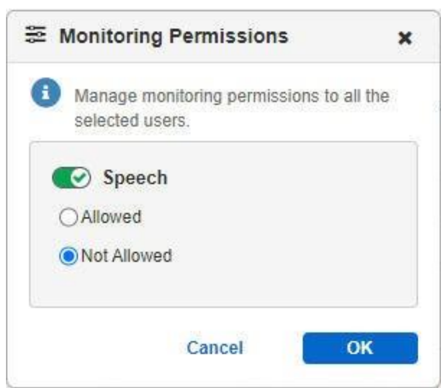
3. Enable the Speech slider and **Allowed** radio button is selected as shown in below screenshot.



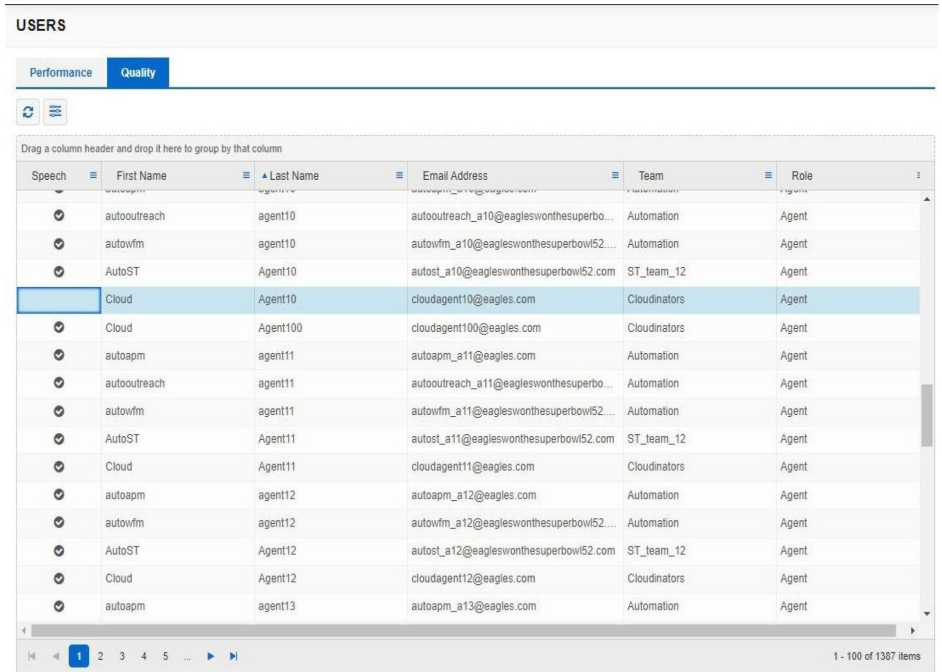
4. Click **OK** button in Monitoring Permissions dialogue will show checkmark  for selected users in the Users grid under the Speech column as shown in below screenshot.



5. Enable the Speech slider and **Not Allowed** radio button is selected as shown in below screenshot.



6. Click **OK** button in Monitoring Permissions dialogue will not show checkmark  for selected users in the Users grid under Speech column as shown in below screenshot.


USERS
Performance
Quality
Drag a column header and drop it here to group by that column
Speech
First Name
Last Name
Email Address
Team
Role
autooutreach agent10 autooutreach_a10@eagleswonthesuperbo... Automation Agent
autowfm agent10 autowfm_a10@eagleswonthesuperbowl52.... Automation Agent
AutoST Agent10 autost_a10@eagleswonthesuperbowl52.com ST_team_12 Agent
Cloud Agent10 cloudagent10@eagles.com Cloudinators Agent
Cloud Agent100 cloudagent100@eagles.com Cloudinators Agent
autoapm agent11 autoapm_a11@eagles.com Automation Agent
autooutreach agent11 autooutreach_a11@eagleswonthesuperbo... Automation Agent
autowfm agent11 autowfm_a11@eagleswonthesuperbowl52.... Automation Agent
AutoST Agent11 autost_a11@eagleswonthesuperbowl52.com ST_team_12 Agent
Cloud Agent11 cloudagent11@eagles.com Cloudinators Agent
autoapm agent12 autoapm_a12@eagles.com Automation Agent
autowfm agent12 autowfm_a12@eagleswonthesuperbowl52.... Automation Agent
AutoST Agent12 autost_a12@eagleswonthesuperbowl52.com ST_team_12 Agent
Cloud Agent12 cloudagent12@eagles.com Cloudinators Agent
autoapm agent13 autoapm_a13@eagles.com Automation Agent
1 2 3 4 5 ...
1 - 100 of 1387 items

5. Coaching

Coaching is a feature from the Aspect Performance component of Workforce Engagement Management that an Administrator or Supervisor uses to improve agents' performance by providing feedback to the agent, for example, in a computer-based training, and giving the agent a specific time frame in which to complete the training.

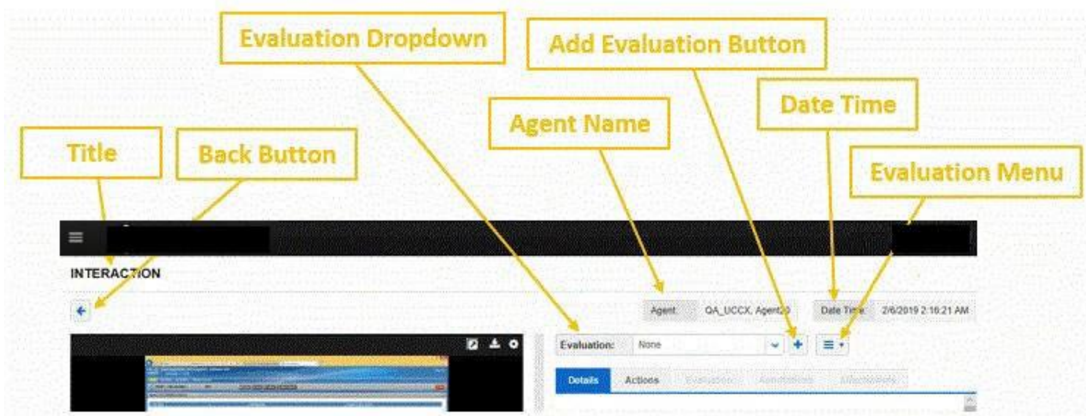
From the Quality component, you can be reviewing an interaction (an evaluation or a recording), and without logging off Quality to launch Performance, you can create a contextual link to Performance and assign coaching directly from Quality.

5.1 Assign Coaching

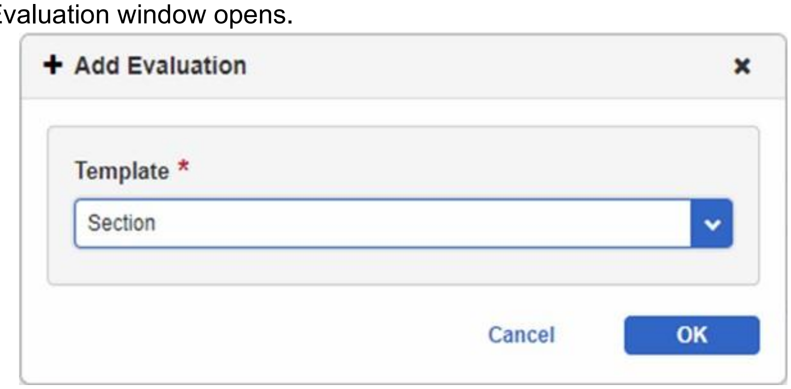
To assign coaching to a new evaluation, perform the following steps.

Note: To assign coaching to an existing evaluation, see Assign Coaching to an Existing Evaluation on page 5-160.

1. Search for an interaction. (See the *Workforce Engagement Management - Aspect Quality Agent Guide,* Chapter 3: Searching for an Interaction.)
2. Open the interaction by double-clicking it. The Interaction window opens.
3. In the right pane, click **Add Evaluation**.



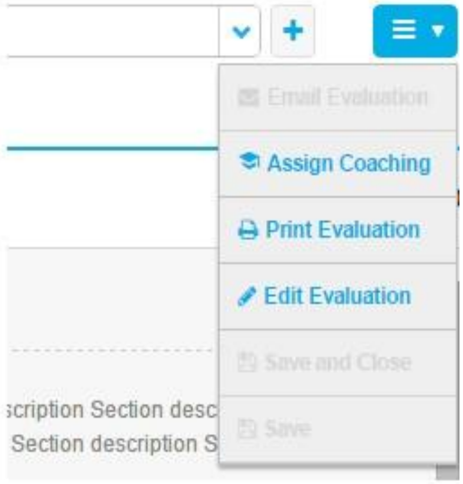
The Add Evaluation window opens.



4. From the drop-down list box, select a **Template**.

Note: The Evaluation templates are displayed alphabetically in the drop-down evaluation list.

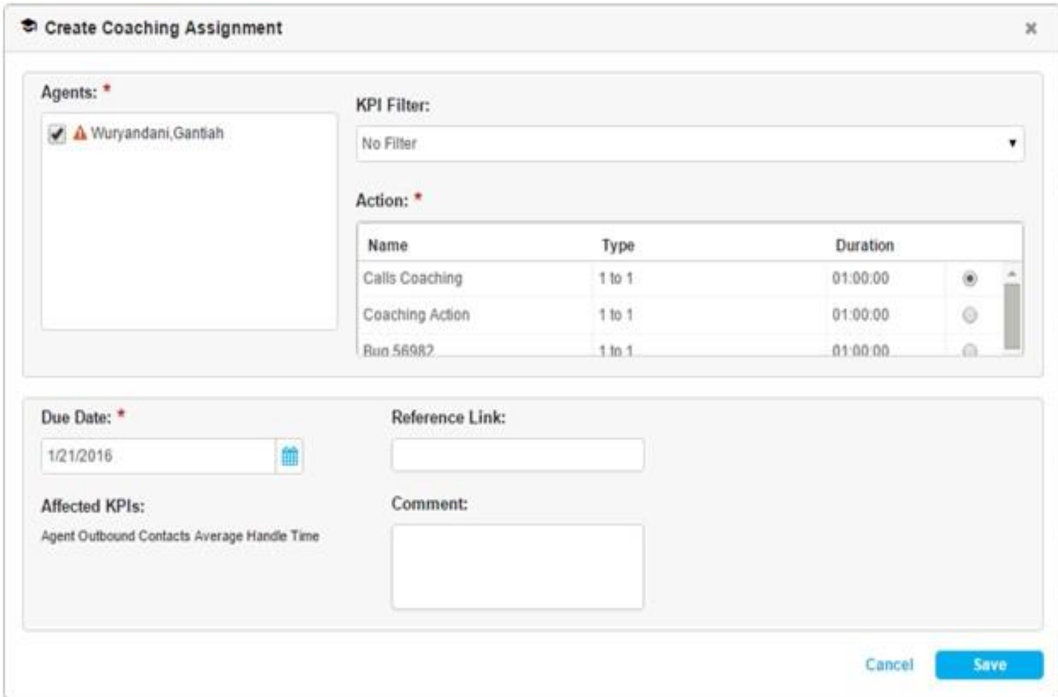
5. Click **OK**. The Add Evaluation window closes and the Interaction window is active.
6. In the right pane, select the **Evaluation** menu.
7. From the drop-down list box, select **Assign Coaching**.



Note: If the Assign Coaching option is inactive, then you do not have permission to assign coaching. To assign coaching, you must

- Have a Performance system configured for Workforce Engagement Management.
- Have a QM Evaluation license and an Performance Coaching license.
- Be logged into Quality as a user who is also configured in Performance.
- Have the Quality agent of the interaction for whom you are creating the coaching mapped to Performance.
- Be logged into Quality as a user who is authorized to access coaching assignments in Performance.
- Be logged into Quality as a user who is authorized to create a coaching assignment in Performance.

The Create Coaching Assignment window opens.



Note: You must complete all fields marked with a red asterisk.

8. In the Agents list box, the check box next to the agent that you want to coach is selected by default.

9. From the **KPI Filter** drop-down list box, you can select from a predefined set of Key Performance Indicators (KPIs) that the coaching action addresses.

   Note: For more information about KPIs, see the *Aspect Performance System Administrator Guide*.

10. From the **Action** list box, you can select from a predefined list the option of the type of training that you want the agent to complete.

11. In the **Due Date** field, using the Calendar, select the date by which you want the agent to complete the action.

12. In the Reference Link text box, type the URL to the external source that provides the coaching for the agent.

    Note: For more information on the Reference Link option, see the *Aspect Performance Supervisor Guide*.

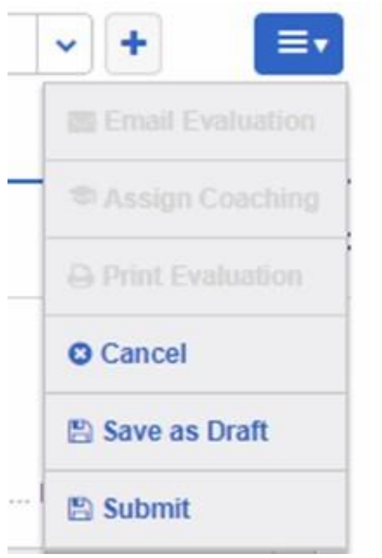
13. In the Comment text box, you can type any other information that you think might be helpful to the agent.

14. Click **Save**. The Create Coaching Assignment window closes and the Interaction window is active.

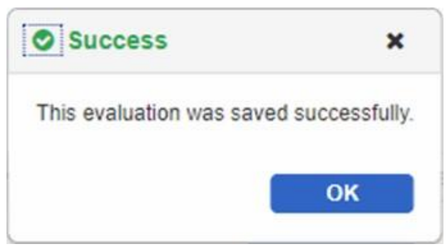
15. In the right pane, select the **Evaluation** menu.

16. To save the coaching assignment, select **Save as Draft**.
    OR

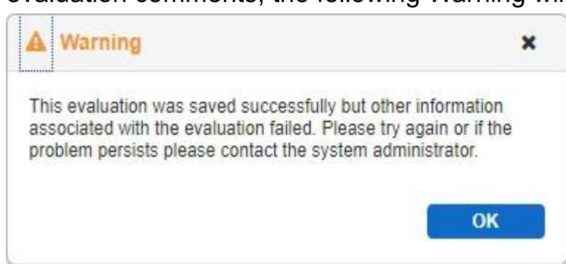
    If you have finished assigning the coaching, select **Submit**. This also saves the coaching assignment.



The Success window opens.



If an error occurred while saving either the coaching assignment, the evaluation attachments, or the evaluation comments, the following Warning window opens.

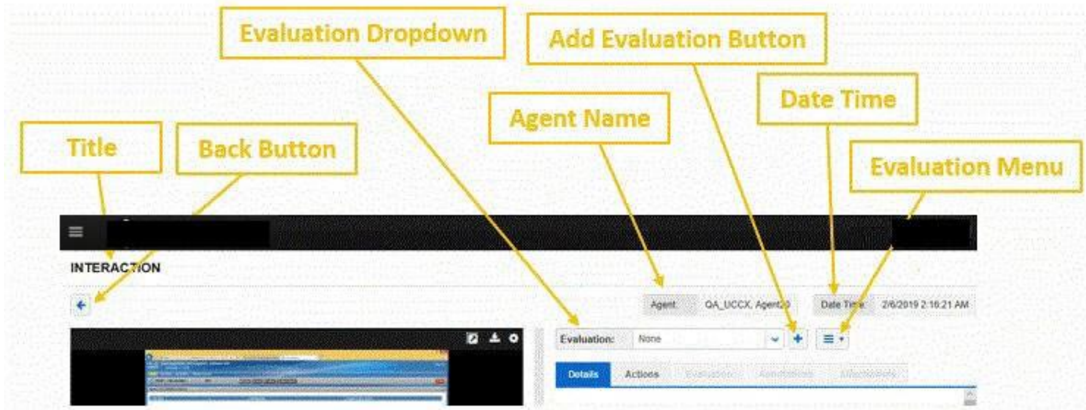


17.On the Success window, click **OK**.

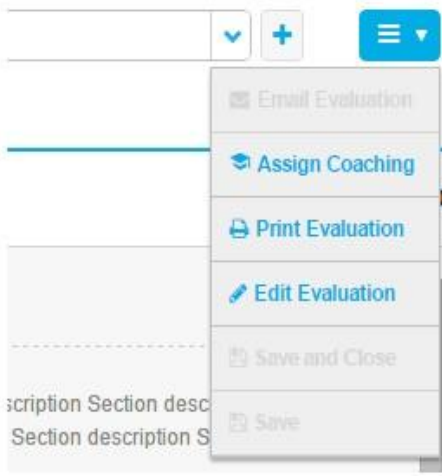
5.1.1 Assign Coaching to an Existing Evaluation

To assign coaching to an existing evaluation, perform the following steps.

1. Search for an interaction. (See the *Workforce Engagement Management - Aspect Quality Agent Guide,* Chapter 3: Searching for an Interaction.)
2. Open the interaction by double-clicking it. The Interaction window opens.
3. In the right pane, select the **Evaluation** menu.



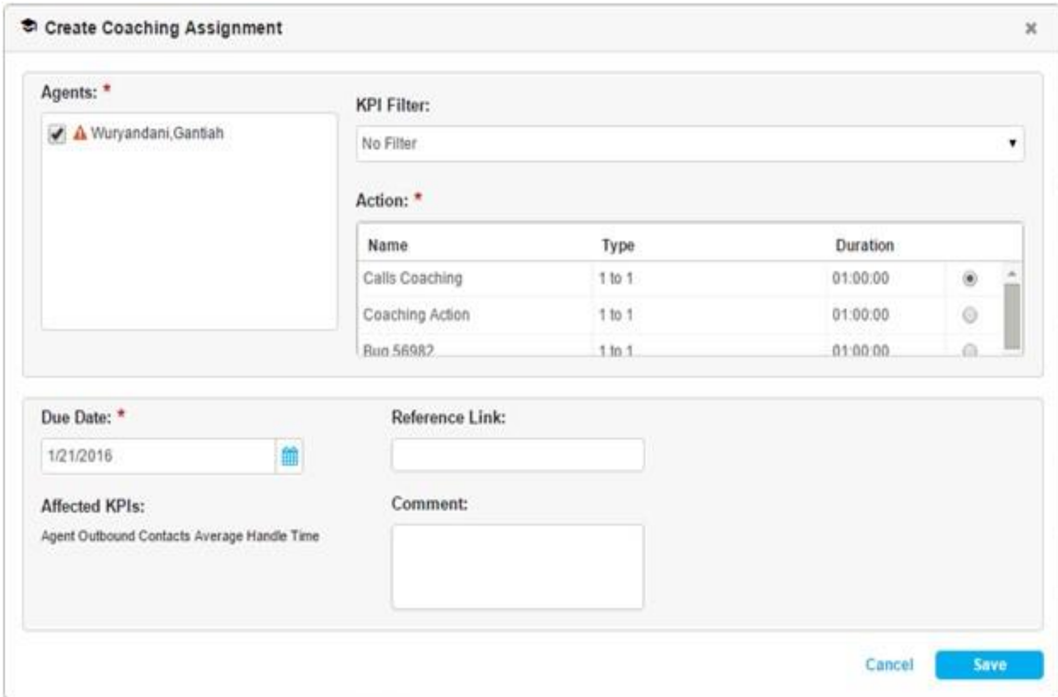
4. From the drop-down list box, select **Assign Coaching**.



Note: If the Assign Coaching option is inactive, then you do not have permission to assign coaching. To assign coaching, you must

- Have a Performance system configured for Workforce Engagement Management.
- Have a QM Evaluation license and an Performance Coaching license.
- Be logged into Quality as a user who is also configured in Performance.
- Have the Quality agent of the interaction for whom you are creating the coaching mapped to Performance.
- Be logged into Quality as a user who is authorized to access coaching assignments in Performance.
- Be logged into Quality as a user who is authorized to create a coaching assignment in Performance.

The Create Coaching Assignment window opens.

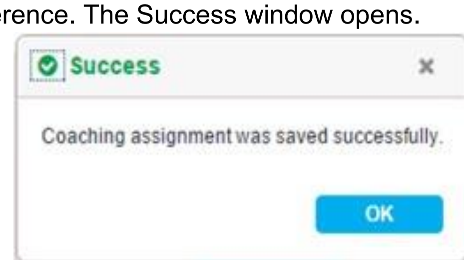


Note: You must complete all fields marked with a red asterisk.

5. In the Agents list box, the check box next to the agent that you want to coach is selected by default.
6. From the **KPI Filter** drop-down list box, you can select from a predefined set of Key Performance Indicators (KPIs) that the coaching action addresses.

   Note: For more information about KPIs, see the *Aspect Performance System Administrator Guide*.
7. From the **Action** list box, you can select from a predefined list the option of the type of training that you want the agent to complete.
8. In the **Due Date** field, using the Calendar, select the date by which you want the agent to complete the action.
9. In the Reference Link text box, type the URL to the external source that provides the coaching for the agent.

   Note: For more information on the Reference Link option, see the *Aspect Performance Supervisor Guide*.
10. In the Comment text box, you can type any other information that you think might be helpful to the agent.
11. Click **Save**. The coaching assignment is created and the scorecard is automatically saved with the coaching reference. The Success window opens.

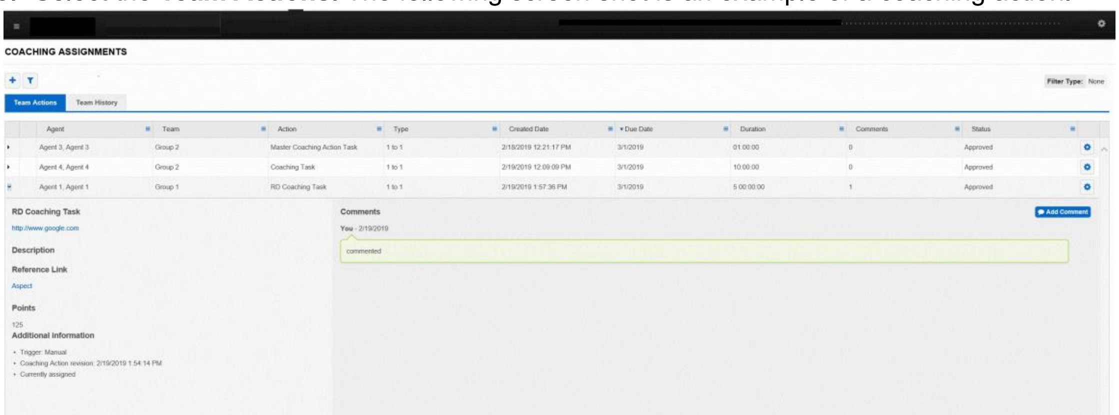


12.On the Success window, click **OK**.

5.1.2 View Coaching Assignments

To view the coaching action in Workforce Engagement Management, on the Workforce Engagement Management dashboard, perform the following steps.

1. Click **Performance**.
2. Select **Application > Coaching Assignments**. The Coaching Assignments window opens.
3. Select the **Team Actions**. The following screen shot is an example of a coaching action.



Note: For more information about the coaching action in Aspect Performance, see Chapter 4: Handling and Managing Coaching in the *Aspect Performance Supervisor Guide*.

5.2 View Coaching

Coaching is a feature from the Aspect Performance component of Workforce Engagement Management that an Administrator or Supervisor uses to improve agents' performance by providing feedback to the agent, for example, in a computer-based training, and giving the agent a specific time frame in which to complete the training.
From the Quality component, you can review an interaction (an evaluation or a recording), and without logging off Quality to launch Performance, you can also view a coaching assignment directly from Quality.

Similarly, from the Performance component, it is possible to launch the associated Quality scorecard if the Open Evaluation contextual link is accessible in the View Coaching window. The link is only accessible if you created the coaching assignment from Quality version 18.1 or later.

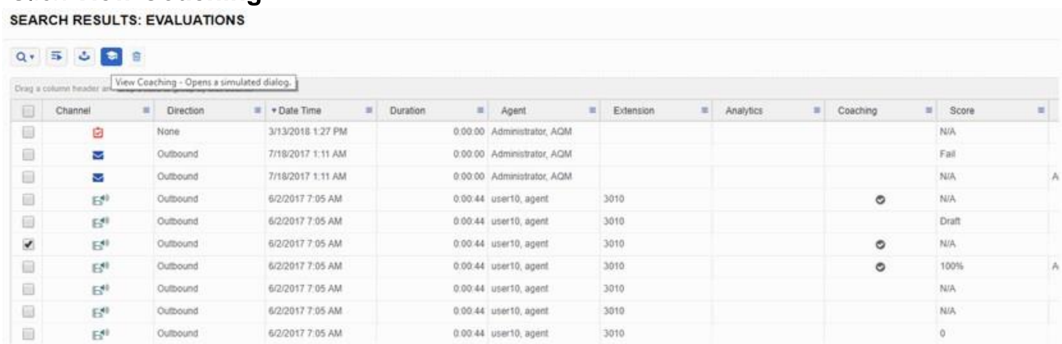
To view coaching, you must

- Have a Performance system configured for Workforce Engagement Management.
- Have a QM Evaluation license and a Performance Coaching license.
- Be logged into Quality as a user who is also configured in Performance.
- Have the Quality agent of the interaction mapped to Performance.

- Be logged into Quality as a user who is authorized to view the coaching assignment in Performance.

5.2.1 View Coaching on the Search Evaluations Window

1. Search for a search evaluation. (See the *Workforce Engagement Management - Aspect Quality Agent Guide*, Chapter 3: Searching for a Scored Interaction.)
2. On the SEARCH RESULTS: EVALUATIONS window, select an interaction that has a coaching assigned to it.
3. Click **View Coaching**.



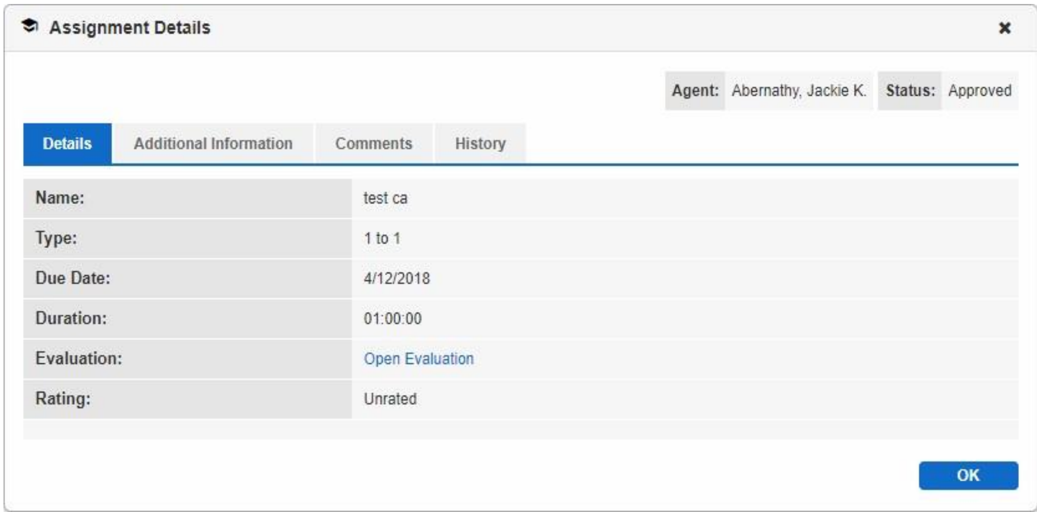
Note: If the View Coaching option is inactive, then

- You do not have access to Performance, OR
- There is no coaching assigned to that interaction, OR
- The coaching assignment was created prior to version 18.

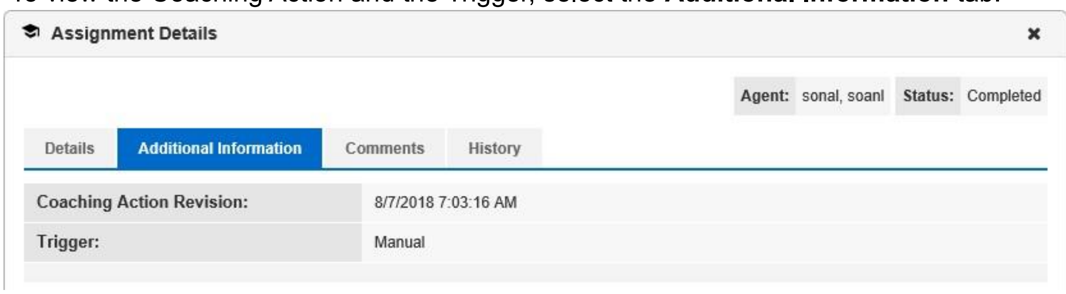
Note: A corresponding Error message opens if you do not have permission to view the coaching assignment.

- The Quality agent of the interaction is not mapped to Performance
- The logged in Quality user is not authorized to view the coaching assignment in Performance.

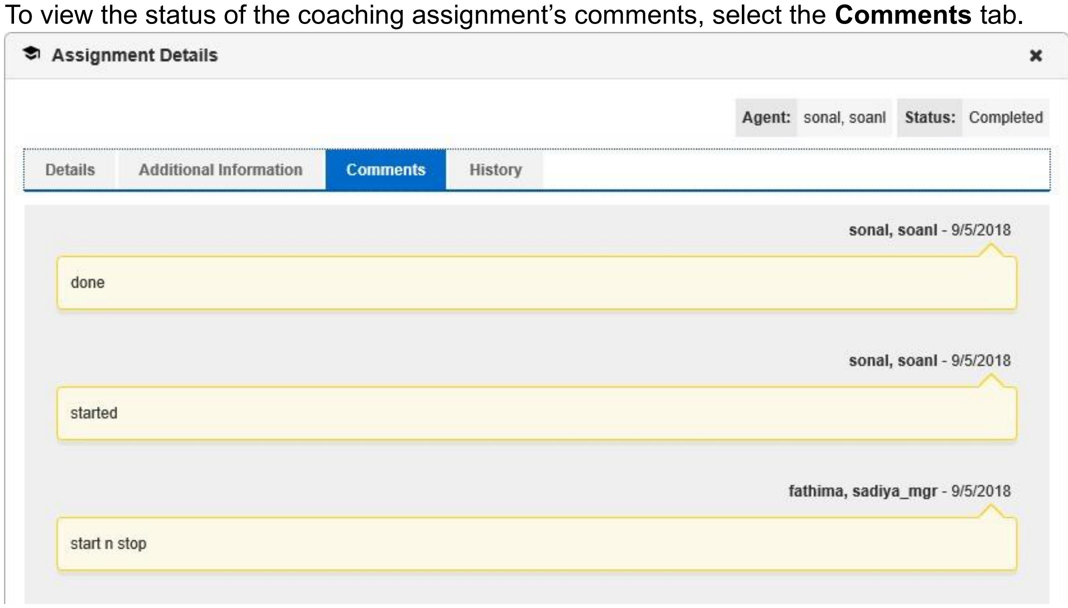
The Assignment Details window opens with the Details tab active.



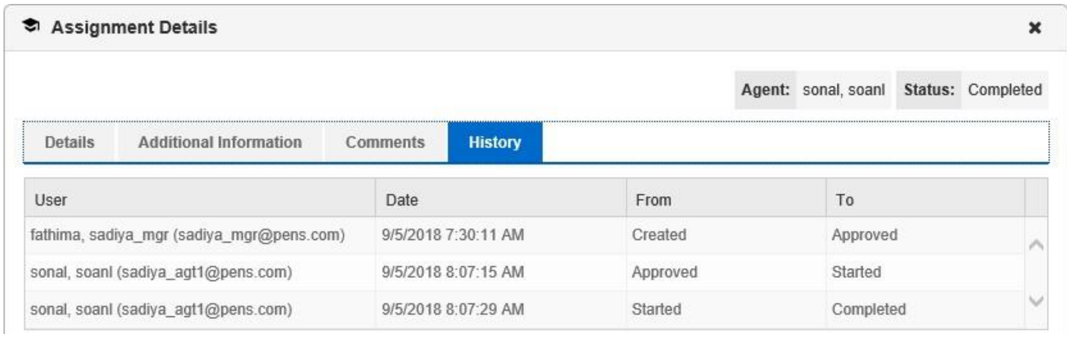
4. To view the Coaching Action and the Trigger, select the **Additional Information** tab.



5. To view the status of the coaching assignment's comments, select the **Comments** tab.



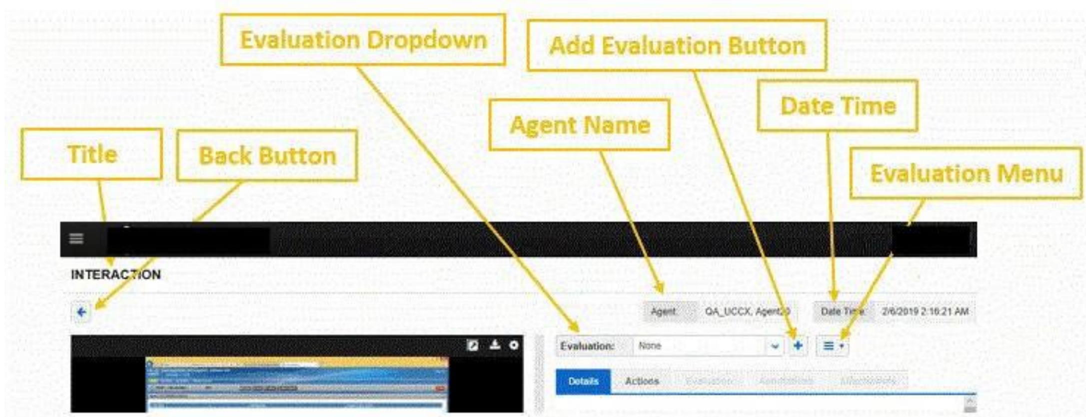
6. To view the chronological history of the coaching assignment, select the **History** tab.



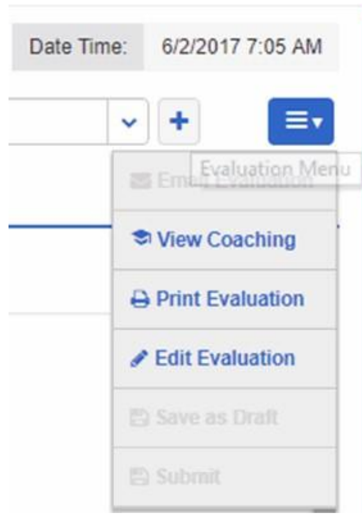
7. When finished viewing the coaching assignment, close the Assignment Details window by clicking **OK**.

5.2.2 View Coaching on the Evaluation or Interaction Windows

1. Search for an interaction. (See the *Workforce Engagement Management - Aspect Quality Agent Guide*, Chapter 3: Searching for an Interaction.)
2. Open the interaction that has coaching assigned by double-clicking it. The Interaction window opens.
3. In the right pane, select the **Evaluation** menu.



4. From the drop-down list box, select View Coaching.



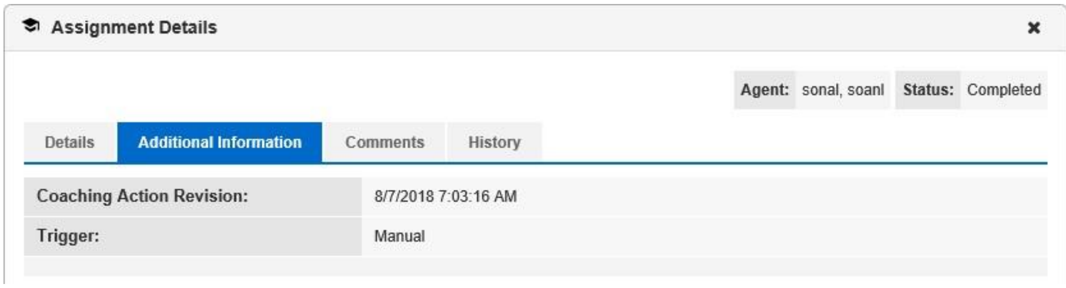
Note: If the View Coaching option is not available, then you do not have permission to view coaching.

If the View Coaching option is inactive, then

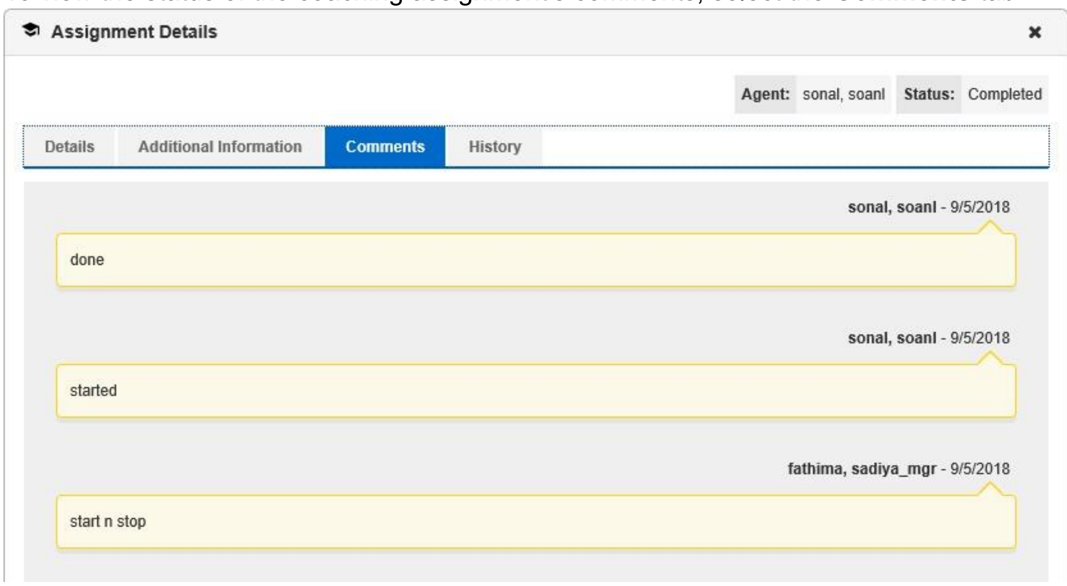
- The logged in Quality user does not have access to Performance, OR
- There is no coaching assigned to that interaction, OR
- The coaching assignment was created prior to version 18, OR
- The Quality agent of the interaction is not mapped to Performance, OR
- The logged in Quality user is not authorized to view the coaching assignment in Performance.

The Assignment Details window opens with the Details tab active.

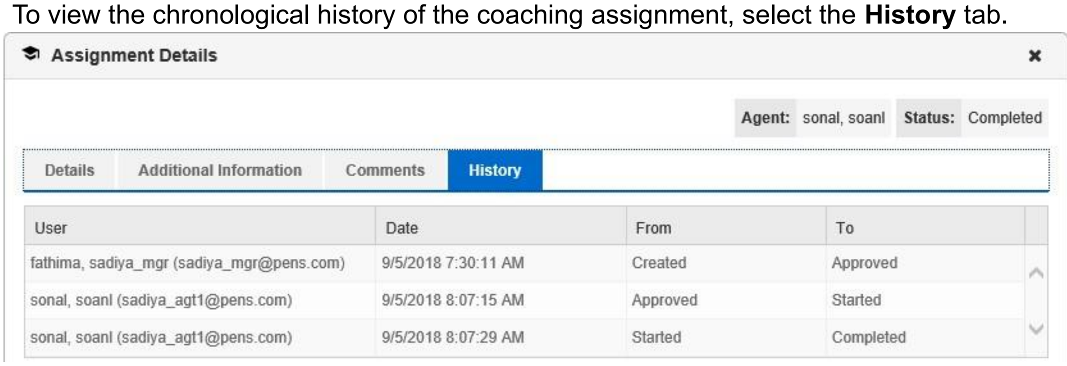
5. To view the Coaching Action and the Trigger, select the **Additional Information** tab.



6. To view the status of the coaching assignment's comments, select the **Comments** tab.



7. To view the chronological history of the coaching assignment, select the **History** tab.



8. When finished viewing the coaching assignment, close the Assignment Details window by clicking **OK**.

6. Evaluation Templates

In Quality, scorecard templates are templates. Before a Team Lead can evaluate any calls, the Team Lead (with rights to create a template) or an Administrator must create a template. To use the template for scoring, the Team Lead performing the review must have the View permission to that template. When a Team Lead creates a template, the Team Lead has permission to see that template, unless the Administrator grants permission to other Team Leads to view it.

You can create templates with questions, multiple sections, and user-defined weights to each question, to customize the grading according to what is important to the call center.

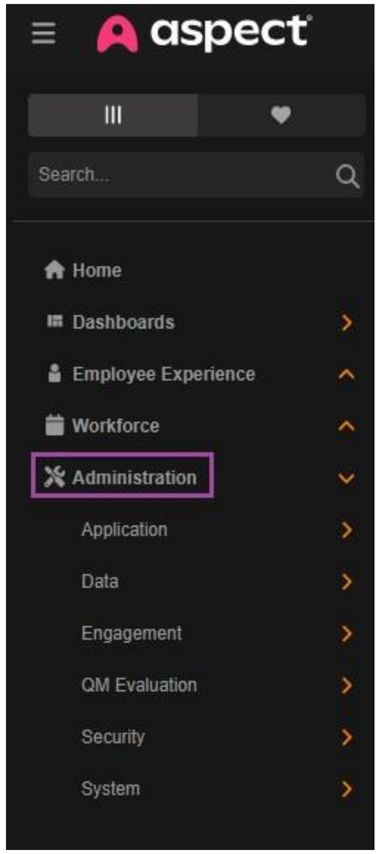
You can use Workforce Engagement Management to create, edit, and duplicate templates. Then, you can save the template as Draft or as Final. Once you have saved a template as Final, you can use the template to evaluate a call.

You can create multiple templates in the system and can activate or deactivate the templates as needed.

6.1 Navigating the Evaluation Template Window

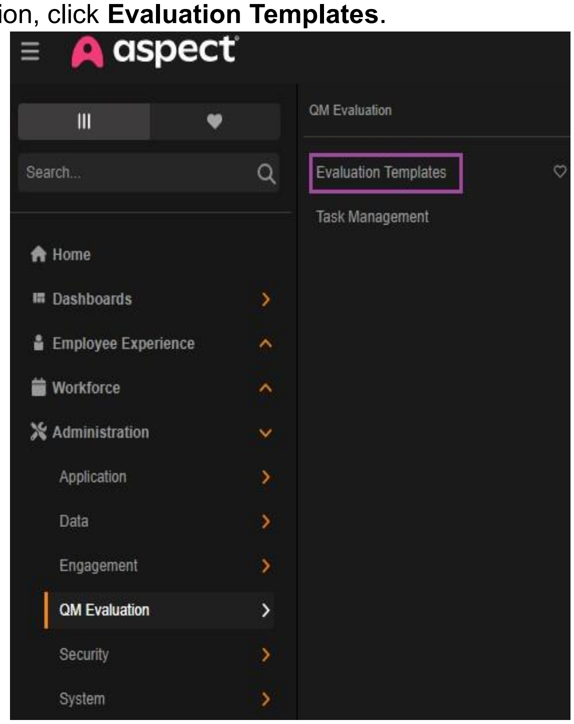
This section describes the Evaluation Templates list window, where templates that you save as Draft and Complete are displayed. On the Evaluation Templates window, you can create a new template; duplicate, edit, or delete a template; or make a template active or inactive.

1. Log in to VUE as an Administrator and go to Workforce Engagement Management.
2. From the **Navigation Bar**, select **Administration**.

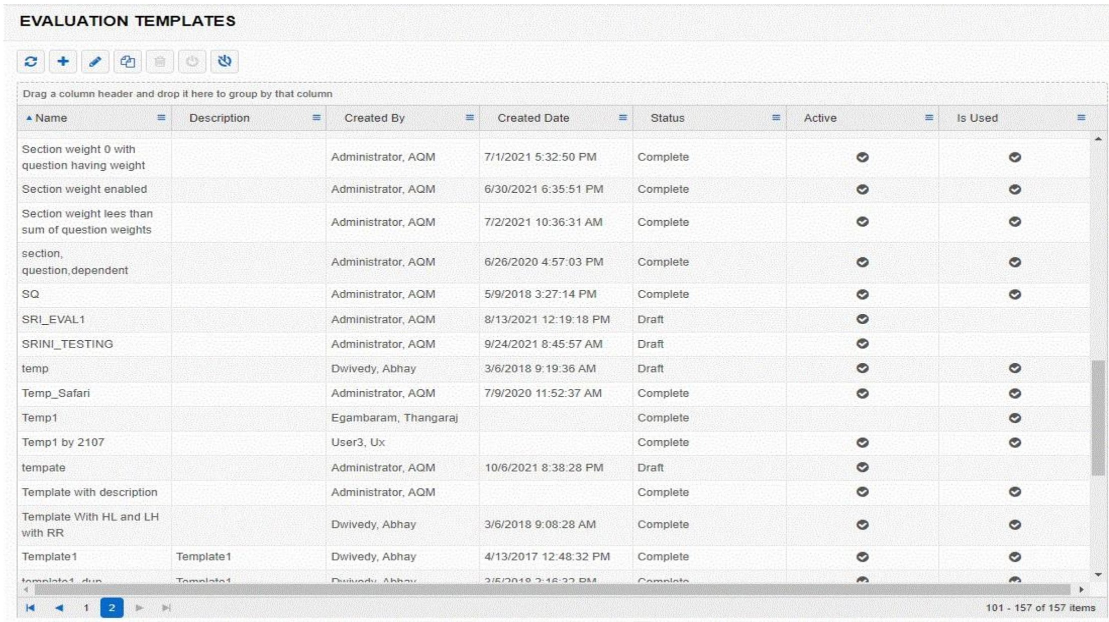


The Administration dashboard opens.

3. Under QM Evaluation, click **Evaluation Templates**.



The Evaluation Templates window opens, and a list of templates whose Status is either Draft or Complete displays in the table.



The following table contains descriptions of each column in the Evaluation Template table.

Column Name	Description
Name	The name of the template.
Description	The description of the template.
Column Name	**Description**
Created By	The name of the user who created the evaluation template. **Note:** • Administrators can see the list of all templates in the system. • Team Leads can see the templates for which the Team Lead is the owner, and also the templates created by other users for which permission is available. • Evaluation Templates that you did not create in Workforce Engagement Management do not display any value in the Created By column.
Created Date	The date that the user created the template. **Note:** • By default, the list of templates are sorted based on the Created Date by descending order; therefore, the most recently-saved evaluation template displays at the top of the list. • Evaluation Templates that you did not create in Workforce Engagement Management do not display any value in the Created Date column.
Status	**Draft:** Templates that the user saves as Draft are not available yet for scoring. Only the Created By user or an Administrator can edit a Draft template. **Complete:** Templates that the user saves as Complete are available for scoring.
Active	If template is available for use in scoring, then a check mark displays in the Active column. If no check mark displays, the template is Inactive, and therefore unavailable for use in scoring.

Is Used	If template is already been used in scoring, then a check mark displays in the Active column. If no check mark displays, the template is not used in scoring.

The following table describes the toolbar icons.

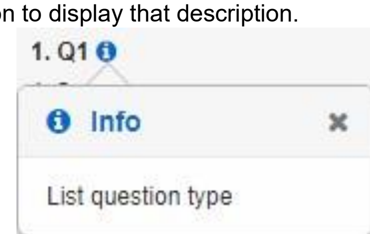
Menu Option	Description
Refresh	Refresh the Evaluation Templates grid.
Add	Add button helps to create a new Evaluation Template
Edit	Opens the Draft and the entire template for you to edit.
Duplicate	Copies the template for you to use as a basis for a new template.
Delete	Removes the template from the Evaluation Templates list. **Note:** If an evaluation is created using this template, the Delete option is inactive.
Activate	Activates the template if the status is inactive.
Deactivate	Deactivates the template if the status is active.

On the Evaluation Templates window, a scroll bar appears when number of templates exceeds the display area. Each page contains no more than 100 templates. If there are more than 100 templates, then pagination appears at the bottom of the window.

6.1.1 Definition and Administration

An administrator uses a template to review an Agent's interaction and evaluate it based on specific criteria. You create the criteria as a part of the template. The following table describes the sections of a template.

Template Section	Description
Sections	Templates may have multiple sections. Add sections to similar questions to group them together. For example, when creating a template to grade customer satisfaction, you might add sections such as: • Section 1: Greeting behavior • Section 2: Hold time
Section Weight	The section weight defines the importance of the section. Based on the response of the questions that you select in this section, the score is converted to the section score. In Workforce Engagement Management, section weight is always equal to the sum of all the question weighs under that section. For example, if Section 1 has 2 questions with the weight of each question as 10, then Section Weight = (10 + 10) = 20. The system calculates this automatically, so there is no option for the user to enter the section weight manually. If the system calculates a section weight of 20, and 2 questions with each having a weight of 10, and when a reviewer evaluates the interaction, if each question gets a score of 10, then the section score is calculated as [(10 + 10)/20]*100 = 100%. (Sum of point accumulated for each question/Sum of all scored question's weight)*100. **Note:** The numbers for Section weight are non-negative integers.

Question Type	Each section can have multiple questions, and you can assign a question type to questions within a section. The type of question assigned should reflect the nature of the question. For example, you would typically assign a True/False or Yes/No question type to a question to verify if an agent greeted the customer. Following are the question types that can have a question weight: • Yes/No • Bonus: Yes/No • True/False • Bonus: True/False • Pass/Fail • Bonus: Pass/Fail • Scored Scale • Bonus: Scored Scale • List (if the Enable Weights check box is selected) Following are the question types that cannot have question weight: • Free Form Text • List (if the Enable Weights check box is deselected)
Template Section	**Description**
Question Weight	The Question Weight defines the importance of the question and allows you to tailor the grading to contact center needs. You can specify weight for each question within a section. **Note:** The numbers for Question weight are non-negative integers.
Question Description	An option to enter the explanation for each question in the template and the explanation displays in the evaluation when the user moves the mouse over the question. For each question that has a description, the user can click the Information icon to display that description. 

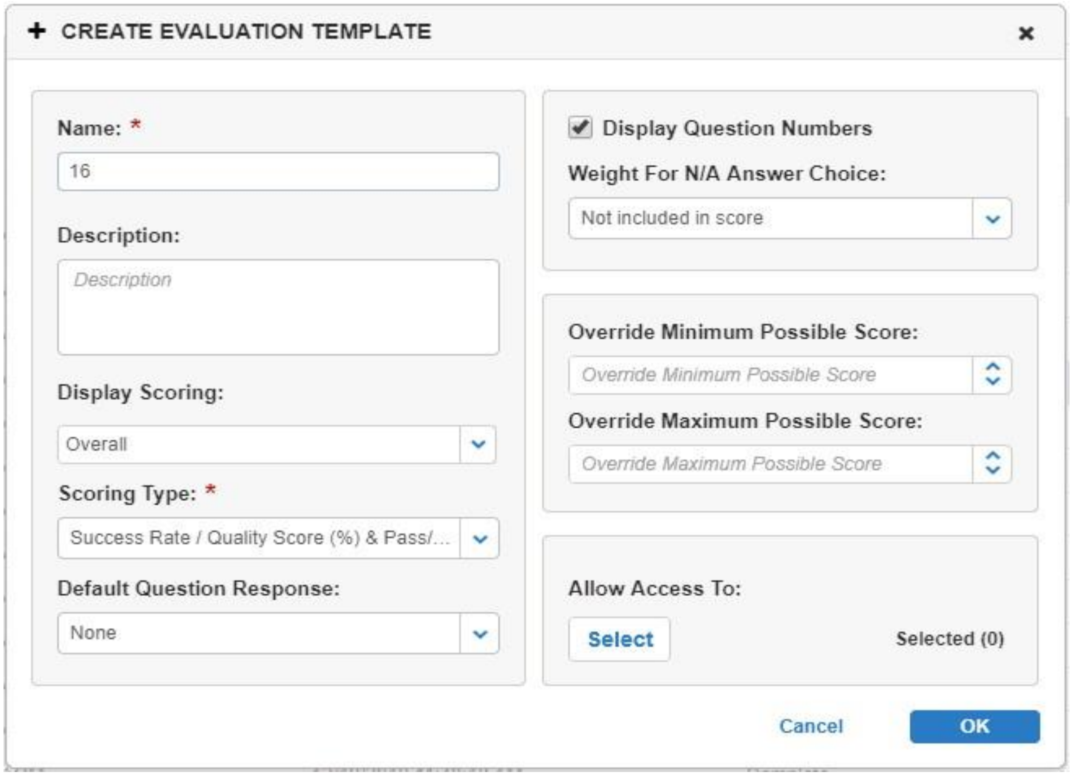
6.1.2 Create an Evaluation Template

This section describes how to create an evaluation template. This includes how to add section details, question details, dependent question details, and how to save the evaluation template.

1. On the Evaluation Templates window, click **Add button** to create a new evaluation template.

   The Create Evaluation Template window opens.



2. In the **Name** text box, type the name of the evaluation template. The maximum number of characters allowed is 100. The template name must be unique and is required.
3. (Optional) In the **Description** text box, type description for the evaluation template. The maximum number of characters allowed is 1024.
4. When you evaluate an interaction, scores can appear in three (3) places on the evaluation window. From the **Display Scoring** drop down list box, select one or more of the following options.

Option	Description
Section	Displays scores for each section.
Question	Displays scores for each question.
Overall	Displays score for the entire evaluation.

5. From the **Scoring Type** drop-down list box, select one of the following options.

Score Display Type	Description
Success Rate / Quality Score (%)	Displays the score converted into a percentage.
Success Rate / Quality Score (%) & Pass/Fail	If the defined Auto Fail condition is not satisfied, the system displays Pass with Success Rate. If the defined Auto Fail condition is satisfied, the system displays Fail with Success Rate.
Score Display Type	**Description**
Total Points (Number)	Displays the absolute/raw score.

Total Points (Number) & Pass/Fail	If the defined Auto Fail condition is not satisfied, the system displays Pass with Total Points. If the defined Auto Fail condition is satisfied, the system displays Fail with Total Points.
Pass/Fail	If the defined Auto Fail condition is not satisfied, the system displays Pass. If the defined Auto Fail condition is satisfied, the system displays Fail.

6. Define the **Default Question Response** for all of the questions. Click the drop-down list and select one of the following options.

Option Type	Description
None	N/A is the default for all the questions in this template.
First answer choice	First answer option defined in the question is the default for all the questions in this template.
Last answer choice	Last answer option defined in the question is the default for all the questions in this template.

7. When you create a new evaluation template, by default, the **Display Question Numbers** check box is selected. You can deselect the check box if you do not want question numbers to display in the evaluation, and if you want to define your own question numbers.

   For example, if the question text is *This is the question title*,

with the check box...	...questions display like this
selected	1. This is the question title.
deselected	This is the question title.

8. **Weight for N/A Answer Choice:**

   - Some evaluation questions may not be relevant to a specific call. In these cases, you might want to use the Not Applicable (N/A) answer option to denote that the question was not appropriate for this situation. However, using an N/A selection can make it difficult to compare its scorecard with other scorecards where the N/A question was scored.
   - Aspect Quality has a Not Applicable (N/A) option for all questions, but for some questions, you may not want N/A to appear as an option. (Refer Add a New Question)
   - Depending on how you configure a scorecard template with Weight for N/A Answer Choice, if a user selects that scorecard template to score an interaction and selects the N/A option for any of the questions, then the system considers N/A in the question score, section score, and overall score. See the following table for more information.

   The **Weight for N/A Answer Choice** drop-down list box contains the following options.

Option Type	Description
Not included in score	• When the user selects N/A in the interaction, the system does not consider the N/A answer in the scorecard calculation. • By default, when the user opens a new scorecard template, the system selects the Not included in score option. **Note:** When the user upgrades from earlier versions of Aspect Quality, by default, the option for Weight for N/A Answer Choice is Not included in the score.

Highest weight of the question	• When the user selects N/A in the interaction, the system permits the highest weight of the question. For example, if 1. The Question Type is Yes/No 2. The Yes option has a weight of 10 3. The No option has a weight of 0 • The user selects N/A for the question, then the question score is 10, and the system considers the section score and the overhaul score as 10.
Lowest weight of the question	• When the user selects N/A in the interaction, the system permits the lowest weight of the question. For example, if 1. The Question Type is Yes/No 2. The Yes option has a weight of 10 3. The No option has a weight of 0 • The user selects N/A for the question, then the question score is 0, and the system considers the section score and the overhaul score as 0.

Note: When the interaction has already been scored by the user, then the Weight for N/A Answer Choice drop-down list box on the scorecard template is disabled.

9. When the Team Lead evaluates a call using a template, and if the overall score is 0 or less, then the configured value overrides the overall score.

   If you want the configured value to override the overall score, then from the drop-down list box, select **Override Minimum Possible Score**.

   Note: If you select the Scoring Type *Quality Score*, then the value that you enter displays as the *Overall* score. If you select the Scoring Type *Total Points*, then the overridden value converts to the absolute score.

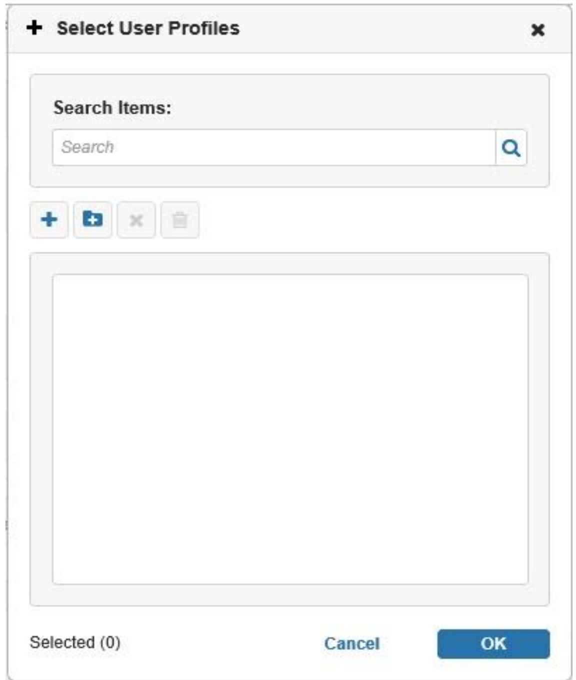
   The calculation to convert the configured value into the absolute score is
   Sum of all Section weights * (value of Override Minimum Possible Score / 100)

10. When the Team Lead uses a template to evaluate a call, and if the evaluation has a maximum score, then the configured value overrides the overall score.

    If you want the configured value to override the overall score, then from the drop-down list box, select **Override Maximum Possible Score**.

    Note: If you select the Scoring Type *Quality Score*, then the value that you enter displays as the *Overall* score. If you select the Scoring Type *Total Points*, then the overridden value converts to the absolute score.6
    The calculation to convert the configured value into the absolute score is
    Sum of all Section weights * (value of Override Maximum Possible Score / 100)

11. Click the **Select** button in the **Allow Access To** section, to select one or more user profiles. It allows the user/s to score for the scorecard template. The **Select User Profiles** window appears as shown below.



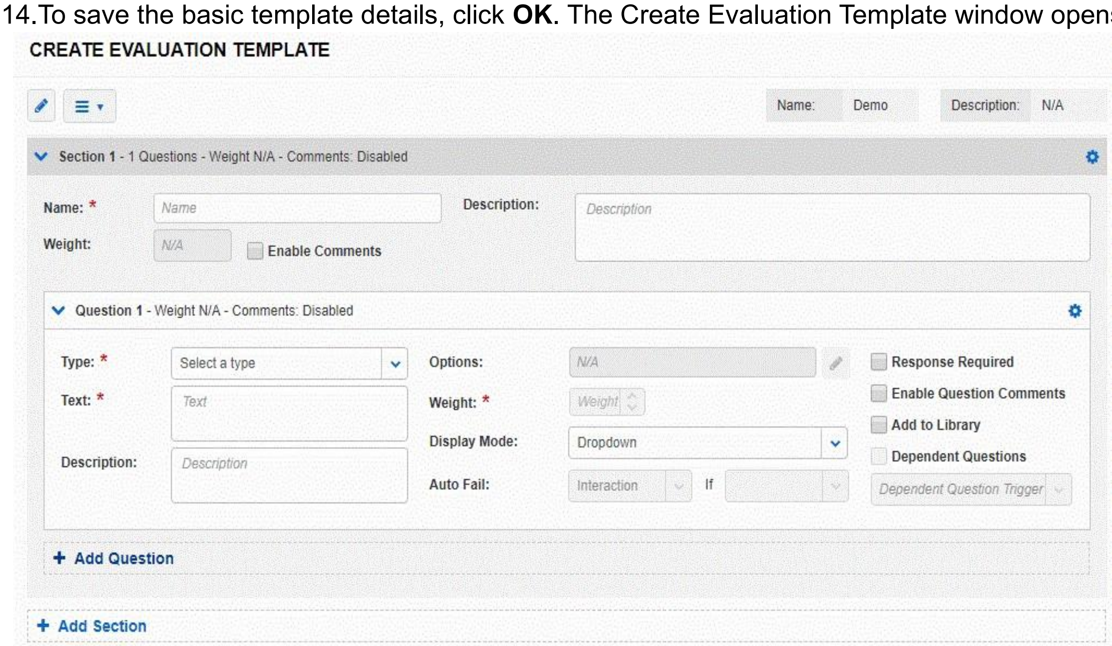
Note: To provide the access for a new user, select the user profile for which the user is associated with.

12. Go to the **Search Items** field, either search by name or click on the magnifying glass to search and select the profile/s.

Or, click on the button to select all of the profiles available in the database.

Note: In Aspect Cloud, every user has their user profile, and the user must be select the corresponding user profile.

13. Click **OK**. The Create Evaluation Templates window is active.
14. To save the basic template details, click **OK**. The Create Evaluation Template window opens.



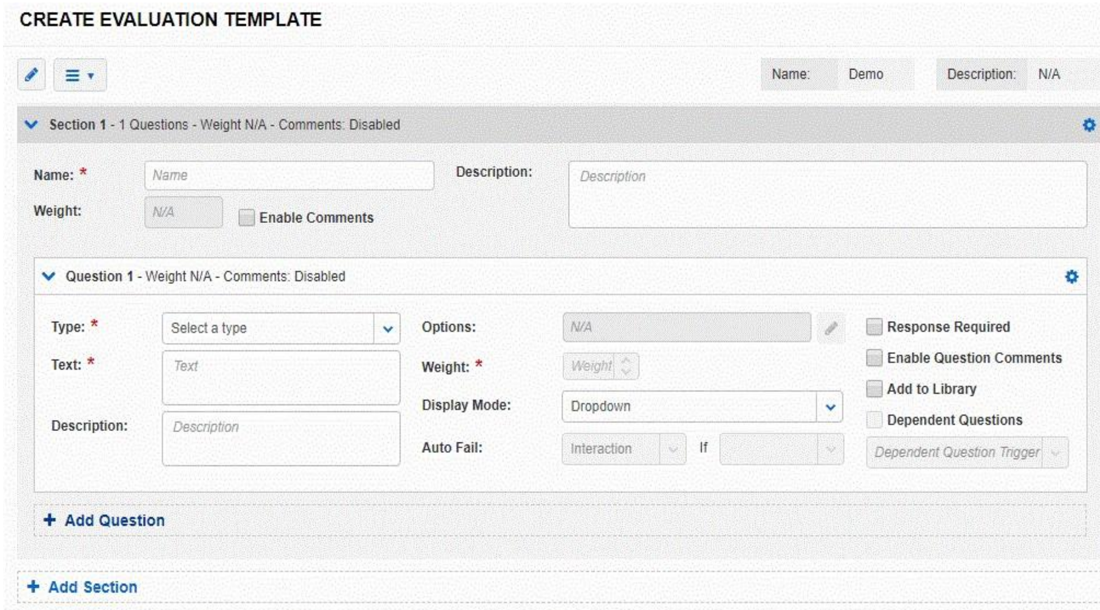
OR

You can cancel the template creation by clicking **Cancel**.

15.In the next procedure, you can Add a New Section.

6.1.2.1 Add a New Section

When you create a new evaluation template, by default, an empty Section with an empty Question displays.



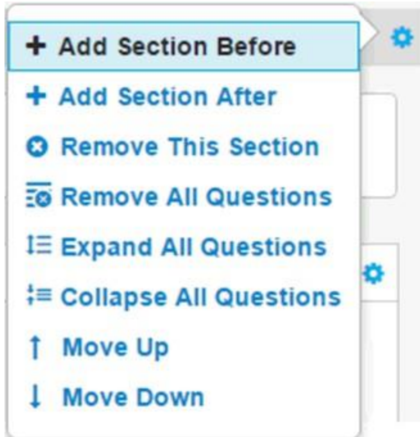
To complete the Section, perform the following steps.

1. The following table describes the fields in the Section.

   Note: Fields with a red asterisk (*) are required fields.

Option	Description
Name	Type or retype the section name. The maximum number of characters allowed is 50. The name is mandatory, but need not be unique.
Description	Type or retype a description of the section. The maximum number of characters allowed is 256. This field is optional.
Weight	Displays the sum of question weights, or displays *N/A* when there are no possible question weights. **Note:** The system calculates the Section weight by adding up all the question weights within the section. Dependent questions and Bonus questions are not included in the Section weight.
Enable Comments	To allow feedback at the Section level while evaluating an interaction, select the check box.

2. On the Section title bar, click the cog wheel icon. The menu contains the following options that you can select regarding this section.



The following table describes the functions of the Section cog wheel menu.

Menu	Description
Add Section Before	Adds an empty section with a question above the current section.
Add Section After	Adds an empty section with a question below the current section.
Add Advanced Failure Condition	Failure condition based on Percentage Score or Point Score.
Score Adjustments	To award or deduct points the user can use the option of Score Adjustments.
Fill Question From Library	Imports a question along with the Text, Description, and Options fields from the question library.
Remove This Section	Removes the current section along with the questions in it. **Note:** If this is the only section in the template, then this menu option is inactive.
Remove All Questions	Removes all the questions within the current section and adds an empty question.
Expand All Questions	Displays all the questions within the current section.
Collapse All Questions	Hides all questions within the current section and displays only the question title.
Move Up	Moves the current section above the preceding section. For example, if the current section number is 2, then this section moves up and displays as section number 1. **Note:** If there are no sections above the current section, then this menu option is inactive.
Move Down	Moves the current section below the following section. For example, if the current section number is 2, then this section moves down and displays as section number 3. **Note:** If there are no sections below the current section, then this menu option is inactive.

Note: You can also add a Section at the bottom of the Create Evaluation Template by clicking **Add Section**.

3. See Add a New Question.

6.1.2.1.1 *Expand or Collapse a Section*

To manually collapse the contents of a section, click the down arrow at the left of section title.

The down arrow changes into a right arrow.

The section details and the questions within that section collapse, and only the section title displays.

To expand and view the contents of a section, click the right arrow at the left of section title. The right arrow changes into a down arrow. The section detail displays below the section title and the questions within the section display.

6.1.2.2 Add a New Question

When you create a new evaluation template, by default, an empty Section with a Question displays. To complete the Question information, perform the following steps.

Note: Fields with a red asterisk (*) are required fields.

1. From the Type drop-down list box, select one of the following types of questions.

   Note: Questions have two categories: questions with weight, and questions without weight (weights are used to calculate the score of the evaluation). Question Types to which you can assign weights are described in the following table.

Type Option	Description
Yes/No Bonus: Yes/No	If the reviewer selects Yes, then the question gets the highest score (the weight is defined in the question). If the reviewer selects No, then the question gets the score 0. You cannot assign custom weights for options, because the weight of the question is assigned to Yes, and 0 is assigned to No. **Note:** The fields for Bonus: Yes/No appear the same as the Yes/No type, except that the Auto Fail and Dependent questions are not applicable.
True/False Bonus: True/False	If the reviewer selects True, then the question gets the highest score (the weight is defined in the question). If the reviewer selects False, then the question gets the score 0. You cannot assign weights for options, because the weight of the question is assigned to True, and 0 is assigned to False. **Note:** The fields for Bonus: True/False appear the same as the True/False type, except that the Auto Fail and Dependent questions are not applicable.
Pass/Fail Bonus: Pass/Fail	If the reviewer selects Pass while evaluating, then the question gets the highest score (the weight is defined in the question). If the reviewer selects Fail while evaluating, then the question gets the score 0. You cannot assign custom weights for options, because the weight of the question is assigned for Pass, and 0 is assigned for Fail. **Note:** The fields for Bonus: Pass/Fail appear same as the Pass/Fail type, except that the Auto Fail and Dependent questions are not applicable.
Scored Scale Bonus: Scored Scale	This question Type can have multiple options. For specific directions, see Scored Scale and Bonus: Scored Scale.
List	This question Type can have multiple options. For specific directions, see List.
Free Form Text	A question Type to which you cannot assign weights (these questions are not considered for evaluation calculation). This question Type has no Options. Since the weight is not allowed, the question title bar does not display the weight. You can define a question so that the reviewer can answer this question by typing a response in free-form.

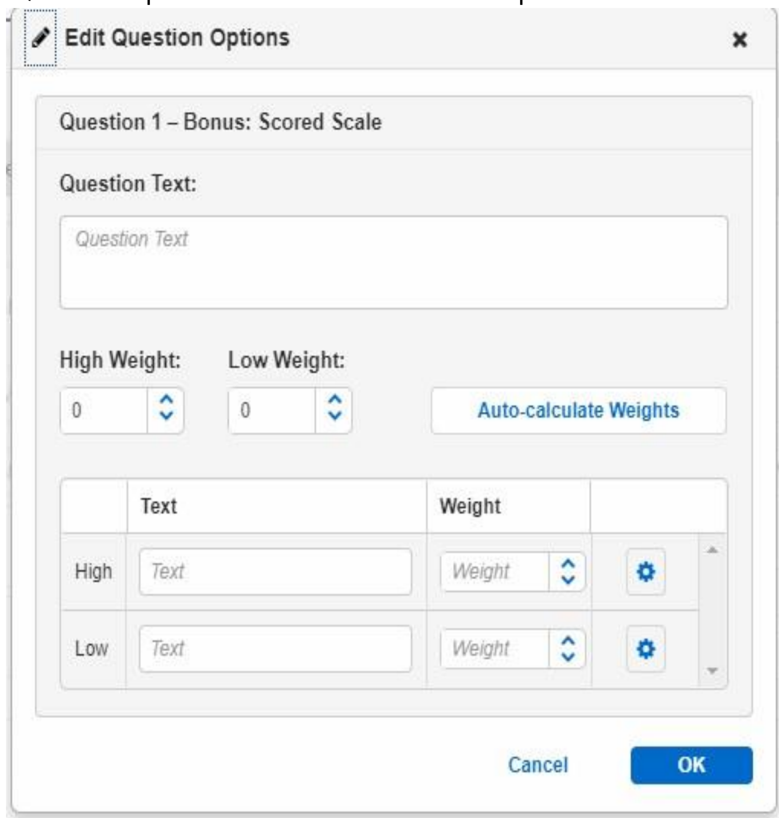
   Note: Once you have completed the fields described in the preceding table, continue to step 2.

6.1.2.2.1 *Scored Scale and Bonus: Scored Scale*

To add or modify the Scored Scale or Bonus: Scored Scale options, perform the following steps.

a. Once you select the Scored Scale or Bonus: Scored Scale from the Type drop-down list box, the Options text box is active. Click **Edit**.

The Edit Question Options - Scored Scale window opens.



b. In the Question Text text box, you can add or modify the question text.

c. To generate the weight for all the options, type or select the value in High Weight and Low Weight text boxes.

Note: The maximum value that is allowed in the High Weight field is 255, and the minimum value allowed in the Low Weight field is 0.

d. Click **Auto-calculate Weights**. The system automatically assigns the weight for all the options.

Note: Formula for Auto-calculate weights:

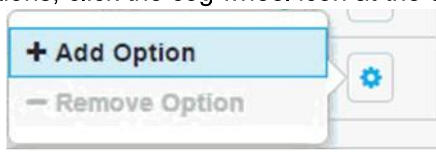
High - (((High - Low)/ (Total Options - 1)) * (Option number - 1))

e. By default, two rows of Text and Weight fields display. The following table describes the text and weight options.

Options	Description
Text	Type the name of the option. **Note:** The option text is unique and mandatory. The maximum characters allowed is 200.
Weight	Type or select the weight of the option. **Note:** The option weight is mandatory. The maximum value allowed is 255 for the highest weight. The minimum value allowed is 0 for the lowest weight.

Note: The option that appears on top should have a weight which is high in value compared to the option that appears below that. For example, if the question contains 4 options and you enter a weight of 20 for option 1, 10 for option 2, 5 for option 3, and 0 for option 4, then the weight range is valid. If the weight that you entered does not match the high-to-low order, a warning message opens.

f. To add or remove options, click the cog wheel icon at the end of the row of the option.



The following table describes the options in the cog wheel menu.

Menu	Description
Add Option	Adds an empty option text and empty weight below the last option.
Remove Option	Removes the current option text and weight. If there are only two options left, then this menu is inactive.

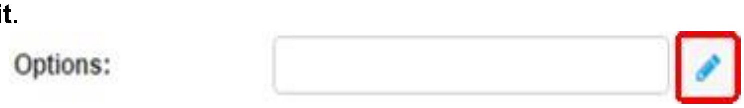
g. Click **OK**. The Edit Question Options window closes and the Create Evaluation Template window is active. The Options text box for the Scored Scale question displays the option text that you typed in the Edit Question Options window, and is separated by a comma.

Note: The highest weight is the question weight and the same weight displays in the Question title bar.

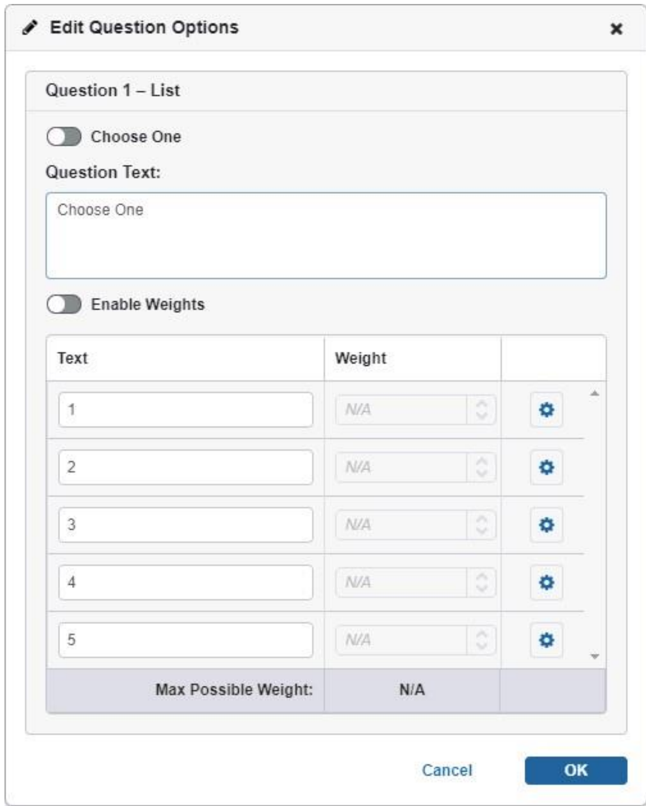
6.1.2.2.2 *List*

To add or modify the List option, perform the following steps.

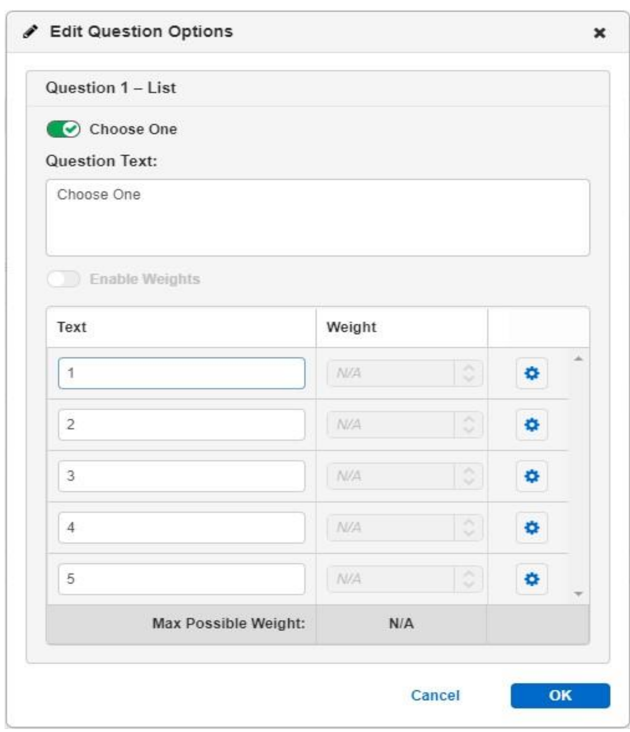
a. Once you select List from the Type drop-down list box, the Options text box is active. Click **Edit**.



The Edit Question Options - List window opens.



b. If you want this question to have option to select only one select the **Choose One** togglebutton.



c. In the Question Text text box, you can add or modify the question text.
d. If you want this question to have weight so that during evaluation, this question's score gets contributed to the evaluations score, enable the **Enable Weights** button.

Note: The Enable Weights button will be **disabled** if the Choose One button is **selected**.

e. By default, five (5) rows of Text and Weight display. The following table describes the text and weight options.

Option	Description
Text	Type the name of the option. **Note:** The option text is unique and mandatory. The maximum characters allowed is 200.
Weight	Type the weight of the option. **Note:** • Weight will be **disabled** if the **Choose One** toggle-button is turned on. • The option weight is mandatory. The weights can be provided in any order. The maximum value allowed is 255, and the minimum value allowed is 0. The values for weight can be duplicated. A warning message opens when the sum of all the option weights exceeds 255.

Note: When you select the Enable Weights button, the Max Possible Weight displays the sum of all the option weights, since the reviewer can select more than one option as an answer choice during evaluation. The max possible weight is assigned to the question weight, and the same weight displays in the question title bar.

When you do not select the Enable Weights check box, the Max Possible Weight displays *N/A*.

f. To add more rows, click the cog wheel icon at the end of the last row. The following menu opens.

The following table describes the cog wheel menu options.

Menu	Description
Add Option Before	Adds an empty row above the current row.
Add Option After	Adds an empty row below the current row.
Move Up	Moves the current row one row above. **Note:** If this is the first row, then this menu is inactive.
Move Down	Moves the current row one row below. **Note:** If this is the last row, then this menu is inactive.

Remove Option	Removes the current row. **Note:** If there are only two rows left, then this menu is inactive.

g. Click **OK**. The Edit Question Options window closes and the Create Evaluation Template window is active. The Options text box for the List question type displays the option text that you entered in the Edit Question Options window, and is separated by comma.

Note: The Maximum Possible Weight is the question weight, and displays in the Question title bar.

2. Based on the question Type that you selected, you may or may not need to enter text in the text box. If you have not yet completed the **Text** field, type the question text in the text box.

   Note: The maximum number of characters allowed is 1024. The Text field is mandatory but does not need to be unique.

3. Type or retype a description for the question by typing or editing the value in the **Description** text box.

   Note: The maximum number of characters allowed is 1024. This is optional.

   This question has no options. Since the weight is not allowed, the question title does not display the weight.

4. To set the orientation for how a question displays in the user interface, from the **Display Mode** drop-down list, select one of the following options.

Menu	Description
Dropdown	All the question options in the template display in a drop-down list box.
Horizontal	All the question options in the template display in an options (radio button) list in a horizontal orientation. **Note:** Since the List type is a multiple choice, List type options display in check box format.
Vertical	All the question options in the template display in an options (radio button) list in a vertical orientation. **Note:** Since the List type question is a multiple choice, List type options display in check box format.

   Note: When the question Type is Free Form Text, the Display Mode drop-down list box is inactive.

5. From the Auto Fail Interaction drop-down list box, select the entity that you want to fail: either **Interaction** (Evaluation), **Section**, or **Question**.

6. From the *If* drop-down list box, select the answer choice that you want to configure the auto fail: **No** or **Yes**. When the reviewer selects the answer options as configured in the second drop-down list box, the selected option in the first drop-down list box auto-fails. For more details about auto-fail, see Auto Fail on page 6-196.

   Note: When the question Type is Free Form Text, List (with the Enable Weight check box selected or deselected), or any Bonus types, the Auto Fail field is inactive.

7. If you want to require a reviewer, while evaluating an interaction, to select an option for a question, then select the **Response Required** check box.

8. If you want a the reviewer to be able to enter comments about a question while evaluating an interaction, select the **Enable Question Comments** check box.

9. If you want to add the question to the question library, select the **Add to Library** check box. The Text, Description, and Options fields of the question are stored in the library. Adding the question to the library allows you to select the question from the library at a later time, when you are creating another template and want to use the same question options as the one you saved.

Note: The system saves the question to the library only when you save the evaluation template, not when you select the Add to Library check box.

A dependent question is a question that displays based on a specific answer option that the reviewer selects during evaluation. For example, if the question, “Did the agent greet the customer,” has answer choices Yes and No, and during evaluation the reviewer selects No, you can configure the template to display a dependent question such as: “Did this agent complete Contact Center Training?”

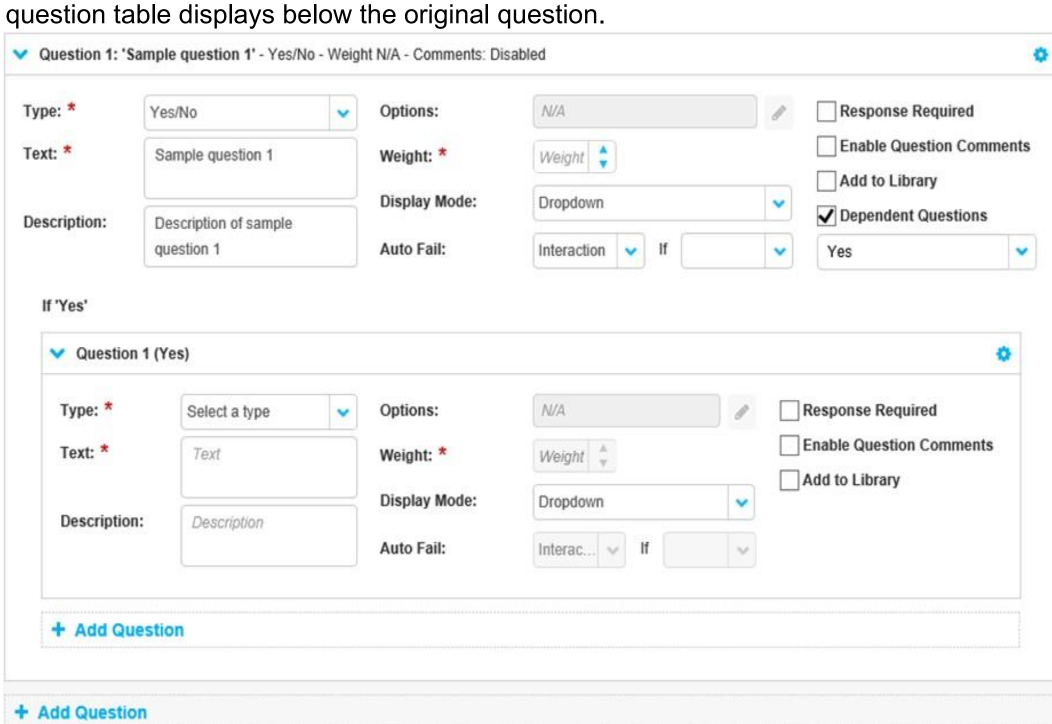
10. Select the **Dependent Questions** check box, which enables the drop-down list box below it.

The dependent question drop-down list box contains options defined for the question. For example, if the question is a Yes/No question, the dependent question drop-down list box contains Yes and No options. If the question is a True/False question, the dependent question drop-down list box contains True and False options.

Note:

- The Dependent Question will be **disabled**, if the Choose One button is **enabled**.
- If you want to add a dependent question, before you continue with this section, see Dependent Questions on page 6-208. Then, return to this step and continue creating an evaluation template.

11. From the dependent question drop-down list box, select an answer choice. An additional question table displays below the original question.

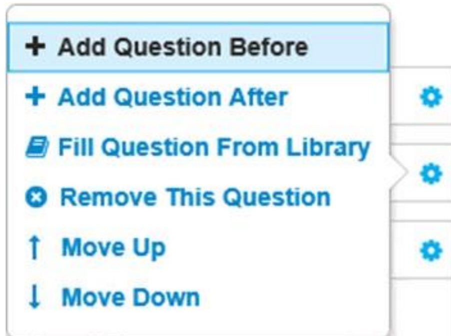


12. You can add multiple dependent questions for the same or different options in the question by selecting **Add Question** below the question.

Note: The description for the fields available in dependent question are same as parent question. Dependent questions cannot have dependent questions.

OR

On the dependent question title bar, click the cog wheel icon. The menu displays various actions that can be performed with the dependent question.



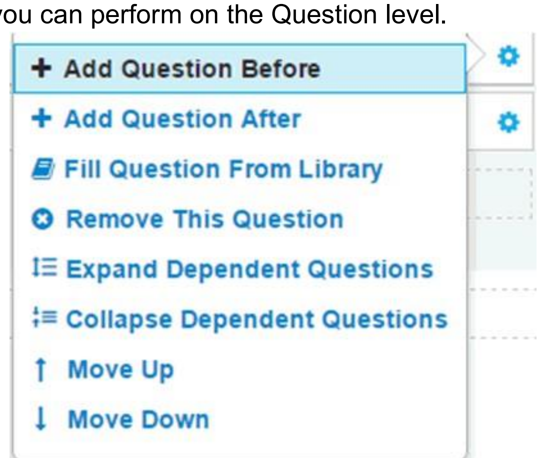
The following table describes the functions of the Dependent Question cog wheel icon menu.

Menu	Description
Add Question Before	Adds an empty dependent question for the same option above the current dependent question.
Add Question After	Adds an empty dependent question for the same option below the current dependent question.
Fill Question From Library	Imports a question and its options into the current dependent question. To import a question, once you select the Fill Question From Library option, perform the following steps. • From the **Select Library Question** drop-down list box, select the question that you want to import into the evaluation template. • Click **OK**. The Fill Question From Library window closes, and the Create Evaluation Template window is active. The library question text, description, and the option text overwrites the current question or dependent question. **Note:** Once the library question overwrites the current question or dependent question, you can not undo the action.
Remove This Question	Removes the current dependent question and its options. **Note:** If this is the only dependent question for a question option, then this clears the check box that corresponds to the question option in the dependent drop-down list box.
Add Advanced Failure Condition	Failure condition based on Percentage Score or Point Score.
Score Adjustments	To award or deduct points the user can use the option of Score Adjustments.
Expand Dependent Questions	Expands all the dependent questions within the current question. **Note:** If there are no dependent questions defined for the current question, then the Expand Dependent Questions option is inactive.

Collapse Dependent Questions	Collapses all the dependent questions within the current question. **Note:** If there are no dependent questions defined for the current question, then the Collapse Dependent Questions option is inactive.
Move Up	Moves the current dependent question one question above. For example, if the current dependent question number is 2, then this dependent question moves up and displays as dependent question 1. **Note:** If there are no dependent questions above the current dependent question, then the Move Up option is inactive.
Move Down	Moves the current dependent question one question below. For example, if the current dependent question number is 2, then this dependent question moves down and displays as dependent question 3. **Note:** If there are no dependent questions below the current dependent question, then the Move Down option is inactive.

13. If you want to add another Question to the template, at the bottom of the window, click **Add Question**.
    OR

    At the end of the Question title bar, click the cog wheel icon to view a menu that displays various actions that you can perform on the Question level.



The following table describes the functions of the Question cog wheel icon menu.

Menu	Description
Add Question Before	Adds an empty question above the current question.
Add Section After	Adds an empty question below the current question.
Fill Question From Library	Imports a question along with the Text, Description, and Options fields from the question library.
Remove This Question	Removes the current question along with its options. **Note:** If this is the only question in the current section, then Remove This Question option is inactive.

Expand Dependent Questions	Expands all the dependent questions within the current question. **Note:** If there are no dependent questions defined for the current question, then the Expand Dependent Questions option is inactive.
Collapse Dependent Questions	Collapses all the dependent questions within the current question. **Note:** If there are no dependent questions defined for the current question, then the Collapse Dependent Questions option is inactive.
Move Up	Moves the current question one question above. For example, if the current question number is 2, then this question moves up and displays as question number 1. **Note:** If there are no questions above the current question, then the Move Up option is inactive.
Move Down	Moves the current question one question below. For example, if the current question number is 2, then this question moves down and displays as question number 3. **Note:** If there are no questions below the current question, then the Move Down option is inactive.

Note: To manually collapse the contents of a Question, click the down arrow at the left of section title.

The down arrow changes to a right arrow.

The Question details and the questions within that Question collapse, and only the Question title displays.

To expand and view the contents of a Question, click the right arrow at the left of Question title. The right arrow changes into a down arrow. The Question detail displays below the Question title.

6.1.2.2.3 *Bonus Question Types*

You can add a Bonus question to a Question section to give the reviewer an opportunity to increase the Section score or Overall score. You add a Bonus question to a template using Workforce Engagement Management. The types of bonus questions are:

- Bonus: Yes/No
- Bonus: True/False
- Bonus: Pass/Fail
- Bonus: Scored Scale

Formula for Section Score

- Section Score in Percentage = (Sum of Question options weight selected/Section Weight) * 100

- Section Score in Point = Sum of selected Question score / Maximum Possible Question Weight * Section Weight

Example

If you create a template with a Section with the following two questions,

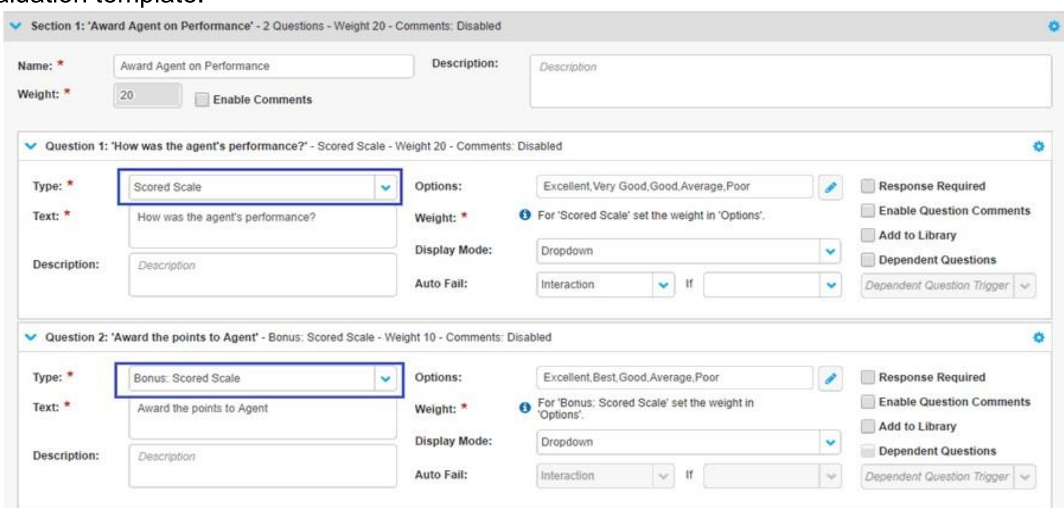
- Question 1 – Scored Scale (type = range from 1 to 5, weight = 20) with the following options.

  Excellent – 20, Very Good – 15, Good – 10, Average – 5, Poor - 0

- Bonus Question 2 – Bonus: Scored Scale (type = range from 1 to 5, weight = 10) with the following options.

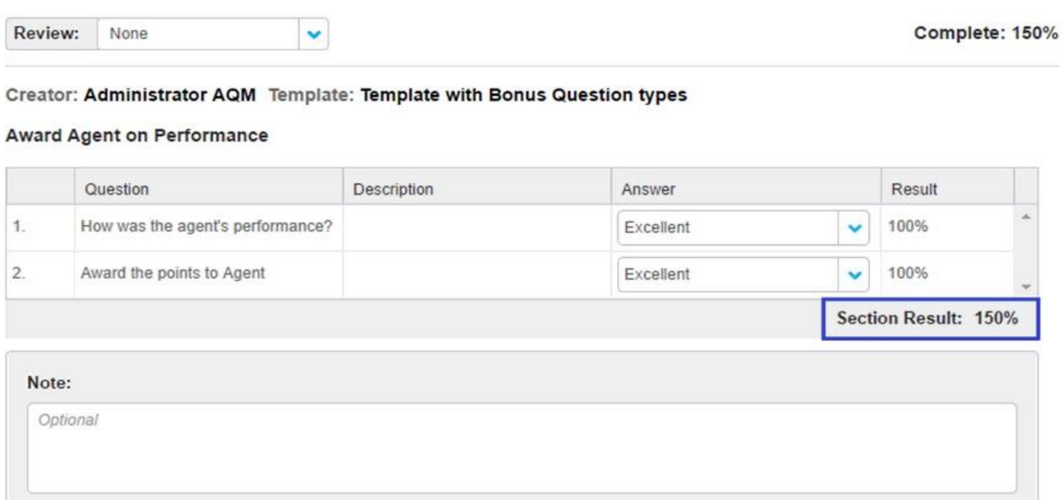
  Excellent – 10, Best – 7.5, Good – 5, Average – 2.5, Poor - 0

then the following screen shot is an example of what the reviewer sees when completing the evaluation template.



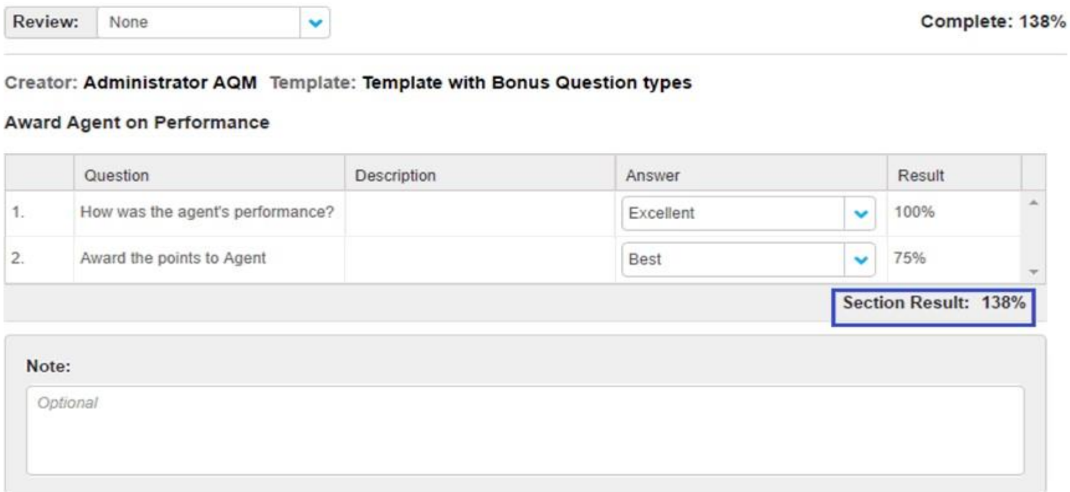
If the reviewer selects **Excellent** as an answer choice for both questions, then the score of the section is:

- Score in Percentage = (20+10)/20*100 = 150% • Score in Points = 20+10 = 30



If the reviewer selects **Excellent** for Question 1, and selects **Best** for Question 2, then the score of the section is:

- Score in Percentage = (20+7.5)/20*100 = 138%
- Score in Points = 20+7.5 = 27.5



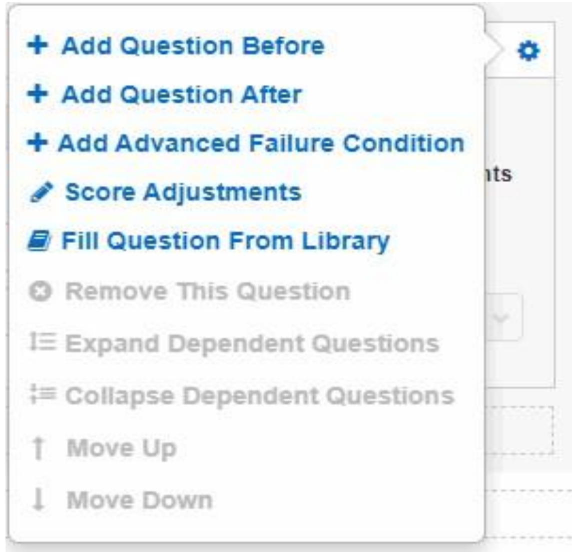
Note: If a template has a Section with *only* Bonus question types, then the entire Section is cannot be scored, which means that the Score displays **N/A** for the Section.

6.1.2.2.4 *Auto Fail*

When creating an evaluation template, you can set an Interaction, Section, or Question to fail when a reviewer selects a respective question option while scoring. The reviewer must select the Template scoring type as **Pass/Fail** to know whether it is pass or fail. User can also select **success Rate / Quality Score(%)** and **Total Points (Numbers)**, when user selects the failure condition, results for the corresponding Interaction, Question, or Section is **0**.

While creating a template, you can set up auto fail. You can set the following question types to qualify for auto fail.

- Scored Scale
- True/False
- Yes/No
- Pass/Fail
  At the end of the Question title bar, click the cog wheel icon to view a menu that displays various actions that you can perform on the Question level.

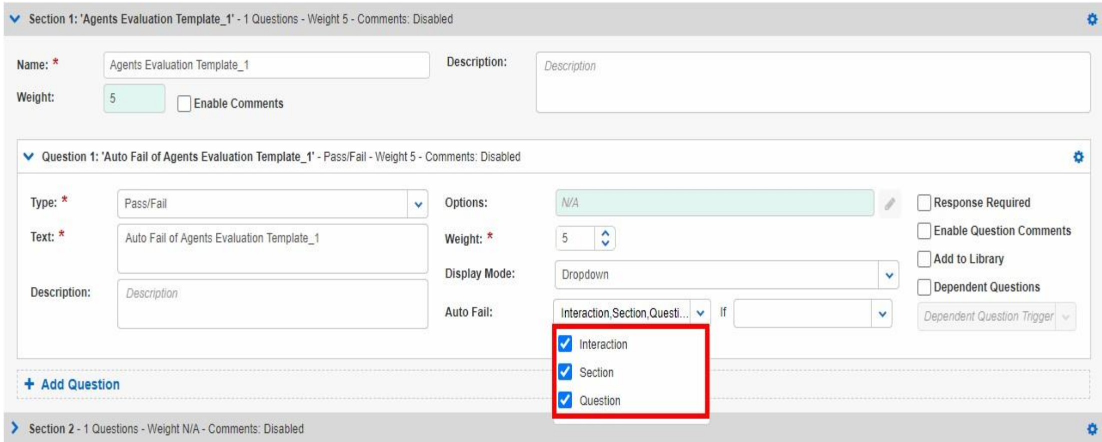

Add Question Before
Add Question After
Add Advanced Failure Condition
Score Adjustments
Fill Question From Library
Remove This Question
Expand Dependent Questions
Collapse Dependent Questions
Move Up
Move Down

The following table describes the functions of the Question cog wheel icon menu.

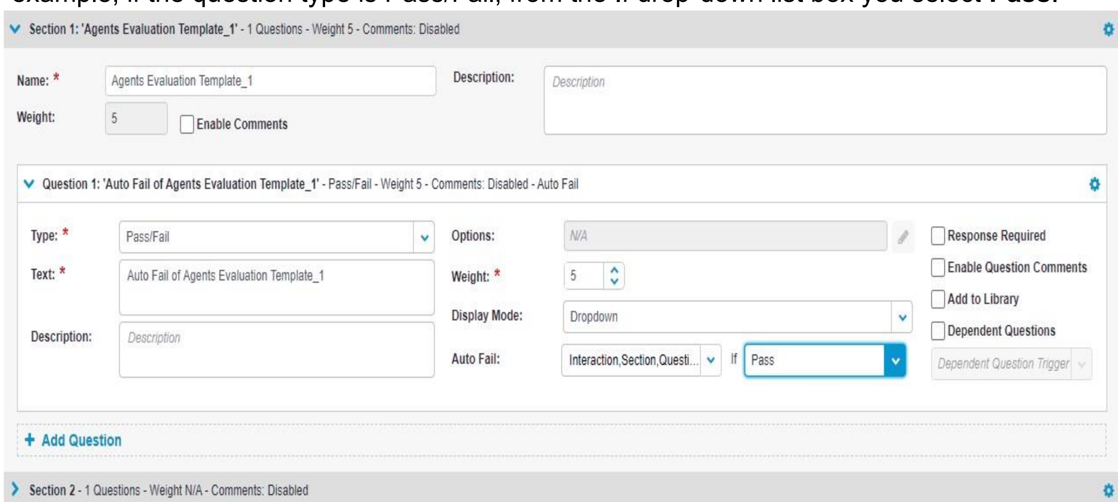
Menu	Description
Add Question Before	Adds an empty question above the current question.
Add Section After	Adds an empty question below the current question.
Add Advanced Failure Condition	Failure condition based on Percentage Score or Point Score.
Score Adjustments	To award or deduct points the user can use the option of Score Adjustments.
Fill Question From Library	Imports a question along with the Text, Description, and Options fields from the question library.
Remove This Question	Removes the current question along with its options. **Note:** If this is the only question in the current section, then Remove This Question option is inactive.
Expand Dependent Questions	Expands all the dependent questions within the current question. **Note:** If there are no dependent questions defined for the current question, then the Expand Dependent Questions option is inactive.
Collapse Dependent Questions	Collapses all the dependent questions within the current question. **Note:** If there are no dependent questions defined for the current question, then the Collapse Dependent Questions option is inactive.
Move Up	Moves the current question one question above. For example, if the current question number is 2, then this question moves up and displays as question number 1. **Note:** If there are no questions above the current question, then the Move Up option is inactive.
Move Down	Moves the current question one question below. For example, if the current question number is 2, then this question moves down and displays as question number 3. **Note:** If there are no questions below the current question, then the Move Down option is inactive.

Note: Refer to Failure Conditions at Question Level on page 6-213 section, under the Advanced Failure Condition on page 6-213.

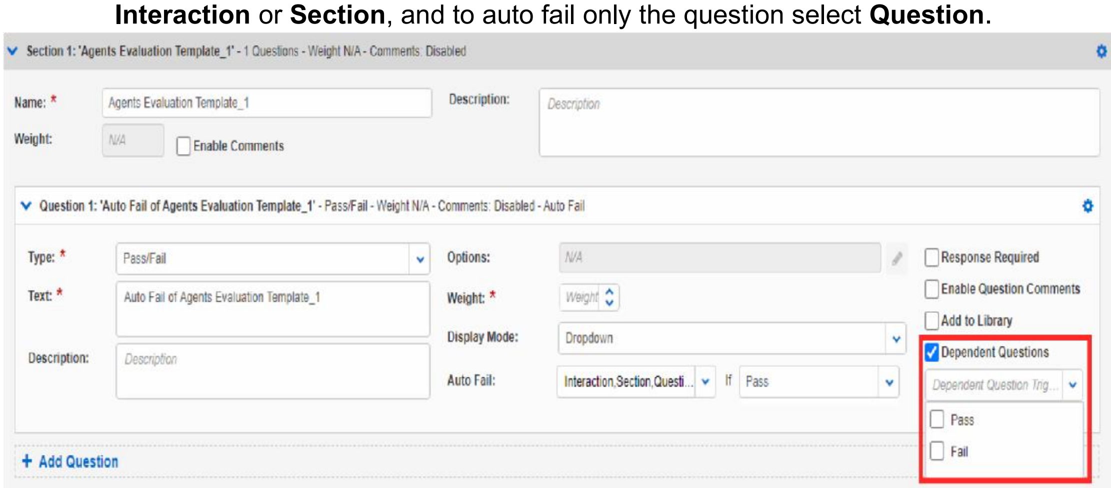
1. In the Create Evaluation Template window, with the Question added, from the Auto Fail dropdown list box, select **Interaction**, **Section**, **Question** or any one/two from the list.



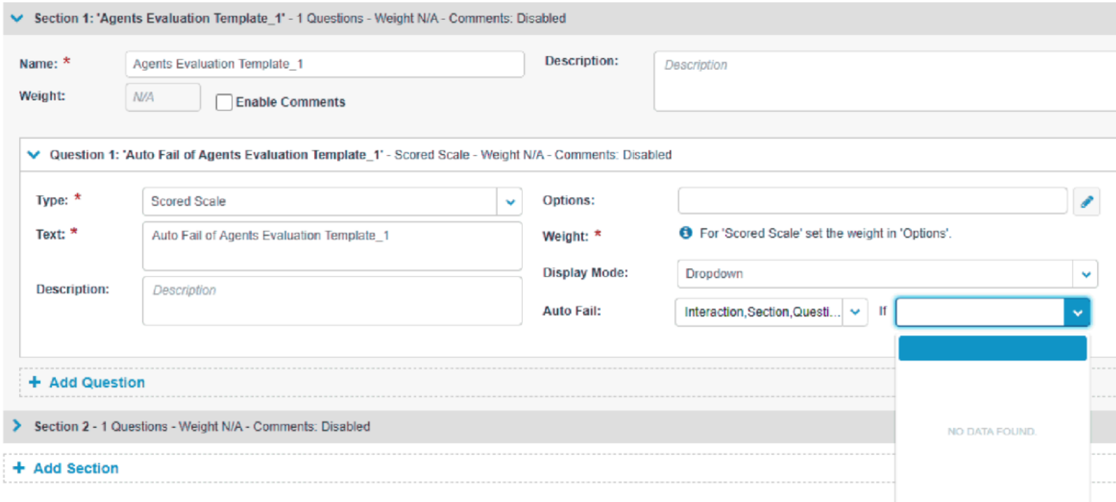
2. From the **If** drop-down list box, select the option that corresponds to the Question type. For example, if the question type is Pass/Fail, from the If drop-down list box you select **Pass**.



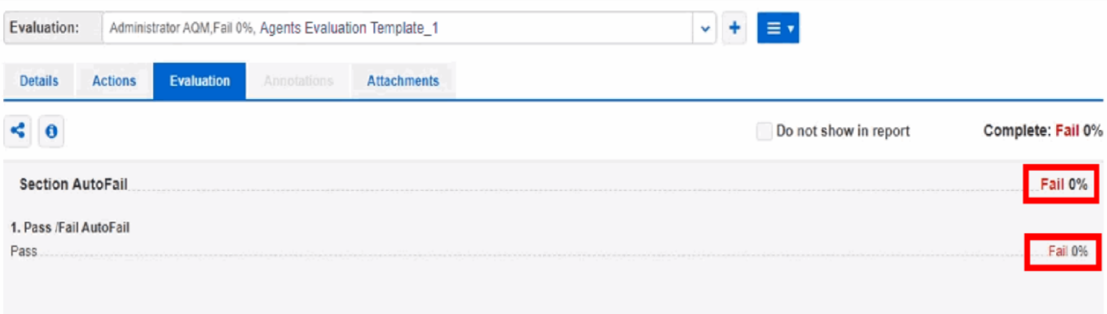
Note: When the user wants to auto fail the entire interaction or the entire section then select **Interaction** or **Section**, and to auto fail only the question select **Question**.



Note: To set up auto fail for a Scored Scale question type, from the If drop-down list box, select an option that your company has created for Scored Scale.



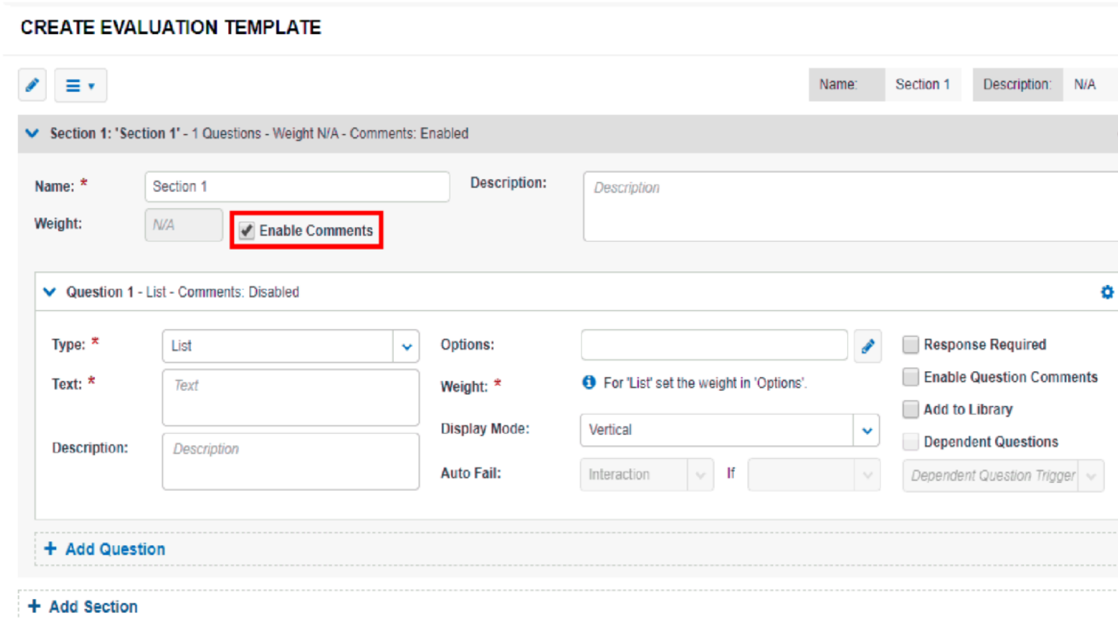
Once an interaction is evaluated by using the Evaluation Template, the result will be displayed under the Evaluation tab, as shown below.



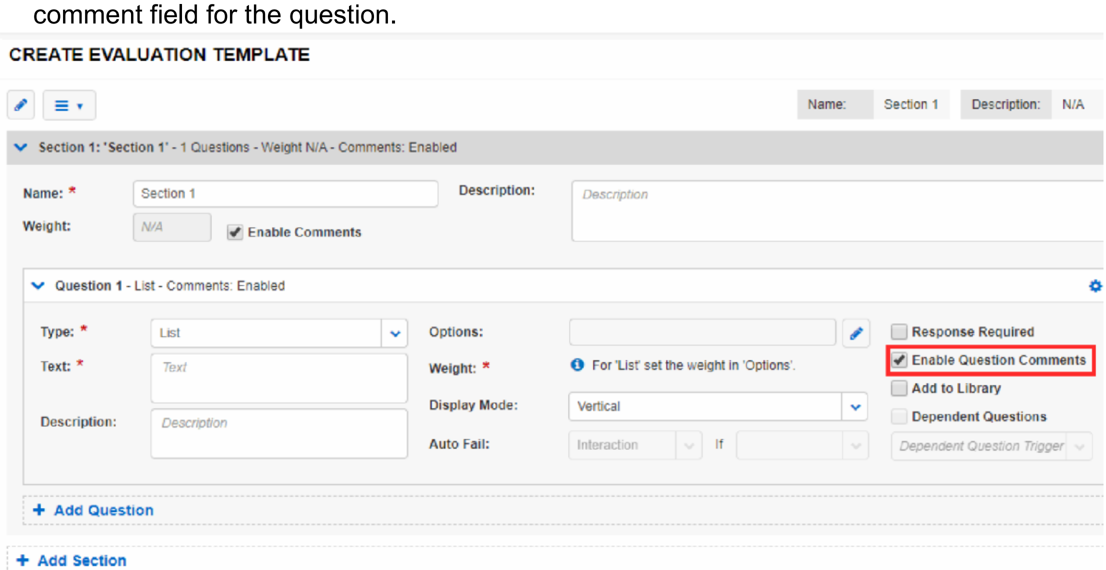
6.1.2.2.5 *List Type*

When you create a List type answer option in an evaluation temple, the reviewer can select more than one answer for a List type question. Based on the answer that a reviewer selects, you can have different weights for each answer. You also have the option to Enable or Disable the List type answer weight.

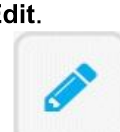
1. In the Create Evaluation Template window, with the Question added, click on the **Enable Comments** checkbox. It enables the comment field for the section.
2. From the Type drop-down list box, select **List**.



3. Click on the **Enable Question Comments** checkbox as shown below. It enables the comment field for the question.



4. Next to the Options text box, click **Edit**.

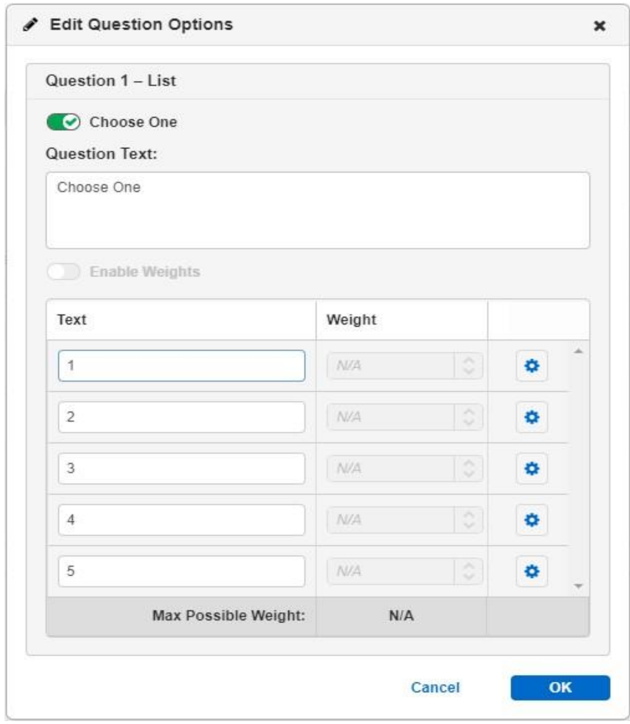


The Edit Question Options window opens with the Question Text field populated from the Create Evaluation Template window.

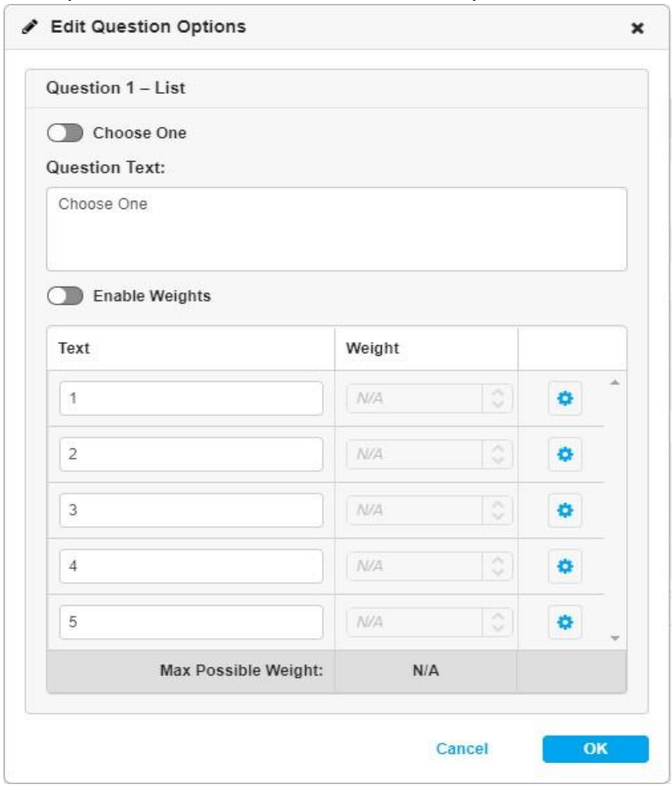
Note: If you want, you can modify the Question Text field.

By default, the Edit Question Options window has five (5) list options with blank text.

5. If you want this question to have option to select only one answer, so that during evaluation, this question's score gets contributed to the evaluations score, enable the **Choose One** button.


Edit Question Options
Question 1 – List
Choose One
Question Text:
Choose One
Enable Weights
Text
Weight
1
N/A
2
N/A
3
N/A
4
N/A
5
N/A
Max Possible Weight:
N/A
Cancel
OK

- In the **Text** column, in the text box field, type the text for each option that you want in the List type Answer option section of the evaluation template.



Note: By default, the Weight column text fields are disabled. If you do not enable the question weight, then the question weight is N/A.

Question weight is calculated based on the sum of the selected option weights. For example, if the reviewer selects options 1, 2, and 4, and the weight is 1, 2, and 4 respectively, then the question weight is 7.

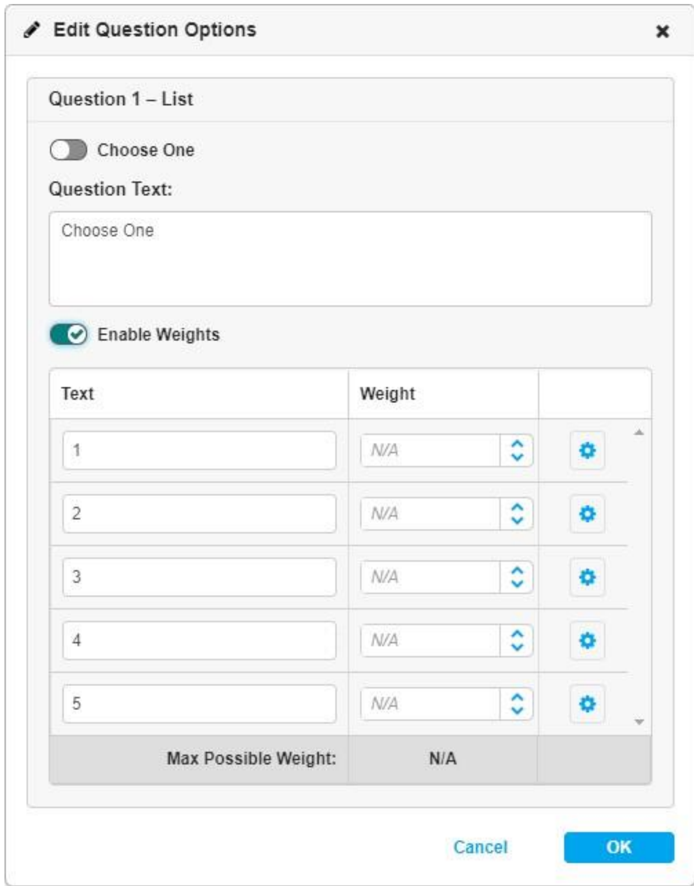
Scoring is based on the following formula:

Percent Score = (Sum of selected options weight/question weight)*100

Point Score = Sum of selected option's weight

6. If you want to add weights to the List answer options, select the **Enable Weights** button.

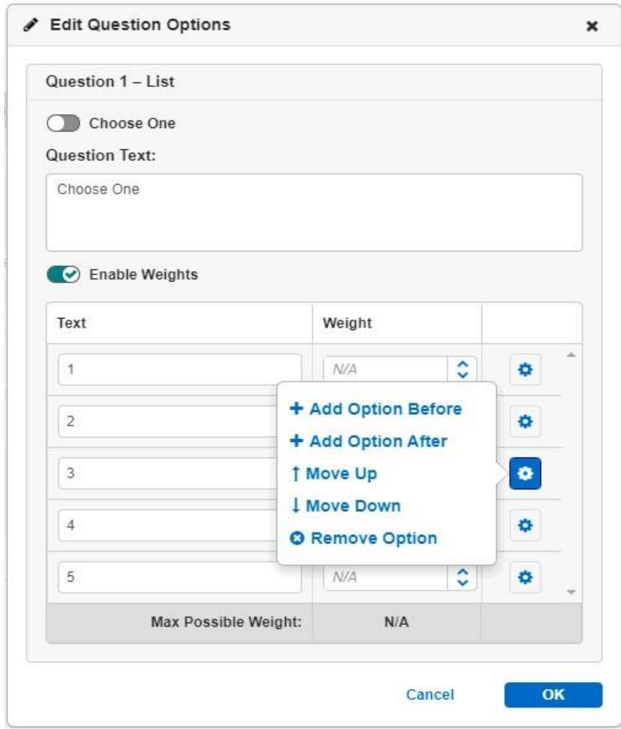
Note: You can type the text and weights in any order that you want. During the interaction evaluation, the reviewer sees the check boxes in the List in the same order as you create them on the Edit Question Options window.



At the bottom of the window, the **Max**(imum) **Possible Weight** displays the total of all the option weights. A question can have the maximum possible weight if the reviewer selects all the Answer check boxes in the list.

Note:

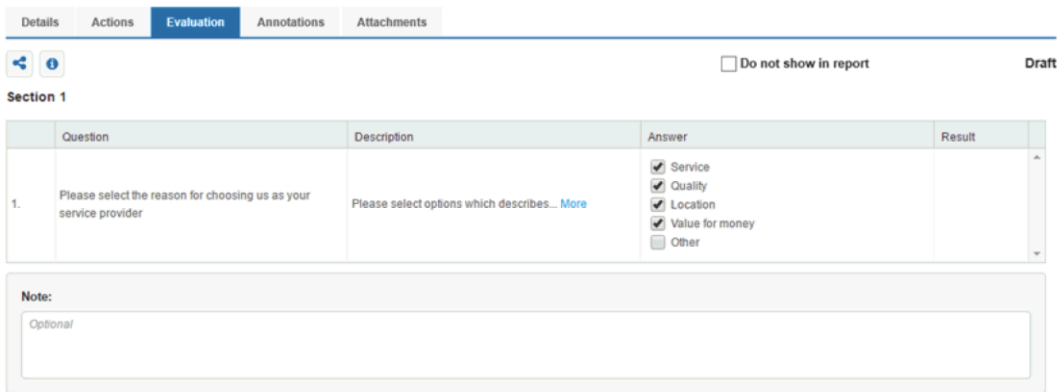
- The Enable Weights button will be **disabled** if the Choose One button is **enabled**.
- You can move the list options up or down in the list, or you can add an option before or after a row in the list. To do this, click the cog wheel icon next to the option that you want to modify.



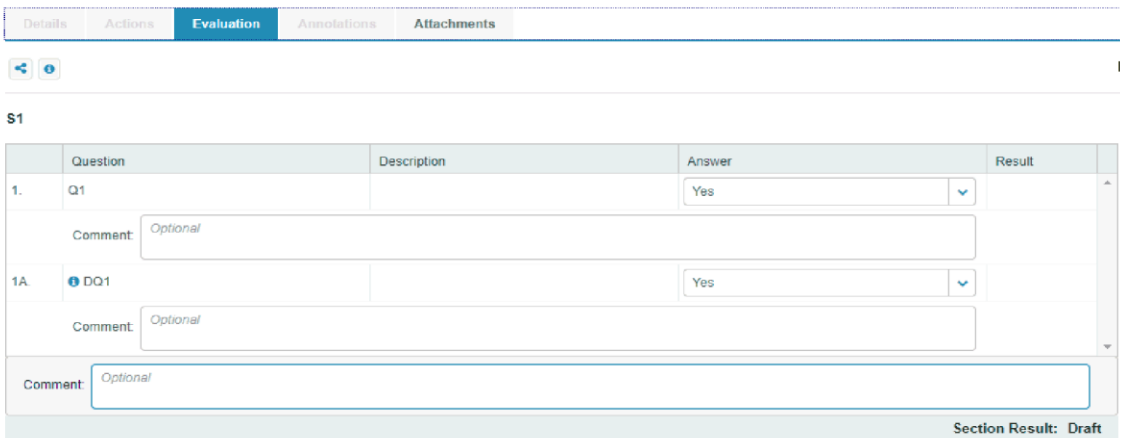
The following table describes the options in the cog wheel menu.

Option	Description
Add Option Before	To add a blank row before any option.
Add Option After	To add a blank row after any option.
Move Up	To move an option one row up. **Note:** When an option reaches the top row, the Move Up menu item is inactive.
Move Down	To move an option to one row down. **Note:** When an option reaches the last row, the Move Down menu item is inactive.
Remove Option	To delete any row until the only two options remain in the list. The List type must have minimum of two options.

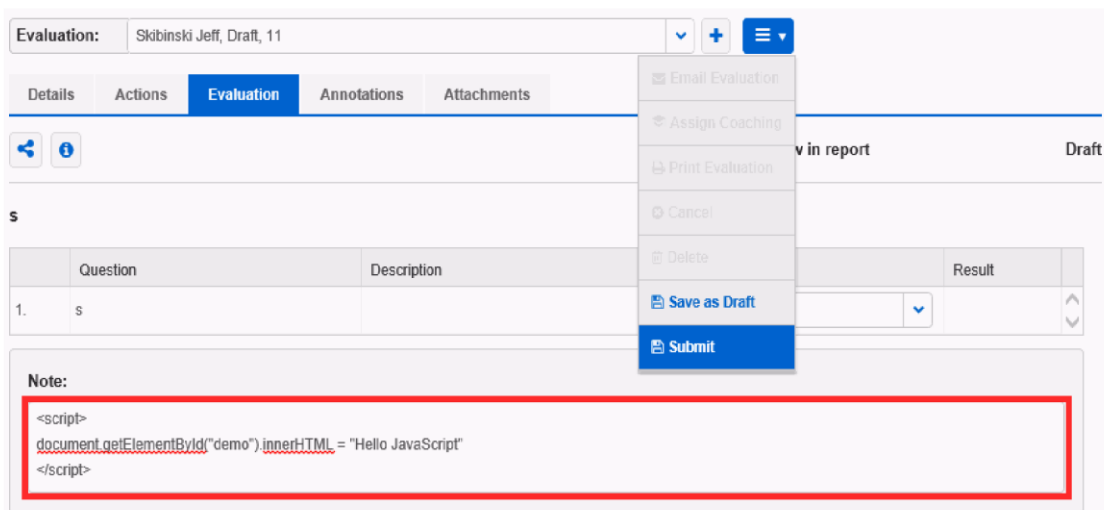
7. When you are finished editing the question options, click **OK**. The Edit Question Options window closes and the Create Evaluation Template window is active.
8. From the Display Mode drop-down list box, select either **Vertical** or **Horizontal**.
   If you select **Vertical**, the reviewer sees the List options displayed as in the following screen shot.



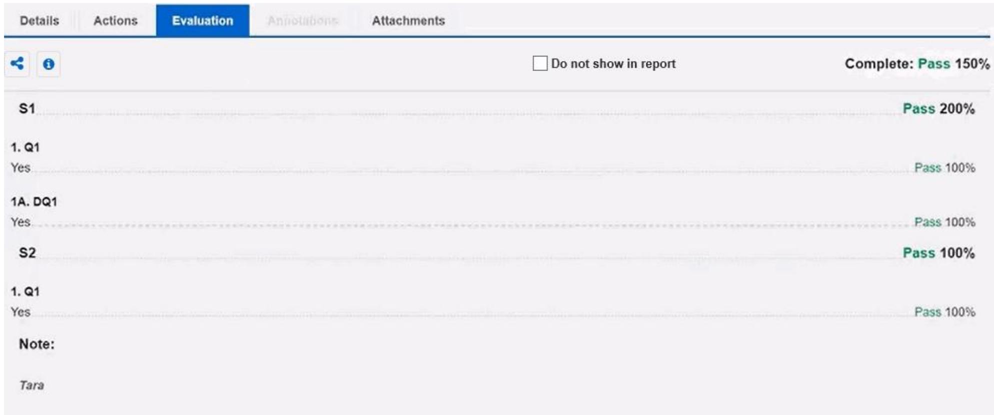
If you select **Horizontal**, the reviewer sees the List options displayed as in the following screen shot.



Note: The Section Question **Comment** fields are added to the Evaluation with the **Note** field. You can also type any text or ***<html>*** text on the fields. Refer the below screenshot.



- If ***<html>*** text is used on the Note field, as shown above, the texts inside the ***<script>*** will not be visible after Submit the evaluation. The other ***<html>*** texts will be shown as shown below.



9. If you select the **Response Required** check box for this List type question, the reviewer is required to select a minimum of one check box on the evaluation template.

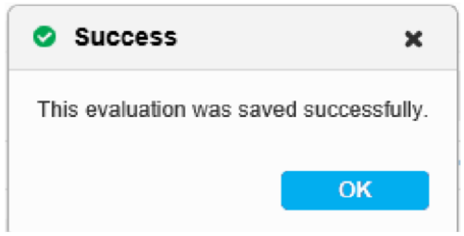
10. When you have finished adding questions and sections, you want to either save the template as a Draft template or as a Final template. Select the main menu icon to view the following menu.

The following table describes the functions of the main menu icon menu.

Menu	Description
Clear Template	Removes all the sections and questions in the template and adds an empty section with an empty question.
Expand All	Expands all the sections, questions, and dependent questions (if any) in the template.
Collapse All	Collapses all the sections, questions, and dependent questions; displays only the section titles.
Menu	**Description**
Cancel	Cancels the changes in the template, closes the Create Evaluation Template window, and the Evaluation Templates window is active. **Note:** If you click **Cancel** before saving the changes, the system displays a Warning window. To delete the changes, click **Yes**.

Save As Draft	Saves the template changes to the database. The evaluation template remains open so that you can continue to make changes. **Note:** This template is not available for a user to select when evaluating an interaction because the template is a Draft.
Save As Final	Saves the template changes to the database. The Create Evaluation template window closes and the Evaluation Templates window is active. **Note:** Selecting this option marks the template as complete and allows a user to select it when evaluating an interaction.

Note: When you save an evaluation template as Draft, it is successfully saved to the database, when the following Success window opens.



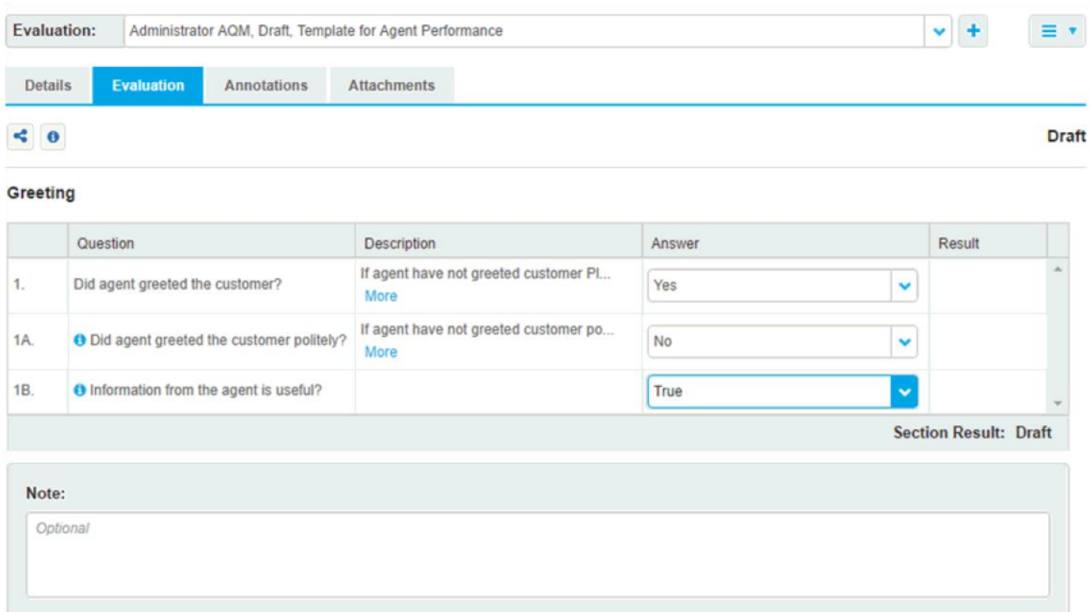
Note: When you click **Save as Final**, the success window does not display.

Whether you click **Save as Final** or **Save as Draft**, the template displays in the Evaluation Templates list.

6.1.2.3 Dependent Questions

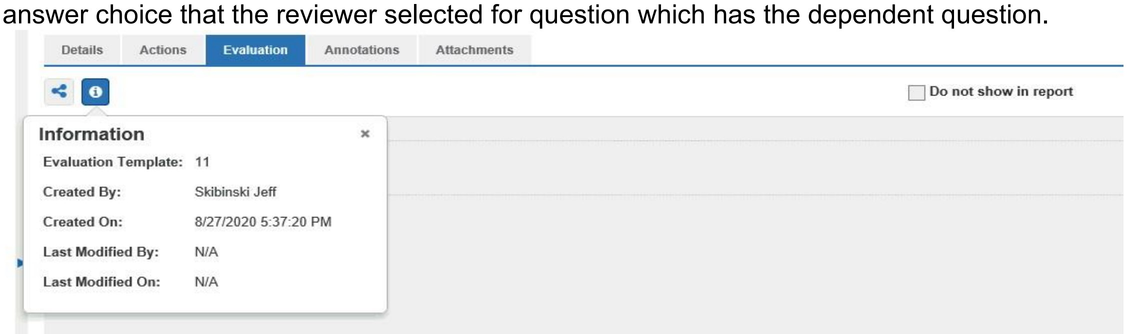
A dependent question is a question that displays based on a specific answer option that the reviewer selects during evaluation. For example, if the question, “Did the agent greet the customer,” has answer choices Yes and No, and during evaluation the reviewer selects No, you can configure the template to display a dependent question such as: “Did this agent complete Contact Center Training?”

Note: The weight of a dependent question is not included in the Section weight.
When a reviewer selects a template, the template details display in the Evaluation tab. The following screen shot displays Question 1 (Did agent greet the customers?), which when the reviewer selected the Answer as Yes, displayed two dependent questions.

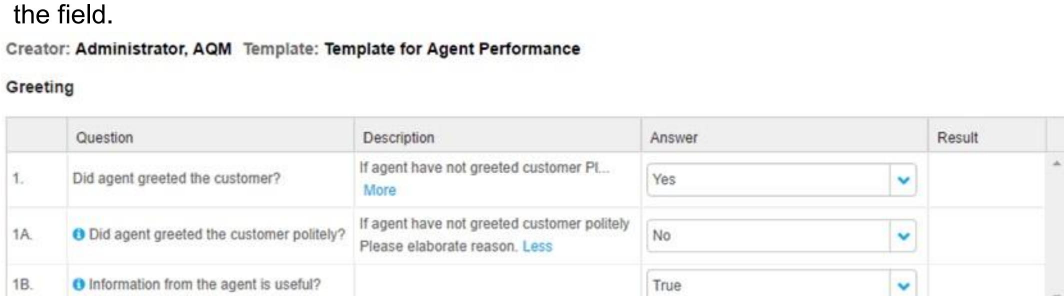


If you configure a Dependent Question number in the template, then the question number appears for the dependent question as XA, where X is the question number. For example: 1A or 1B, as in the preceding screen shot.

An Information icon displays next to the dependent questions, and when the reviewer clicks on the Information icon, the following message displays. In the following screen shot, **Yes** is the answer choice that the reviewer selected for question which has the dependent question.



In the Description column, if a dependent question's description exceeds the maximum allowed space in the field, then a More hyperlink displays. The reviewer can click **More** to display the complete question description; the hyperlink changes to **Less**. When the reviewer is finished reading the description, they can click Less to display fewer words in the field.



6.1.2.3.1 *Score Calculation Formula - With Dependent Questions*

The following table describes the system formulas behind the Percentage Score and Point Score options.

	Question Score Display	Dependent Question Score Display	Section Score Display	Overall Score Display
Percentage Score	(Sum of selected question options weight/Question Weight) * 100	(Sum of selected dependent question options weight/ Dependent Question Weight) * 100	((Sum of selected question options weight + Sum of selected dependent question options weight) /Section weight) * 100	(Sum of all section score/ Sum of weights of all sections) * 100
Example: Section Weight as 10 Question weight as 10 Option 1 = 2 Dependent question weight = 10 Option 1 = 10 Option 2 = 0 Option 2 = 3 Option 3 = 5 If Option 1 (Option 1 selected in dependent question), Option 2 selected	(2+3/10)*100 = 50%	(10/10)*100 = 100%	((2+10+3)/ 10)*100 = 150%	((2+10+3)/ 10)*100 = 150%
	Question Score Display	**Dependent Question Score Display**	**Section Score Display**	**Overall Score Display**
Point Score	Sum of selected question options weight	Sum of selected dependent question options weight	Sum of Question Score (includes Dependent Questions Score) / Maximum Possible Question Weight (excludes Dependent Question Weight) * Section Weight	Sum of all Section Scores

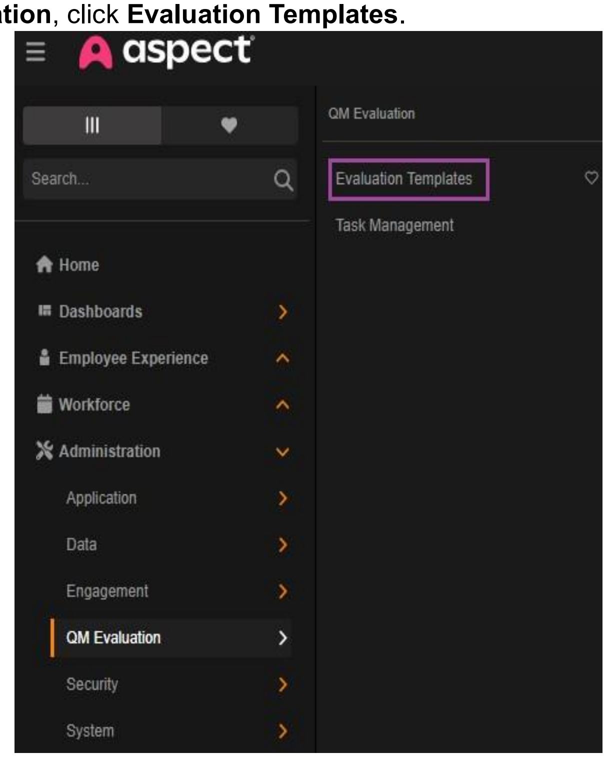
Example: Section Weight as 10 Question weight as 10 Option 1 = 2 Dependent question weight = 10 Option 1 = 10 Option 2 = 0 Option 2 = 3 Option 3 = 5 If Option 1 (Option 1 selected in dependent question), Option 2 selected	2+3 = 5	10	2+10+3 = 15	2+10+3 = 15

6.1.3 Edit an Evaluation Template

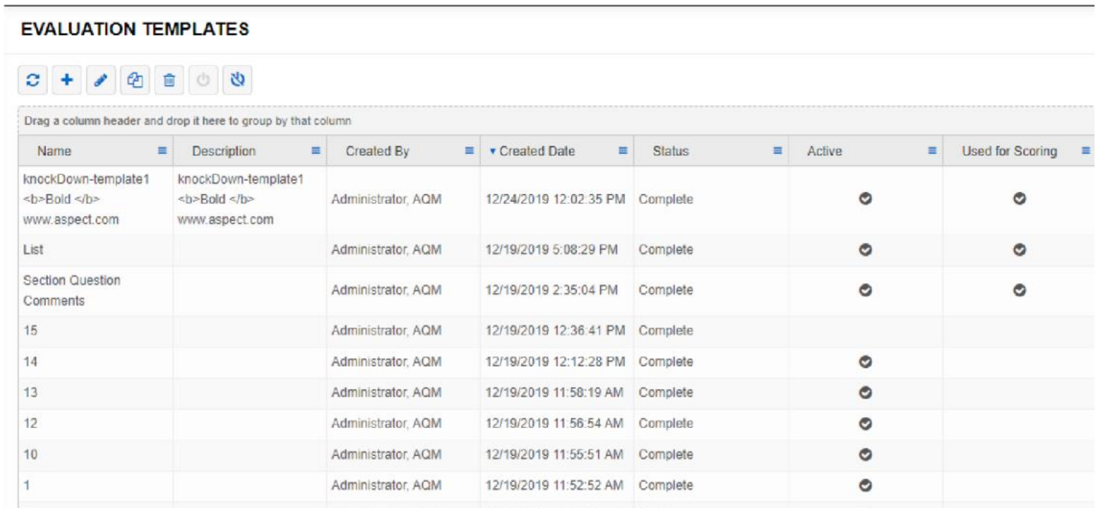
Use the edit feature to change the basic template details, section details, question details, and dependent question details. The Evaluation Templates are editable when the evaluation templates are saved as Draft and saved as Final.

To edit an evaluation template that you created as Draft, perform the following steps.

1. Launch Workforce Engagement Management.
2. Log in as an Administrator.
3. From the Main menu main menu, select **Administration**. The Administration panel appears.
4. Under **QM Evaluation**, click **Evaluation Templates**.



The Evaluation Templates window opens, and a list of templates whose Status is either Draft or Complete displays in the grid.



Name	Description	Created By	Created Date	Status	Active	Used for Scoring
knockDown-template1 Bold www.aspect.com	knockDown-template1 Bold www.aspect.com	Administrator, AQM	12/24/2019 12:02:35 PM	Complete	✔	✔
List		Administrator, AQM	12/19/2019 5:08:29 PM	Complete	✔	✔
Section Question Comments		Administrator, AQM	12/19/2019 2:35:04 PM	Complete	✔	✔
15		Administrator, AQM	12/19/2019 12:36:41 PM	Complete		
14		Administrator, AQM	12/19/2019 12:12:28 PM	Complete	✔	
13		Administrator, AQM	12/19/2019 11:58:19 AM	Complete	✔	
12		Administrator, AQM	12/19/2019 11:56:54 AM	Complete	✔	
10		Administrator, AQM	12/19/2019 11:55:51 AM	Complete	✔	
1		Administrator, AQM	12/19/2019 11:52:52 AM	Complete	✔	

The **Edit** button will be displayed beside the **Add** button as shown on the above screen.

Note: In previous version Edit button was displayed under cog wheel option menu. Now it is moved beside Add button.

6.1.4 Advanced Failure Condition

Aspect Quality has been enhanced to provide different and more complex ways to determine scorecard failures. All the existing automatic failure conditions that were introduced in earlier versions of Aspect Quality have been replaced with a new set of failure conditions. The new failure conditions have the following properties.

- You can define failure conditions for a question or a section.
- Each question or section can have 0 or more assigned failure conditions (it is not mandatory to assign a failure condition. However, it works for four question types such as Pass/Fail, Scored Scale, True/False, and Yes/No).

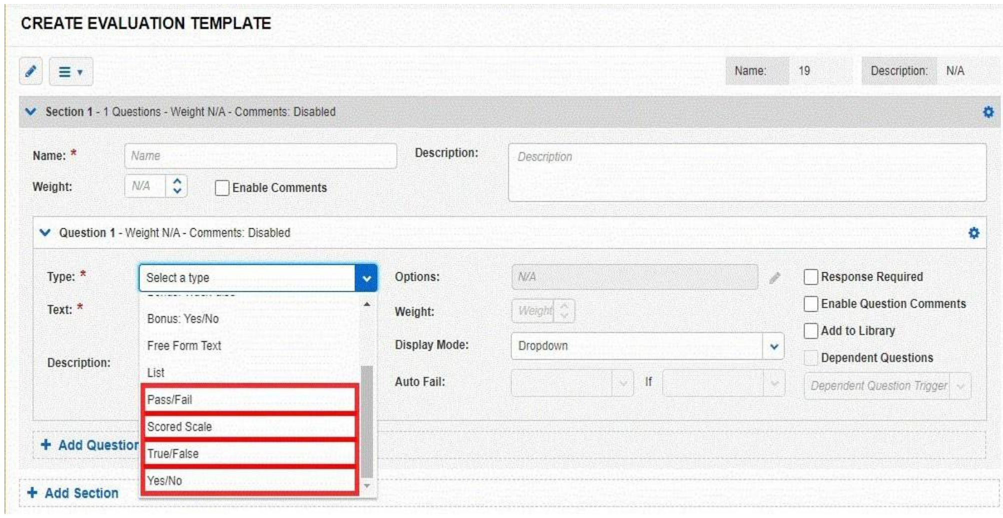
6.1.4.1 Failure Conditions at Question Level

There are two parameters to define the failure conditions at question level such as Percentage Score and Point Score.

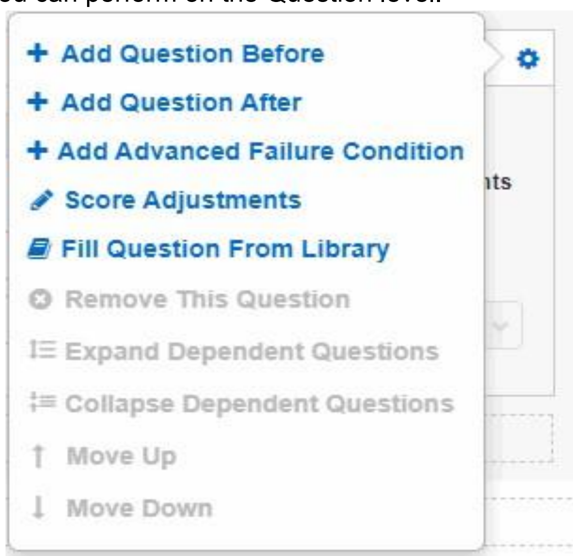
6.1.4.1.1 *Percentage Score*

To define the failure conditions based on the percentage score, follow the steps below.

1. When you are creating a template, you have to select a question type such as Pass/Fail, Scored Scale, True/False, and Yes/No, as shown below.



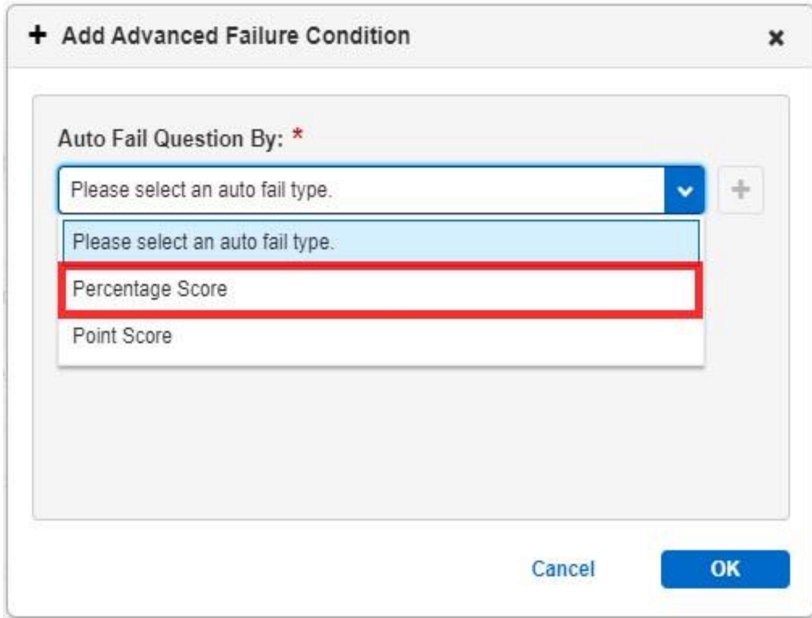
2. At the end of the Question title bar, click the **cog wheel** icon to view a menu that displays various actions that you can perform on the Question level.



Note: After selecting any of the above displayed question type, the Add Advanced Failure Condition option will be **enabled**.

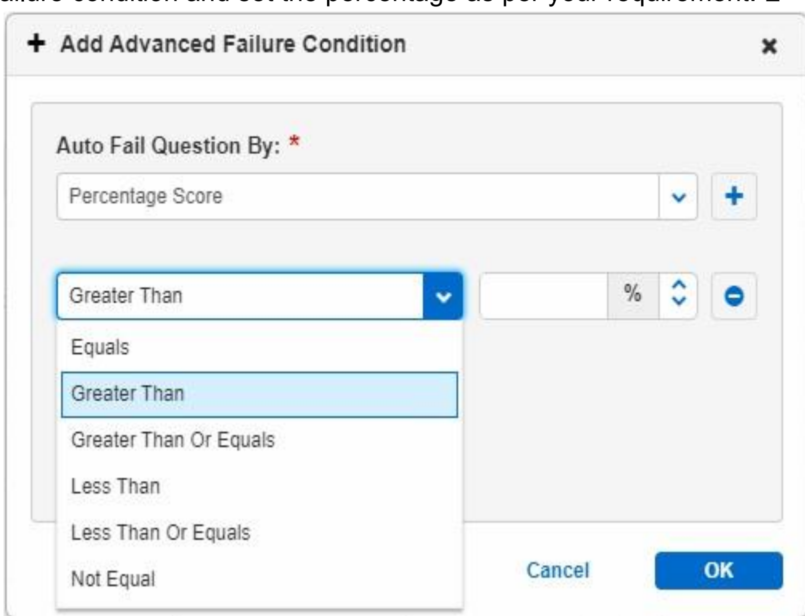
3. Click on the **Add Advanced Failure Condition** option and the Add Advanced Failure Condition window appears.

4. Click on the **Auto Fail Question By** drop-down and select **Percentage Score**.



5.After selecting the Percentage Score, click on  button.

6. Choose the failure condition and set the percentage as per your requirement.



Example: If you create a failure condition called Percentage Score > 50 and while scoring a call using this template, if the question score is greater than 50%, then the question fails. Even though the failure condition is satisfied and the question fails, the score of the question is not set to 0. You must have the Question Scores Display option set to Percentage Score & Pass/Fail, Point Score & Pass/Fail, or Pass/Fail to determine if this question has failed or not.

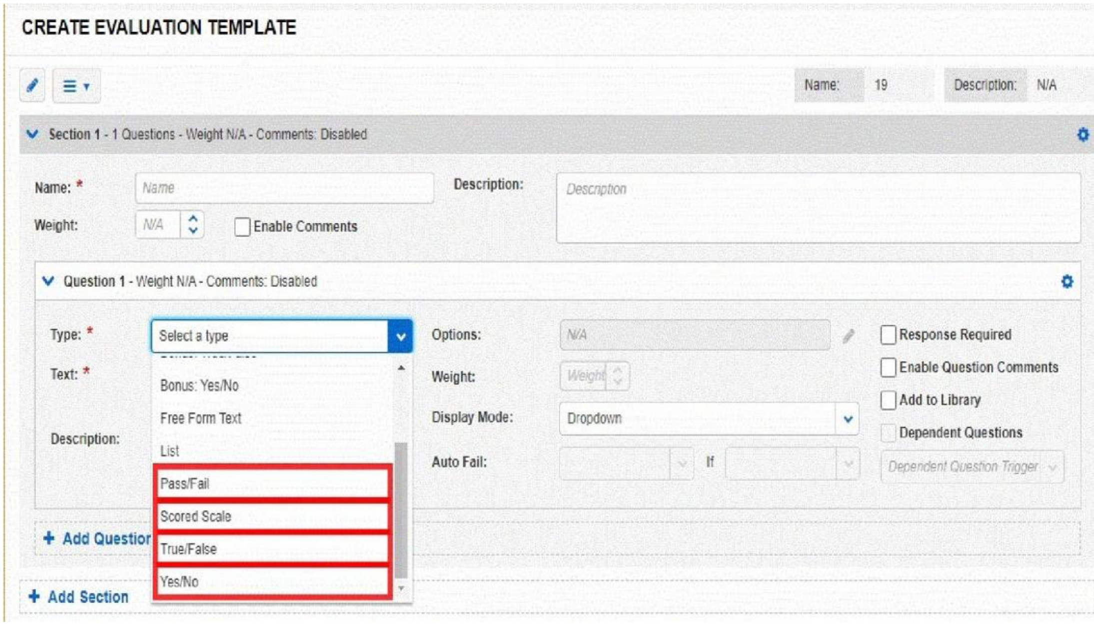
Note: You can add a maximum of four failure conditions to the Add Advanced Failure Condition window.

7. Click on **OK** button to complete the process.

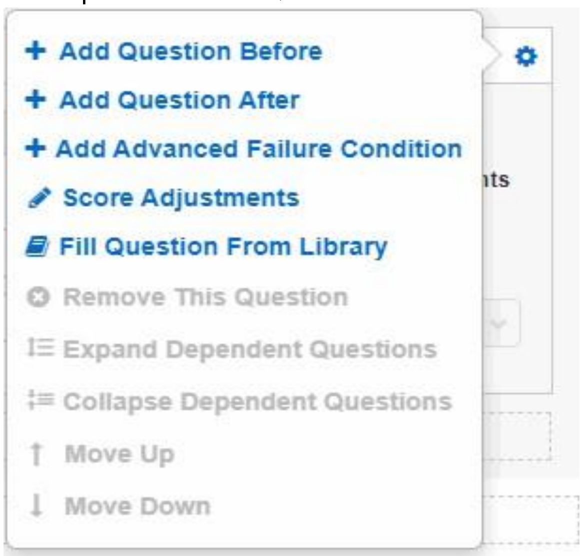
6.1.4.1.2 *Point Score*

To define the failure conditions based on the point score, follow the steps below.

1. When you are creating a template, you have to select a question type such as Pass/Fail, Scored Scale, True/False, and Yes/No, as shown below.

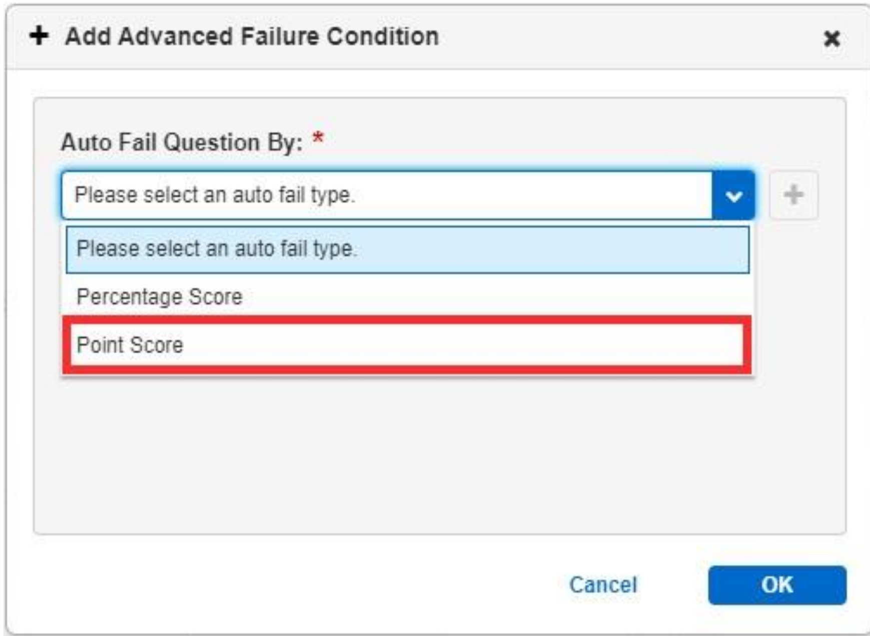


2. At the end of the Question title bar, click the **cog wheel** icon to view a menu that displays various actions that you can perform on the Question level.



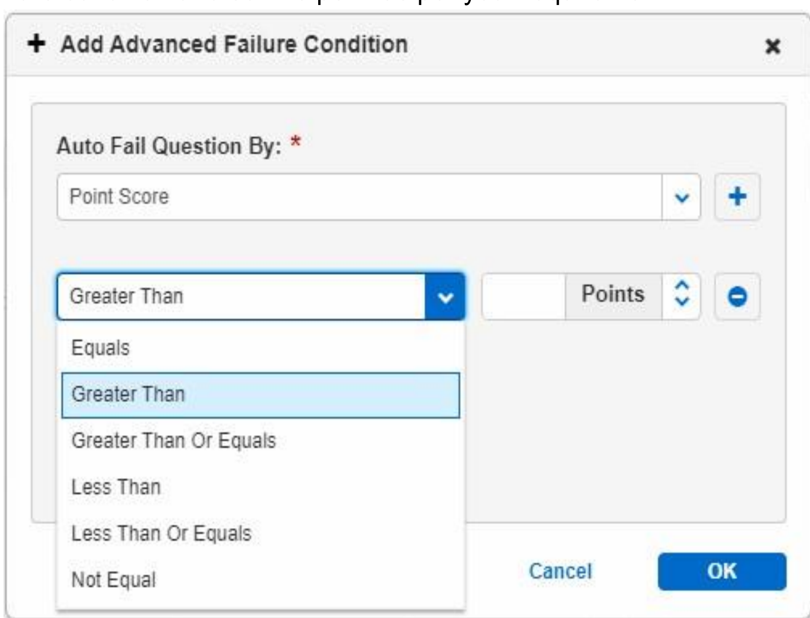
Note: After selecting any of the above displayed question type, the Add Advanced Failure Condition option will be **enabled**.

3. Click on the **Add Advanced Failure Condition** option and the Add Advanced Failure Condition window appears.
4. Click on the **Auto Fail Question By** drop-down and select **Point Score.**



5.After selecting the Point Score, click on + button.

6. Choose the failure condition and set the point as per your requirement.



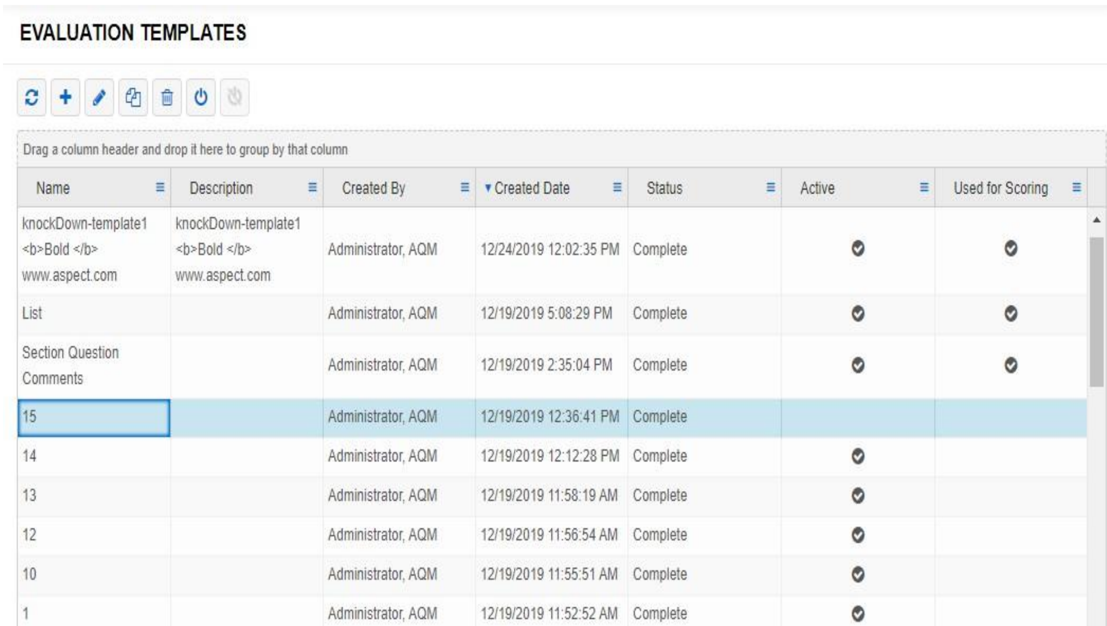
Example: If you create a failure condition called Point Score = 10, and while scoring the call with this template, if the question option you select has an option weight of 10, then the question fails. Even though the failure condition is satisfied and the question fails, the score of the question is not set to 0. You must set the Question Scores display option to Percentage Score & Pass/Fail, Point Score & Pass/Fail, or Pass/Fail to know whether or not this question failed.

Note: You can add a maximum of four failure conditions to the Add Advanced Failure Condition window.

7. Click on **OK** button to complete the process.

6.1.4.2 Editing an Evaluation Template as Draft

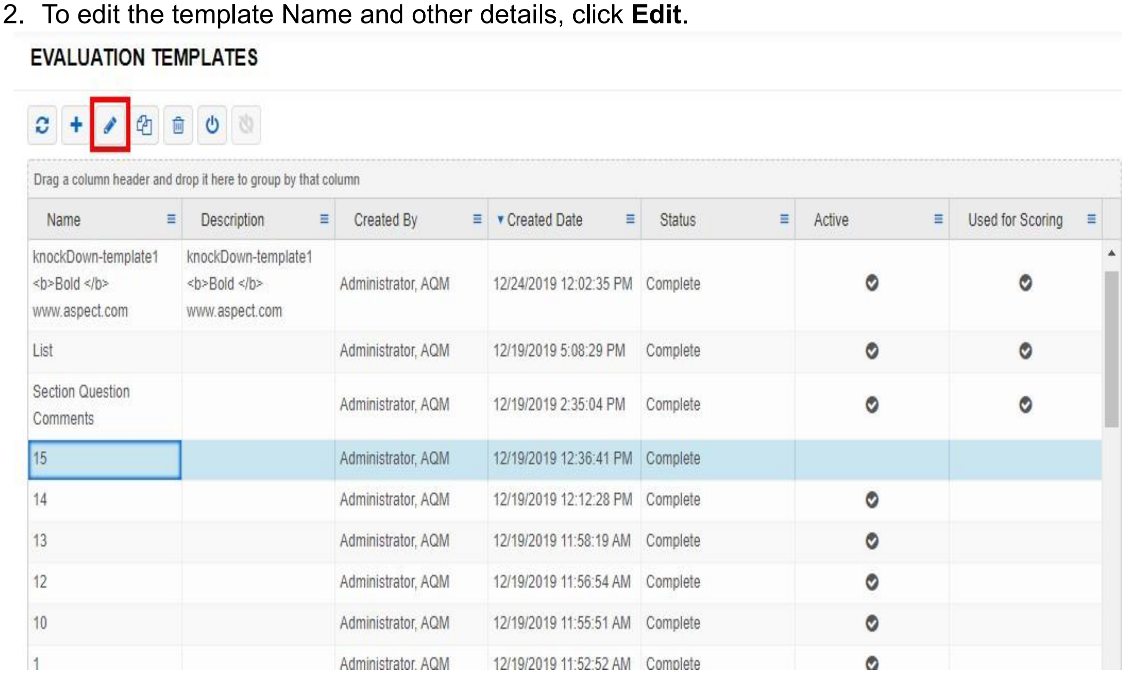
1. Select the row of the Evaluation Template that you want to edit and click on the **Edit** button.



Name	Description	Created By	Created Date	Status	Active	Used for Scoring
knockDown-template1 Bold www.aspect.com	knockDown-template1 Bold www.aspect.com	Administrator, AQM	12/24/2019 12:02:35 PM	Complete	✔	✔
List		Administrator, AQM	12/19/2019 5:08:29 PM	Complete	✔	✔
Section Question Comments		Administrator, AQM	12/19/2019 2:35:04 PM	Complete	✔	✔
15		Administrator, AQM	12/19/2019 12:36:41 PM	Complete		
14		Administrator, AQM	12/19/2019 12:12:28 PM	Complete	✔	
13		Administrator, AQM	12/19/2019 11:58:19 AM	Complete	✔	
12		Administrator, AQM	12/19/2019 11:56:54 AM	Complete	✔	
10		Administrator, AQM	12/19/2019 11:55:51 AM	Complete	✔	
1		Administrator, AQM	12/19/2019 11:52:52 AM	Complete	✔	

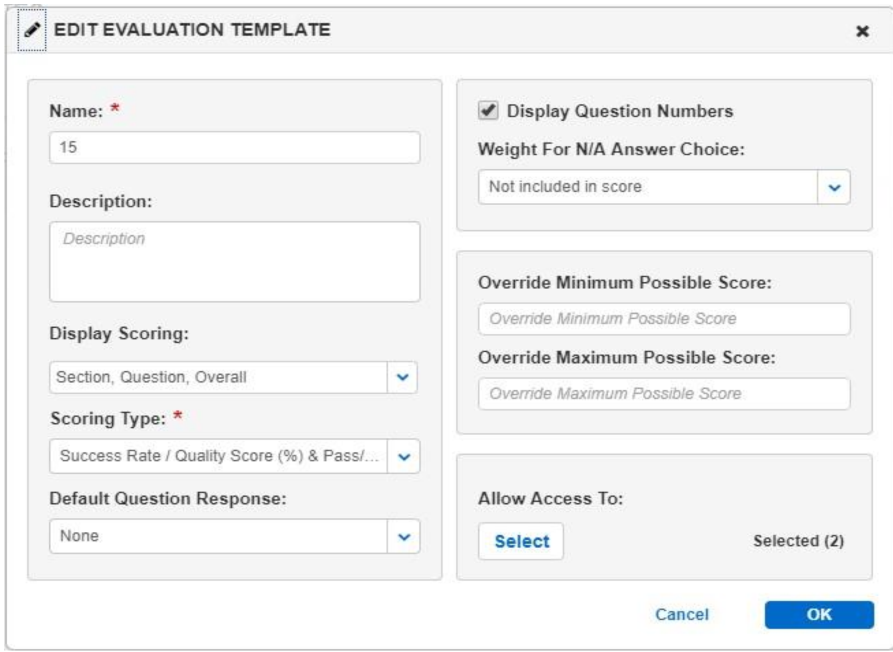
The Edit Evaluation Template window opens.

2. To edit the template Name and other details, click **Edit**.



Name	Description	Created By	Created Date	Status	Active	Used for Scoring
knockDown-template1 Bold www.aspect.com	knockDown-template1 Bold www.aspect.com	Administrator, AQM	12/24/2019 12:02:35 PM	Complete	✔	✔
List		Administrator, AQM	12/19/2019 5:08:29 PM	Complete	✔	✔
Section Question Comments		Administrator, AQM	12/19/2019 2:35:04 PM	Complete	✔	✔
15		Administrator, AQM	12/19/2019 12:36:41 PM	Complete		
14		Administrator, AQM	12/19/2019 12:12:28 PM	Complete	✔	
13		Administrator, AQM	12/19/2019 11:58:19 AM	Complete	✔	
12		Administrator, AQM	12/19/2019 11:56:54 AM	Complete	✔	
10		Administrator, AQM	12/19/2019 11:55:51 AM	Complete	✔	
1		Administrator, AQM	12/19/2019 11:52:52 AM	Complete	✔	

The Edit Evaluation Template details window opens.



3. Select the required fields based on requirement.

   Note: For detailed information about each Evaluation Template (question or section) field, see Create an Evaluation Template on page 6-175.

4. To close the template details without editing, click **Cancel**.

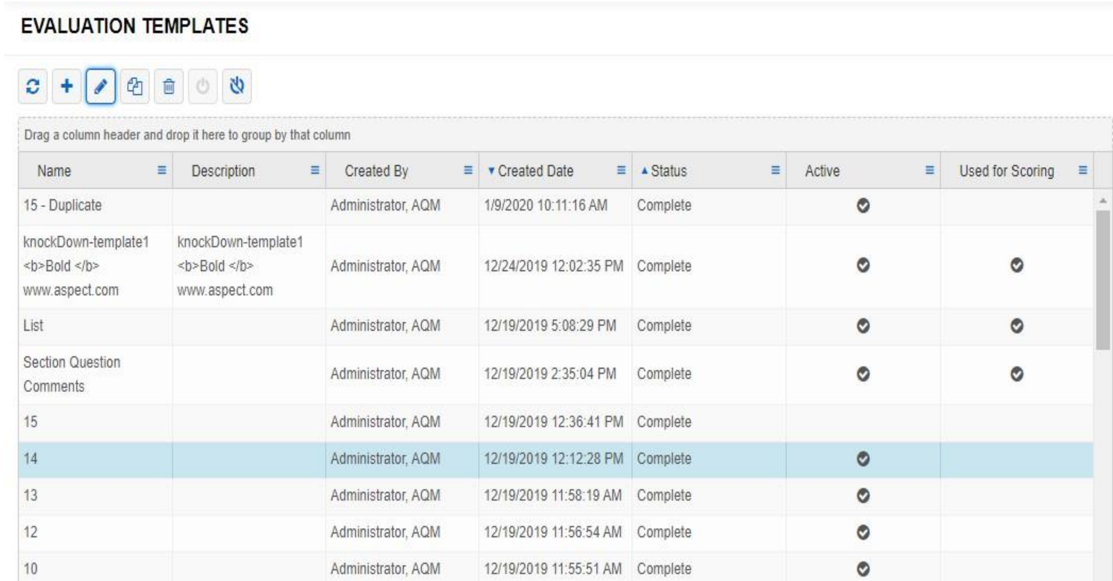
   OR

   To save the template changes, click **OK**.
   The Edit Evaluation Template details window closes and the Edit Evaluation Template window with the sections and questions displays.

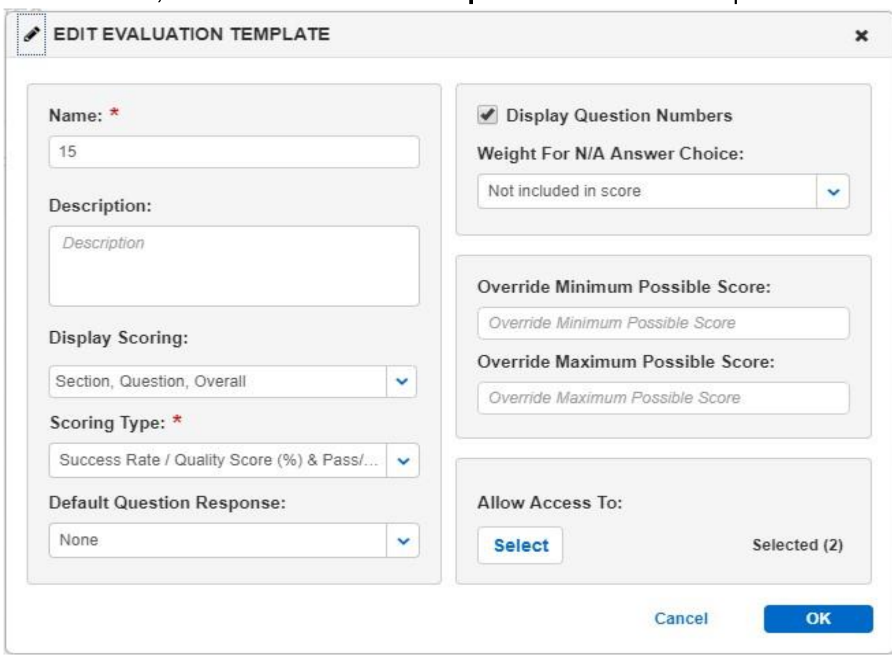
5. When you have finished adding questions and sections, you want to either save the template as a Draft or as Final. Click the main menu icon and from the menu select either **Save As Draft** or **Save as Final**.

6.1.4.3 Editing an Evaluation Template as Complete

The Edit button is introduced to edit Evaluation Template which is in a complete state and helps to add/remove permissions for users. As an example, if a new employee joins the organization and the user wants to give permission for the newly joined employee to use the existing evaluation template till version 19, the user has to duplicate the template and add the new user. In version 19, the Edit button is added. Hence, the user is able to add/remove permission even for an evaluation template with the status as Complete.

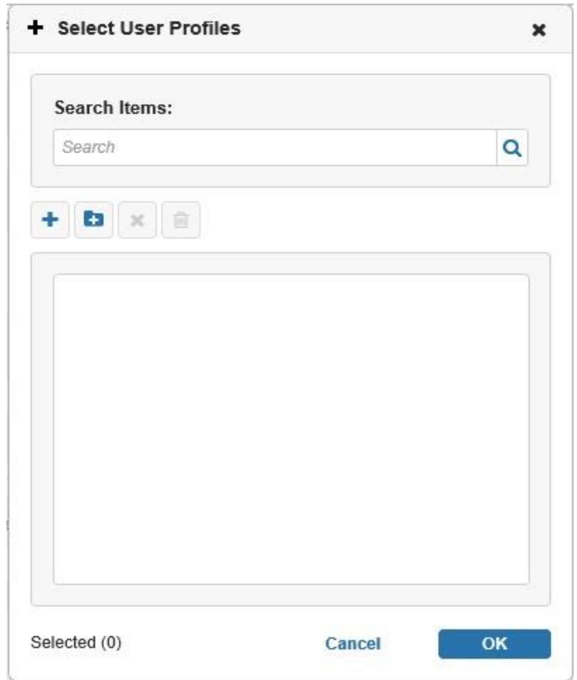


1. Click **Edit** button , the **Edit Evaluation Template** details window opens.



2. All the fields in above screen will be enabled and editable other than "**Override Minimum Possible Score**" and "**Override Maximum Possible Score**" fields.

3. Click the **Select** button in the **Allow Access To** section, to select one or more user profiles. It allows the user/s to score for the scorecard template. The **Select User Profiles** window appears as shown below.



Note: To provide the access for a new user, select the user profile for which the user is associated with.

4. Go to the **Search Items** field, either search by name or click on the magnifying glass to search and select the profile/s. □

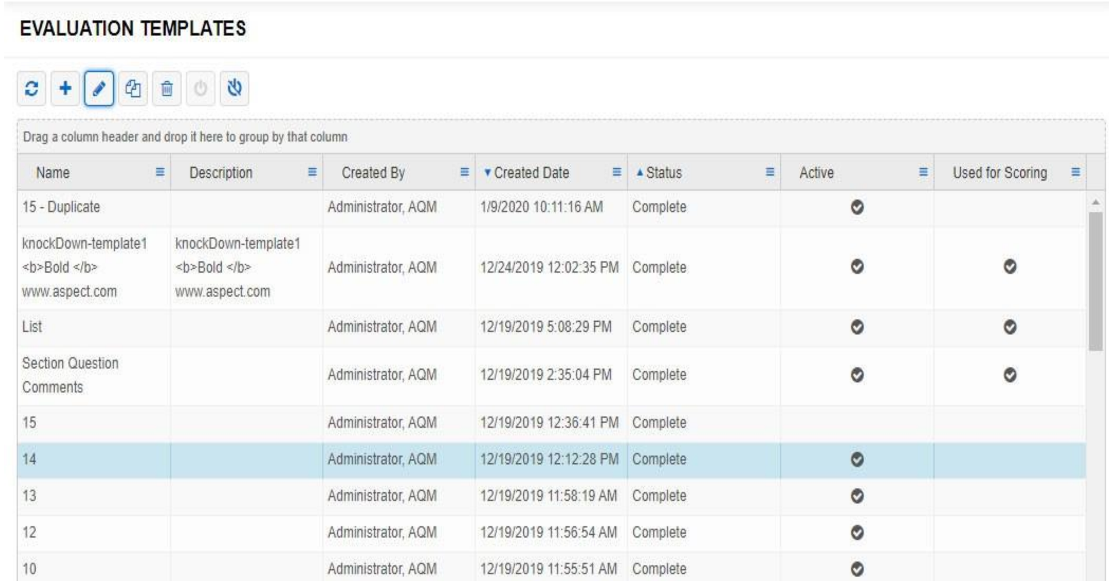
   Or, click on the  button to select all of the profiles available in the database.

5. In Aspect Cloud, every user has their user profile, and the user must be select the corresponding user profile.

6. Click on the **OK** button in the Edit Evaluation Template dialog. System will save the evaluation template and display in the grid.

Note:

- For any typo in the evaluation template name, the system will allow you to change that without impacting the existing evaluations or existing report data.
- A user is able to edit the **Scoring Type** as well. If you think you need to change the scoring type and for example you change from Quality Score to Point Score then all the existing evaluations and the evaluations that you are going to create all will be displayed with point score. This does not mean system will recalculate the scores again and the scores are already calculated and stored in all the possible formats of Scoring types and system will just display those.



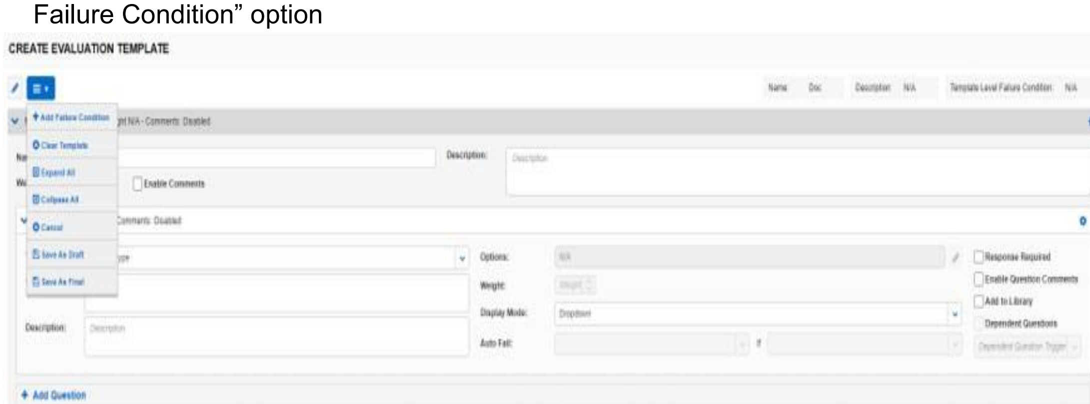
For the Premise user who is not the owner of the evaluation template and have edit permission on the evaluation template in user profiles can edit the evaluation template.

6.1.4.4 Failure Conditions at Template Level

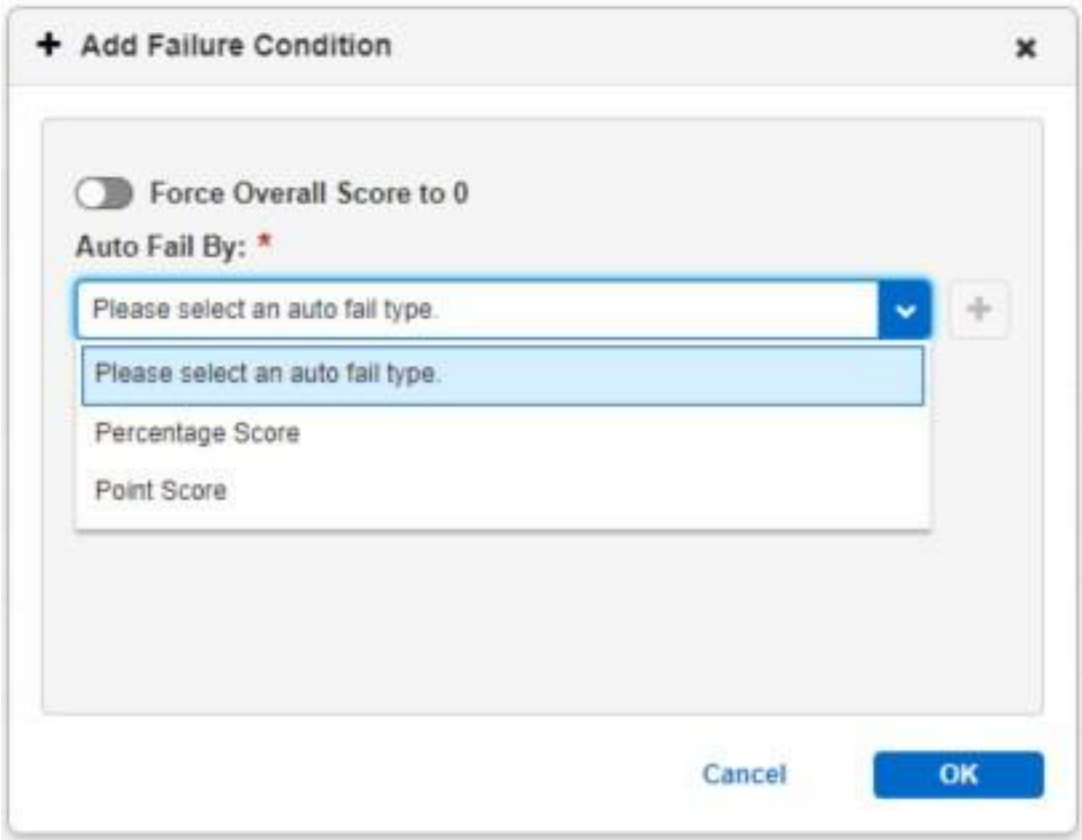
To define the failure condition at the template level (for Overall Score of the template) user can use this failure condition. There are two parameters to define the failure conditions at template level such as **Percentage Score** and **Point Score**.

To define the failure conditions at the template level, follow the steps below.

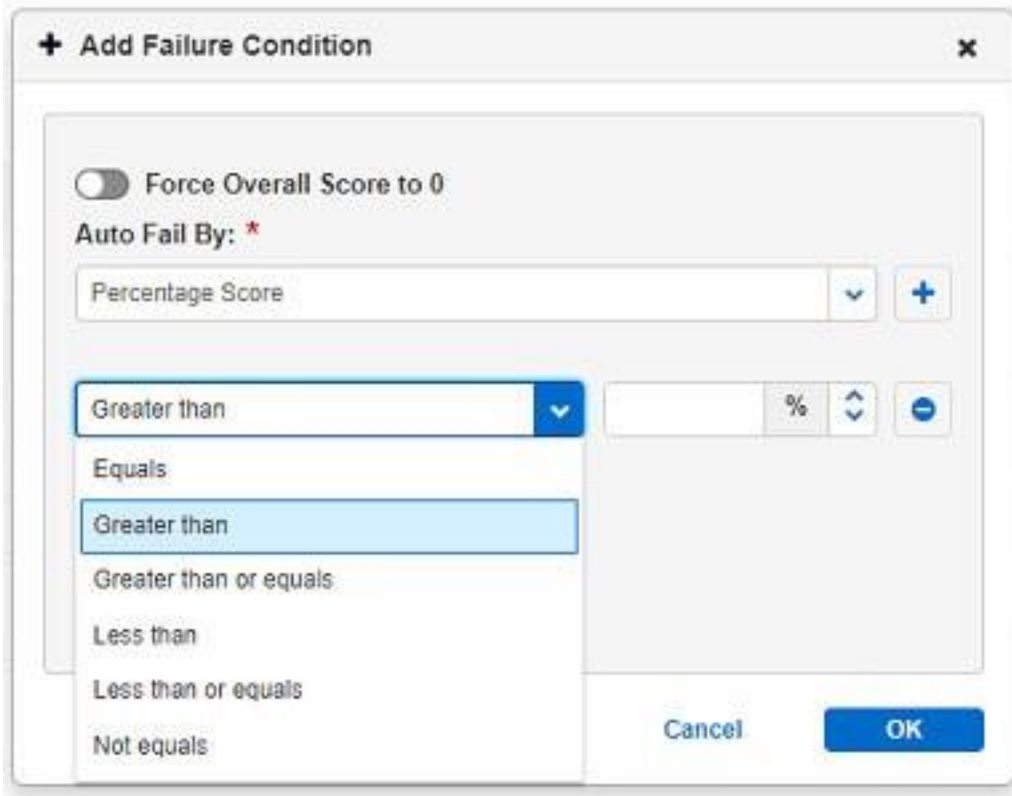
1. Click on Action menu in the tool bar of Create Evaluation Template page and Select "Add Failure Condition" option



2. **Add Failure Condition** dialog will be displayed with **Auto Fail By** drop down list. Select **Percentage Score** or **Point Score** as per the requirement as shown in the screenshot below.



3. Click on the '**+**' button. You will see different options dropdown list to set the failure condition. Set the failure condition as per the requirement.



Example: If you create a failure condition called Percentage Score < 50 while scoring a call using this template, and if the overall score is lesser than 50%, then the overall score fails. **OR**

If you create a failure condition called Point Score = 10, and while scoring the call with this template, if the overall score gets a point score of 10, then the overall score fails.

You must have the Overall Score Display option set to Percentage Score & Pass/Fail, Point Score & Pass/Fail, to determine if this overall score has failed or not.

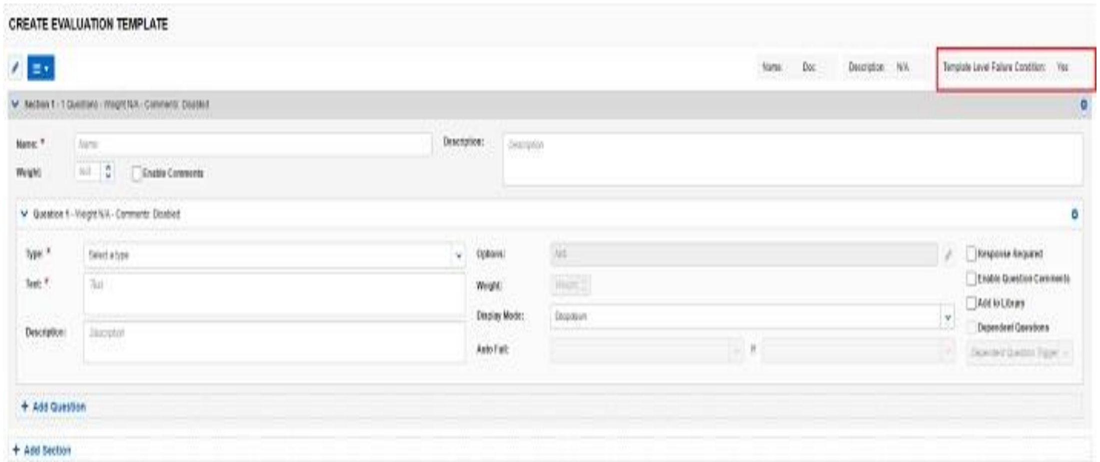
Note:

a. A maximum of 4 different failure conditions can be added by clicking on “+” button.

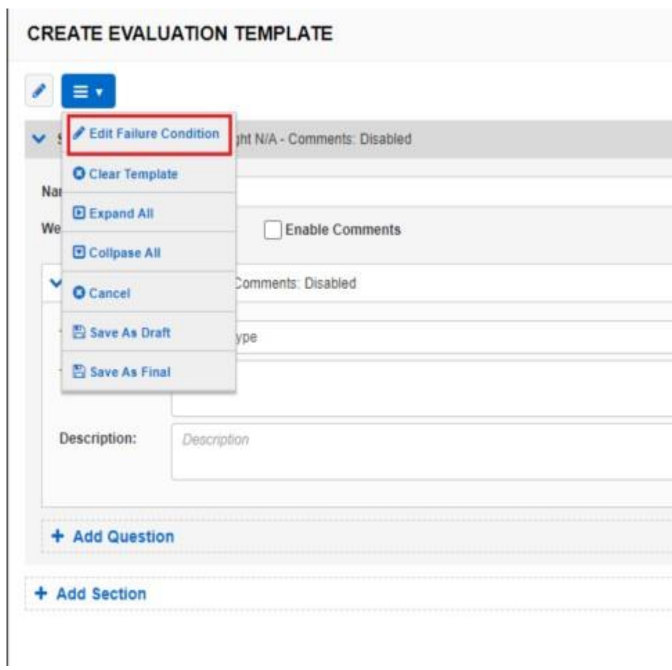
b. To remove the condition added click on the “- “(remove) button of the corresponding condition row.

c. If you toggled on the Force Overall Score to 0 toggle button, the Overall score will be set to 0 when failure condition meets the criteria else evaluation will be termed as Failed but the score will not reset to 0

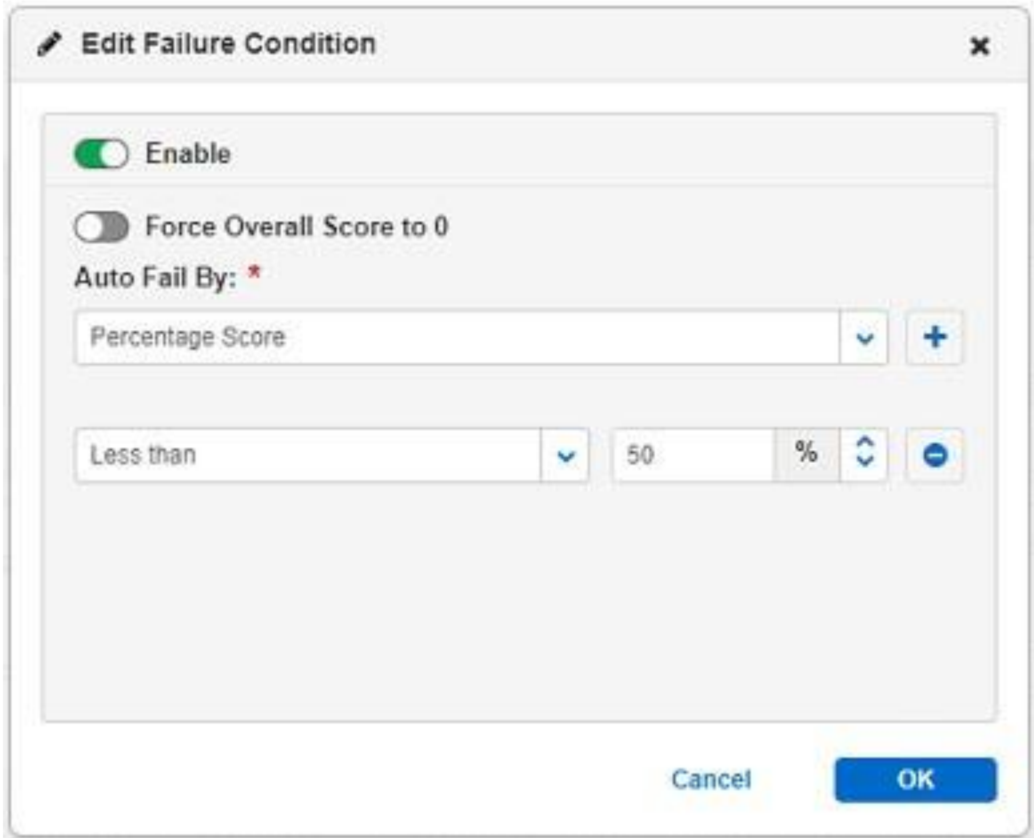
4. Click the **OK** button to save the failure condition. The Failure Condition for Template is enabled as shown below.



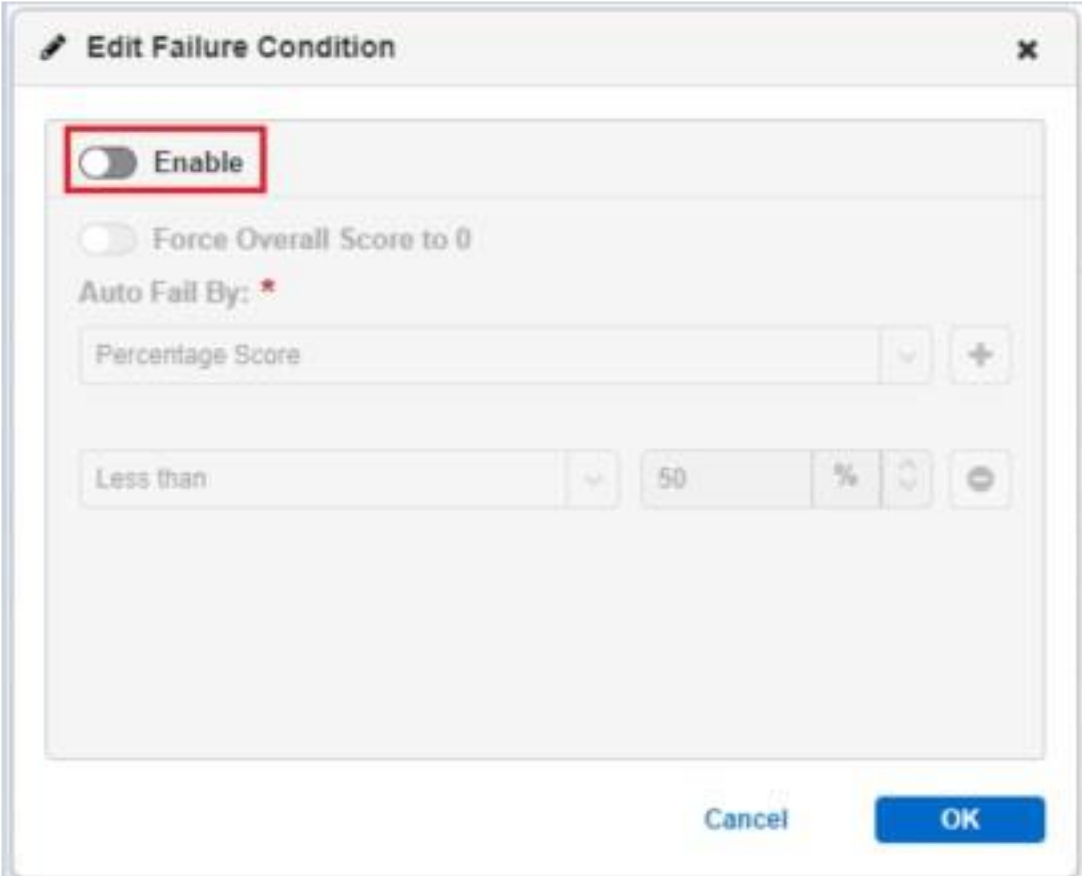
5. If you want to update the failure condition defined, click on the Action menu in the tool bar in the Create Evaluation Template page and Select **Edit Failure Condition** option.



6. Update the failure condition as required and Click on **OK** button.



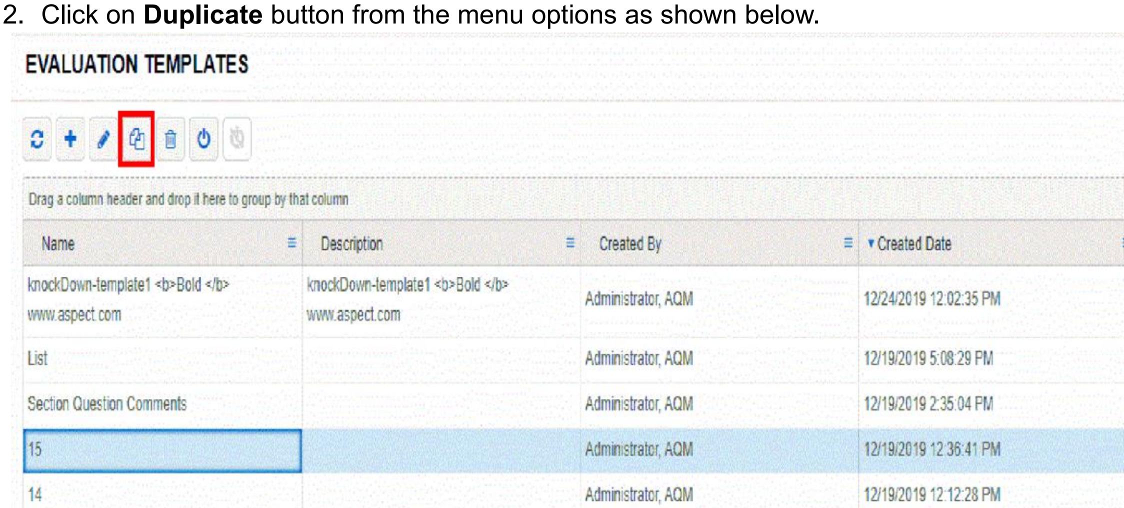
7. To clear or remove the Failure condition added, turn off the Enable toggle button and Click the **OK** button.



6.1.5 Duplicate an Evaluation Template

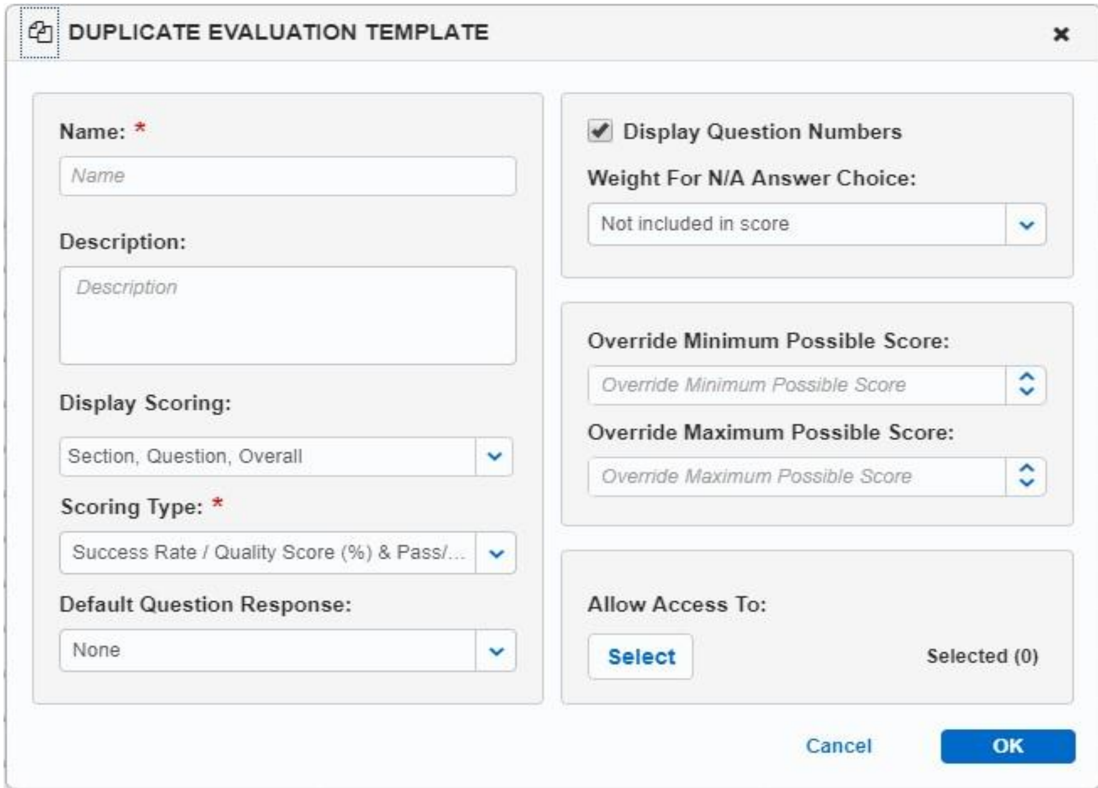
In Workforce Engagement Management, you may want to duplicate a template if you want to use already-created sections or questions in a template, but you want to name the template with a different name, thereby creating a new template.

1. On the Evaluation Template window, highlight the row of the Evaluation Template that you want to duplicate.
2. Click on **Duplicate** button from the menu options as shown below.



The Duplicate Evaluation Template dialog window opens. All the values from the duplicated template are copied to the Duplicate Evaluation Template window, except the Name.

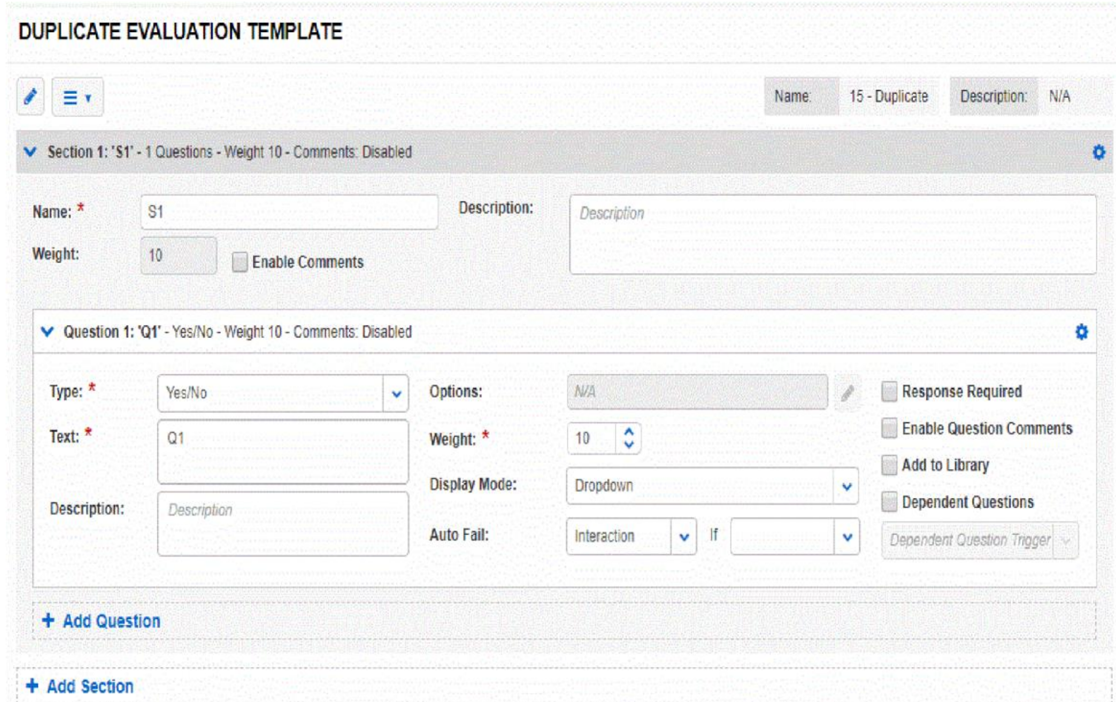
Note: The fields marked with a red asterisk (*) are required fields.



3. In the **Name** text box, type a name for the template. The maximum number of characters allowed is 100. The template name must be unique across the system and is mandatory.
4. To return without duplicating the evaluation template, click **Cancel**.

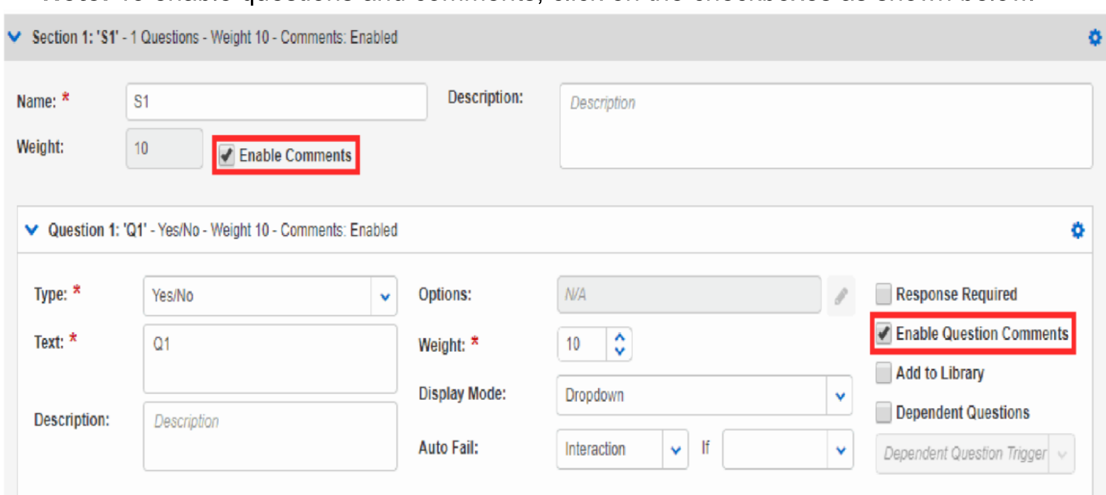
   OR

   To save the duplicated template details, click **OK**. The Close Evaluation Template details window closes and the Duplicate Evaluation Template window with existing sections, questions and dependent questions is active.



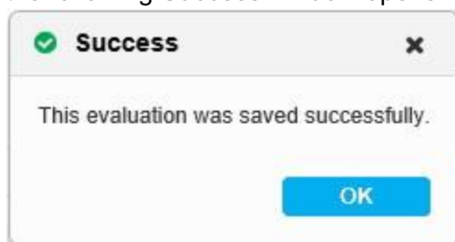
You can make changes to existing sections, question and dependent questions or you can add new sections, questions and dependent questions.

Note: To enable questions and comments, click on the checkboxes as shown below.



5. If you want to add a new section(s) to the duplicated template, see Add a New Section on page 6-180.
6. If you want to add a new question(s) to the duplicated template, see Add a New Question on page 6-183.
7. When you have finished adding questions and sections, you want to either save the duplicated template as a Draft template or as a Final template. Select the main menu to view the following menu.

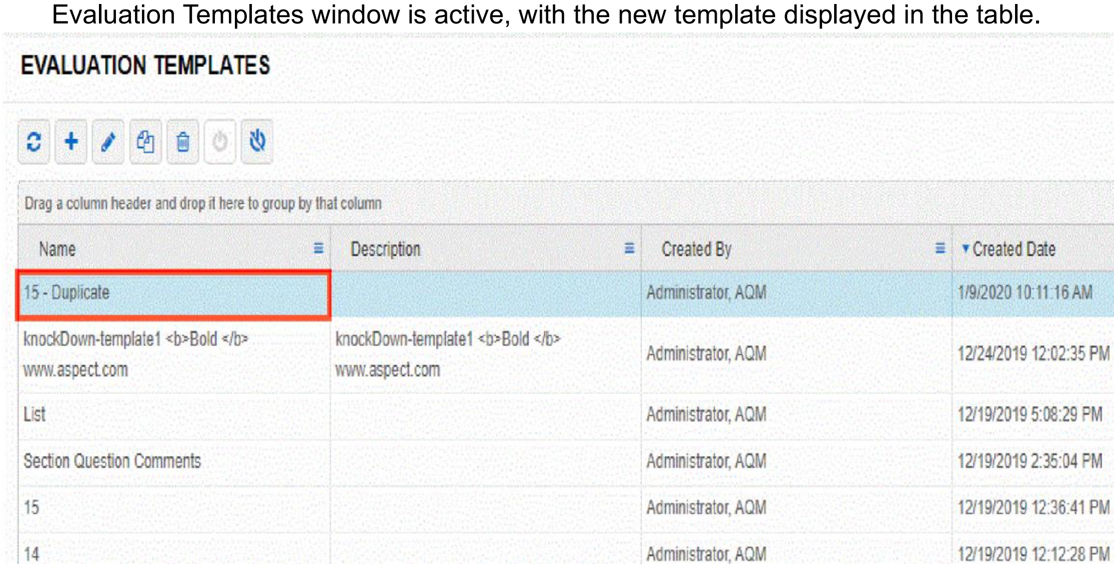
Note: When you save an evaluation template as Draft, it is successfully saved to the database, when the following Success window opens.



Note: When you click **Save as Final**, the success window does not display.

Whether you click **Save as Final** or **Save as Draft**, the template displays in the Evaluation Templates list.

8. Save the duplicated template. The Duplicated Evaluation Template window closes and the Evaluation Templates window is active, with the new template displayed in the table.



6.1.5.1 Duplicate a Template Created in Quality

You can duplicate a template in Workforce Engagement Management that was originally created in Aspect Quality (not in Workforce Engagement Management); however, some of the question Types appear different in the duplicated template. These differences are described in the following table.

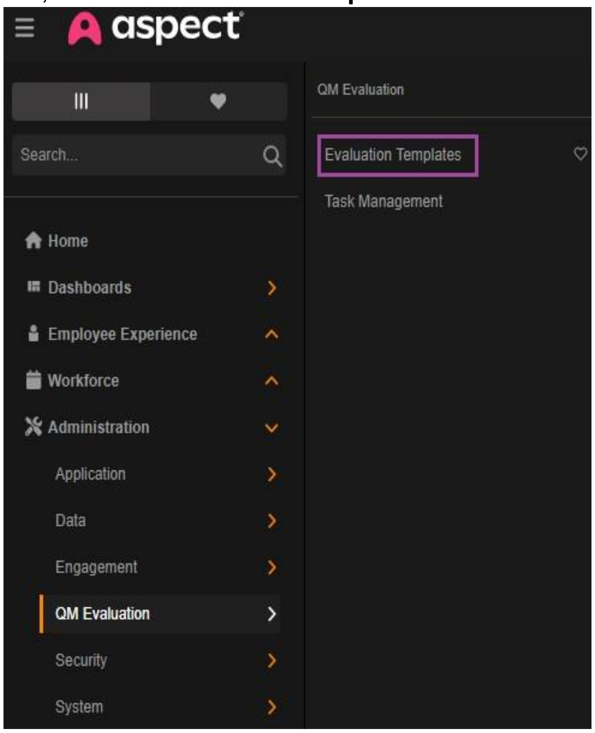
Question Type in AQM	Displays as this in WEM
• Choose one • Choose one or more	• List, with Enable Options Weight deselected
• Scored Scale (Low to High)	• Scored Scale **Note:** The options order of this question Type displays as High to Low.
• Single Line Answer • Multi Line Answer	• Free Form Text

Note: If you created a template in Aspect Quality (not in Workforce Engagement Management) that contains the Scored Scale (Low to High), Choose One, Choose One or More, Single Line Answer, or Multi Line Answer question types, and then a reviewer uses that template in Workforce Engagement Management to evaluate an interaction, then those question types display in Workforce Engagement Management as you created them in Aspect Quality.

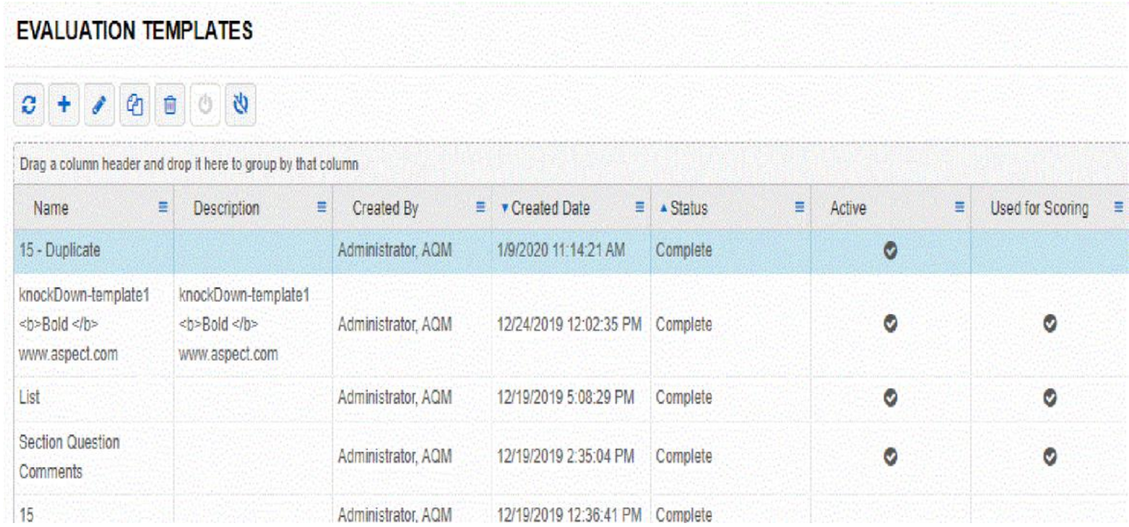
6.1.6 Delete an Evaluation Template

This section describes how to delete an evaluation template. Follow the steps below to delete an Evaluation Template.

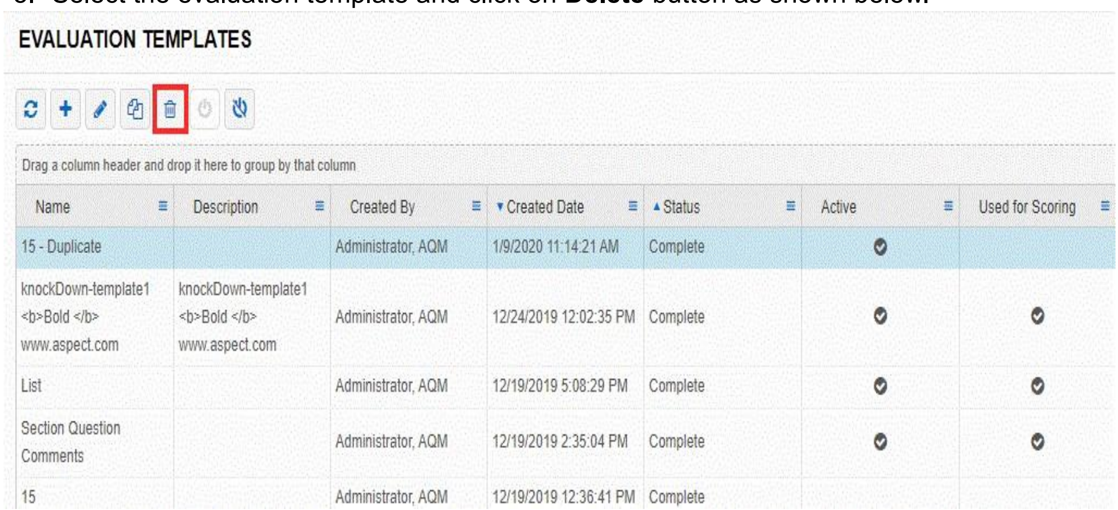
1. Launch Workforce Engagement Management.
2. Log in as an Administrator.
3. From the Main menu, select **Administration**. The Administration panel appears.
4. Under **QM Evaluation**, click on **Evaluation Templates**.



The Evaluation Templates window opens. A list of templates whose status is either Draft or Complete and the templates which are used to score display in the grid.



5. Select the evaluation template and click on **Delete** button as shown below.



Note:

- If an evaluation template is already in use for scoring, then the Delete button is **disabled**. Check the **Used for Scoring** column on the grid for the templates which are already in use for scoring.
- The admin or the evaluation template owner can delete those Evaluation Templates which are not used for scoring.

6. Click on **Yes** to delete the Evaluation Template.

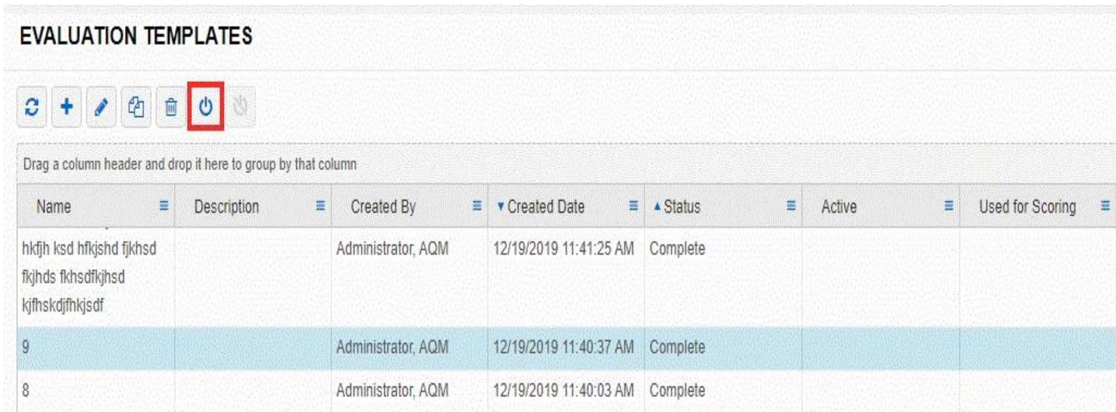
6.1.7 Activate and Deactivate Evaluation Template/s

This section describes how to activate and deactivate one or multiple Evaluation Templates.

6.1.7.1 One Evaluation Template

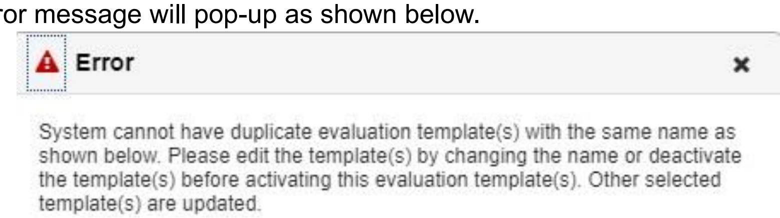
Follow the steps below to activate and deactivate one Evaluation Template.

1. From the Main menu, select **Administration**. The Administration panel appears.
2. Under QM Evaluation, click on **Evaluation Templates**. The Evaluation Templates window appears.
3. Select the Evaluation Template on the grid, and click on **Activate** button from the menu buttons as shown below.



Note:

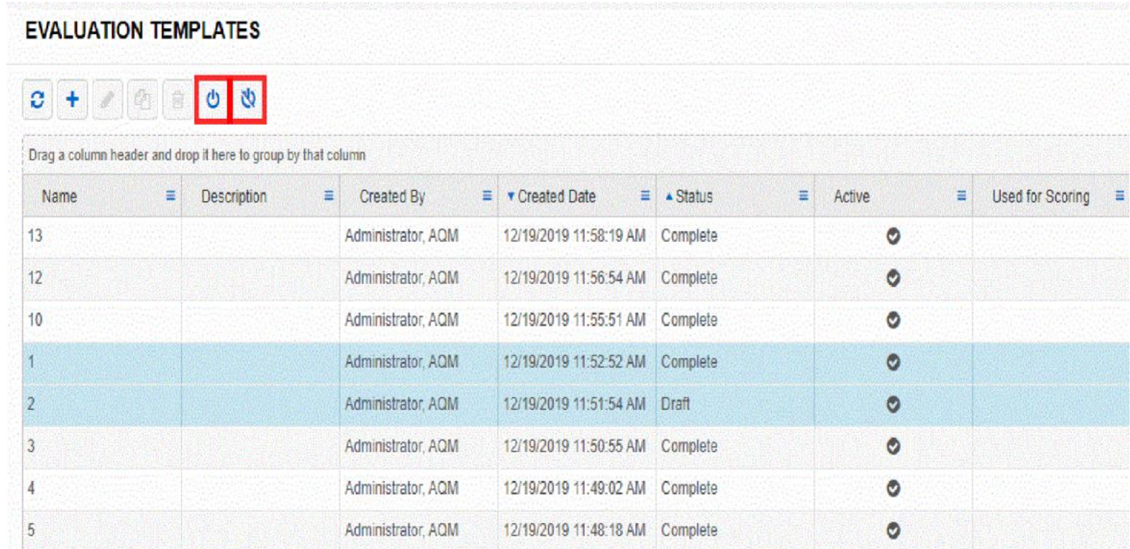
- When the Evaluation template is active, then the Activate button is disabled, and the **Deactivate** button is enabled. Click the Deactivate button to deactivate the Evaluation template.
- While activating an evaluation template, if an evaluation template with the same name exists then only that evaluation template status will not be updated and an error message will pop-up as shown below.



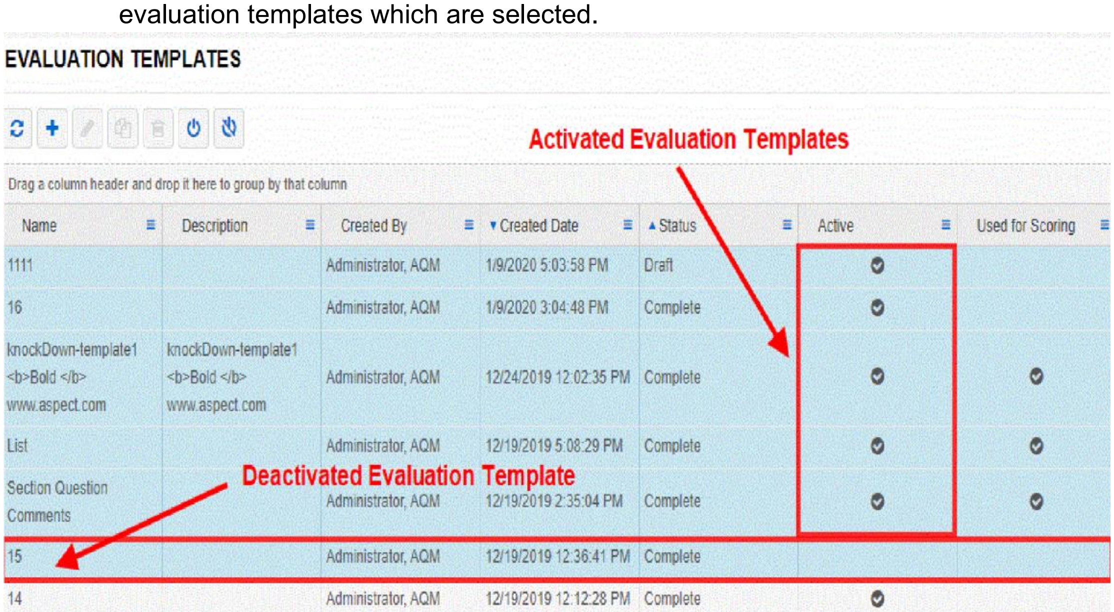
6.1.7.2 Multiple Evaluation Templates

Follow the steps below to activate and deactivate multiple Evaluation Templates.

1. From the Main menu, select **Administration**. The Administration panel appears.
2. Under QM Evaluation, click on **Evaluation Templates**. The Evaluation Templates window appears.
3. Press Ctrl + Left-click to select multiple Evaluation Templates at a time, and click on **Activate** or **Deactivate** button from the menu buttons as shown below.



- When the selected evaluation templates are active then, the **Deactivate** button will deactivate all of the selected templates.
- When some of the evaluation templates are activated and some are not activated (as shown below), then the **Activate** button will activate all of the deactivated evaluation templates which are selected.
- When some of the evaluation templates are activated and some are not activated (as shown below), then the **Deactivate** button will deactivate all of the activated evaluation templates which are selected.



Note: Edit, Duplicate and Delete buttons are disabled when multiple evaluation templates are selected.

6.2 Non-Recording Evaluations

Non-recording evaluation are evaluations that are not associated with a media file. For example, if you want to evaluate back-office work, then you can create and use a nonrecording evaluation.

The Administrator role can create a non-recording evaluation. You can assign Mentors and Agents the ability to create a non-recording evaluation by assigning the Create a Task right to the Mentor's or Agent's user profile.

Some examples of when a user creates a non-recording evaluation are:

- Back-office employee work that does not have an associated recording in Quality.
- Third-party recordings where recorded files can reside in another system, and Mentors or Administrators use Quality for quality scoring purposes only.
- General coaching, agent feedback forms, and periodic rolled-up scorecards (for example, monthly, quarterly, or annual scorecards) where the evaluation corresponds to many contacts (not tied to a single interaction).
- The system may or may not record the non-recording evaluation that the Agent performs as it occurs, but the Mentor or Administrator still can score the Agent's task.

This section describes how to create and edit non-recording evaluations.

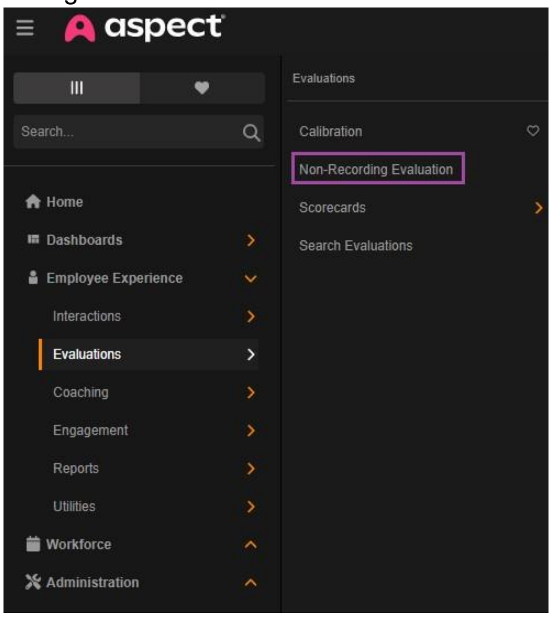
6.2.1 Create a Non-Recording Evaluation

This section describes how to create a non-recording evaluation in Workforce Engagement Management

1. Login to Workforce Engagement Management.
2. Click **Employee Experience**.
3. Under **Evaluations**, click **Non-Recording Evaluation**.

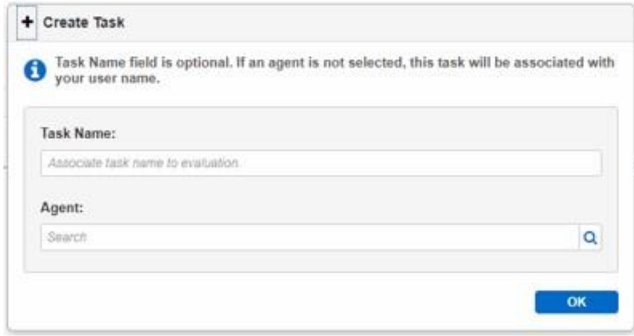
   Note:

   - The Non-Recording Evaluation link only displays if the logged-in user has the Evaluation license.
   - The user must have rights to create a task in the User Profile.

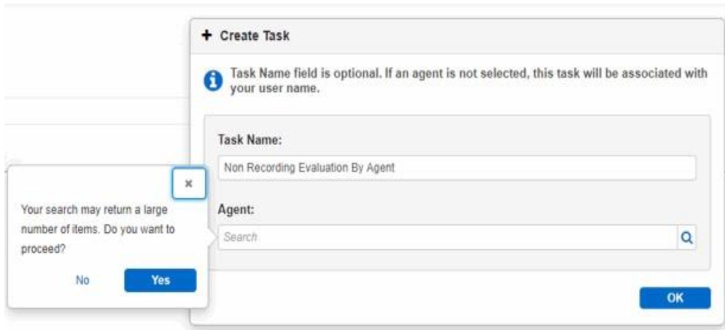


   The Create Task dialog appears.

4. Enter the **Task Name**. The Task Name is an optional field.



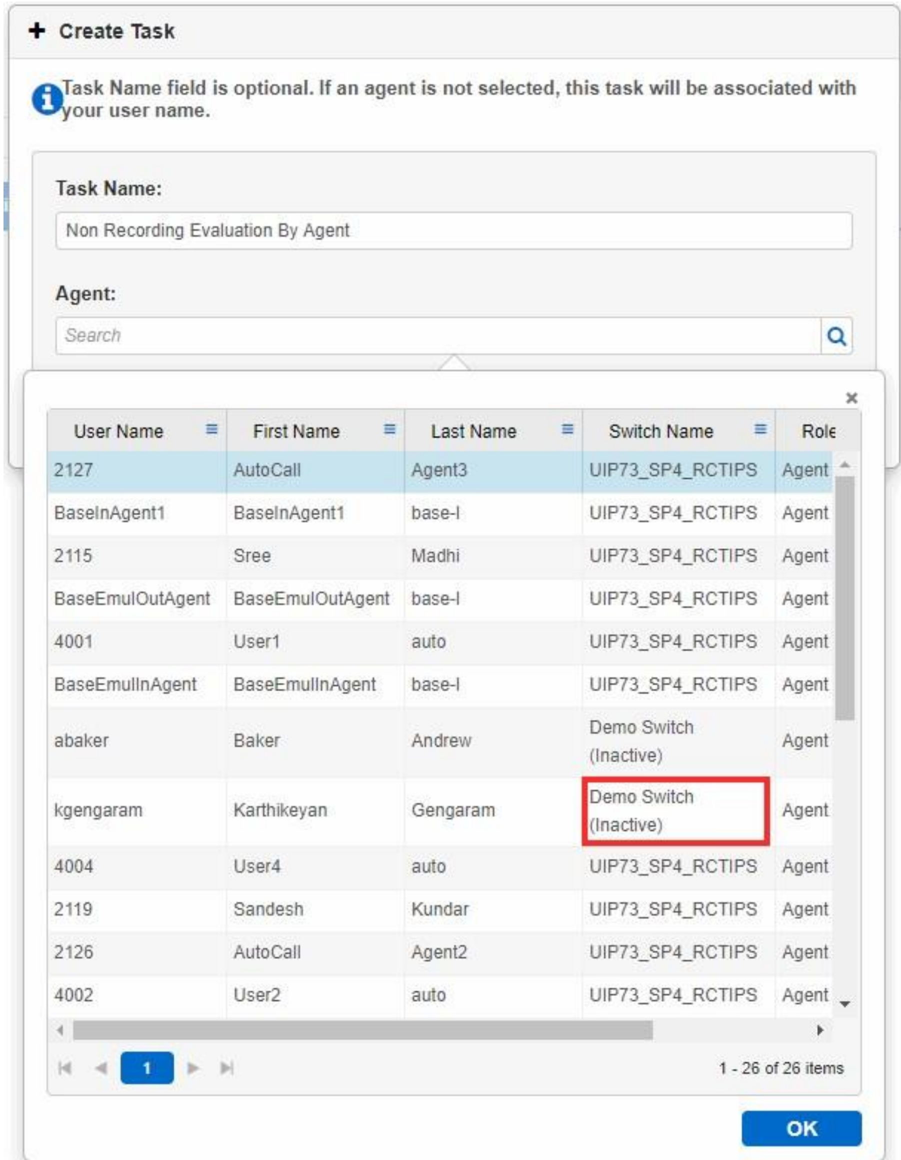
5. Go to right-hand side of the **Agent**'s field and click on the **Search** button to get list of agents. Click on **Yes** to get the entire list of agents and click on **No** to search agents based on User Name, First Name, and Last Name.



Note: If the Agent is not selected, the logged-in user is consider as Agent.

6. The user is able to search agents based on the following fields.

Role	Description
Administrator	All the users associated with teams should be displayed.
Mentor	Based on team permission, associated user should be displayed.
Agent	Only the logged in user will be displayed always.

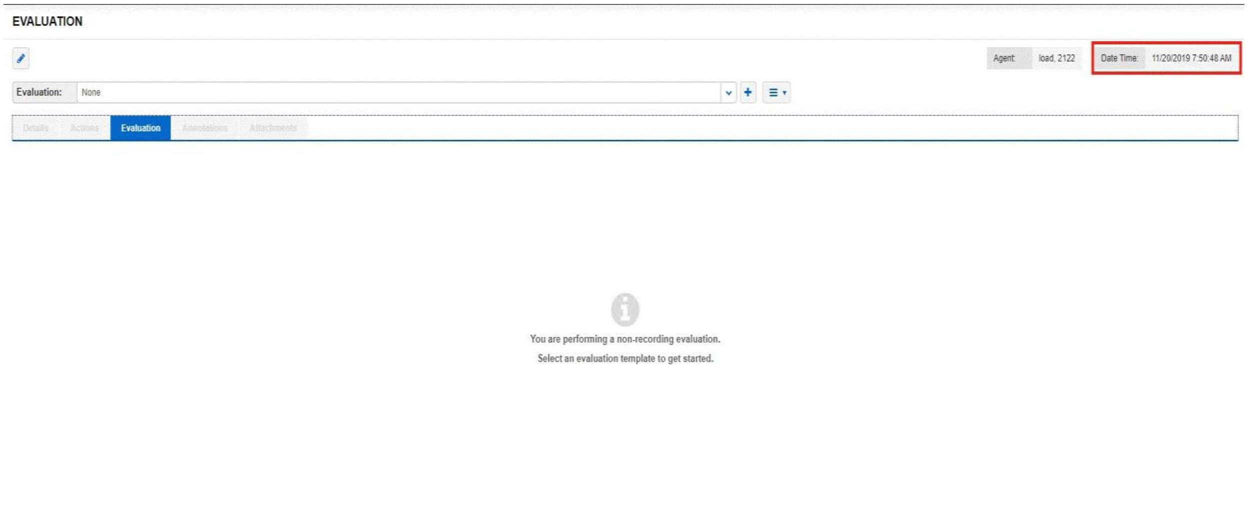


7. Select the user from the search grid as shown above. **Ex:**- 2127 is selected from the search grid, is taken agent.

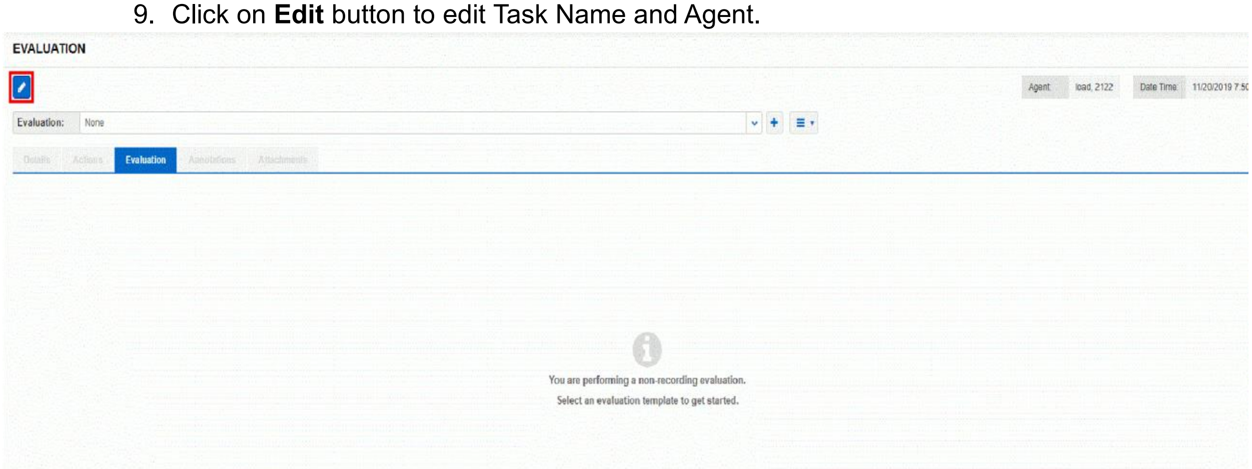
   Note: If an user is assigned to an inactive switch, then switch name with **(Inactive)** suffix will be displayed.

8. Click on **OK** button. The **Evaluation** window appears and the **Start Time** is displayed at the right-hand corner of the Evaluation window.

   Note: First time when the task is clicked called **Start Time**.

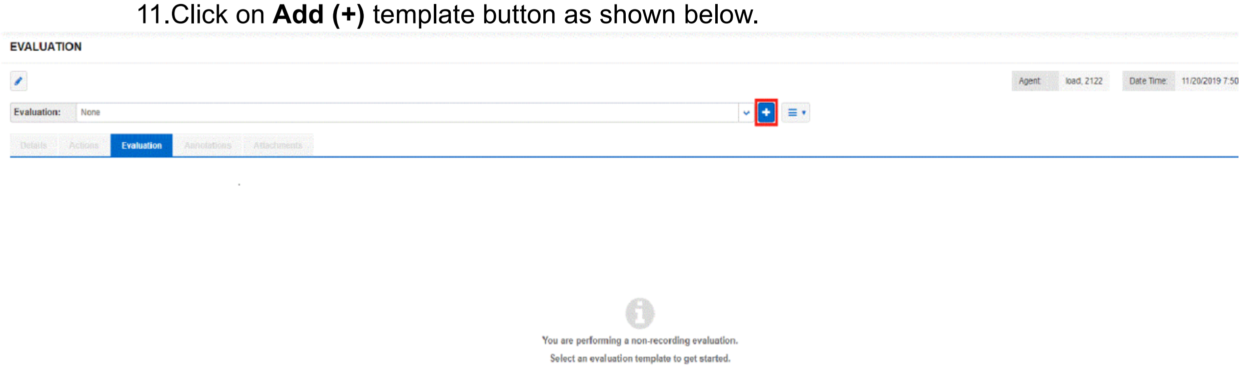


9. Click on **Edit** button to edit Task Name and Agent.

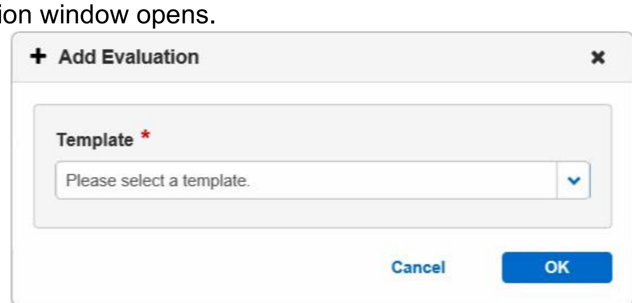


10. Edit the **Task Name** and **Agent** and click on **OK** button.

11. Click on **Add (+)** template button as shown below.



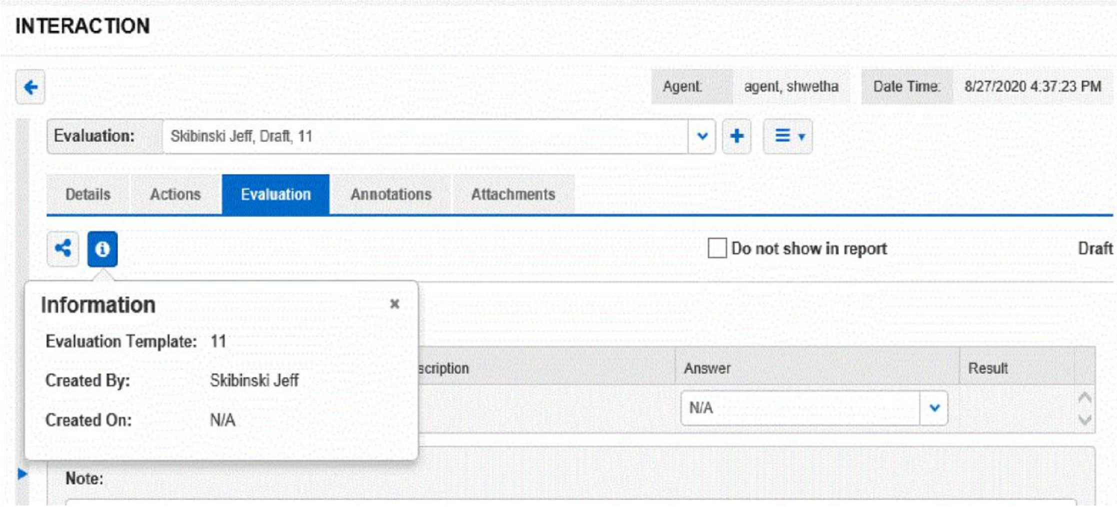
The Add Evaluation window opens.



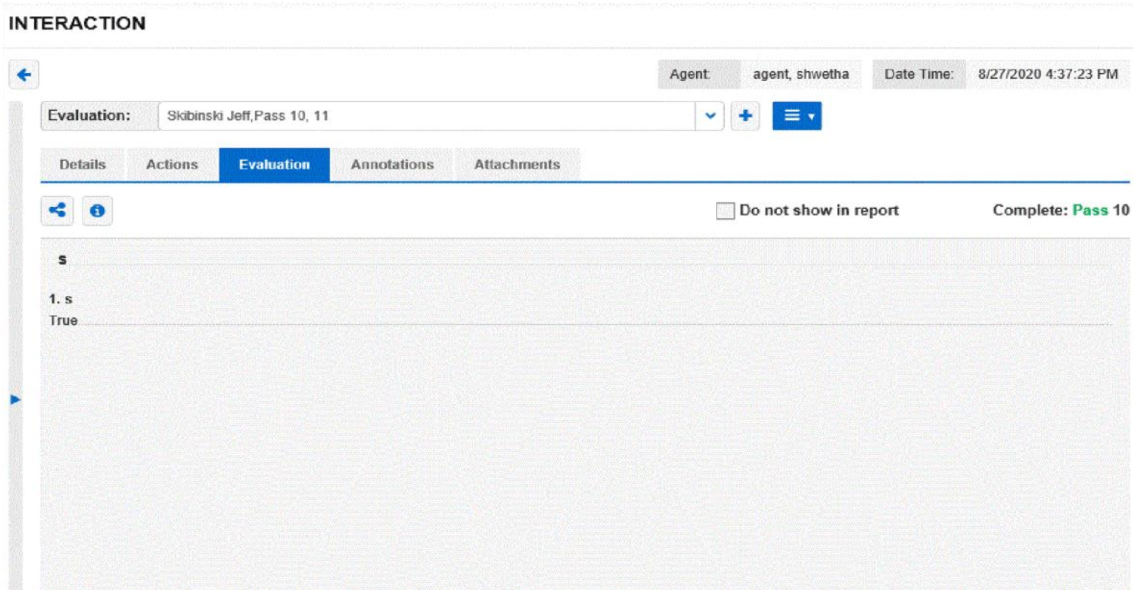
12.From the Template drop-down list box, select a template that you want to use to evaluate the work.

Note: The Evaluation templates are displayed alphabetically in the drop-down evaluation list.

13.Click **OK**. The Add Evaluation window closes and the Evaluation window is active with the Evaluation tab open and updated with evaluation details. Also, the Evaluation drop-down list box displays the evaluated User Name and Template Name.

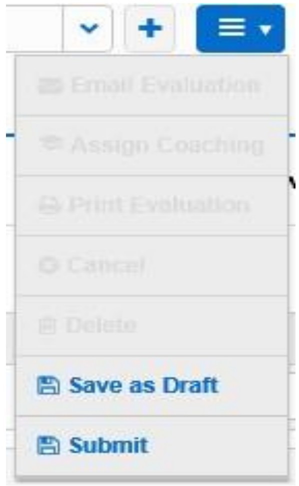


14.Select the options for the questions and **Submit** the evaluation.

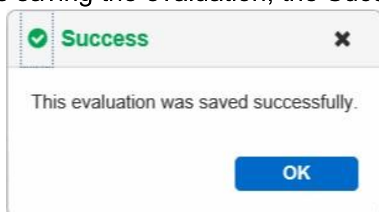


15.Save the evaluation as a draft, or submit it.

- To save the evaluation for further modification, from the Evaluation menu, select **Save as Draft**.



Once the system finishes saving the evaluation, the Success window opens.



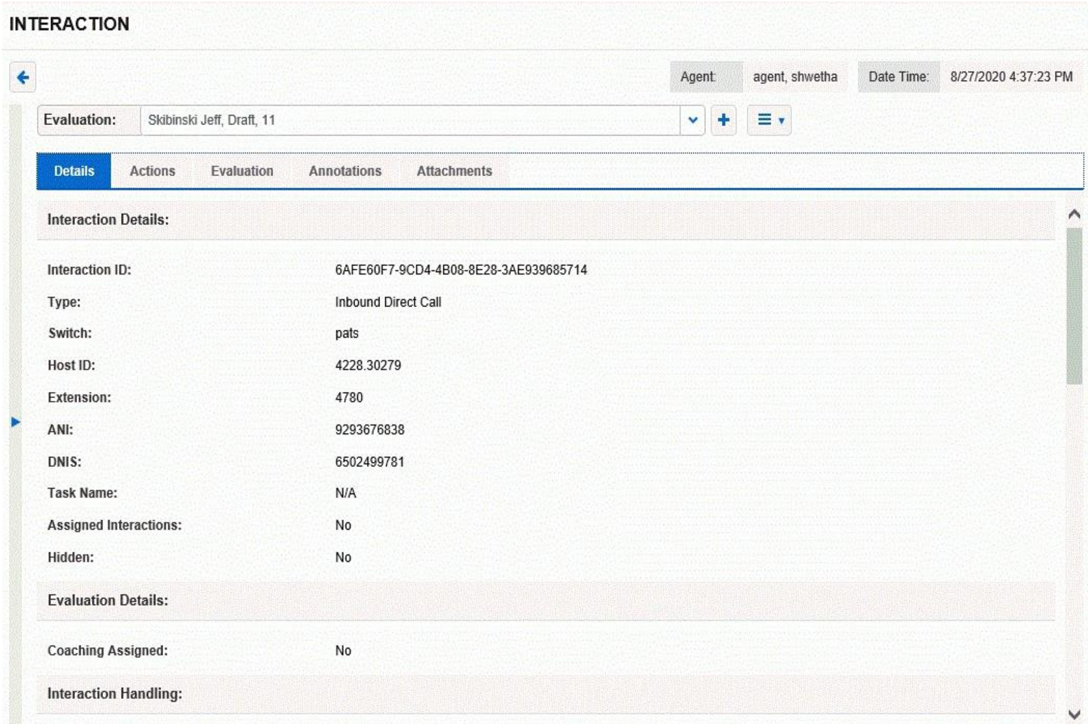
Click **OK**. The Success window closes, the Evaluation window is active and displays in Edit mode, so that you can continue to modify the evaluation.

OR

- If you are finished evaluating the work, from the Evaluation menu, select **Submit**. Once the system finishes submitting the evaluation, the Success window opens.

Click **OK**. The Success window closes, the Evaluation window is active and displays in Read Only mode.

16. Go to **Details** > **Interaction Details** to view the Task Name field as shown below.



Note:

- When the user click on Non-Recording Evaluation, the last successfully saved task details will pop-up automatically.
- The Task Name and the selected Agent will be the same until the user logout.

6.3 Email an Evaluation

Administrators or the owner of an evaluation can prompt urgent reviews by emailing a link to the evaluation directly to the agent who needs to review the evaluation. When the recipient clicks the link in the email, the evaluation opens for immediate review of the comments.

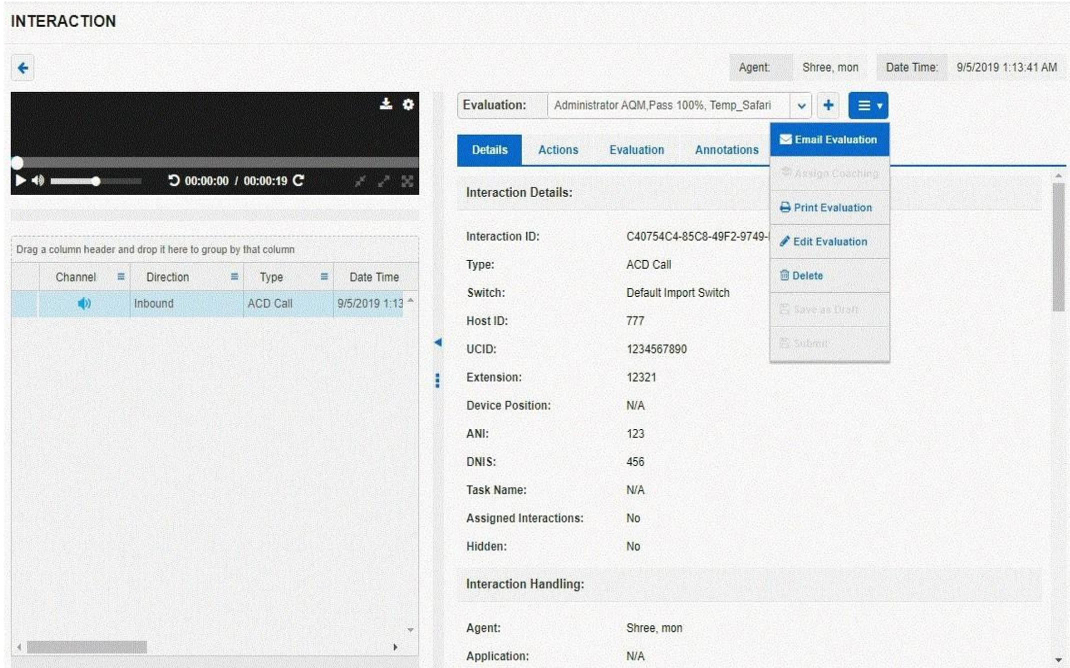
Note: To email an evaluation, the following requirements must be met:

- The Email Evaluation option is active and available only if the mail server is correctly configured (see the *Aspect Quality Server Installation Guide* to configure the SMTP Mail Server in the Interaction Monitor process).
- The Email Evaluation option is active if you configure the mail ID for the logged-in user (see the *Aspect Quality Server Installation Guide* to configure the logged-in user on the User Definition window).
- The option is active when the Interaction window loads with an accessible evaluation.
- If you create the evaluation but have not saved it to the database, the Email Evaluation option is inactive.

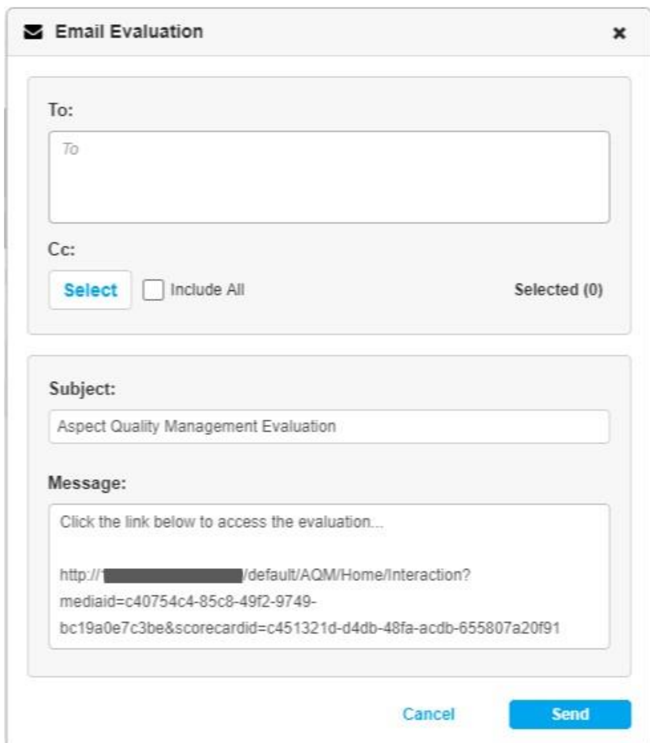
To email an evaluation, perform the following steps.

1. Search for an interaction (see the *Workforce Engagement Management - Quality Agent Guide,* Chapter 3, Searching for an Interaction).
2. From the Search Results window, double-click the interaction that you want to email for review. The interaction loads in the window.

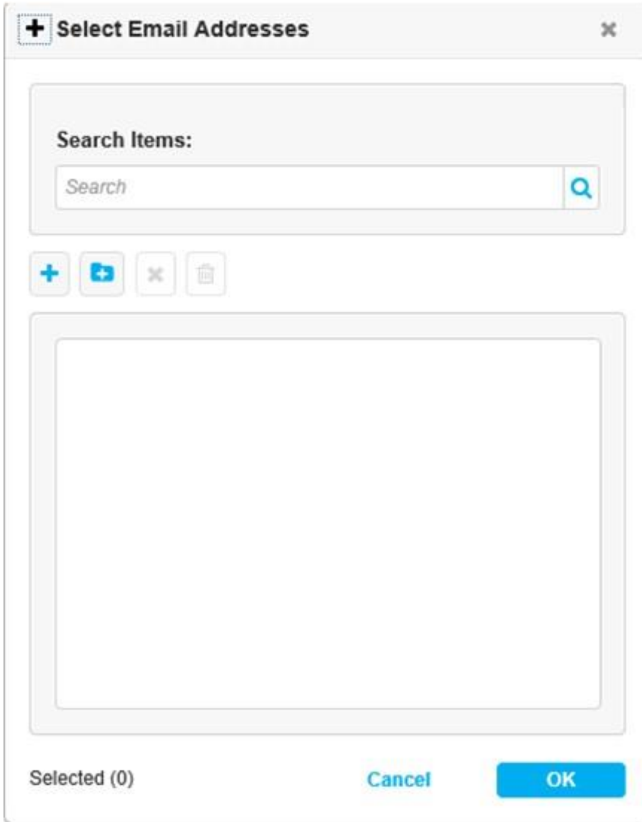
3. From the Evaluation menu, select **Email Evaluation**.



The Email Evaluation window opens with the interaction's agent's email address in the To field.



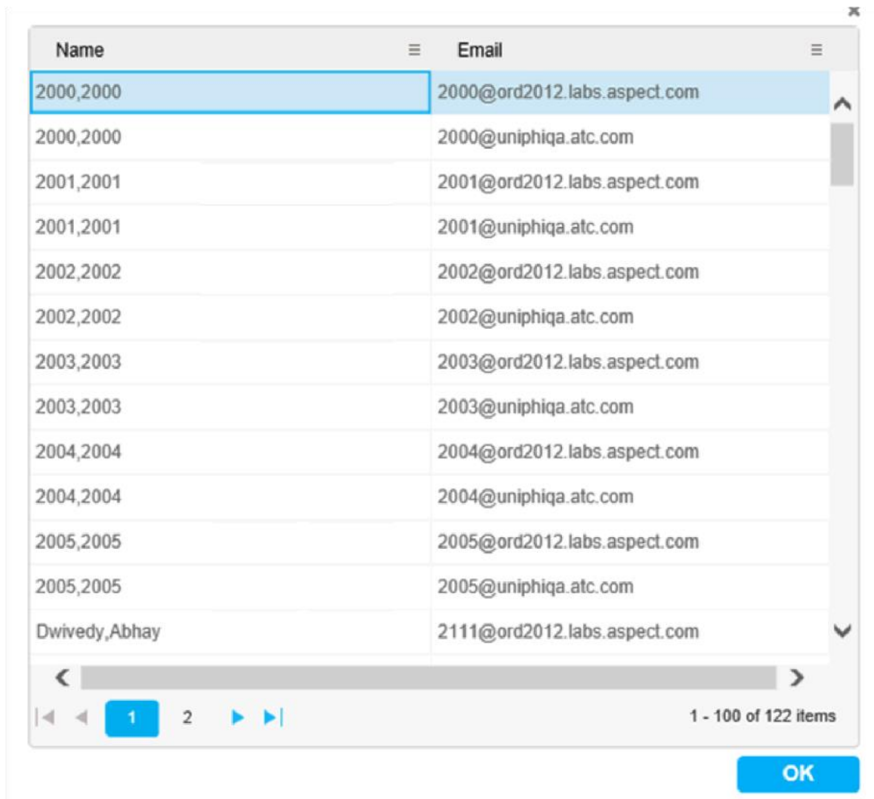
4. Click **Select**. The Select Email Addresses window opens.



5. To include more addressees in the Email, in the Search Items text box, type the first name, last name, or Email ID of the person you want to add.

6. Click **Search.**

Note: If you click Search without entering anything in the Search Items text box, a Warning message opens, stating, *Your Search may return a large number of items. Do you want to proceed?* If you click Yes, email Names and addresses display in the list box.

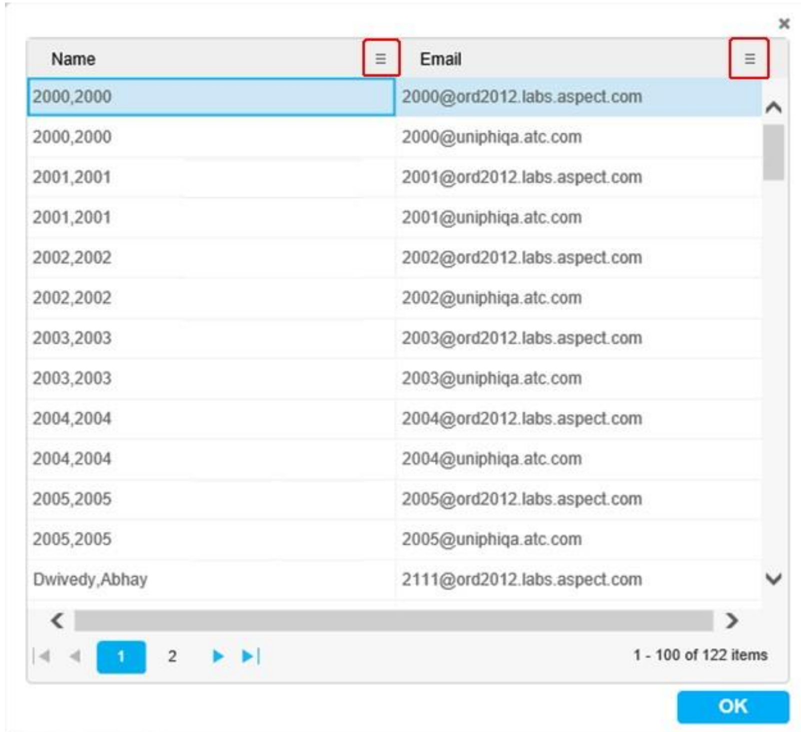


The table contains the following columns.

Column Name	Description
Name	Display the user's name in the format *Lastname, Firstname*.
Email	Displays the corresponding Email ID of the user in that row.

The table displays 100 records per page. Use the pagination buttons below the table to move to the next page, previous page, first page, or last page.

Note: By clicking the main menu next to the specific column name, you can sort (ascending or descending), add, remove, or filter the columns; you can also clear all filters.



The following table describes the accessible Email IDs for the logged-in user.

Logged In User	Search Results
Agent	System retrieves the details of the mentors associated with the agent's team and whose Email IDs are configured in the system. If the user is not associated with any team, then the system does not return any email IDs.
Mentor	System retrieves the details of all the members of the mentor's team, and all the mentors in the system whose Email IDs are configured in the system.
Administrator	System retrieves the details of the all the users whose Email IDs are configured in the system.

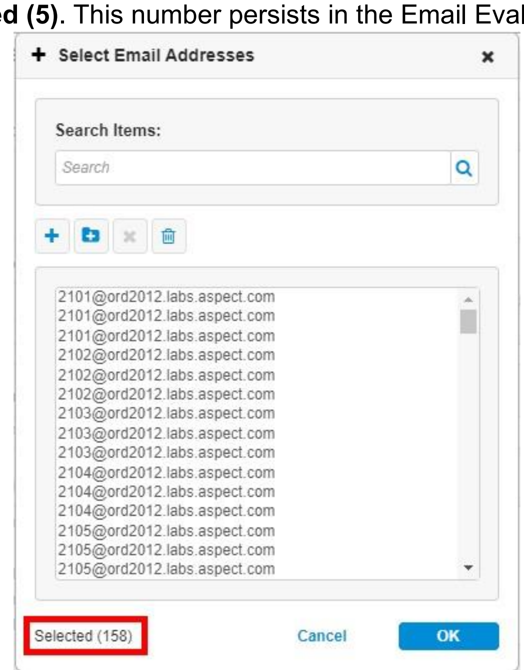
Note: Inactive user details do **not** display in the table.

The following table describes the buttons below the Search Items field.

Button Icon	Button Name	Description
	Add	Adds the first matching Email address if the user typed in a search phrase in the search text box, or if the system selects the first accessible Email ID.

	Add All	Adds all the Email addresses based on the search text specified. If you do not specify any text, then the system adds all the accessible Email IDs.
	Clear Selected	Removes the selected Email address. This button is enabled only if the detail list text box has at least one email address.
	Clear All	Removes all the Email address in the list. This button is enabled only if the detail list text box has at least one Email address.

Note: At the bottom of the window, next to the word Selected, the system displays the total number of email addresses that you added to the detail list box. For example, in the following screen shot, the user added five (5) email addresses. Therefore, the label displays **Selected (5)**. This number persists in the Email Evaluation window.

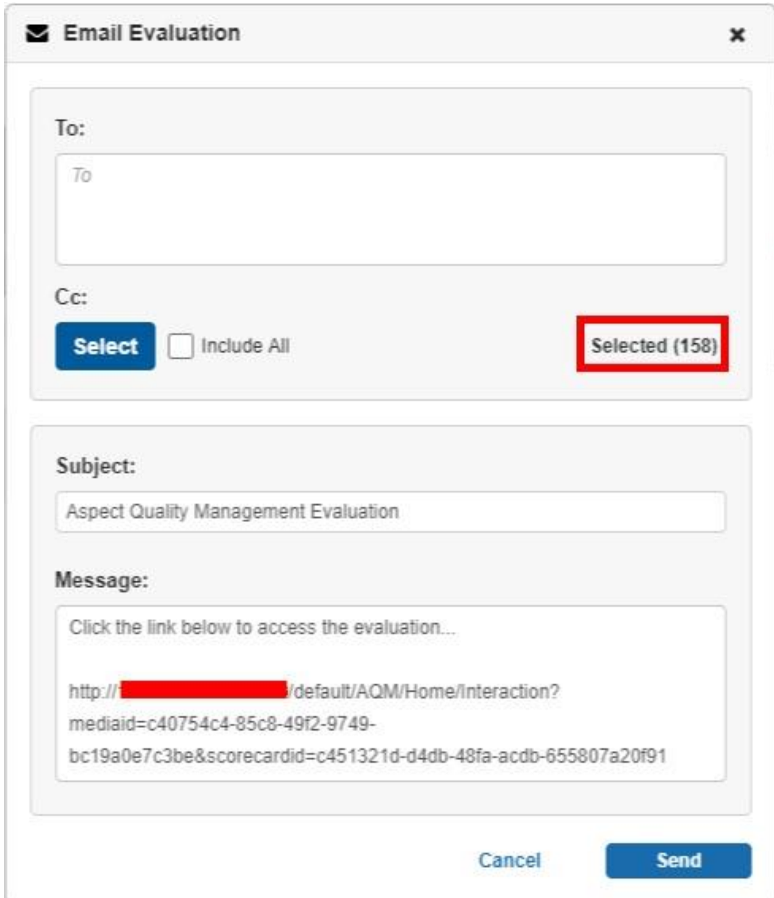


7. To add a user's email address to the email, select the row and click **OK**.

   Note: Alternatively, you can double-click the row to add the user's email address.

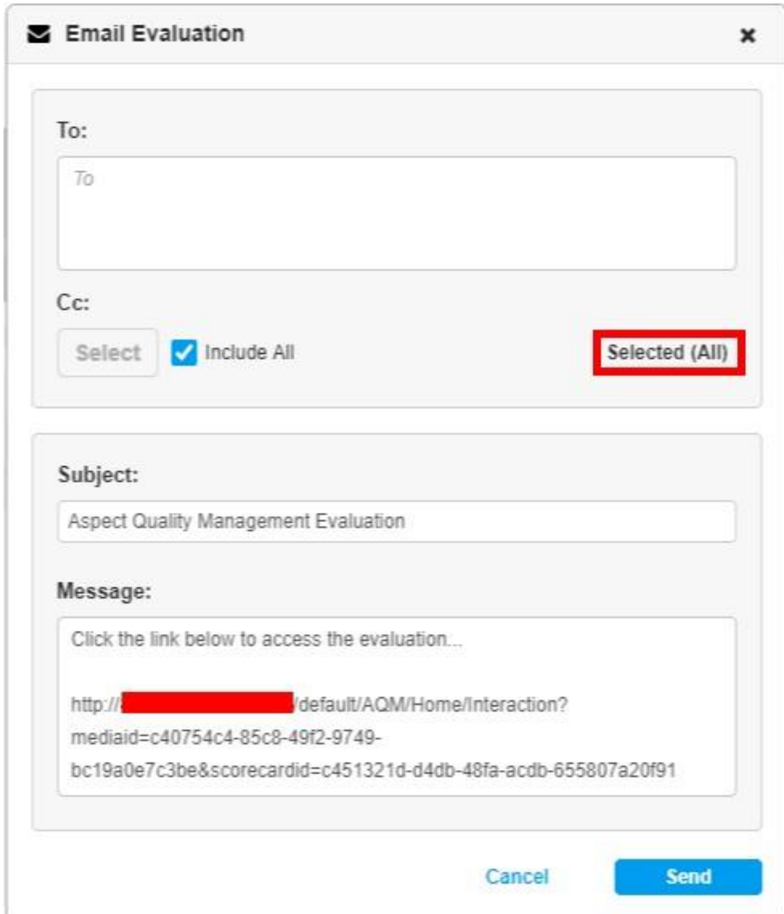
   Click **Cancel** to close the Select Email Addresses window without adding the Email addresses to the email.

   The Select Email Addresses window closes and the selected Email Evaluation window opens with the Selected button displaying the number of email addresses that you selected.



Note: If you are entering the email recipients *manually* (that is, if you do not select the Include All check box as described below, in step 8), then the total number of emails between the To and the Cc fields cannot equal more than 100.

8. To add all accessible email IDs ("all emails" is a number of emails that your organization determines), select the **Include All** check box. The Selected field displays Selected (All).



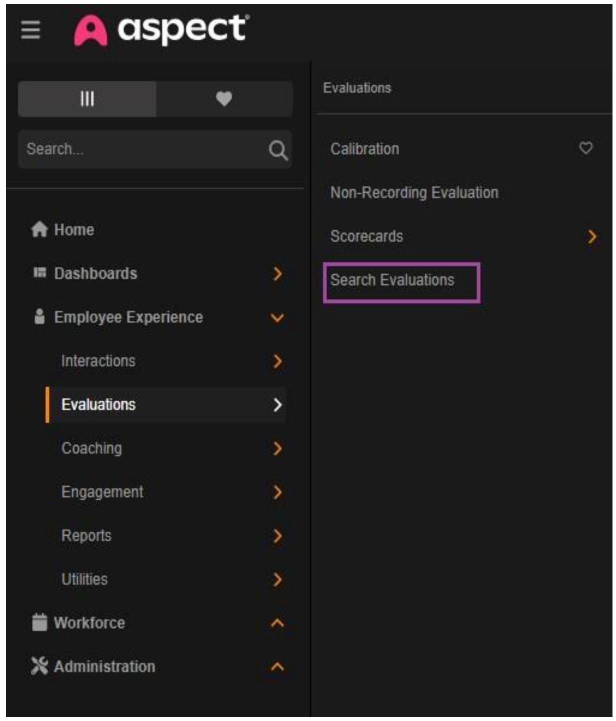
Note: Once you select the Include All check box, the Select button is inactive.

9. Click **Send**. The system sends the email to all the email addresses that you added to the Cc list.

6.4 Delete an Evaluation

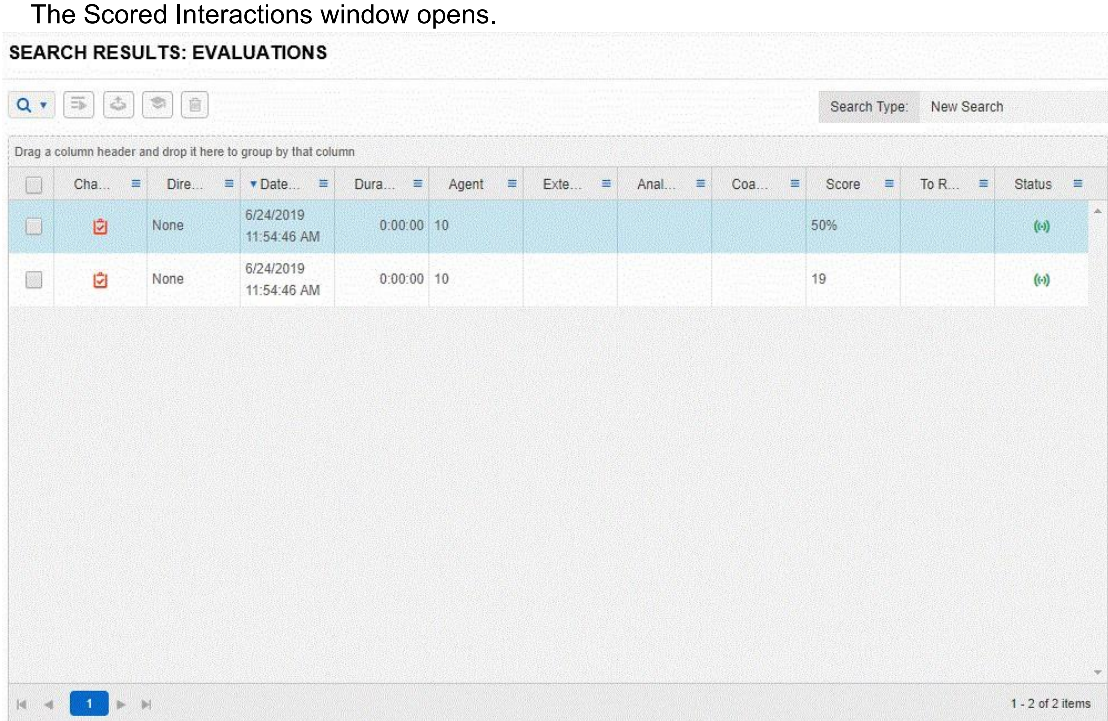
This section describes how to delete evaluation in Workforce Engagement Management.

1. Log in to Workforce Engagement Management as an Administrator.
2. On the Dashboard, click **Employee Experience**.
3. Under **Evaluations**, click the **Search Evaluations** link.

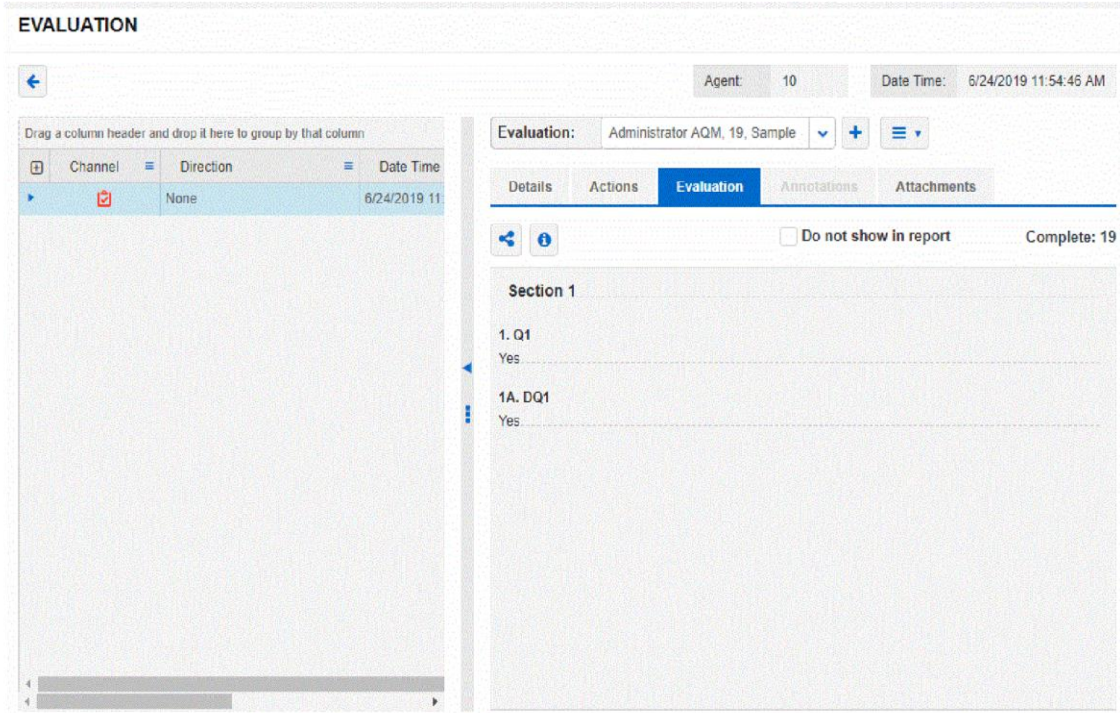


Note: The Scored Interactions link is displayed only if the logged-in user has the Evaluation license.

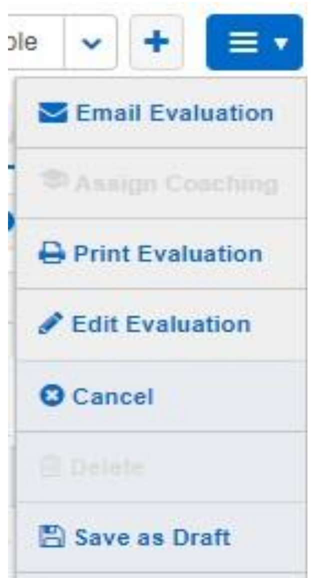
The Scored Interactions window opens.



4. Double-click on the evaluation that you want to delete. The evaluation opens.
5. In the right pane, select the **Evaluation** tab.



6. On the Evaluation tab, click the Evaluation menu.



The Delete option on the Evaluation menu is enabled when the logged-in user is one of the following:

- An Administrator
- A Mentor and the owner of the evaluation
- An Agent and the owner of the evaluation

Note: If the logged-in user is not the owner of the evaluation, then the Evaluation menu tool tip displays the message, *You don't have access to delete this evaluation*.

7. From the Evaluation menu, click **Delete**. A Warning window opens.

If the interaction **is not** protected, the Warning window displays, *Are you sure you want to delete this evaluation?*

If the interaction **is** protected, the Warning window displays, *This interaction is protected. Are you sure you want to delete this evaluation?*

8. To delete the Evaluation, click **Yes**. The system deletes the evaluation and the associated annotations and attachments.

Note: If there is more than one evaluation for the same interaction, the Interaction window loads the next available evaluation details.

If any evaluation has Assign Coaching, then the system remove the evaluation reference link (if it exists) in the Coaching that is assigned.

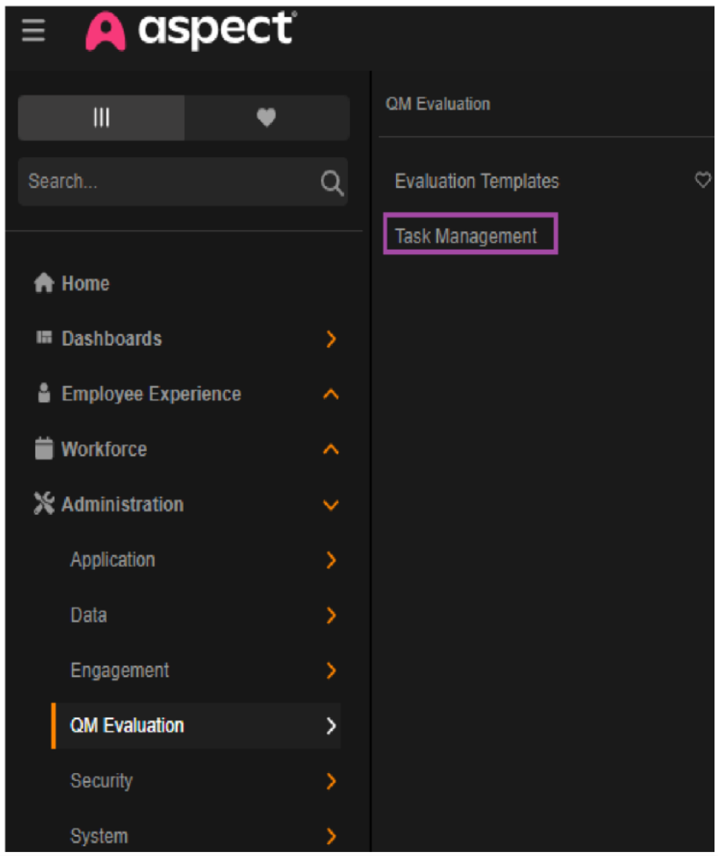
7. Task Management

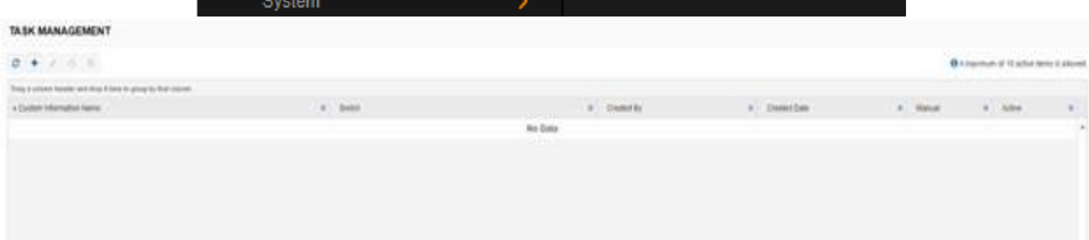
This feature allows the user to define the custom information keys that are available for use in a Non Recording Evaluation (Task) in WEM.

- Users with System Owner persona can create/edit/activate/deactivate the custom information keys.

Follow the below mentioned steps to manage custom information keys.

1. Login to WEM as system administrator.
2. Navigate to **main menu > Administrator > QM Evaluation > Task Management link**



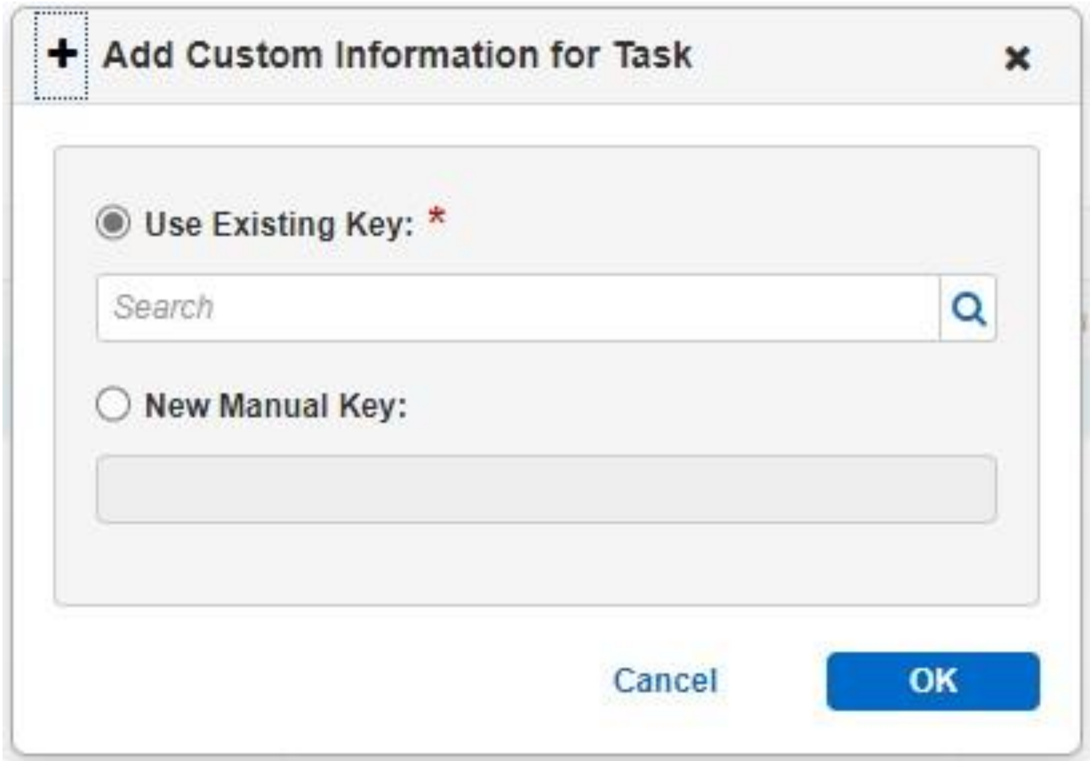


Action Menus

Button Name	Functionality
Refresh	Refreshes the task management grid with the latest data

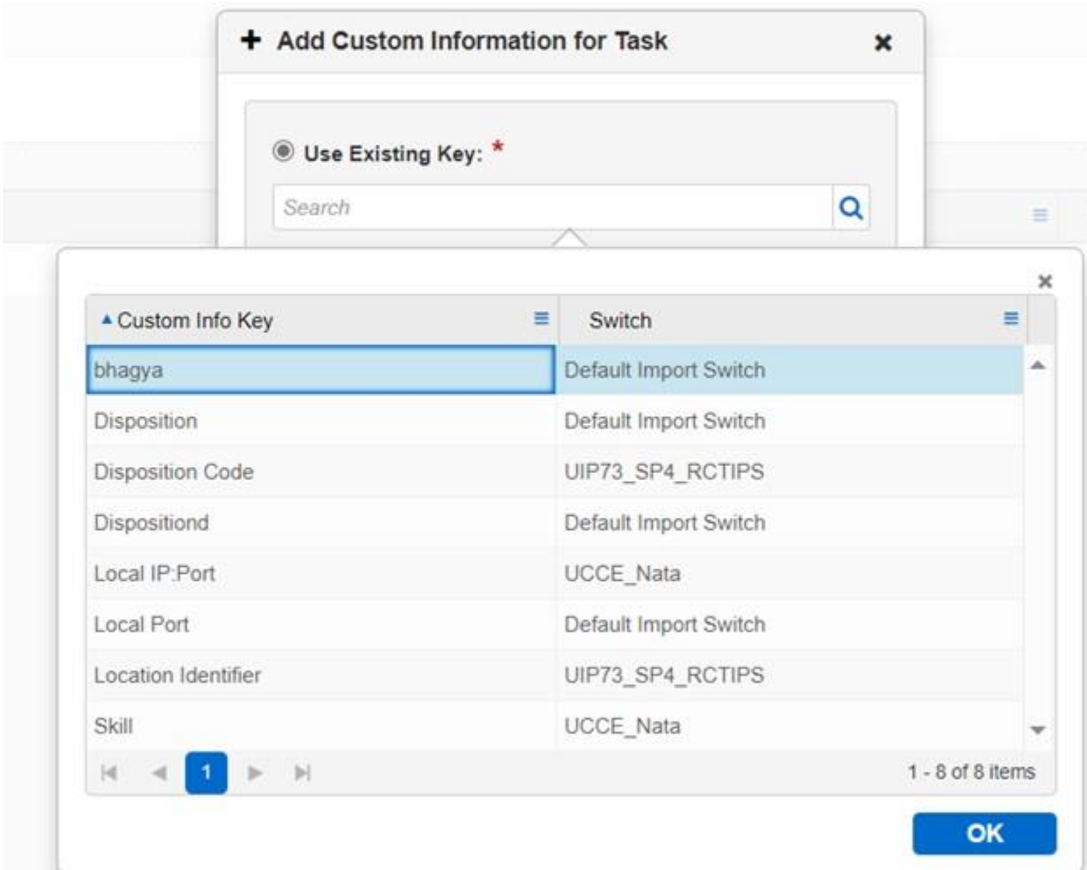
Add	Allows the user the ability to add new or existing custom information key to the task management grid.
Edit	The Edit button will be enabled only for the newly added keys. For existing custom information keys, the edit button will be disabled
Activate	Activates the custom information key for use in Tasks.
Deactivate	Deactivates the custom information key so that it can no longer be used in Tasks.

3. Click on "+" (Add) button to add existing or new custom information key to the task management grid.

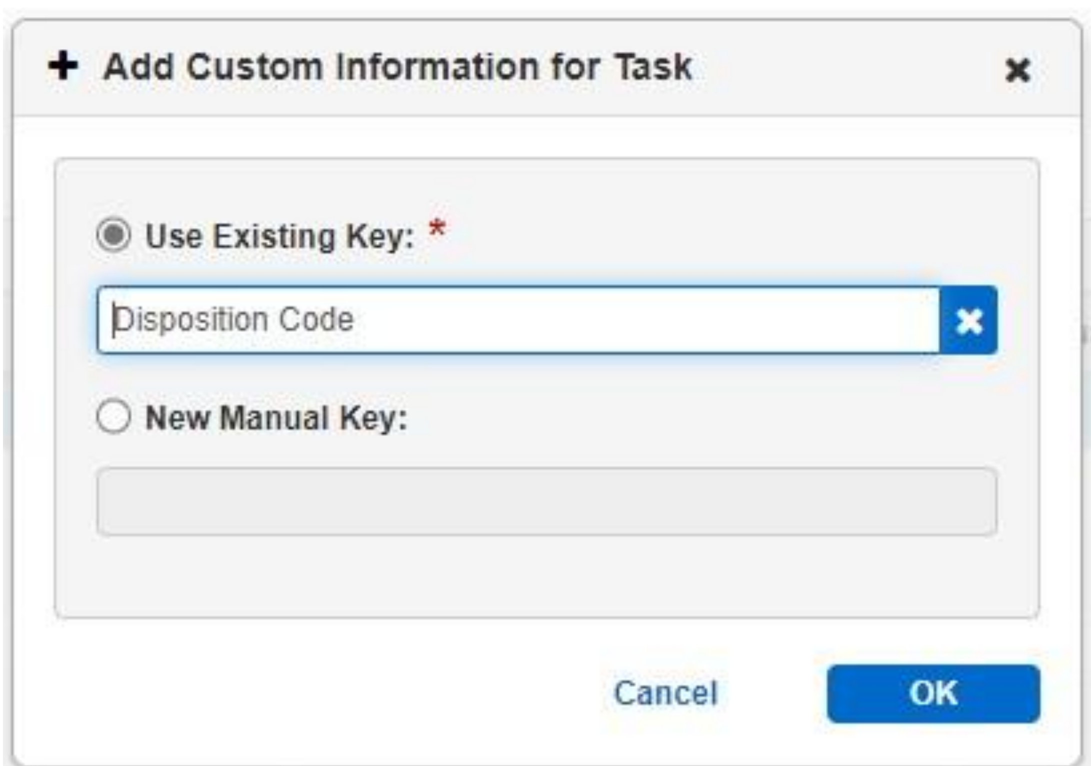


4. By default, "Use Existing Key" radio button will be selected. With this option the user can add the existing custom information key to the task management grid.
5. Click on the Search button to see all the active custom information existing in the system.

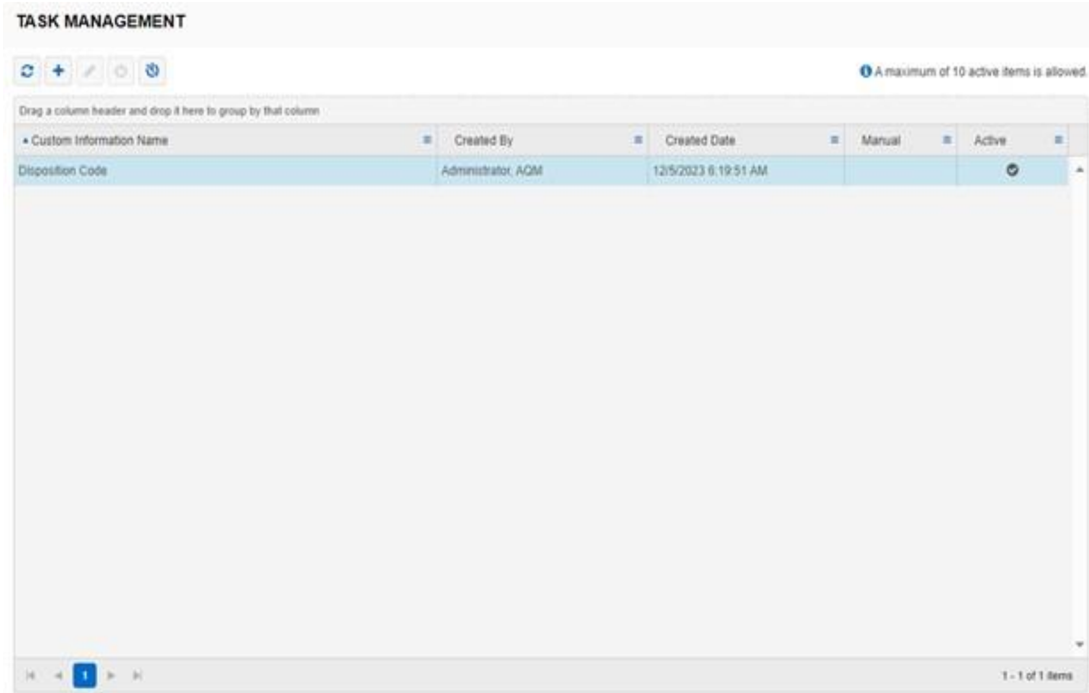
Note: Existing custom information can be searched by providing the string in the search text box.



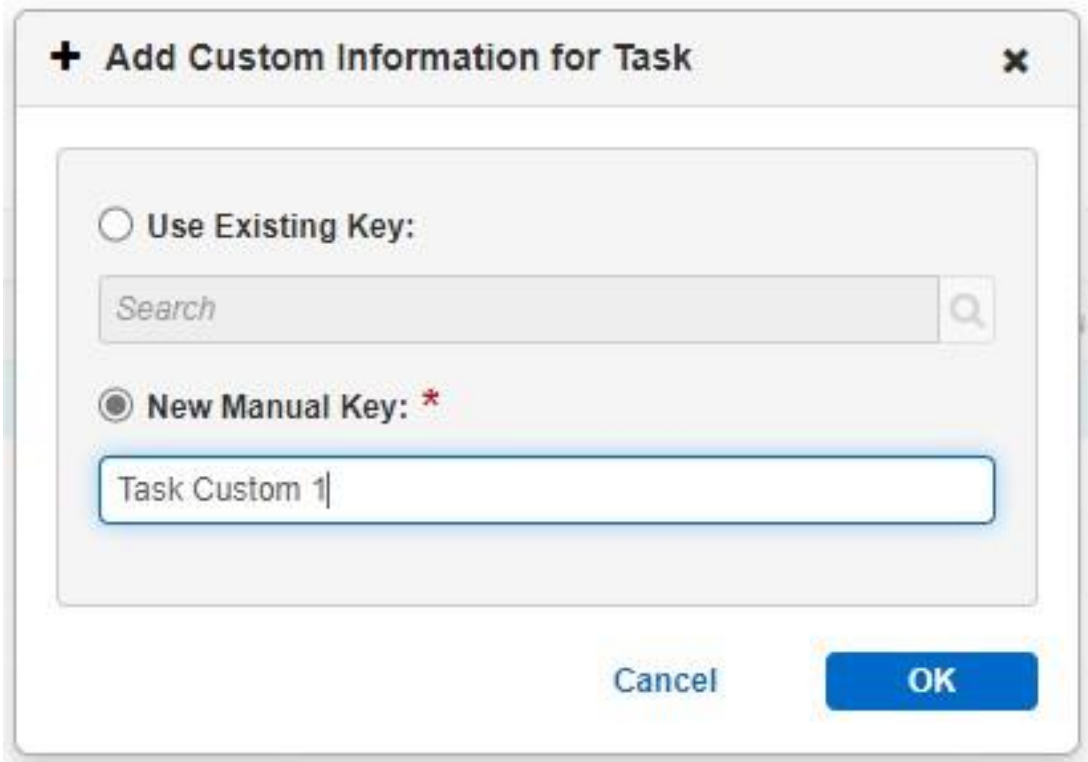
6. Select the custom information and click on OK button.



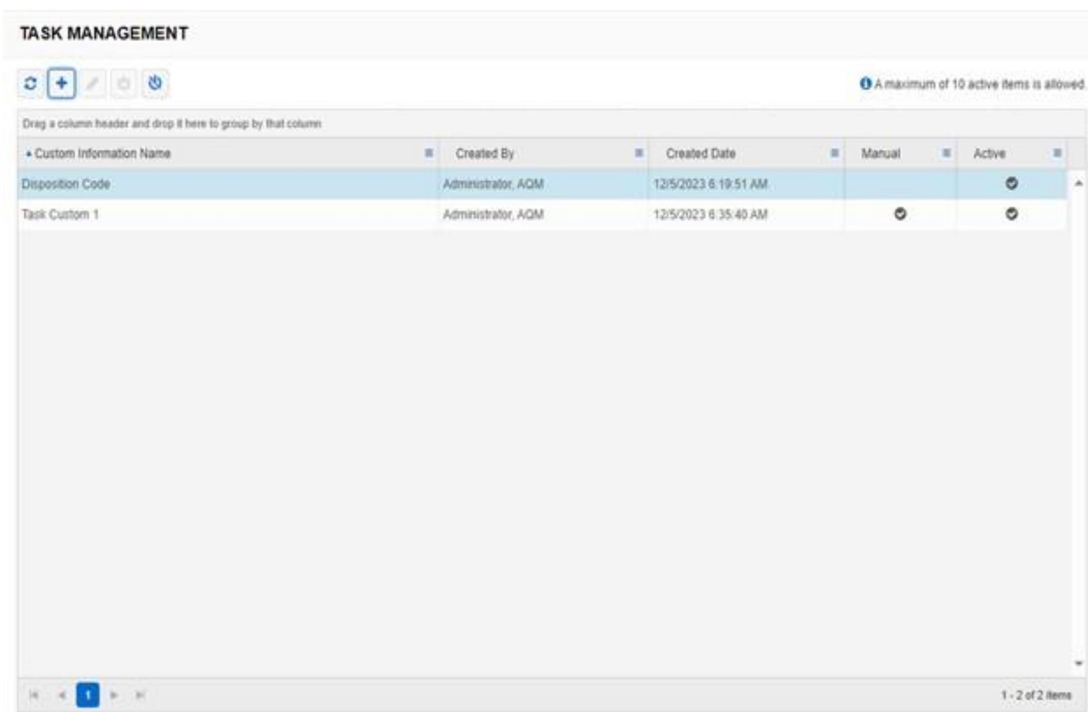
7. Click on the OK button.
8. The existing custom information key gets added to the task management grid as shown in the below screenshot.



9. Defining a new custom information key.
10. Click on "+" (Add) button.
11. Select "New Manual Key" radio button. Textbox and switch dropdown list will be enabled.
12. Enter the custom information key name and click OK.



13.The new custom information key gets added to the task management grid.



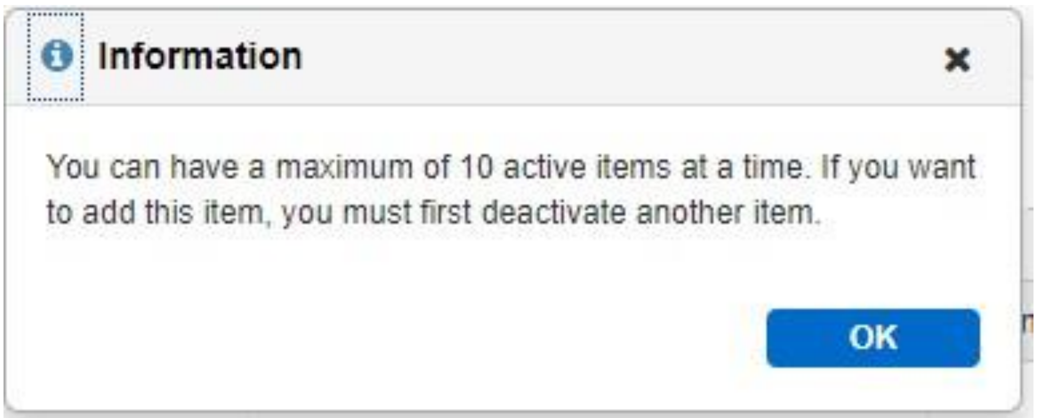
Task Management details will display as explained below

Column Name	Description
Custom Information Name	Name of the custom information key

Created By	The user who added the custom information key.
Created Date	The date and time when the custom information key was created
Manual	• This column specifies if the custom information key is an existing one or it is added newly. • Tick mark indicates newly added custom information key • Blank value indicates it is an existing custom information key
Active	This column indicates if the custom information key is active or inactive

Note: Maximum of 10 active custom information key can be created using existing or new custom information keys.

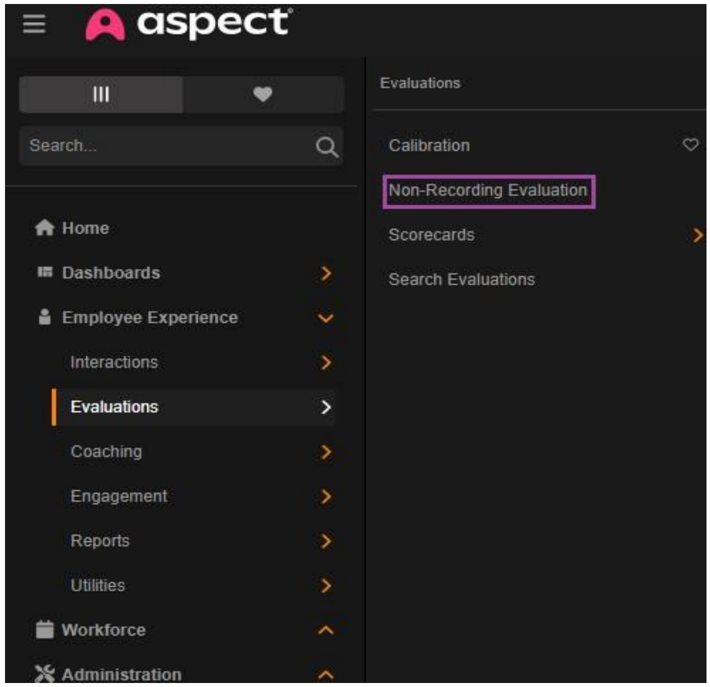
Clicking on "+" button after adding 10 active custom information keys will show information message.



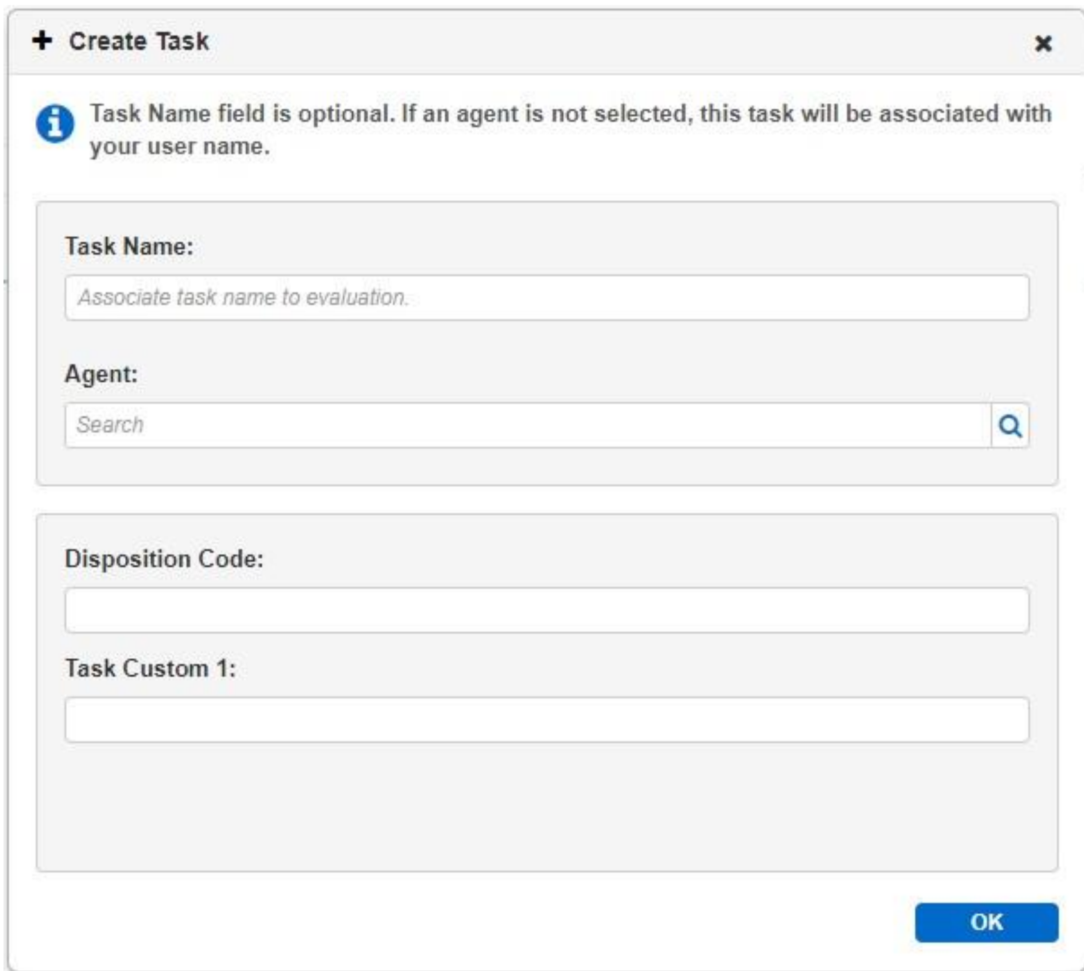
14. The custom information key name newly added can be updated by the user by clicking on "Edit" button. The custom information which is added by selecting the "Existing Key" will not be allowed to Edit.
15. The user can Activate/Deactivate the custom information by clicking on Activate/Deactivate buttons.

7.1 Create Non Recording Evaluation and associate custom information key

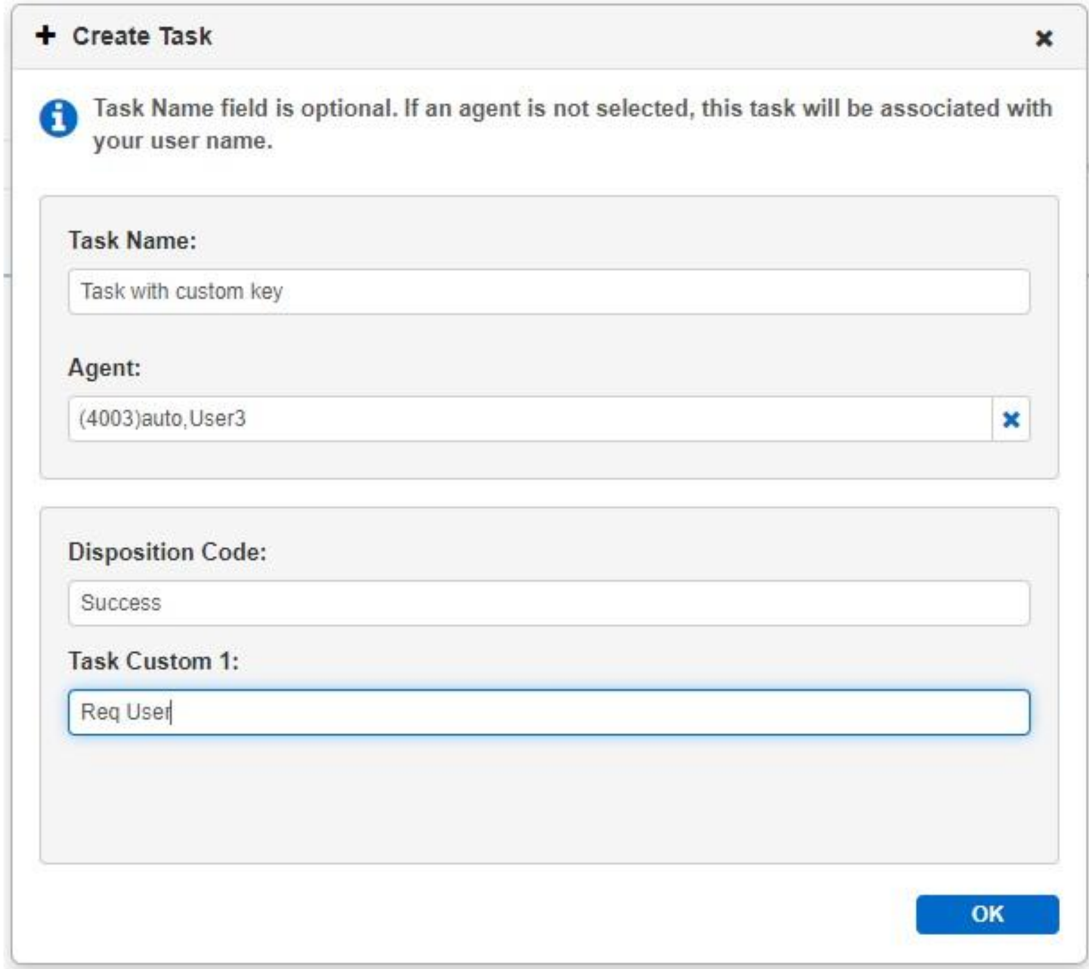
1. Click on main menu navigation > Employee Experience > Evaluations > Non Recording evaluation link



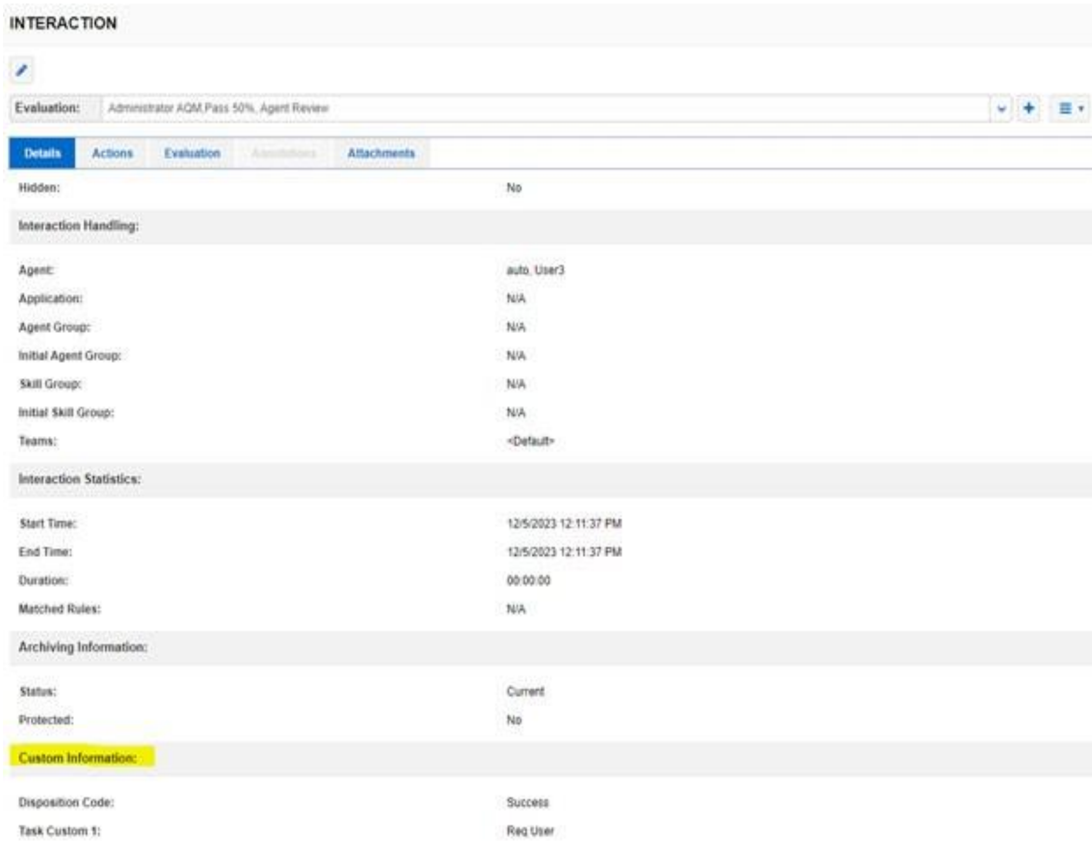
2. Create Task dialog will be displayed with the active custom information keys added to the task.



3. Manager or Agent can create Non Recording Evaluation with custom information value required for the custom information key to assign to a task.
4. Enter the task name, select the user to create task (taken agent), enter the custom information value in the required custom information field and Click OK.



5. Click on "+" (Add evaluation) button and select a template, select a valid answer for the template question and submit the evaluation.
6. Task gets created and the custom information key values entered will be displayed under "Details" tab.



Note: User can search for the Non Recording Evaluation (Task) by adding the custom information search criteria.

8. Scorecard Calibration

While quality scoring focuses on the Agent score, calibration scoring focuses on how well individual Mentors' scores align with the Master Calibrator scores, to identify issues in the scoring process. Aspect Quality has quality scoring, and calibration scoring using the same process as quality scoring (for more information about quality scoring, see Chapter 6, Evaluation Templates).

Note: Any user who is a participant in a calibration event can calibrate scores.

A Mentor, called the Calibration Master, requests other users (called the Calibration Users) to review and score an interaction using a specified scorecard template. After a specified number of days, the Calibration Master compares his response to the other Mentors responses and identifies any issues in the scoring process.

To perform a scorecard calibration, the steps are as follows.

1. In Aspect Quality, create or modify user profiles with the Assign Calibration Event and/or the View Calibration Event rights (see Best Practices for Calibration User Profiles).

2. In Aspect Cloud Workforce Engagement Management, Tag an Interaction for Calibration.

3. Create a Calibration Event.

4. Calibrate a Calibration Event.

5. View Calibration Event Results.

8.1 Best Practices for Calibration User Profiles

Use Aspect Quality to have multiple Mentors grade the same interaction, calibrating measurements so that users grade all resources fairly and objectively. Use the Calibration option to view all mentor responses on a scorecard in the same window for comparison on a question-by-question and section-by-section basis.

To use the calibration feature, Aspect recommends to set up a user profile and then assign this user profile the rights needed for the role of assigning calibration calls. Name the user profile Calibration Master, and then select the **Assign Calibration Event** and the **View Calibration Event** check box.

8.2 Tag an Interaction for Calibration

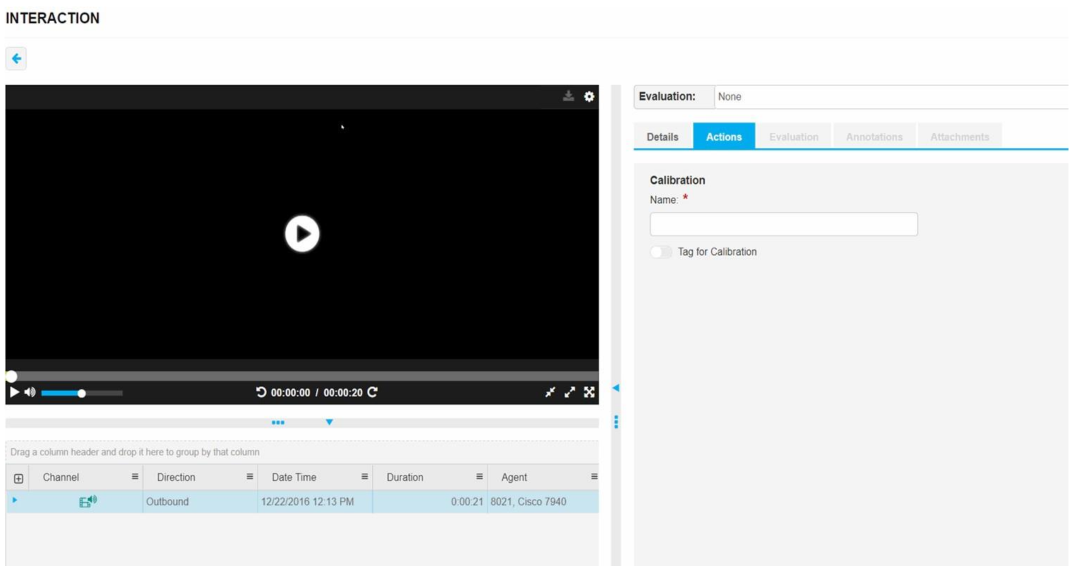
If you want an interaction or interactions to be scored and calibrated, you must first tag the interaction or interactions. If you have the View Calibration Event and the Assign Calibration Event rights, you can tag an interaction for calibration. In Aspect Cloud, this means you must be logged in as an Agent, Team Lead, Manager, User Administrator, or a System Owner to tag an interaction.

Note: If you have only the View Calibration Event right, then you can see a tag created by other users, but you cannot edit or remove a tag.

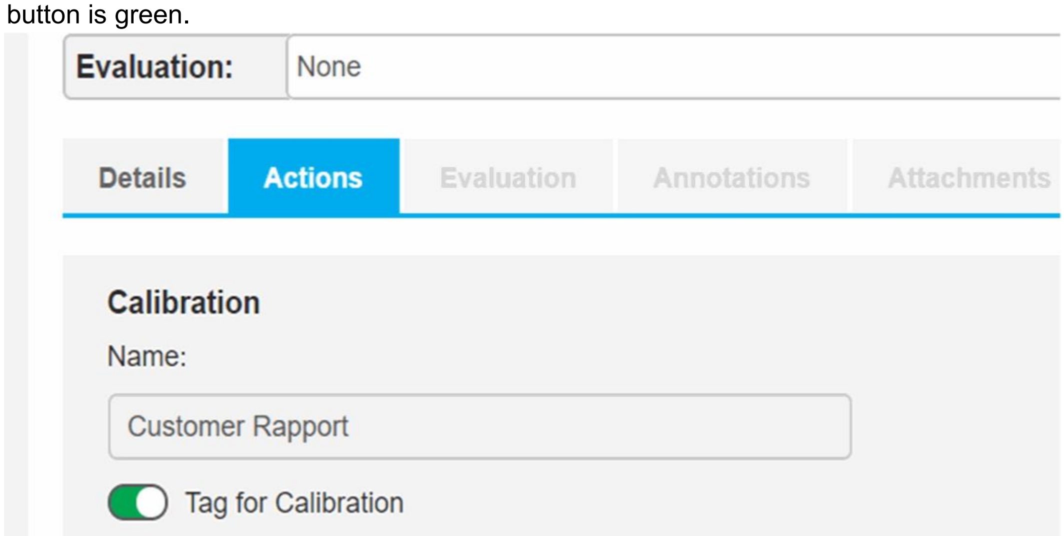
If you have neither View Calibration Event nor Assign Calibration Event rights, then you cannot see or create a tag for an interaction. The Action tab displays a message that says No actions available.

To tag an interaction for calibration, perform the following steps.

1. From the Quality dashboard, under Interaction, click **Search**.
2. Search for an Interaction.
3. Select one or more interactions.
4. Create a Playlist. The Interaction window opens with the Media Player or Chat/SMS transcript window active.
5. In the right pane, select the **Actions** tab.



6. On the Actions tab, in the **Name** text box, type a name for the tag.
7. Click the **Tag for Calibration** toggle button. The interaction is tagged when the toggle button is green.



Note: Once you tag the interaction for calibration, you cannot edit the tag name unless you deselect the Tag for Calibration toggle button.□

□

You can only create one tag per interaction.□

□

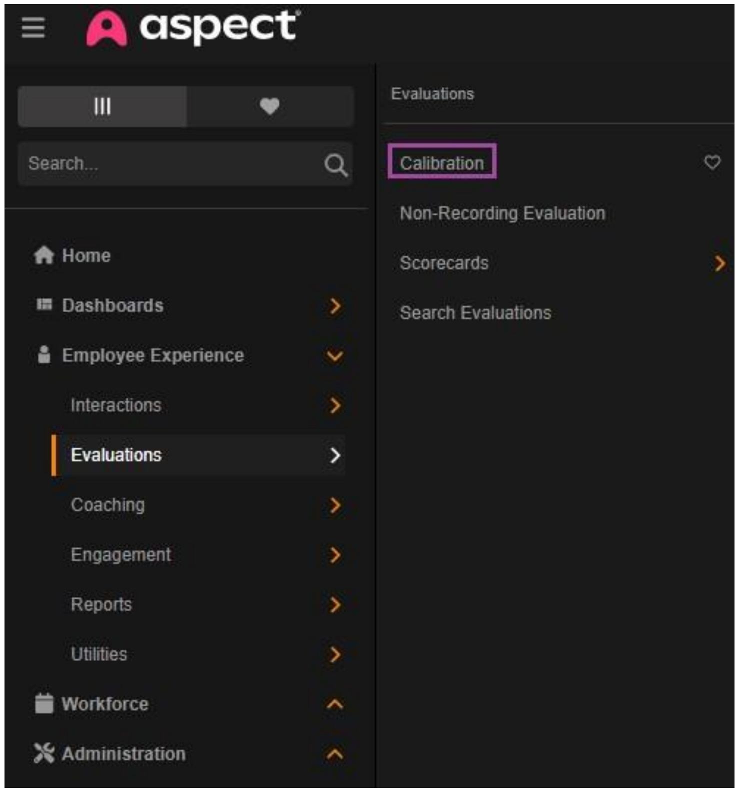
If a user has tagged an interaction on which you want to create a different tag, contact the user who created the tag, ask the user to remove the tag, and then you can tag the interaction with a different name. Therefore, only an Administrator or the owner of a tag can remove a calibration tag for an interaction. □

□

However, if you remove a calibration tag, the calibration events created using the removed tag continue to display the calibration name and there is no impact to the calibration event. In addition, you cannot remove a calibration tag from an interaction that is assigned to at least one calibration event that has not yet expired.

8.3 Create a Calibration Event

If you are a user who has the View Calibration Event right in your user profile, and you have the QM Evaluation license, then in the Employee Experience dashboard you see the Calibration link.

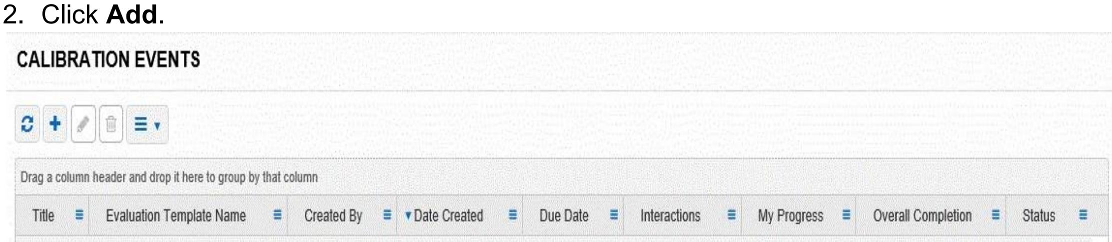


Note: If you are a participant with View Calibration Event right, you can view the calibration events assigned to you.

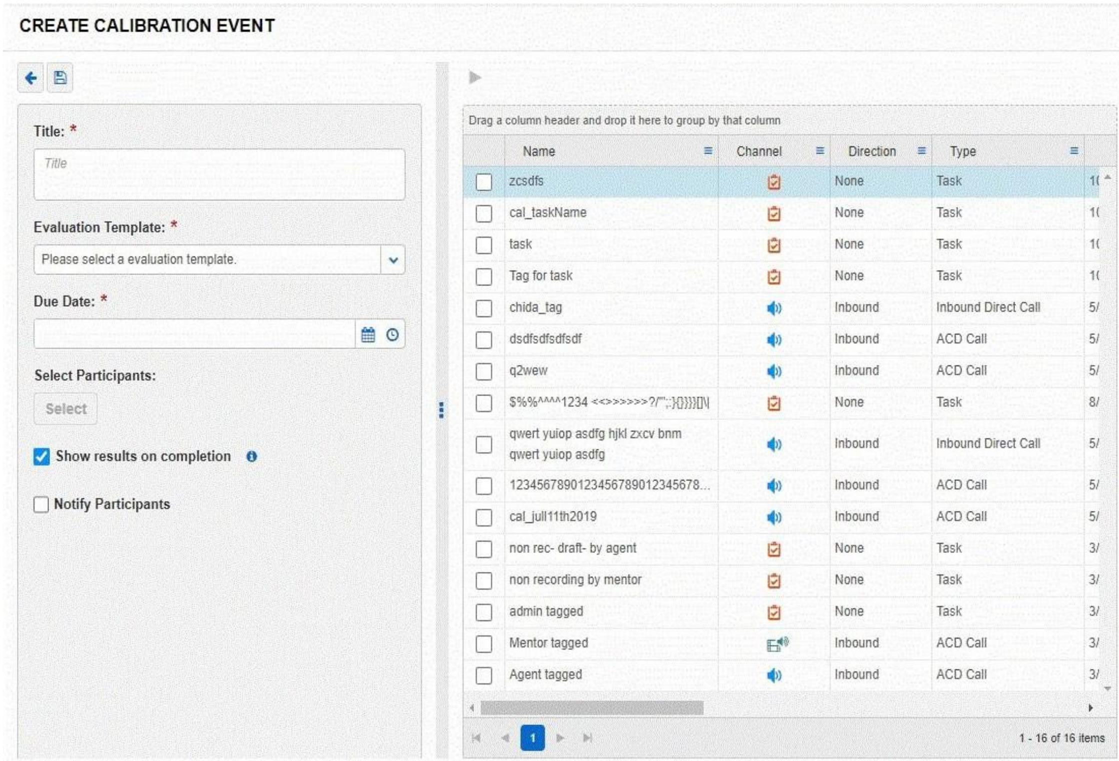
1. Click the **Calibration** link. The Calibration Events window opens.

   Note: If you have the Assign Calibration Event right, then the Add button is enabled.

2. Click **Add**.



The Create Calibration Event window opens. In the right pane is a list of interactions that you tagged for calibration.



Note: To return to the Calibration Events window, click **Back**.

Note: All required fields are marked with a red asterisk (*).

3. In the left pane, in the **Title** text box, type a name for the calibration event. This is a multi-line text box that accepts a maximum of 250 characters, including alphabetical, numeric, and special characters.

4. From the **Evaluation Template** drop-down list box, select the template to assign to the event.

   Note: Only the templates to which you (the logged-in user) have permission display in the drop-down list box.□

   □

   Only templates created in Workforce Engagement Management display.□

   □

   Templates saved as Draft do not display in the drop-down list box.

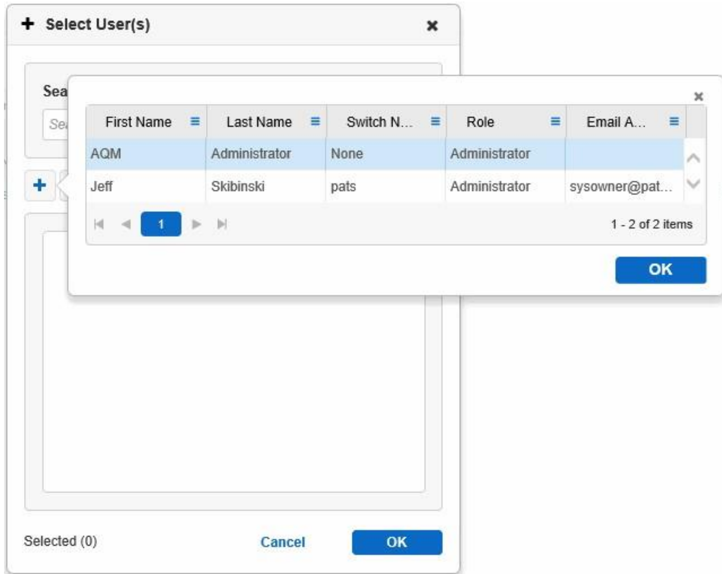
5. In the **Due Date** text box, using the Calendar icon, select the due date and time of the calibration event (the date and time when the calibration event expires).

   Note: The due date must always be at least 24 hours greater than the current date and time that you are creating the calibration event.

6. In the **Select Participants** section, click **Select**. The Select Users window opens.

   Note: The Select button is active only after you select a template from the Evaluation Template drop-down list box.

7. To select users to participate in the calibration event, you must add them to the Select Users list box by clicking **Select User**. The Select User pop-up window opens with a list of users who have the View Calibration Event right, and who have permission to the template that you selected.



8. From the list of names, select the user(s) who you want to participate in the calibration event. The user name(s) appear(s) in the list box of the Select Users window.

   Note:

   - At the bottom of the Select Users window, Selected (X) displays, where X equals the number of participants that you selected.
   - If an user is assigned to an inactive switch, then switch name with **(Inactive)** suffix will be displayed.

9. Click **OK**. The Select Users window closes, and the Create Calibration Event window is active.

10. By default, the **Show results on completion** checkbox is checked.

    Note: The participants will not be able to view the results until all the participants complete the calibration.

11. If you want all calibration event participants to receive email notifying them of the required action, select the **Notify Participants** check box.

12. In the right pane is a list of interactions that you tagged for calibration. Select the check box next to the interaction(s) that you want to assign to the calibration event.

    Note: One hundred interactions display per page.

    The following table describes the columns in the interaction pane. By default, the data is sorted by the Date Tagged column in descending order.

Column Name	Description
Name	Name of the calibration tag provided for the interaction.
Channel	Displays the channel type (for example, Chat).
Column Name	**Description**
Direction	The direction of the interaction (for example, Inbound or Outbound)

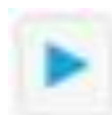
Type	Displays the interaction type (for example, Inbound Direct Call)
Date Time	The date and time of the interaction.
Agent	The Taken Agent on the interaction.
ANI	The ANI of the interaction.
DNIS	The DNIS of the interaction.
Date Tagged	Displays the date and time that the tag was created for the interaction.
Times Used	Specifies the total number of times that any user has used the interaction for a calibration event.
Tagged By	The LastName, FirstName of the user who created the calibration tag.

The following table describes column names that are hidden by default.

Column Name	Description
Duration	The length of time of the interaction.
Extension	The extension of the agent who handled the interaction.
Status	Displays the status of the interaction (for example, Current/Historical or Archived).
Hold Count	The total number of Holds that occurred during the interaction.
Host ID	The identifier of the entity as known by the ACD or PBX.
Maximum Hold Time	The maximum duration of the hold in the interaction. If there is more than one hold, the system identifies the maximum duration of the hold out of all of the holds in the interaction.
Interaction ID	The ID of the interaction which is stored in the database.
Device Position	If available from the switch, the Position ID of the agent on which premises the agent is located. **Note:** The Device Position column is hidden by default.
Universal Call ID	A unique Avaya ID.
Total Hold Time	The Total Hold Time duration in a call.
Universal Media ID	A unique Aspect Cloud ID that references a customer interaction, regardless of channel type.
Customer Name	The name of the customer associated with a chat interaction. **Note:** Customer Name criteria only displays when you have a Chat license.
Customer Email Address	The Email address of the customer associated with a chat interaction. Customer Email Address criteria only displays when you have a Chat license.

Column Name	Description
Message Count	Number of messages within an SMS interaction.
Terminal Number	The terminal number of the agent who accepted the interaction.
Recording Reason	The reason for the recording. Possible values include Agent Requested, Team Lead Requested, and API Requested.
Task Name	The Task Name which is stored in the database.
Transcript File Name	There are three types of Transcript files such as Chat, SMS and Email. The Transcript File Name will be displayed in a specific way for Chat, SMS and Email. Example: • **Chat** - chat/2020/09/02/09/ab48a17e-7015-4571-9e6a7d6597cae5e3.json • **SMS** - sms/2020/09/02/09/d265f317-00d1-4ba8-8a27ee5073946c1b.json • **Email** - email/2020/09/02/09/0559-6e54/130-0
Thread ID	The identification number for the email thread.
Message ID	The identification number for the email thread.
Email Subject	The subject of the email interaction.

Note: If you want to play back the media interaction or read the Chat/SMS transcript before assigning an interaction for the calibration event, select the interaction by clicking anywhere on the row and then click Play.



Note: OR, you can double-click the row to play the interaction.

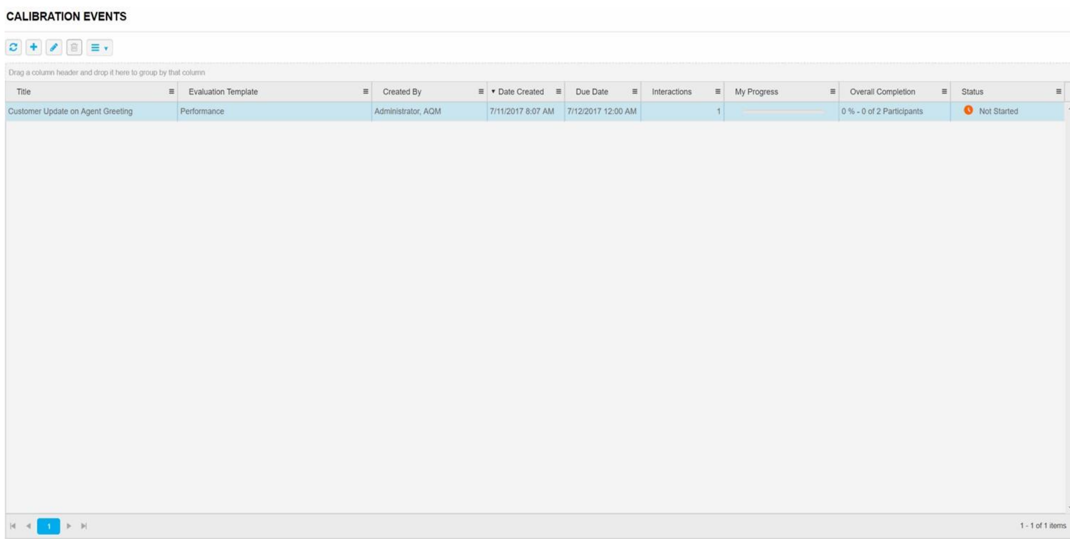
The Play button is not enabled for a Task interaction.

The Media Player launches. You can only play back one interaction at a time. When you are finished playing back the interaction, click **OK**. The Media Player closes and the Create Calibration Event window is active.

13.Save the calibration event by clicking **Save**.

Note: If you do not complete the mandatory fields, a window corresponding to the incomplete field opens.

The Calibration Events window opens with the event that you just created in the list.

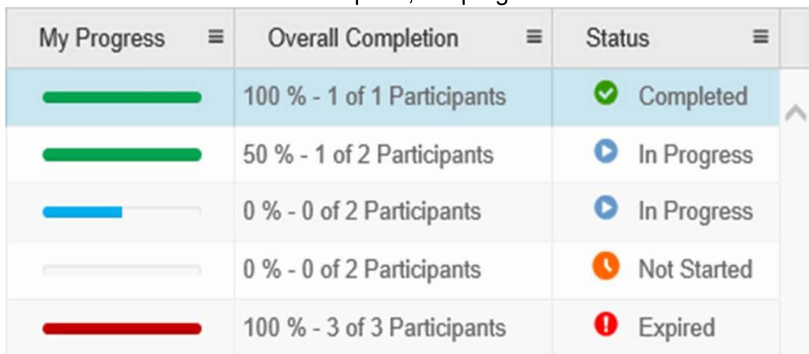


Note: By default, the Calibration Events table is sorted by Date Created in descending order.

One hundred records display per page.

The following table describes the columns on the Calibration Events window.

Column Name	Description
Title	The name of the calibration event.
Evaluation Template	The template name assigned to the calibration event.
Created By	The LastName, FirstName of the owner of the calibration event.
Date Created	The date and time when the owner created the calibration event. **Note:** The date and time are based on the time zone of the client machine where the owner created the event. The format is based on the locale.
Due Date	The date and time when the calibration event expires. **Note:** The date and time are based on the time zone of the client machine where the owner created the event. The format is based on the locale.
Interactions	The total number of interactions assigned for the calibration event.
Column Name	**Description**

<table>
<tr><td>My Progress</td><td>Displays the progress made by the participant when evaluating the interaction associated with the calibration event.
• If the progress is less than 100%, the progress bar is blue.
• If the progress is 100%, the progress bar is green.
• If the calibration event has expired, the progress bar is red.

Note: If you hover your mouse over the My Progress column, the tool tip displays the Overall Completion percentage.</td></tr>
<tr><td>Overall Completion</td><td>Displays how many users have completed the scoring for the calibration event, in percentage. For example, if 1 out of 2 participants have completed the scoring, the Overall Completion displays 50%.</td></tr>
<tr><td>Status</td><td>Indicates the status of the calibration event with icons. The following list describes the values for this column.
• Not Started - When the calibration event is created and no participants have scored any of the interactions.
• In Progress - When any one of the participants submit scores for any ones of the interactions in the calibration event.
• Completed - When all participants have finished scoring all interactions under the calibration event.
• Expired - When a calibration event completion date has passed.</td></tr>
</table>

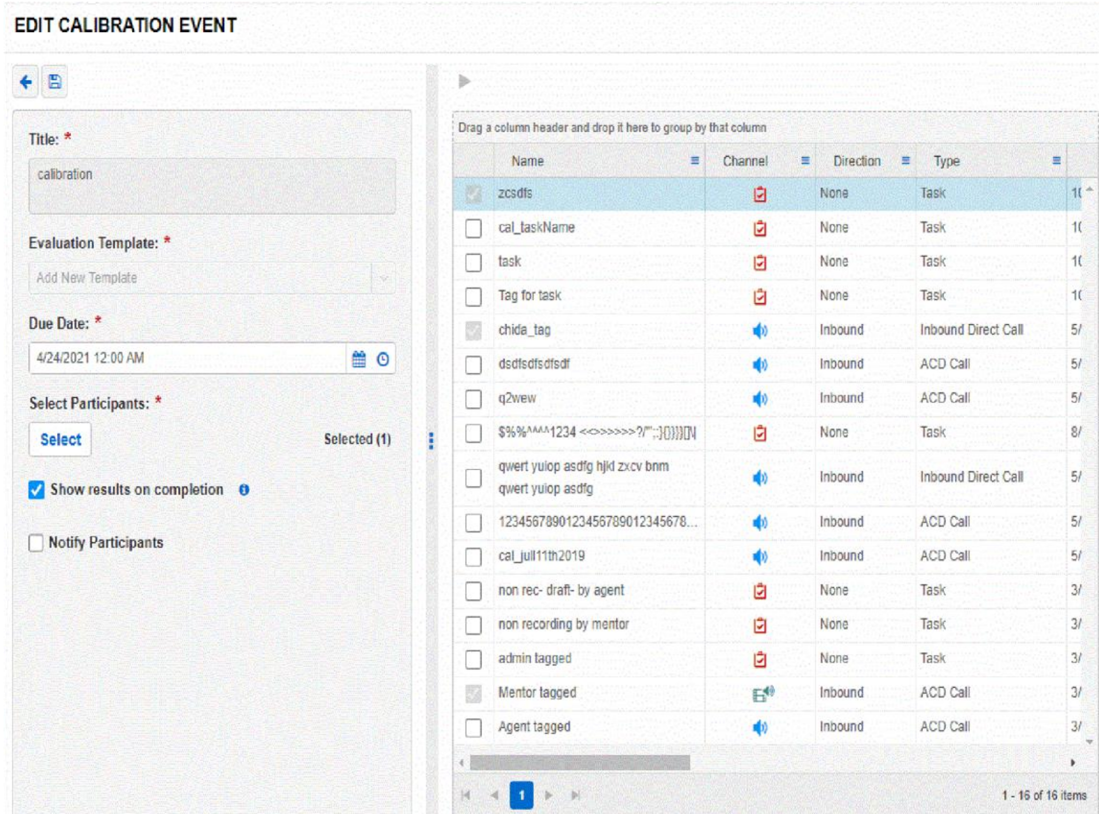
8.3.1 Edit a Calibration Event

Only an Administrator or the owner of the calibration event can edit the calibration event. To edit a calibration event, perform the following steps.

1. On the Dashboard, click **Quality**.
2. Under QM Evaluation, click **Calibration**. The Calibration Events window opens.
3. Select the calibration event that you want to edit and click **Edit**.

   The Edit Calibration Event window opens.



4. You can edit the following fields.
   - Due Date

     Note: If you extend the due date for a calibration event that has expired, the Status of the event is updated to Not Started or In Progress or Completed, accordingly.
   - Select Participants
   - Show results on completion

     Note: If you unchecked the checkbox, the participants will be able to see the results before all the participants complete the calibration.
   - Notify Participants
   - Interaction
5. Click **Save**.

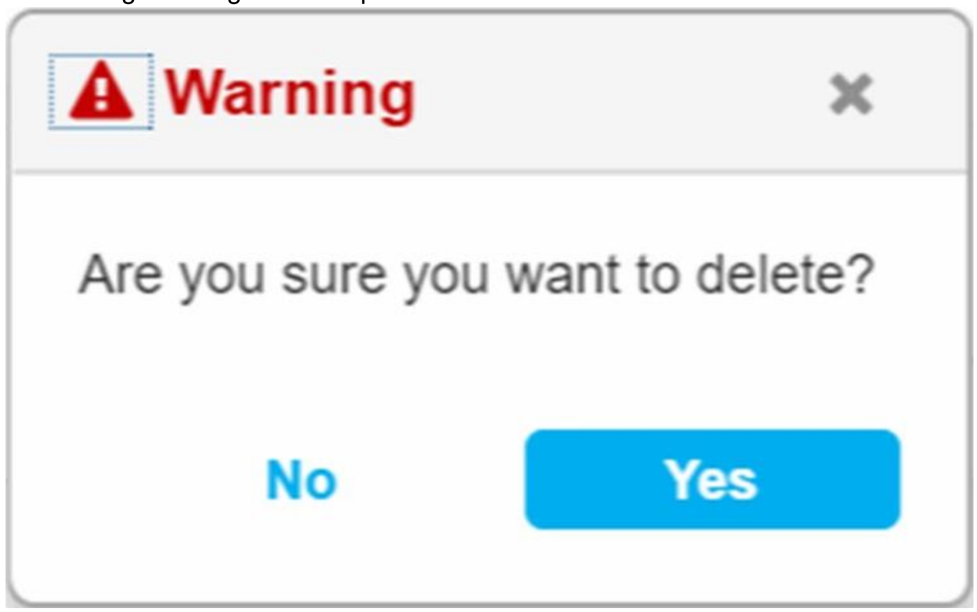
8.3.2 Delete a Calibration Event

Only an Administrator or the owner of the calibration event can delete the calibration event. You can only delete calibration events that have expired.

To delete a calibration event, perform the following steps.

1. On the Dashboard, click **Quality**.
2. Under QM Evaluation, click **Calibration**. The Calibration Events window opens.
3. Select the row of the calibration event that you want to edit.
4. Click **Delete**.

The following Warning window opens.



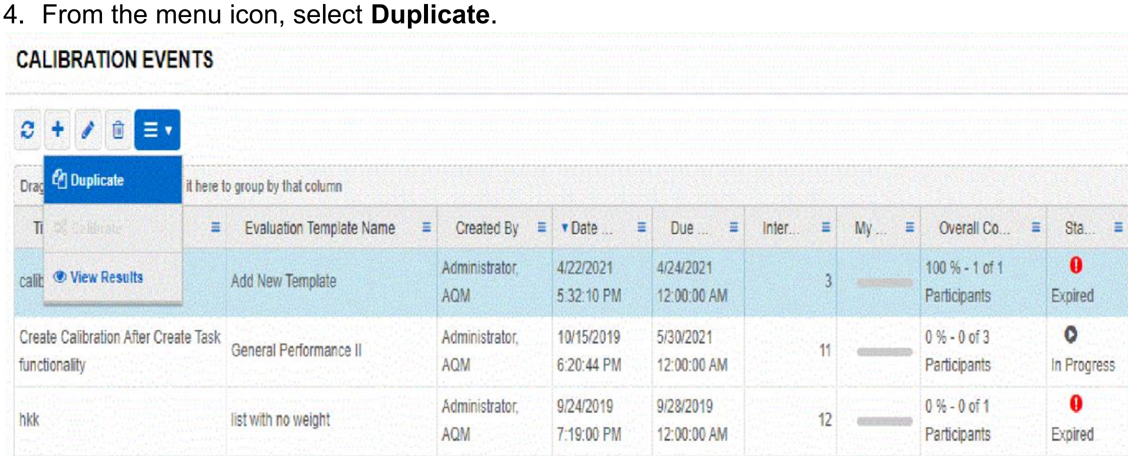
5. To delete the calibration event, click **Yes**. The calibration event is removed from the Calibration Events window.

8.3.3 Duplicate a Calibration Event

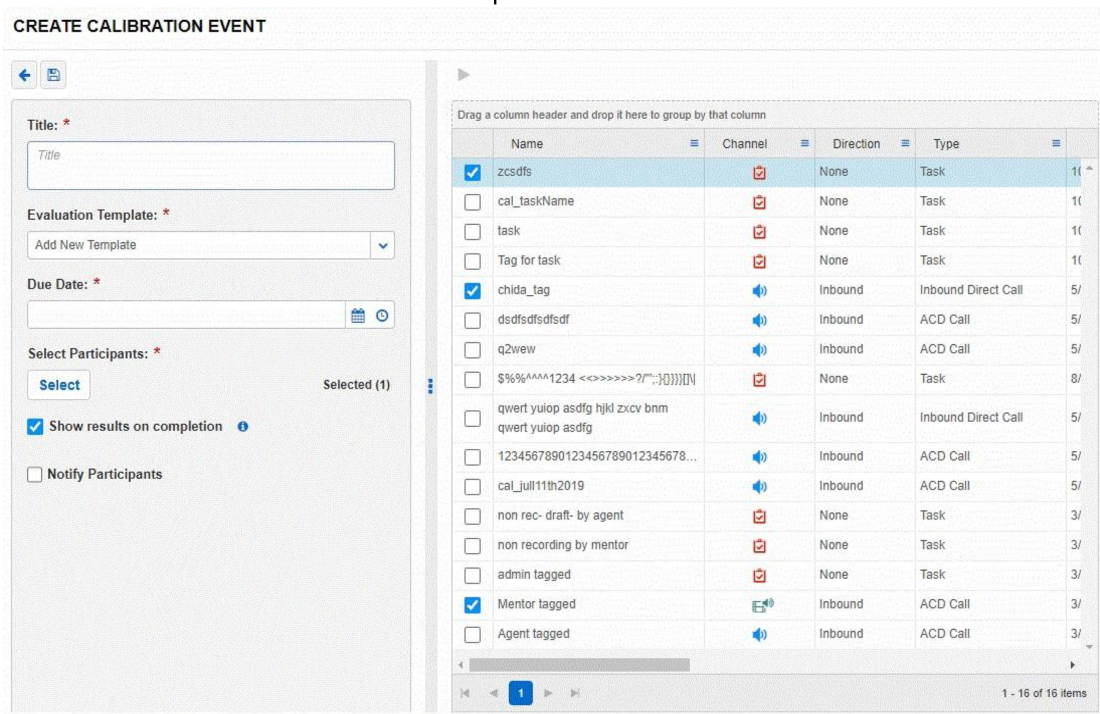
If you want to copy a calibration event, you must have access to the calibration event and the Assign Calibration Event right.

To duplicate a calibration event, perform the following steps.

1. On the Dashboard, click **Quality**.
2. Under QM Evaluation, click **Calibration**. The Calibration Events window opens.
3. Select the row of the calibration event that you want to copy.
4. From the menu icon, select **Duplicate**.



The Create Calibration Event window opens.



5. In the **Title** text box, type a name for the copied calibration event.

6. The copied Evaluation Template displays, but you can select a different template from the drop-down list box.

   Note: If you change the Evaluation Template, and the selected participants in the copied calibration event do not have permission to the template that you selected, the Selected number changes.

7. In the **Due Date** text box, click the **Calendar** icon and select a date that is 24 hours greater than the current date and time of the client machine.

8. If you want to change the participants on the calibration event, click **Select** and add or remove the participants as appropriate.
9. Check or uncheck the **Show results on completion** checkbox as per the requirement.

10. Based on the copied calibration event, you may want to select or deselect the **Notify Participants** check box.

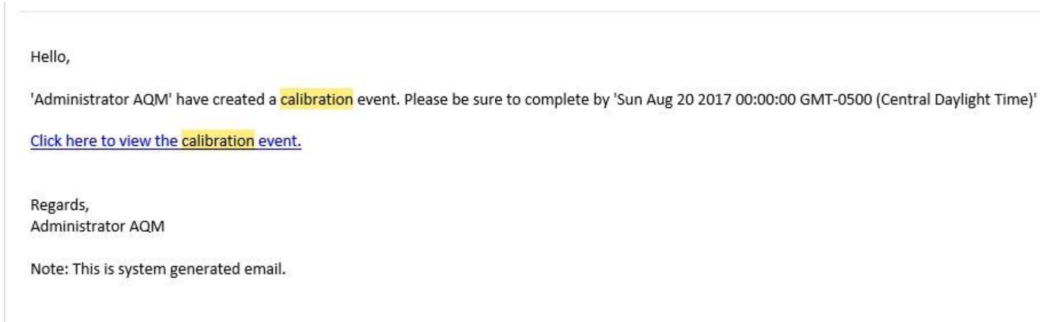
    If the aggregate user is logged in to Workforce Engagement Management and is duplicating the calibration event, the Created By name displays.

    The Interaction(s) is(are) copied and enabled. You can assign the same interaction(s) for the calibration event, or you can assign a different set of interaction(s) for the new event.

11. After making the necessary changes, click **Save**. The new calibration event displays in the Calibration Events list.

8.4 Calibration Event Email

When a user creates a calibration event and selects participants to score interactions to be calibrated, the user can choose to notify participants by email. Once the user saves the calibration event, an email is distributed to the participants.


Hello,

'Administrator AQM' have created a calibration event. Please be sure to complete by 'Sun Aug 20 2017 00:00:00 GMT-0500 (Central Daylight Time)'

Click here to view the calibration event.

Regards,
Administrator AQM

Note: This is system generated email.

Note: If the creator of the calibration event or any of the participants selected to score the interaction does not have an email address configured, then a message displays, asking you to configure that email address. However, email is not sent only if the creator does not have an email address configured in their Aspect Quality user account.

As an email recipient, click the link in the email, which takes you to the Calibration Events window where you can evaluate the interaction that is assigned to the calibration event. To score an interaction to be calibrated, see Calibrate a Calibration Event.

8.5 Calibrate a Calibration Event

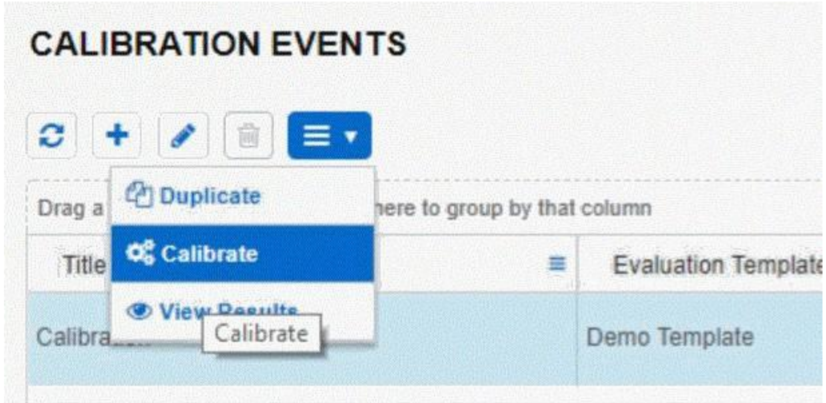
Once a user has created a calibration event, the following steps must occur.

- The selected participants receive an email with a link to the calibration event (see Calibration Event Email).
- The participants score the interactions. To score interactions that are tagged for calibration, see Score a Calibration Event.
- Finally, the creator of the calibration event views the progress of the interaction scores and when the calibration event is complete, the creator can interpret the results.

8.5.1 Score a Calibration Event

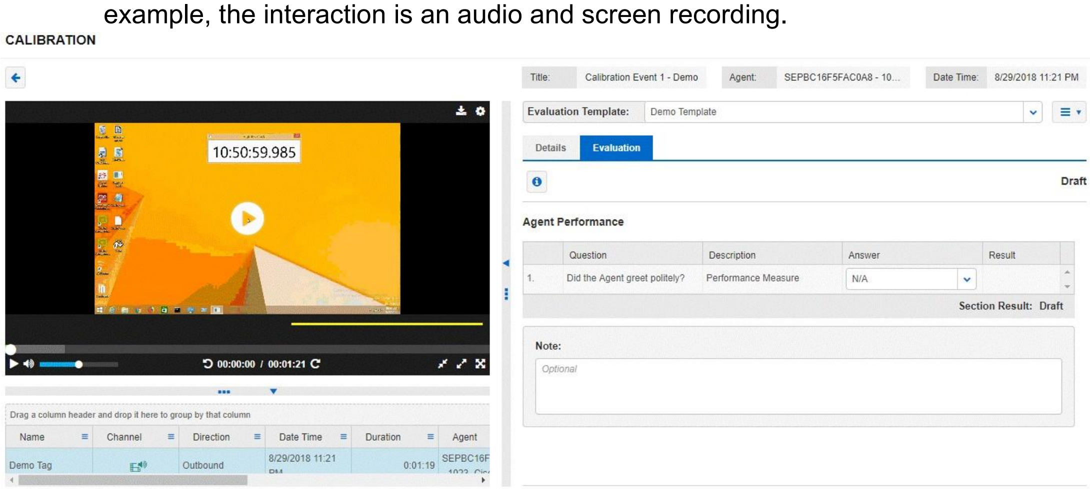
You may have received an email asking you to score a calibration event (see Calibration Event Email). If so, click the link in the email and the Calibration Events window opens.

1. On the Calibration Events window, from the list of calibration events, select row of the calibration event that you want to score.
2. From the menu icon, select **Calibrate**.



The Calibration window opens with the Evaluation tab active, with the first interaction selected in the playlist table, and the media player loads with that first interaction for playback.

Note: If the interaction is a Chat/SMS, the Transcript player opens. In the following example, the interaction is an audio and screen recording.

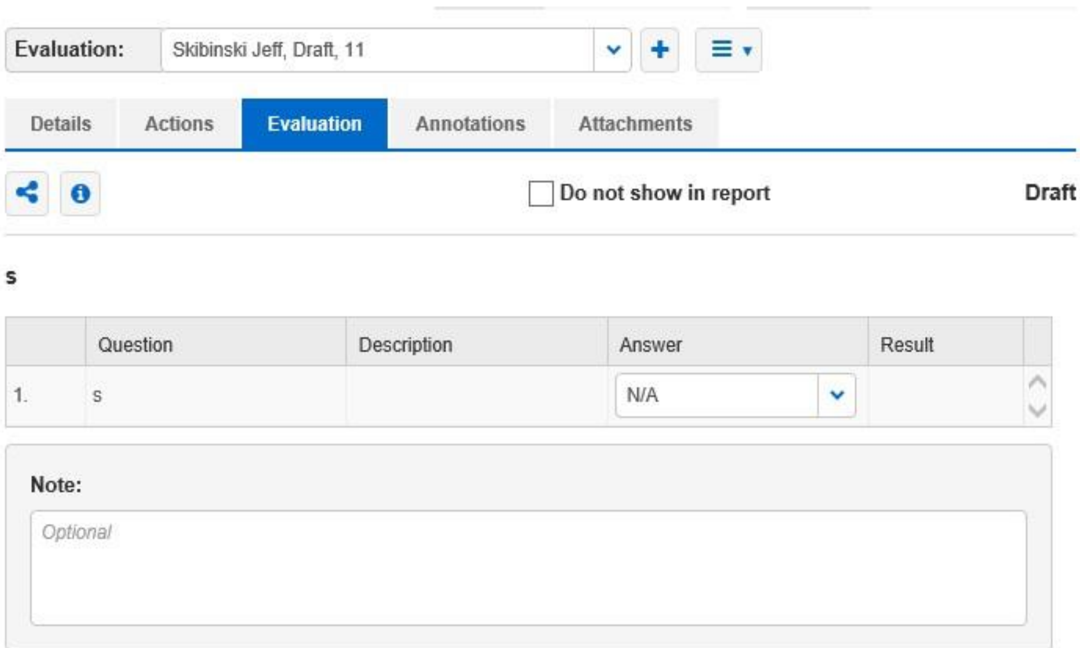


Note: To return to the Calibration Events window, click **Back**. If you opened the Calibration window by clicking on the link from the calibration email, the Back button does not display.

Above the Evaluation tab are fields that are described in the following table.

Column Name	Description
Title	The name of the calibration event.
Agent	The name of the Taken Agent for the selected interaction.
Date Time	The date and time of the selected interaction.
Evaluation Template	The name of the template that the creator of the calibration event selected for the participant to use to score the interaction to be calibrated.

3. Listen to and/or watch the recording and using that information, in the Evaluation tab, respond to the questions in the Answer column.



Note: The Status of the respective interaction is on the right; in the example above, the interaction status is Draft.

When you click **Information**, an Information box opens.

The following table describes the details in the Information box.

Field/Column Name	Description
Evaluation Template	The name of the evaluation template used in the calibration event.
Created By	The logged in user. The username appears in the Lastname Firstname format.
Field/Column Name	**Description**
Created On	The date and time when the calibration evaluation is created. **Note:** The date and time appear only when the calibration evaluation is saved. This field displays N/A if the calibration evaluation is not saved even once.

Last Modified On	The date and time when the calibration evaluation was last modified. **Note:** • This field appears only after the calibration evaluation is saved. If the calibration evaluation is not saved even once, this field will not appear. • This field displays the date and time when the calibration evaluation is modified at least once, else it displays N/A.

4. If there is more than one interaction in the playlist, double-click the next interaction and respond to the questions in the Evaluation tab.

   Note: To complete the calibration event, you must score all interactions in the calibration event.

5. Once you have finished scoring the interactions for the calibration event, you must submit it for calibration by clicking the Evaluation menu and selecting **Submit**.

Note: If you have not finished scoring the calibration and want to complete it at a later time, you can select **Evaluation > Save as Draft**. Until the evaluation is submitted, the Calibration Results window does not include the evaluation in the Score or Standard Deviation.

The Evaluation menu items are enabled or disabled based on the calibration event status. The following table describes the conditions.

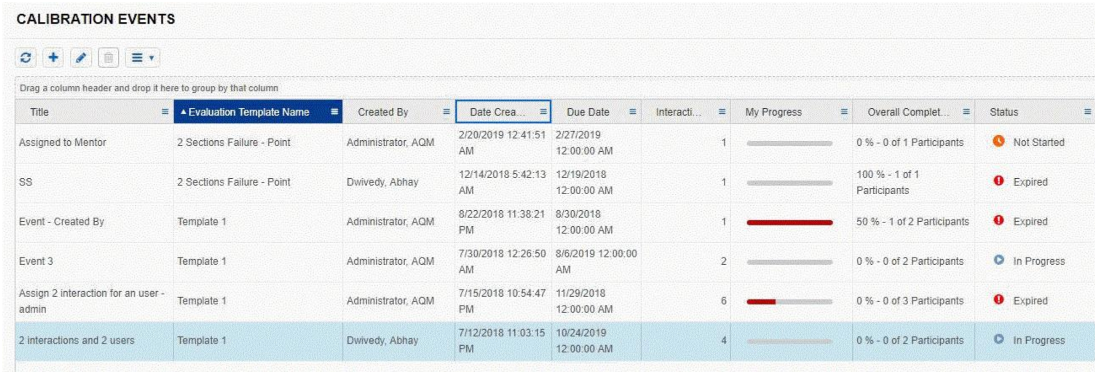
Menu Item	Description
Print Evaluation	Enabled only when the evaluation is submitted.
Cancel	Enabled when evaluation is in Create/Edit mode.
Edit Evaluation	Enabled when evaluation is saved and opened in Read-Only mode.
Save as Draft	Enabled in Create/Edit mode only when the evaluation has not been submitted; disabled when the evaluation is submitted.
Submit	Enabled in Create/Edit mode.

Note: When the interaction is scored, the status is Draft.

When the calibration event is submitted, the status is Complete with Actual Score.

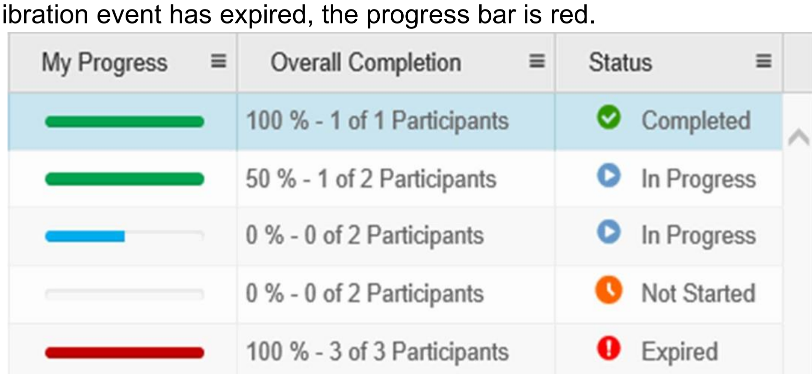
8.5.2 Calibration Event Progress and Status

On the Calibration Events window, in the table, you can view the progress (including an overall completion percentage) and status of the calibration events assigned to you, or that you created.



The My Progress column displays the progress made by the participant when evaluating the interaction associated with the calibration event.

- If the progress is less than 100%, the progress bar is blue.
- If the progress is 100%, the progress bar is green.
- If the calibration event has expired, the progress bar is red.



Note: If you hover your mouse over the My Progress column, the tool tip displays the overall complete percentage, which is also visible in the Overall Completion column.

The Status column displays the status of the calibration event with icons. The following list describes the values for this column.

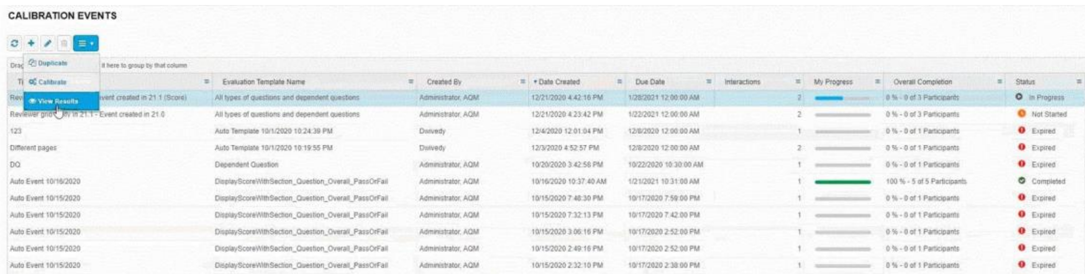
- **Not Started** - When the calibration event is created and no participants have scored any of the interactions.
- **In Progress** - When any one of the participants submit scores for any one of the interactions in the calibration event.
- **Completed** - When all participants have finished scoring all interactions under the calibration event.
- **Expired** - When a calibration event completion date has passed.

8.6 View Calibration Event Results

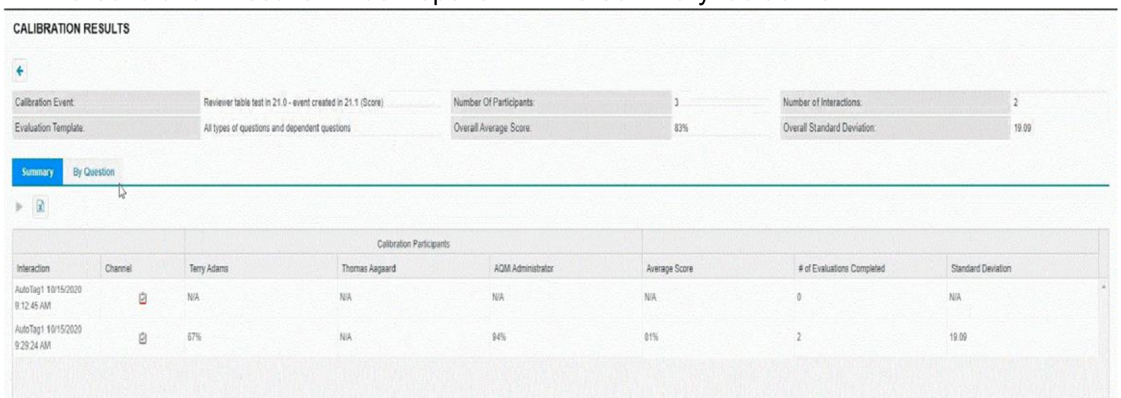
To view a calibration event result, you must be either the owner of or a participant in the event; you can view results regardless of the status of the event.

You can view calibration event results by performing the following steps.

1. On the Calibration Events window, select an event.
2. Click the menu button and select **View Results**.

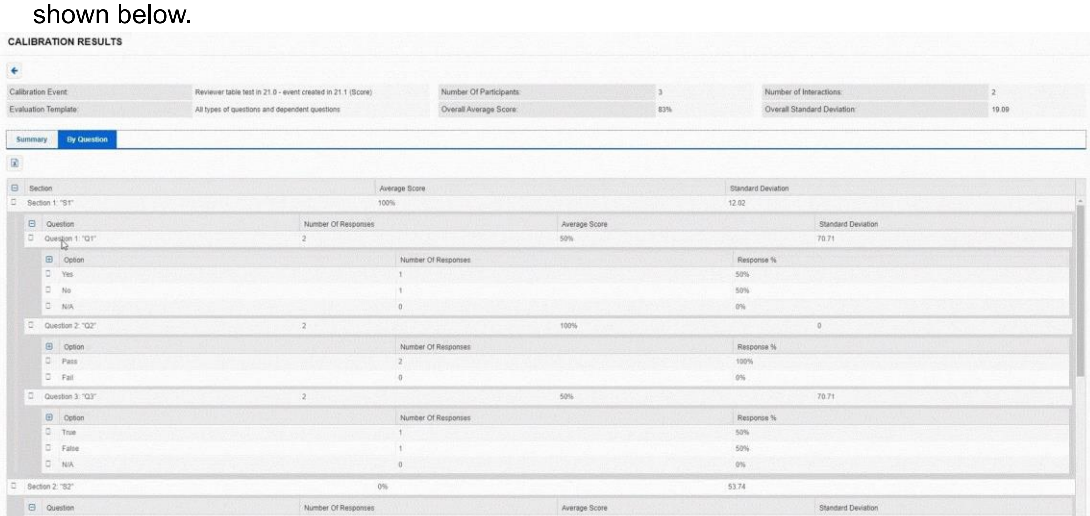


The Calibration Results window opens with the Summary tab active.



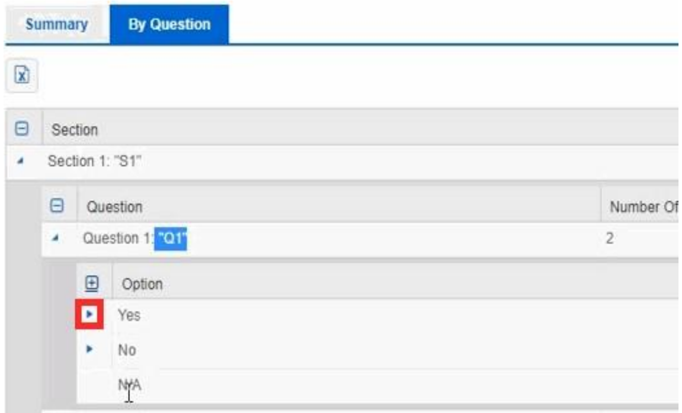
Note: To return to the Calibration Events window, click **Back**.

3. Go to the **By Question** tab and the questions related to the calibration event are listed as shown below.

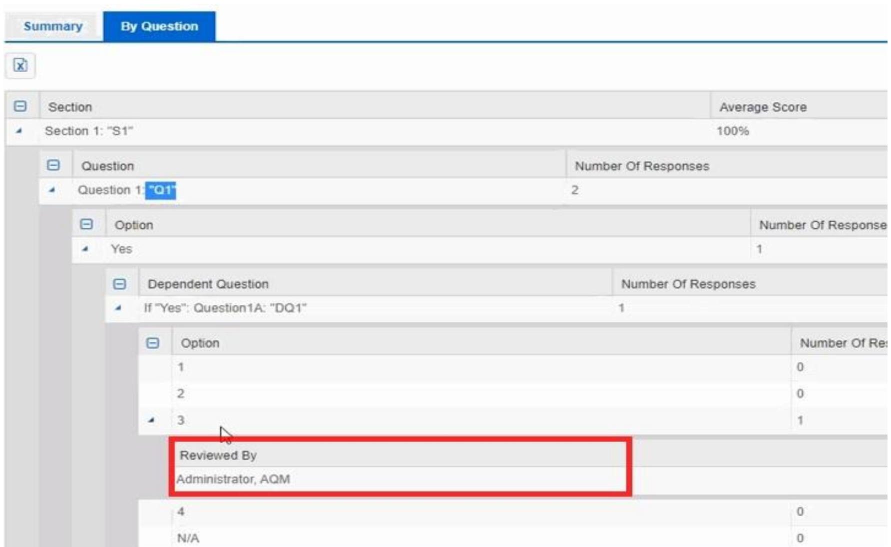


4. To view the dependent questions and the reviewer, click on the drill-down. *Example:*

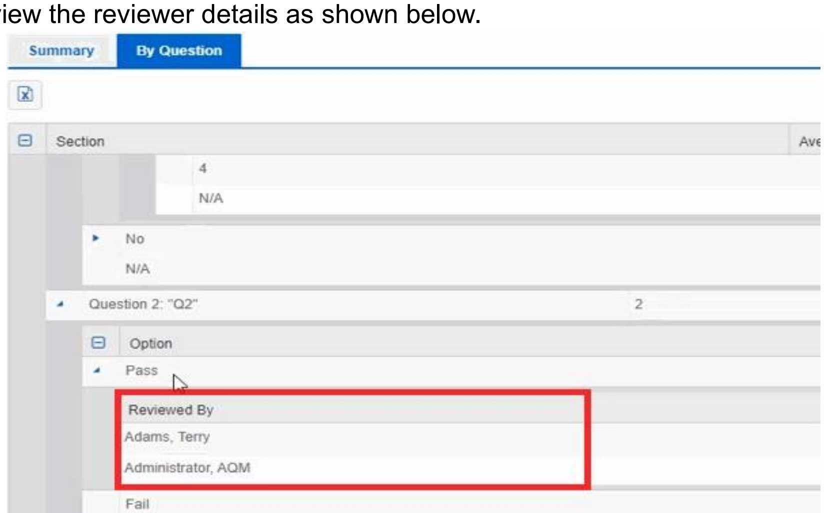
- Here, Q1 has a dependent question and it has Yes/No option, so click on the drilldown button as shown below.



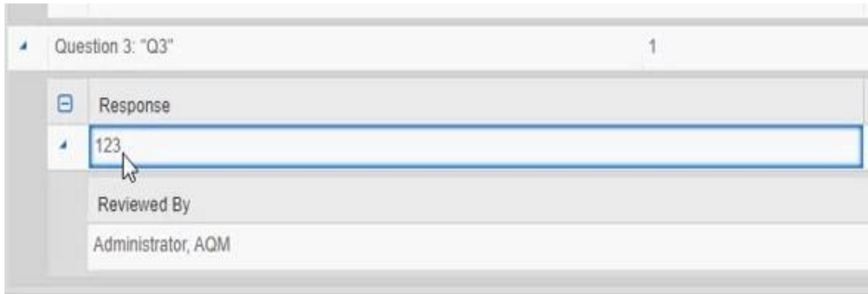
The options related to the question appear and click on the drill-down button to view the reviewer as shown below.



- The Q2 does not have any dependent question, so click on the drill-down button to view the reviewer details as shown below.



- For any free form questions, the reviewer responds to the question and the response will be shown on the grid as shown below.



5. When multiple reviewers are provided with any responses, then the responses will be shown in multiple rows.

8.6.1 Calibration Events Summary Tab

The following table describes the fields above the Summary tab.

Field	Description
Calibration Event	The name of the selected calibration event.
Evaluation Template	The name of the evaluation template assigned to the selected calibration event.
Number of Interactions	The total number of interactions assigned to the selected calibration event.
Number of Participants	The total number of users assigned to score the selected calibration event.
Field	**Description**
Overall Average Score	The average score of all the participants for all the interactions scored. The formula used is [Total Point Score of each User/Total Max Possible Score of each User]*100 For example, User1 scored Interaction1 as 50 and Interaction2 as 100; User2 scored Interaction1 as 75 and Interaction2 as 50. The overall average score is [(50+100+75+75+50)/(100+100+100+100)]*100 = 68.75%.
Overall Standard Deviation	The formula used to calculate the overall standard deviation is: $\sigma = \sqrt{\frac{1}{N}\sum_{i=1}^{N}(x_i - \mu)^2}$ For example, User1 score is 100 and User2's score is 0, then 100,0 is used for the Standard Deviation formula, and the result is 70.71 (rounded to the nearest 100th decimal point).

The following table describes the columns on the Summary tab, which displays for interactions that are assigned to the selected calibration event, along with the scores completed by each user.

Column Name	Description
Interaction	Interactions that are tagged for calibration.
Channel	Displays the channel icon (for example, Voice, Voice and Screen, Screen Only, Chat, SMS, or Task).
Calibration Participants	The user name of each participant displays in a separate column. Each user column contains the calibration score for the respective interactions.
Average Score	The average of evaluated score by user for the respective interaction. All scores display in percentage. **Note:** If the template scoring type is Total Points or Pass/Fail, then scores convert to percentage, and display here. The interactions overall score displays here. For example, User1’s score is 100 and Interaction2 as 100; User2’s score is 0, then the average score is [(100+0)/(100+100)]*100 = 50%.
# of Evaluations Completed	The number of evaluations scored and completed for the respective interaction. **Note:** If the scored evaluation is in Draft mode, it does not count as a completed evaluation.
Column Name	**Description**
Standard Deviation	The standard deviation formula is $\sigma = \sqrt{\frac{1}{N}\sum_{i=1}^{N}(x_i - \mu)^2}$ For example, User1 score is 100 and User2’s score is 0, then 100,0 is used for the Standard Deviation formula, and the result is 70.71 (rounded to the nearest 100th decimal point).

8.6.1.1 Play an Interaction from the Summary Tab

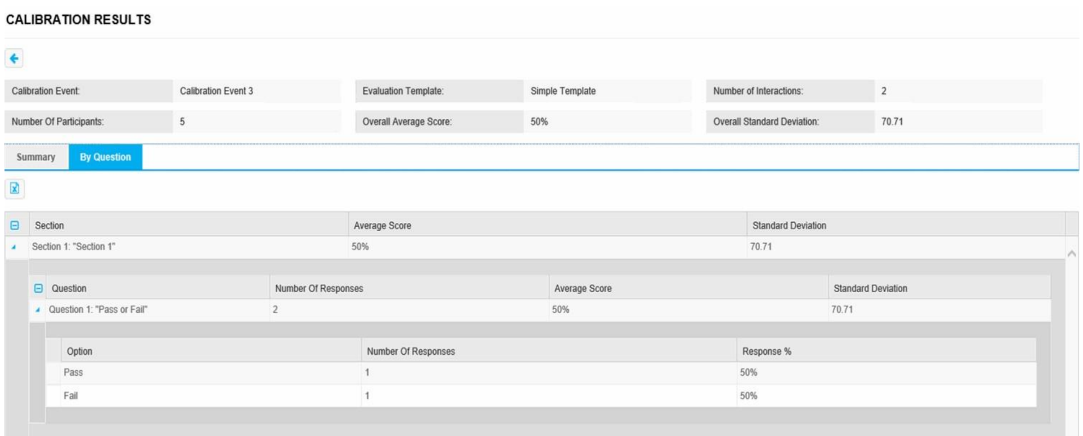
If you want to play an interaction while viewing calibration results on the Summary tab, select the interaction and click **Play**. The Media Player opens and loads the selected interaction.

Note: You cannot click Play when the interaction is a Task.

To close the Media Player and return to the Summary tab, click **Close**.

8.6.2 Calibration Events By Question

Click **By Question** tab.



The following table describes the main header columns on the By Question tab.

Column Name	Description
Section	The name of the section.

Column Name	Description
Average Score	The average of the section. All scores display as a percentage. **Note:** If the template scoring type is Total Points or Pass/Fail, then scores convert to percentage, and display here. [Total Point Score of Section/Total Max Possible Score of Section]*100 For example, User1's score for Section1 is 100 and Section2 is 0, then the average score is [(100+0)/(100+100)]*100 = 50%.
Standard Deviation	The standard deviation formula is $$\sigma = \sqrt{\frac{1}{N}\sum_{i=1}^{N}(x_i - \mu)^2}$$ For example, User1 score is 100 and User2's score is 0, then 100,0 is used for the Standard Deviation formula, and the result is 70.71 (rounded to the nearest 100th decimal point).

The following table describes the Question sub-section columns on the By Question tab.

Column Name	Description
Question	The question itself.
Number of Responses	The number of responses to the question, including any N/A response.
Average Score	Average score of the section, displayed as a percentage, including if the question is a Point Score or a Pass/Fail question. The formula used is [Total Point Score of each User/Total Max Possible Score of each User]*100 For example, User1's score for Question1 is 100 and Questtion2 is 0, then the average score is [(100+0)/(100+100)]*100 = 50%.
Standard Deviation	The standard deviation formula is $\sigma = \sqrt{\frac{1}{N}\sum_{i=1}^{N}(x_i - \mu)^2}$ For example, User1 scored Question1 as 100 and Question2 as 0, then 100,0 is used for the Standard Deviation formula, and the result is 70.71 (rounded to the nearest 100th decimal point).

The following table describes the columns in the sub-section under Question.

Column Name	Description
Option	The type of option (for example, Pass/Fail) for the question.
Number of Responses	The number of time that the option is selected by a user.
Response %	The percentage of the responses for the option, based on the users assigned to that calibration event. The formula used for this percentage is [Number of Responses for that option/Total number of responses for that question]*100

If an option contains dependent questions, then another table displays under the Option subsection. The following table describes the columns in the table.

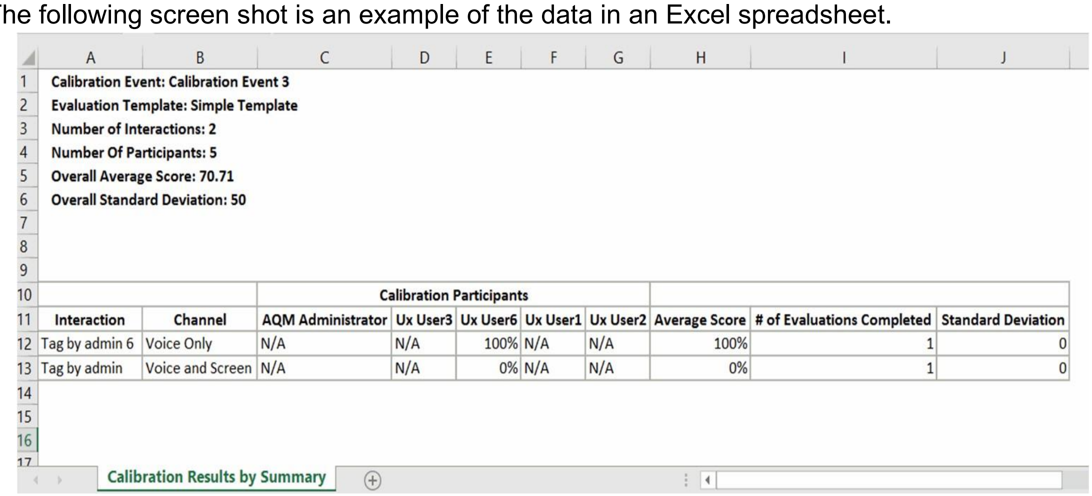
Column Name	Description
Dependent Question	The name of the dependent question.
Number of Responses	The number of responses to the question.
Average Score	Average score of the section, displayed as a percentage, including if the question is a Point Score or a Pass/Fail question. The formula used is [Total Point Score of Question for each User/Total Max Possible Score of Question for each User]*100 For example, User1's score for Question1 is 100 and Questtion2 is 0, then the average score is [(100+0)/(100+100)]*100 = 50%.

Column Name	Description
Standard Deviation	The standard deviation formula is $$\sigma = \sqrt{\frac{1}{N}\sum_{i=1}^{N}(x_i - \mu)^2}$$ For example, User1 scored Question1 as 100 and Question2 as 0, then 100,0 is used for the Standard Deviation formula, and the result is 70.71 (rounded to the nearest 100th decimal point).

8.6.3 Export Results Data to Excel

If you want to export the content of the Summary tab or the By Question tab to Excel, then on the tab from which you want to export the data, click **Export to Excel**.

The following screen shot is an example of the data in an Excel spreadsheet.



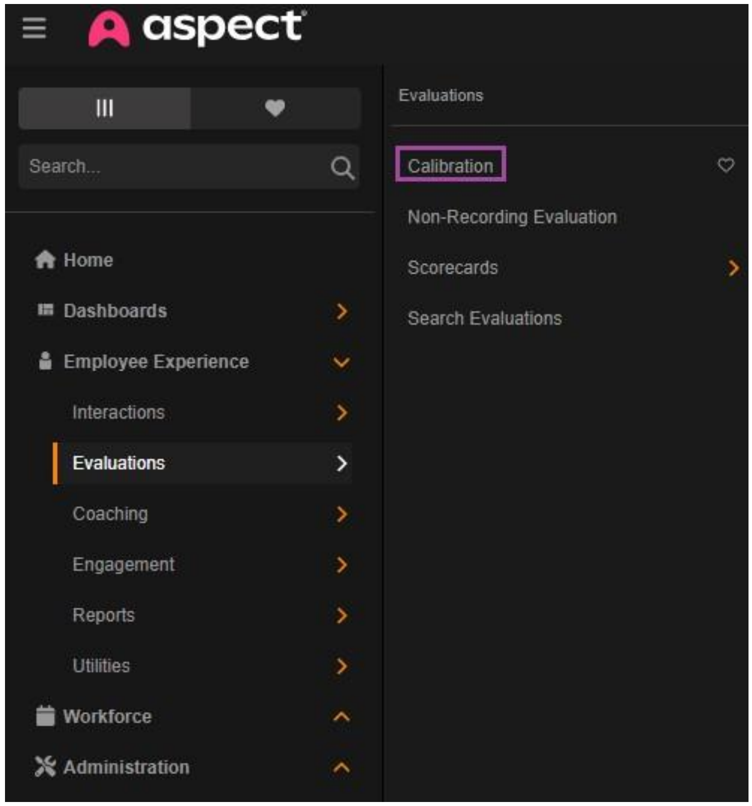
Calibration Event: Calibration Event 3
Evaluation Template: Simple Template
Number of Interactions: 2
Number Of Participants: 5
Overall Average Score: 70.71
Overall Standard Deviation: 50

		Calibration Participants							
Interaction	Channel	AQM Administrator	Ux User3	Ux User6	Ux User1	Ux User2	Average Score	# of Evaluations Completed	Standard Deviation
Tag by admin 6	Voice Only	N/A	N/A	100%	N/A	N/A	100%	1	0
Tag by admin	Voice and Screen	N/A	N/A	0%	N/A	N/A	0%	1	0

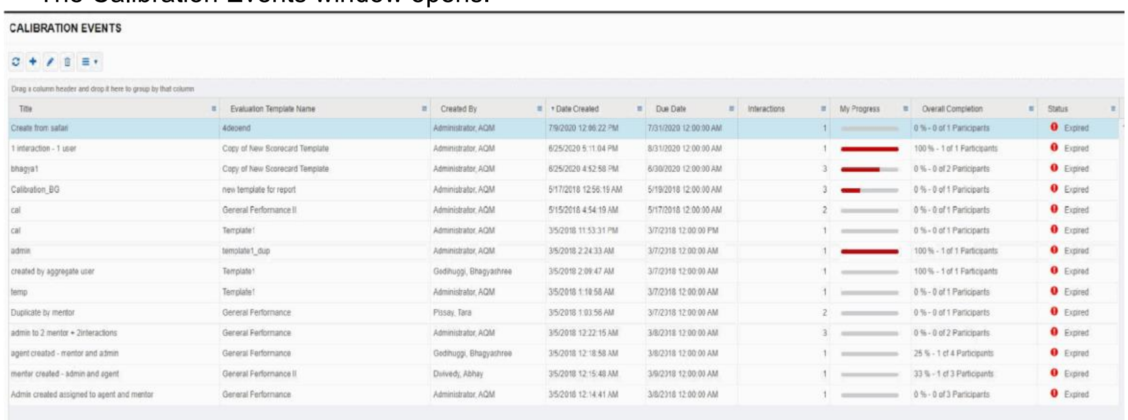
8.7 Delete a Calibration Event

This section describes how to delete a calibration event in Workforce Engagement Management.

1. Log in to Workforce Engagement Management as an Administrator.
2. From the Dashboard, click **Employee Experience**.
3. Under **Evaluations**, click the **Calibration** link.



The Calibration Events window opens.



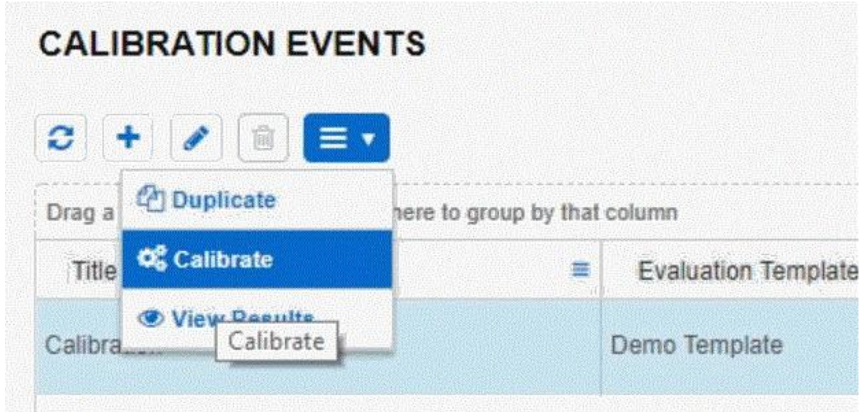
CALIBRATION EVENTS

Drag a column header and drop it here to group by that column

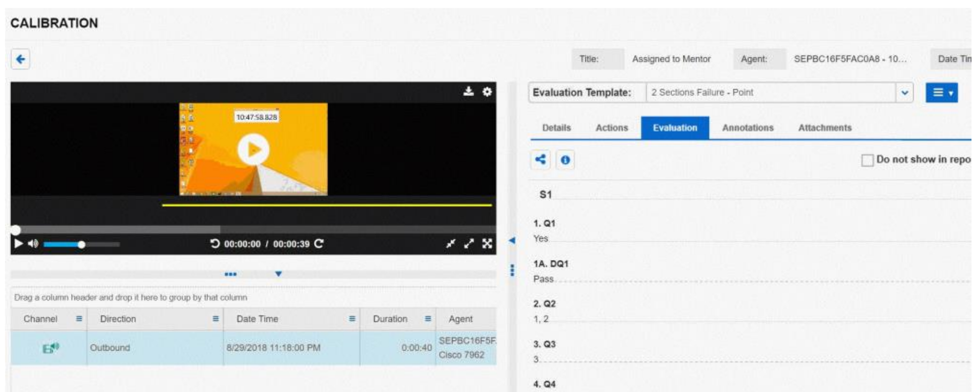
Title	Evaluation Template Name	Created By	Date Created	Due Date	Interactions	My Progress	Overall Completion	Status
Create from safari	4deoend	Administrator, AQM	7/9/2020 12:06:22 PM	7/31/2020 12:00:00 AM	1		0 % - 0 of 1 Participants	Expired
1 interaction - 1 user	Copy of New Scorecard Template	Administrator, AQM	6/25/2020 5:11:04 PM	8/31/2020 12:00:00 AM	1		100 % - 1 of 1 Participants	Expired
bhagya1	Copy of New Scorecard Template	Administrator, AQM	6/25/2020 4:52:58 PM	6/30/2020 12:00:00 AM	3		0 % - 0 of 2 Participants	Expired
Calibration_BG	new template for report	Administrator, AQM	5/17/2018 12:56:19 AM	5/19/2018 12:00:00 AM	3		0 % - 0 of 1 Participants	Expired
cal	General Performance II	Administrator, AQM	5/15/2018 4:54:19 AM	5/17/2018 12:00:00 AM	2		0 % - 0 of 1 Participants	Expired
cal	Template1	Administrator, AQM	3/5/2018 11:53:31 PM	3/7/2018 12:00:00 PM	1		0 % - 0 of 1 Participants	Expired
admin	template1_dup	Administrator, AQM	3/5/2018 2:24:33 AM	3/7/2018 12:00:00 AM	1		100 % - 1 of 1 Participants	Expired
created by aggregate user	Template1	Godihuggi, Bhagyashree	3/5/2018 2:09:47 AM	3/7/2018 12:00:00 AM	1		100 % - 1 of 1 Participants	Expired
temp	Template1	Administrator, AQM	3/5/2018 1:10:58 AM	3/7/2018 12:00:00 AM	1		0 % - 0 of 1 Participants	Expired
Duplicate by mentor	General Performance	Pissay, Tara	3/5/2018 1:03:56 AM	3/7/2018 12:00:00 AM	2		0 % - 0 of 1 Participants	Expired
admin to 2 mentor + 2interactions	General Performance	Administrator, AQM	3/5/2018 12:22:15 AM	3/8/2018 12:00:00 AM	3		0 % - 0 of 2 Participants	Expired
agent created - mentor and admin	General Performance	Godihuggi, Bhagyashree	3/5/2018 12:18:58 AM	3/8/2018 12:00:00 AM	1		25 % - 1 of 4 Participants	Expired
mentor created - admin and agent	General Performance II	Dwivedy, Abhay	3/5/2018 12:15:48 AM	3/9/2018 12:00:00 AM	1		33 % - 1 of 3 Participants	Expired
Admin created assigned to agent and mentor	General Performance	Administrator, AQM	3/5/2018 12:14:41 AM	3/8/2018 12:00:00 AM	1		0 % - 0 of 3 Participants	Expired

4. In the list, highlight the calibration event that you want to delete by selecting it.

   Note: The Delete button will be enabled when the calibration event is **expired**.
5. From the Calibration menu, select the **Calibrate** option.



The Calibration window opens with the Evaluation tab active in the right pane.



Note: You can only delete a calibration evaluation if the calibration event is not expired.

The Delete option is enabled once the user completes the calibration evaluation for the calibration event; otherwise the Delete option is disabled.

Clicking Delete only deletes the calibration evaluation for the logged-in user.

6. From the Evaluation menu, click **Delete**.

A Warning window opens.

- If the calibration event has, for example, two interactions, and user scored both interactions, then the **My Progress** window displays 100%. However, when a user deletes one evaluation that the user scored, then the **My Progress** window displays 50%.
- If the Status is **Expired**, the user cannot delete the calibration evaluation.
- If the Status is **In Progress**, the Status continues to display **In Progress**
- If the calibration event has, for example, two interactions, the user scored both interactions, the event is assigned for two users, then when the second user has completed both evaluations, the **Overall Completion** displays 50% - 1 of 2 Participants.
- On the View Result window, the system generates the results (Averaged Results) by excluding the deleted evaluation.

9. Reporting in Workforce Engagement Management

This chapter describes how to save a report, view a report, run a report and the available reports in Aspect Quality with Workforce Engagement Management.

- Accessing Reports on page 9-298
- Save a Report on page 9-300
- Edit a Report on page 9-339
- View a Report on page 9-344

9.1 About Quality Reports

Using Quality, you can view quality data for individuals and evaluation templates. Information displays in tabular-style reports between which you can navigate the data.

You can generate the following reports in Quality.

- Save a Report on page 9-300

Note: You can access Quality reports if you are a user with Administrator or Mentor privileges (the user must have Create Report right in his user profile to add a new report) in Workforce Engagement Management. For a Mentor to report on agents, the Mentor must have permissions to those specific teams and agents.

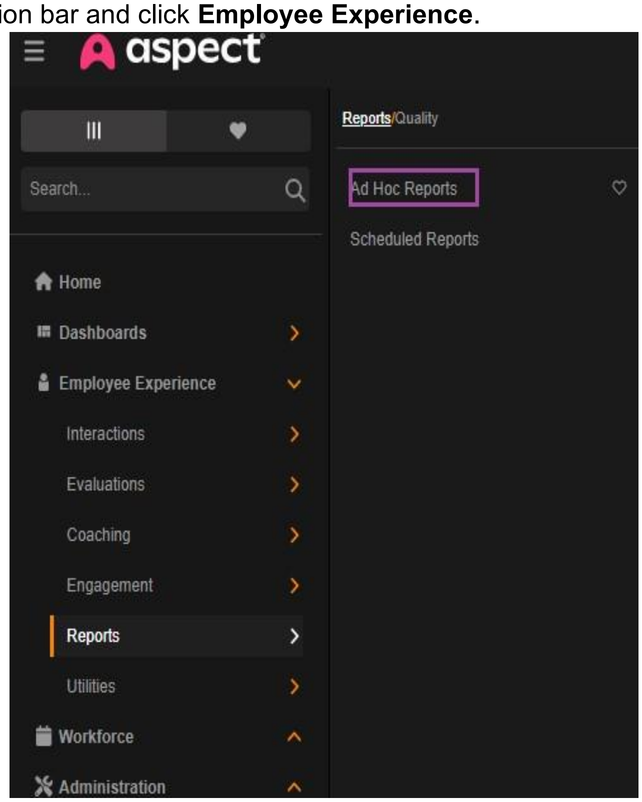
The Evaluation Detail report and the Quality Score Trend report only display data for interaction records. If the system Archiver process automatically deletes interaction data, or if a user manually deletes it, then the data is no longer available for reports.
As you navigate through the Workforce Engagement Management application, the system remembers the last report search criteria that you entered and loads it, *only for the lifetime of the browser session.*

Note: The above applies only to the Evaluation Detail Report and Audit Activity Detail Report. Now, the Quality Score Trend report is able to save the report in the database.

9.2 Accessing Reports

You can navigate to any of the Reports by performing the following steps:

1. Log in to Workforce Engagement Management as an Administrator or a Mentor.
2. Go to Navigation bar and click **Employee Experience**.



3. Go to **Reports**, select **Quality**.
4. To complete the filter criteria for the report which you want to access, click on **Scheduled Reports** or **Ad Hoc Reports**.

   - **Scheduled Reports** - When the user wants to generate a report or view an existing Scheduled Report on a scheduled time such as One Time, Daily, Weekly and Monthly, then select Scheduled Reports. The Aspect Quality system generates the report based on the scheduled time.
     Example: The user wants to check the daily report. So, if the user enables the schedule and sets the Date Type as Daily, the Aspect Quality system generates the reports on daily basis.

- **Ad Hoc Reports -** When the user wants to generate a report manually, then select Ad Hoc reports.
- Scheduled Reports and Ad Hoc Reports contain the Quality Score Trend report type.

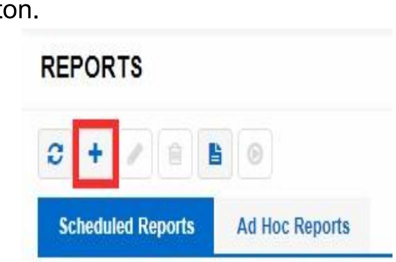
5. The **Reports** window appears which consists of the Scheduled Reports and Ad Hoc Reports tabs. The tab is highlighted based on the selected reports type such as Scheduled Reports or Ad Hoc Reports. The Reports grid consists of the columns listed on the following table.

Column Name	Description
Name	The name of the report.
Description	The description of the report.
Report Type	The report type is displayed in this column.
Created Date Time	The date and time when the report was created.
Created By	The creator of the report.
Column Name	**Description**
Last Run Date	The date and time when the report run last time.
Last Run By	The name who runs the report last time.
Schedule	If the report is scheduled for daily, weekly, monthly. **Note:** This column is applicable **only for the Scheduled Reports**.
Start Date	The date when the scheduled report was started. **Note:** This column is applicable **only for the Scheduled Reports.**
End Date	The date when the scheduled report will be ended. **Note:** This column is applicable **only for the Scheduled Reports**.
Next Scheduled Date	The next date of the scheduled report. **Note:** This column is applicable **only for the Scheduled Reports**.
Status	The status such as Success or Failed.
Active	If the report is active then checkmark will be shown on the column.

9.3 Save a Report

To save a Report (regardless of whether you are in the Scheduled Reports tab or Ad Hoc Reports tab in the Reports window) follow the steps below.

1. Click on the Add + button.

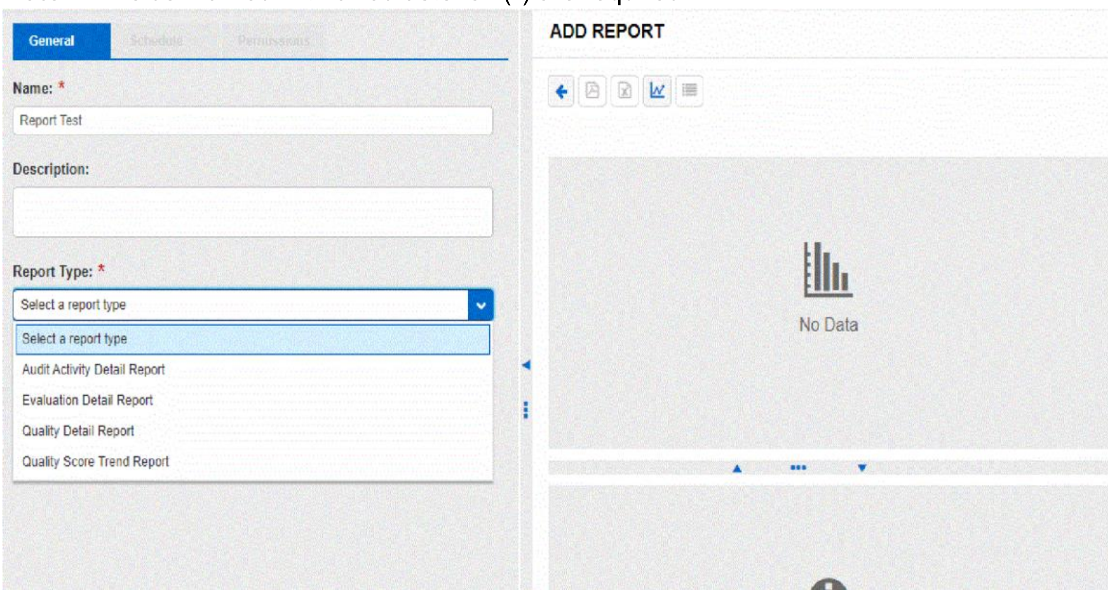


2. Add Report window appears. By default, the General tab will be selected as shown below.

9.3.1 General Tab

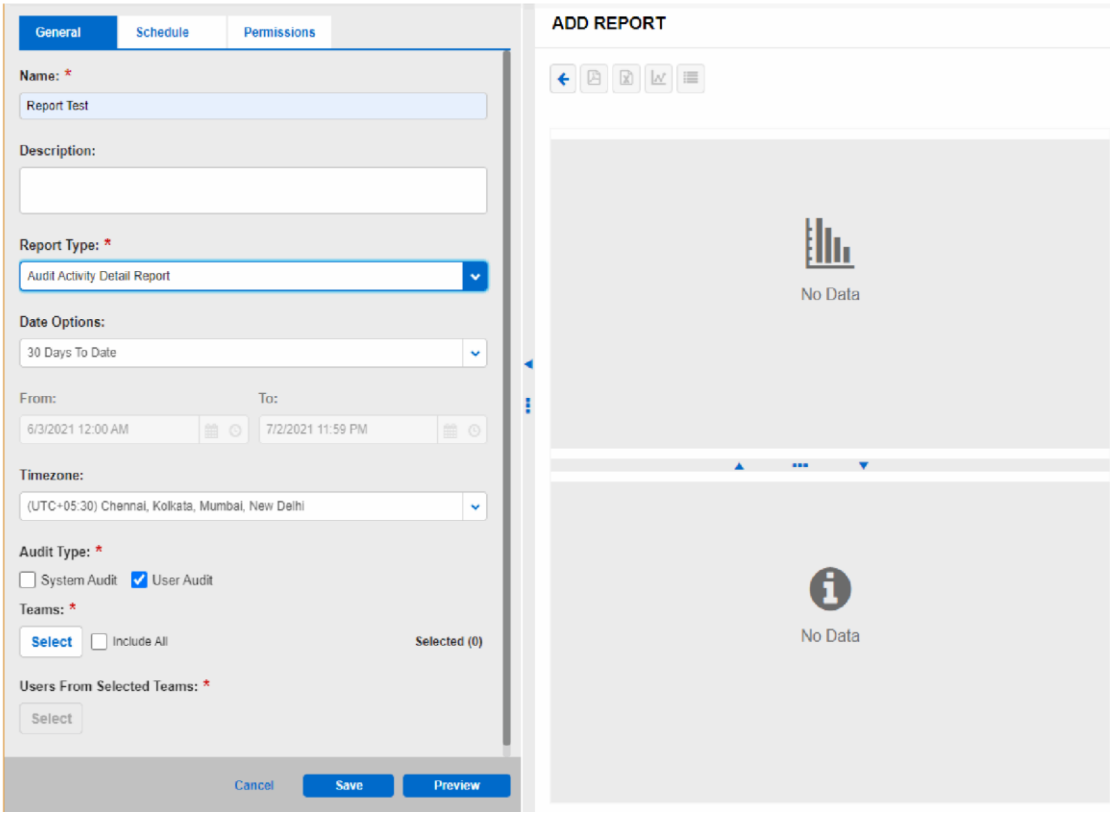
1. Under the General tab, type a unique name for the report in the Name field.
2. Add description (if required) of the report in the Description field.
3. Click on the drop-down list of the Report Type field. The listed Report Types are Audit Activity Detail Report, Evaluation Detail Report, Quality Detail Report and Quality Score Trend Report

Note: All fields marked with a red asterisk (*) are required.



9.3.1.1 Audit Activity Detail Report

Select the Audit Activity Detail Report to review activities logged for users/system over a specific date range.

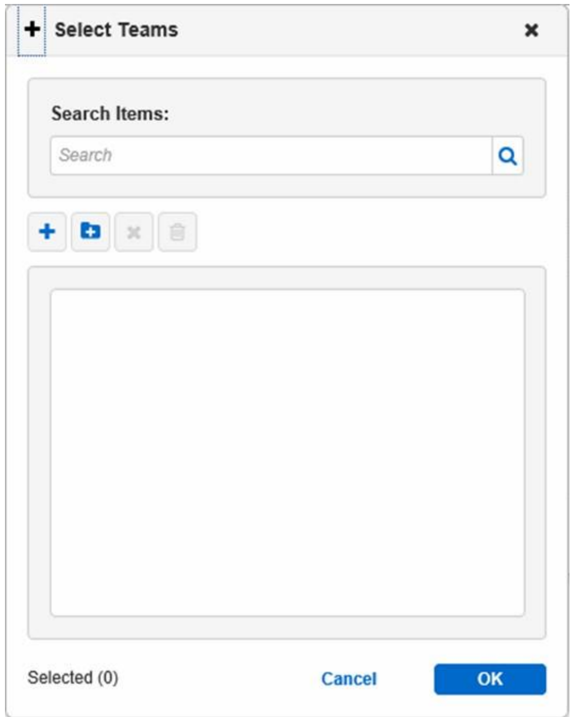


1. Select the Date Options from the drop-down list. To choose any date range based on your requirement or click on Custom Date Range. If you select Custom Date Range, the From and To fields are enabled.
2. Choose the date and time range on From and To field. To select date, click on icon, and to select time, click on icon.

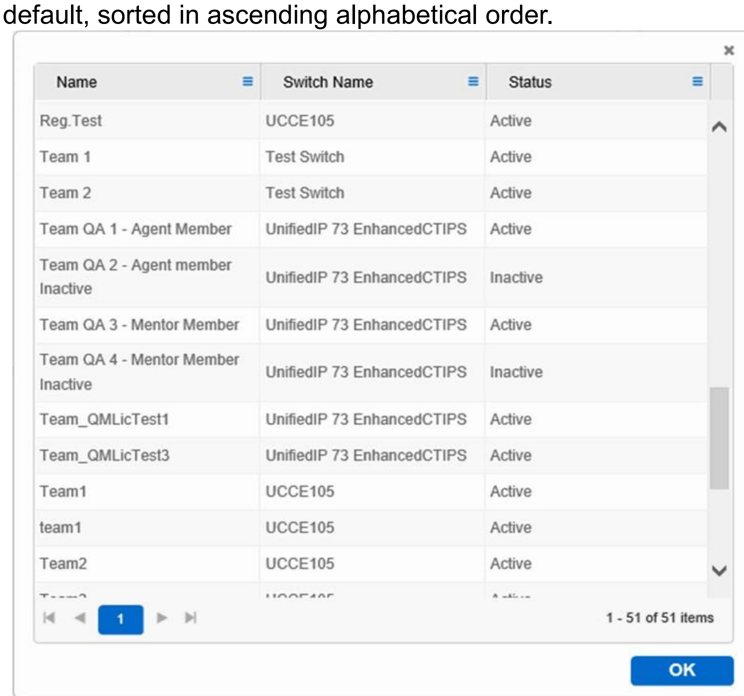
   Note: If you have selected Custom Date Range, then the date range must be within the last four years.
3. By default, the Timezone is selected based on your location. To change the Timezone, click on the drop-down and choose your required timezone.
4. Click on the **System Audit** or **User Audit** or **both** as per your requirement.

   Note: If you select only System Audit, the Teams and User From Selected Teams will be disabled.
5. After selecting the **User Audit**, the **Teams** button will be enabled.
6. Under **Teams**, click Select. The Select Teams window opens.

   Note: The user can click on **Include All** checkbox to include all the teams or else click on Select button to add specific teams.
7. Click on the icon in the Search Items field and select Yes. A window opens with a list of available teams.



8. Search for a team in the Search Items text box by clicking Search and select Yes. A window opens with the list of available teams. Active teams display in the list box, and the table is, by default, sorted in ascending alphabetical order.



Note:

- To include all of the teams, click on **Include All** checkbox.
- If you are logged in as an Administrator, you can search for and select any of the teams.
- If you are logged in as a Mentor, you can only search for and select teams for which have either Score/Review permission in your user profile.

- By default, only Active teams will be displayed. Refer to Edit My Preferences on page 3-147, if you would like to see the Inactive teams along with the Active teams in the reports.

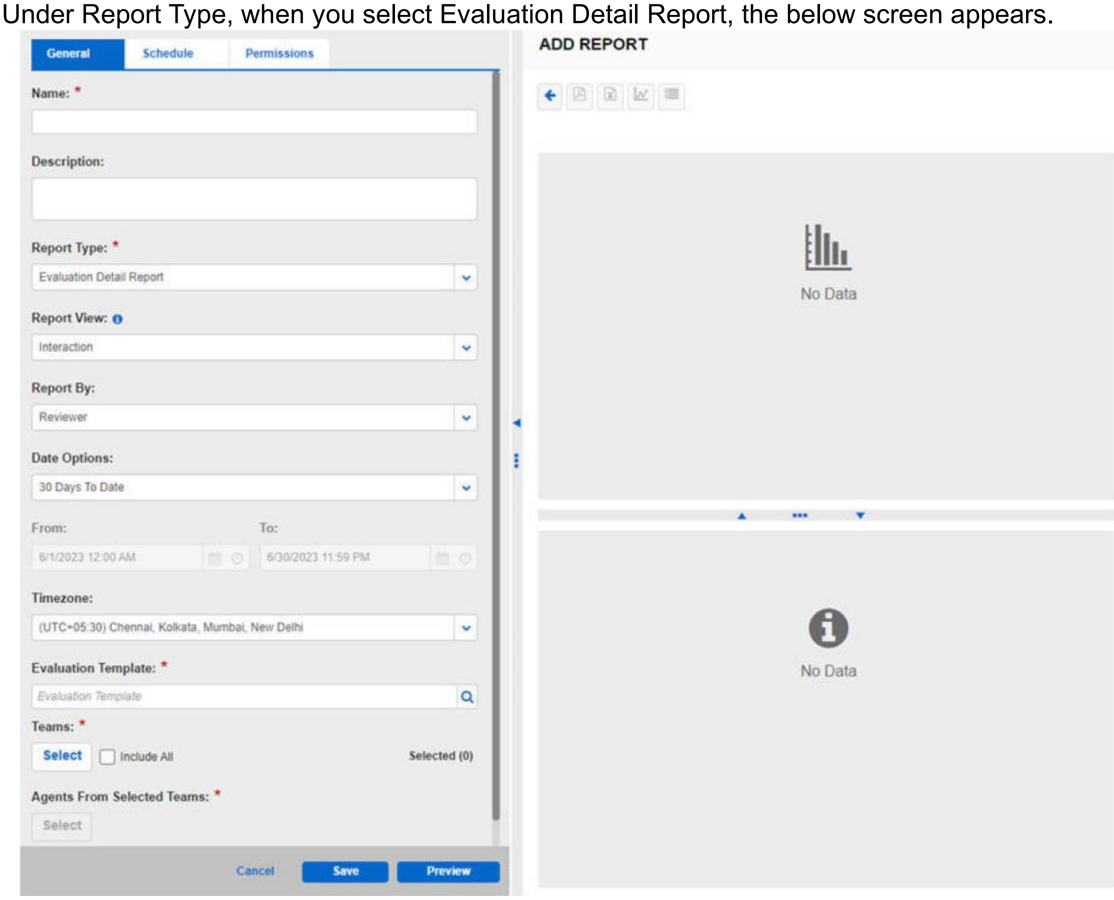
9. After selecting the teams, the **Users From Selected Teams** field will be enabled.

10. Click on the  icon in the Search User(s) field and select Yes. A window opens with a list of available users.

Select the user as per your requirement and click **OK**.

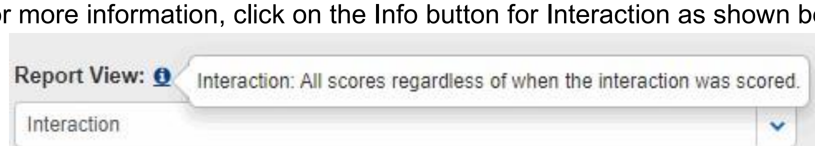
9.3.1.2 Evaluation Detail Report

Select the **Evaluation Detail Report** to review the details of the evaluation template. This report provides the details of an evaluation template in section, Questions and dependent hierarchy such as Question Type, Points Earned, Points Possible, Success Rate and Total Response. Under Report Type, when you select Evaluation Detail Report, the below screen appears.

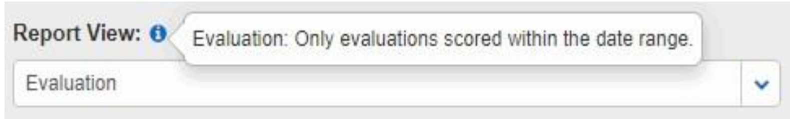


1. Click on the Report View drop-down and select Interaction or Evaluation.

   Note: For more information, click on the Info button for Interaction as shown below.

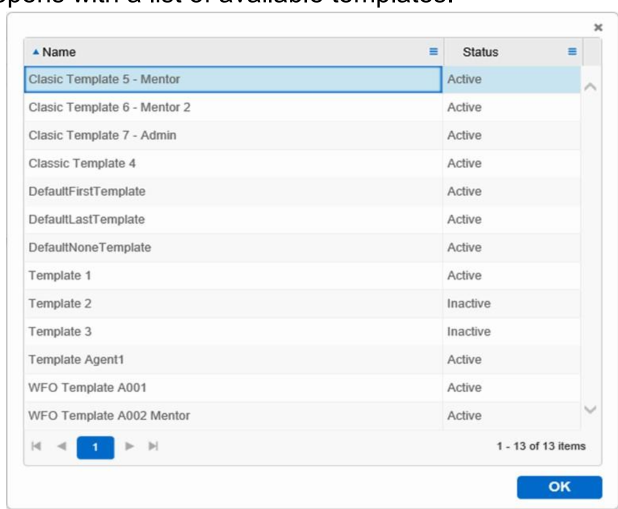


For more information, click on the Info button for Evaluation as shown below.



2. Select the Report By drop-down list and select Agent or Reviewer. Select the Agent option to display the scores grouped on the basis of agents, whereas the Reviewer option will display the scores grouped on the basis of reviewer. By default, the system selects the Reviewer as an option. The user can change the default option, based on the requirement.
3. Select the Date Options from the drop-down list. To choose any date range based on your requirement, click on Custom Date Range. If you select Custom Date Range, the From and To fields are enabled.
4. Choose the date and time range on From and To field. To select date, click on  icon and for time,  icon.

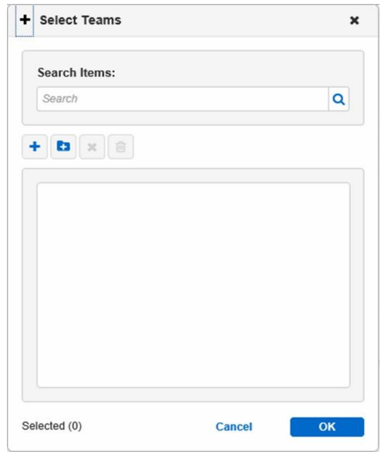
   Note: If you have selected Custom Date Range, then the date range must be within the last four years.
5. By default, the Timezone is selected based on your location. To change the Timezone, click on the drop-down and choose your required timezone.
6. Under the Evaluation Template field, click on the  icon in the Search Items field, and select Yes. A window opens with a list of available templates.



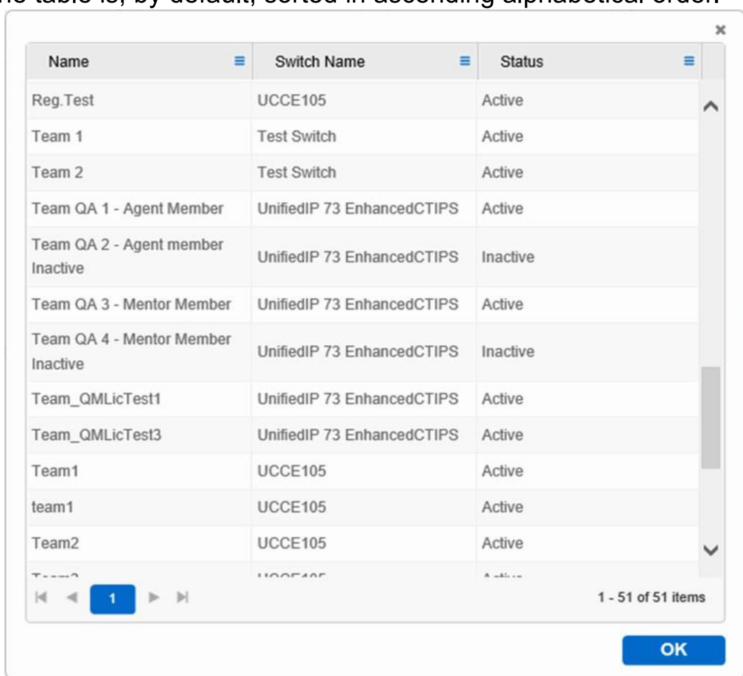
   Active and Inactive templates display in the list; see the Status column. Select the template as required.

   Note:

   - Select only one template at a time.
   - If you are logged in as an Administrator, you have access to all templates.
   - If you are logged in as a Mentor, you have access to templates based on how the evaluations assigned to you:
   - By default, only Active evaluation templates will be displayed. Refer to Edit My Preferences on page 3-147, if you would like to see the Inactive users along with the Active evaluation templates in the search criteria.
7. Once you have selected the template, click OK. The templates window closes and the Select Evaluation Template window is active.
8. Under **Teams**, click Select. The Select Teams window opens.



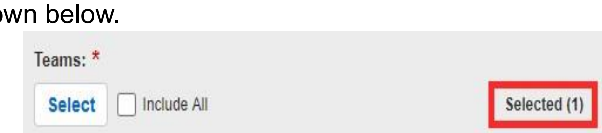
9. Search for a team in the Search Items text box by clicking Search and select Yes. A window opens with the list of available teams. Both Active and Inactive teams display in the list box, and the table is, by default, sorted in ascending alphabetical order.



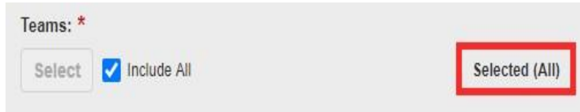
Note:

- If you are logged in as an Administrator, you can search for and select any of the teams.
- If you are logged in as a Mentor, you can only search for and select teams for which have either Score/Review permission in your user profile.
- If you select the **Teams** criteria in prior versions, you will be able to see Active teams in the Search dialog under the Status column. By default, only Active users will be displayed. Refer to Edit My Preferences on page 3-147, if you would like to see the Inactive teams along with the Active teams in the search criteria.

10. Click OK to return to the General tab. Under the Teams section, The number of Teams are displayed, as shown below.



Note: If you have checked the Include All, then the Select button will be disabled and “All” will be displayed as shown below.



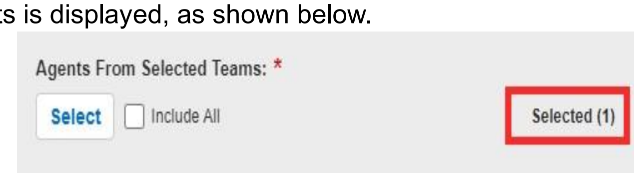
11. The **Select** button, under the **Agents From Selected Teams**, is enabled. Click on the Select button, the Select Agent(s) window opens.

12. Search for an Agent in the Search Items text box by clicking Search and select Yes. A window opens with the list of available agents **for the selected team**.

Note: If you select the **Agents** criteria in prior versions, you will be able to see Active users in the Search dialog under the Status column. By default, only Active users will be displayed. Refer to Edit My Preferences on page 3-147, if you would like to see the Inactive users along with the Active users in the search criteria.

13. Select the Agent and click OK.

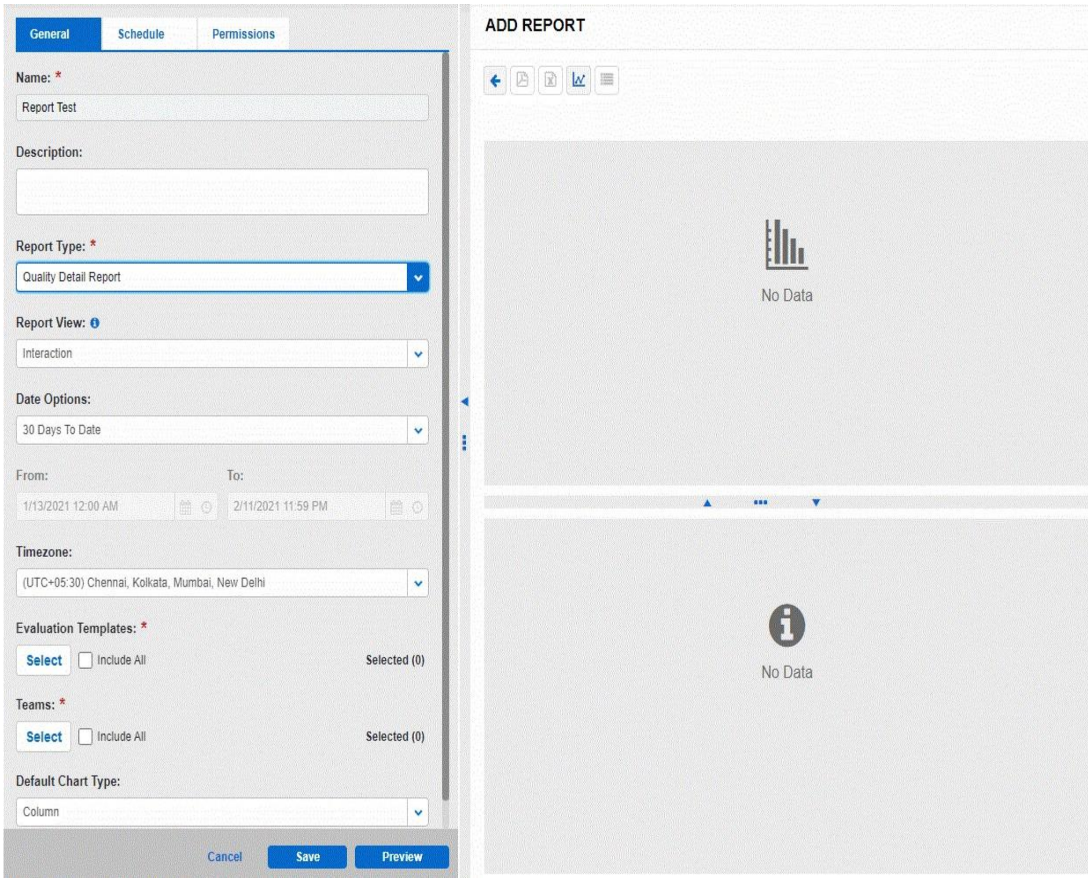
14. Click OK to return to the General tab. Under the **Agent From Selected Teams** section, the number of Agents is displayed, as shown below.



Note: If you have checked the Include All, then the Select button will be disabled and “All” will be displayed as shown below.

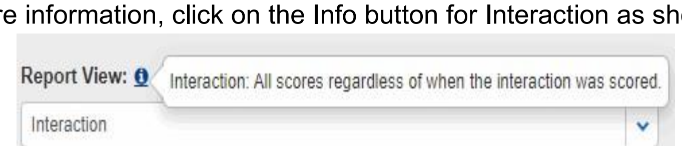
9.3.1.3 Quality Detail Report

Select the **Quality Detail Report** to review the details of the quality score of agents in a team for interactions evaluated against the specified evaluation templates. This report provides the ability to display you the High Score/ Average Score/ Low Score and number of evaluations scores for each Evaluation Template and provides you with the ability to drill down from Templates to Teams. Also, it allows to view the High Score/ Average Score/ Low Score and number of evaluations scored for the agents in each selected team, provides you with the ability to drill down to agent level, and you further drill down the details of the evaluations at each agent level. Under Report Type, when you select Quality Detail Report, the below screen appears.

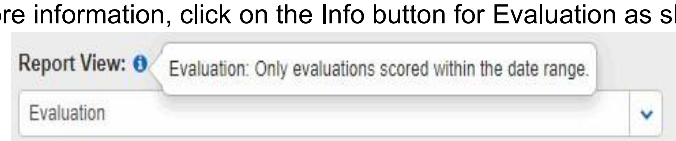


1. Click on the Report View drop-down and select Interaction or Evaluation.

   Note: For more information, click on the Info button for Interaction as shown below.

   For more information, click on the Info button for Evaluation as shown below.

2. Select the Date Options from the drop-down list. To choose any date range based on your requirement, click on Custom Date Range. If you select Custom Date Range, the From and To fields are enabled.

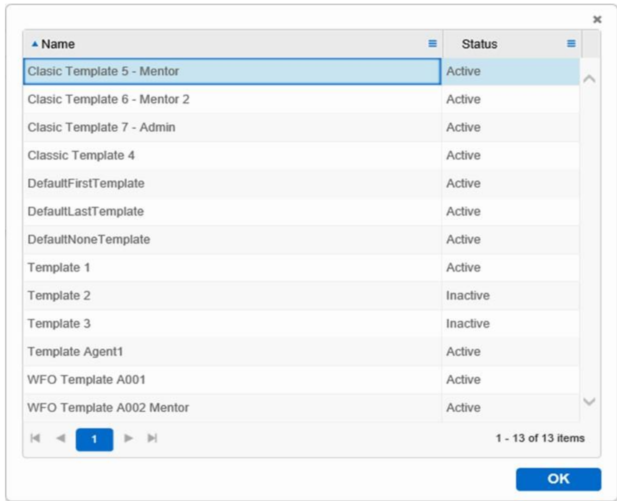
3. Choose the date and time range on From and To field. To select date, click on icon and for time, icon.

   Note: If you have selected Custom Date Range, then the date range must be within the last four years.

4. By default, the Timezone is selected based on your location. To change the Timezone, click on the drop-down and choose your required timezone.

5. Under the Evaluation Template field, select a template specific to the evaluations that you want to see by clicking Select button (if you want to include all of the available evaluation templates, then click on the Include All check box). The Select Evaluation Template window appears.

6. Click on the icon in the Search Items field and select Yes. A window opens with a list of available templates.



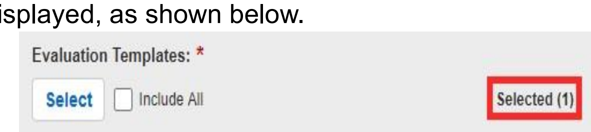
Active and Inactive templates display in the list; see the Status column. Select one template or multiple templates as required. To select multiple templates, **CTRL+ Left-click** on the templates.

Note:

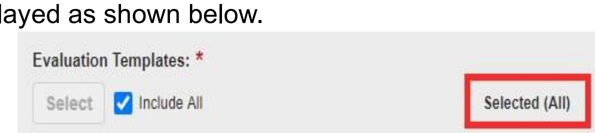
- If you are logged in as an Administrator, you have access to all templates.

  If you are logged in as a Mentor, you have access to templates based on whether the evaluations are assigned to you.
- By default, only Active evaluation templates will be displayed. Refer to Edit My Preferences on page 3-147, if you would like to see the Inactive users along with the Active evaluation templates in the search criteria.

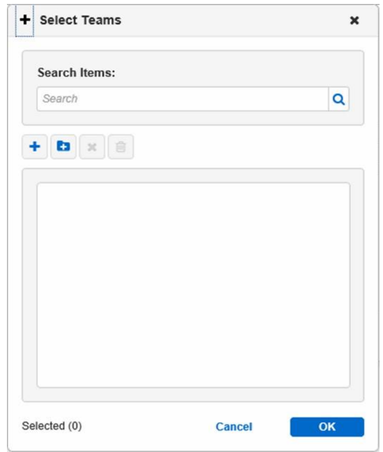
7. Once you have selected the template, click OK. The templates window closes and the Select Evaluation Template window is active.
8. Click OK to return to the General tab. Under the Evaluation Templates section, the number of templates is displayed, as shown below.



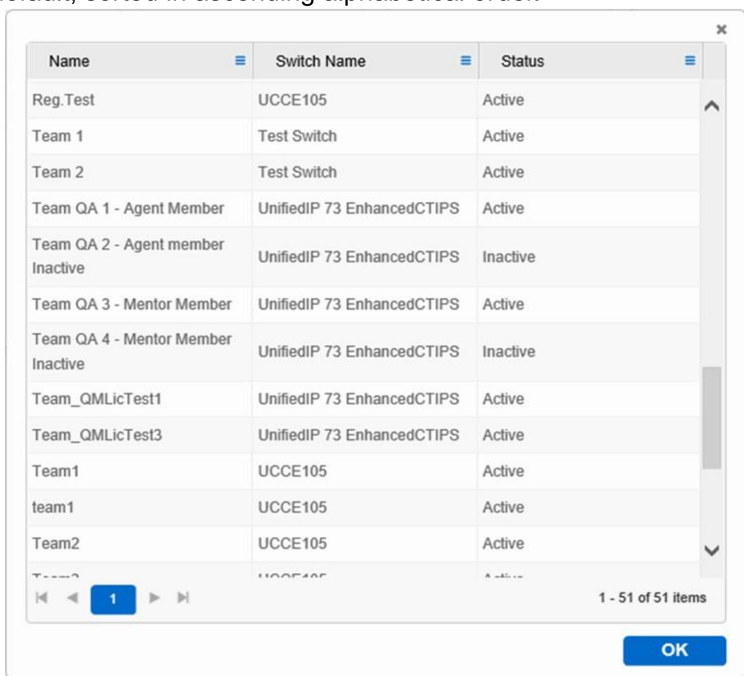
Note: If you have checked the Include All, then the Select button will be disabled and “All” will be displayed as shown below.



9. Under Team, click Select. The Select Teams window opens.



10.Search for a team in the Search Items text box by clicking Search and select Yes. A window opens with the list of available teams. Active teams display in the list box, and the table is, by default, sorted in ascending alphabetical order.

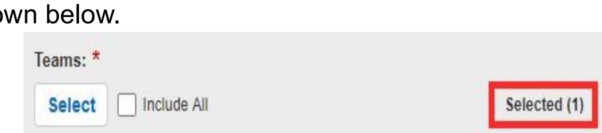


Name	Switch Name	Status
Reg.Test	UCCE105	Active
Team 1	Test Switch	Active
Team 2	Test Switch	Active
Team QA 1 - Agent Member	UnifiedIP 73 EnhancedCTIPS	Active
Team QA 2 - Agent member Inactive	UnifiedIP 73 EnhancedCTIPS	Inactive
Team QA 3 - Mentor Member	UnifiedIP 73 EnhancedCTIPS	Active
Team QA 4 - Mentor Member Inactive	UnifiedIP 73 EnhancedCTIPS	Inactive
Team_QMLicTest1	UnifiedIP 73 EnhancedCTIPS	Active
Team_QMLicTest3	UnifiedIP 73 EnhancedCTIPS	Active
Team1	UCCE105	Active
team1	UCCE105	Active
Team2	UCCE105	Active

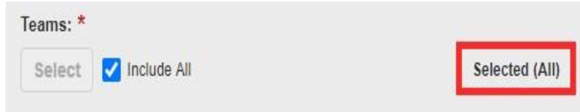
Note:

- If you are logged in as an Administrator, you can search for and select any of the teams.
- If you are logged in as a Mentor, you can only search for and select teams for which have either Score/Review permission in your user profile.

11.Click OK to return to the General tab. Under the Teams section, the number of Teams is displayed, as shown below.



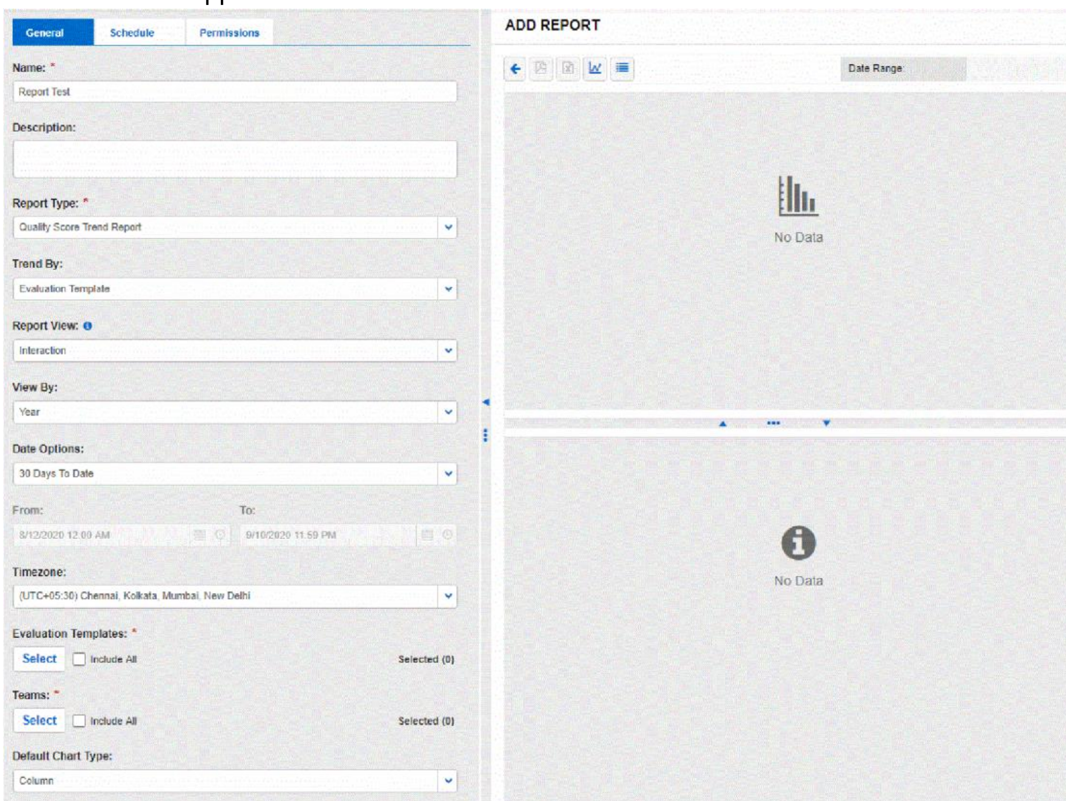
Note: If you have checked the Include All, then the Select button will be disabled and "All" will be displayed as shown below.



12. Under the Default Chart Type section field's drop-down, select the chart type as your default chart type. It means whenever you access this report, the chart type will be shown based on the selection from the drop-down list.

9.3.1.4 Quality Score Trend Report

Select the **Quality Score Trend Report** to review the average quality score of agents in a team for interactions evaluated against the specified evaluation template. The report generates at a team level. Under Report Type, when you select Quality Score Trend Report, the below screen appears.

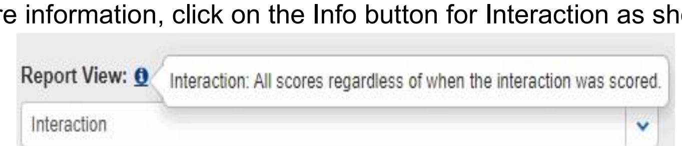


1. Click on the drop-down of Trend By field and select the option based on the requirement.

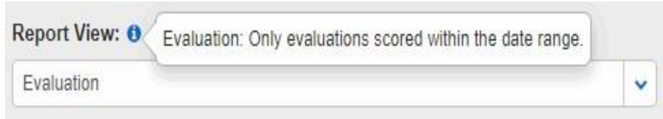
   Note: Refer the Save a Report Based on Trend By Field on page 9-325.

2. Click on the Report View drop-down and select Interaction or Evaluation.

   Note: For more information, click on the Info button for Interaction as shown below.

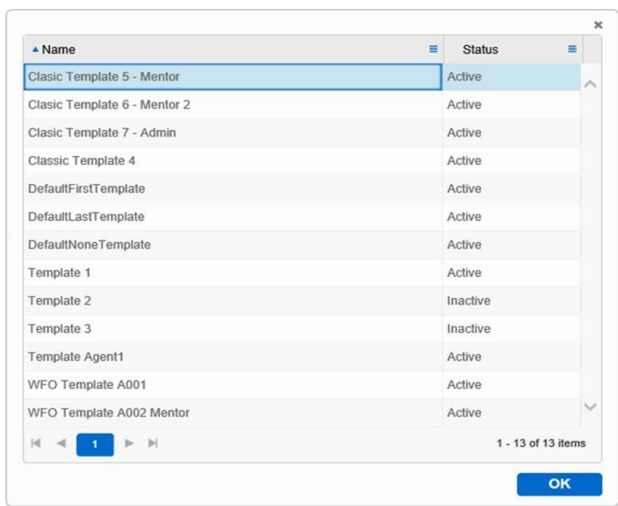


For more information, click on the Info button for Evaluation as shown below.



3. From the View By field, choose the option under the drop-down list to view the report Year or Quarter or Month or Week or Day wise.
4. Select the Date Options from the drop-down list. To choose any date range based on your requirement, click on Custom Date Range. If you select Custom Date Range, the From and To fields are enabled.
5. Choose the date and time range on From and To field. To select date, click on icon and for time, icon.

   Note: If you have selected Custom Date Range, then the date range must be within the last four years.
6. By default, the Timezone is selected based on your location. To change the Timezone, click on the drop-down and choose your required timezone.
7. Under the Evaluation Template field, select a template specific to the evaluations that you want to see by clicking Select button (if you want to include all of the available evaluation templates, then click on the Include All checkbox). The Select Evaluation Template window appears.
8. Click on the icon in the Search Items field and select Yes. A window opens with a list of available templates.



Name	Status
Clasic Template 5 - Mentor	Active
Clasic Template 6 - Mentor 2	Active
Clasic Template 7 - Admin	Active
Classic Template 4	Active
DefaultFirstTemplate	Active
DefaultLastTemplate	Active
DefaultNoneTemplate	Active
Template 1	Active
Template 2	Inactive
Template 3	Inactive
Template Agent1	Active
WFO Template A001	Active
WFO Template A002 Mentor	Active

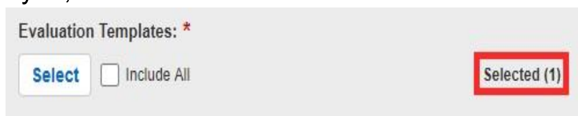
Active and Inactive templates display in the list; see the Status column.

Note: If you are logged in as an Administrator, you have access to all templates.

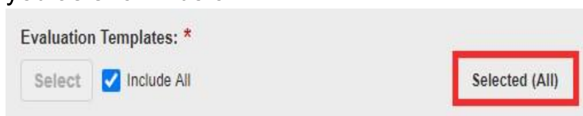
If you are logged in as a Mentor, you have access to templates based on whether the evaluations are assigned to you:

- Peer review
- Agent review
- Team review
- Evaluation Assigned
- Permission in User Profile

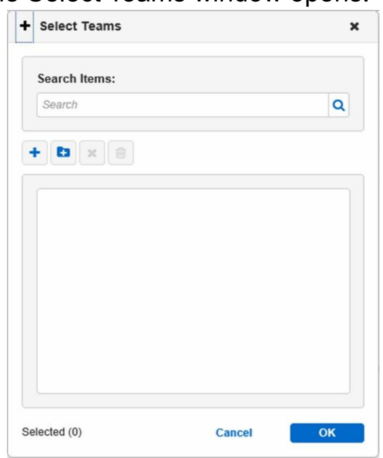
9. Once you have selected the template, click OK. The templates window closes and the Select Evaluation Template window is active.
10. Click OK to return to the General tab. Under the Evaluation Templates section, the number of templates is displayed, as shown below.



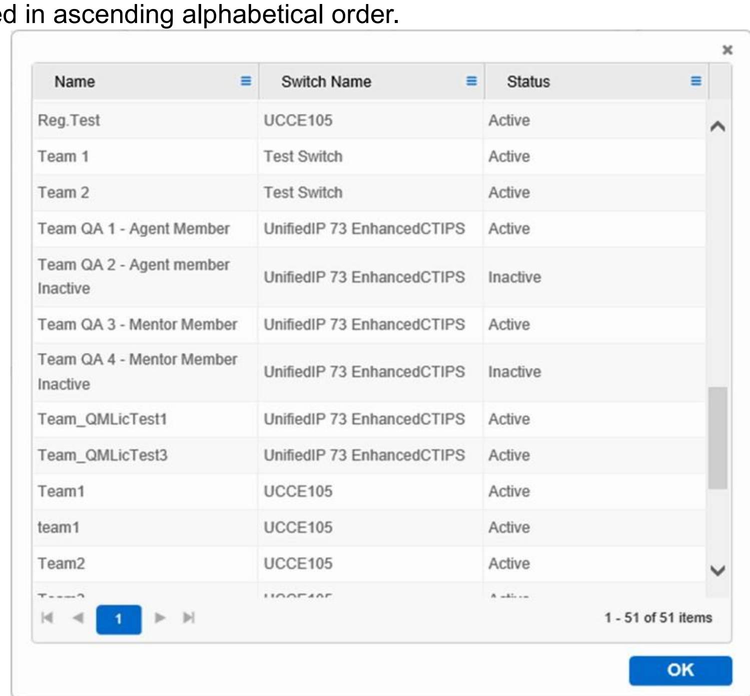
Note: If you have checked the Include All, then the Select button will be disabled and “All” will be displayed as shown below.



11. Under Team, click Select. The Select Teams window opens.

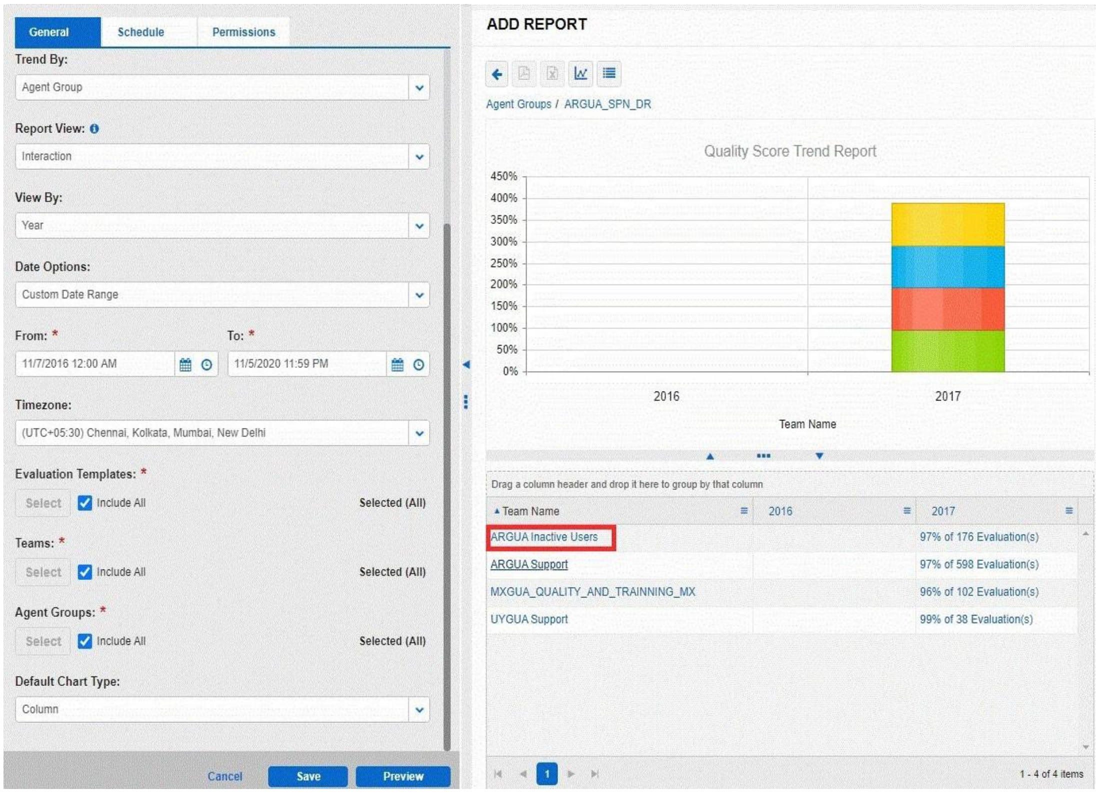


12. Search for a team in the Search Items text box by clicking Search and select Yes. A window opens with the list of available teams. Active teams display in the list box, and the table is, by default, sorted in ascending alphabetical order.

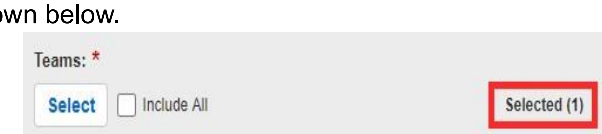


Note:

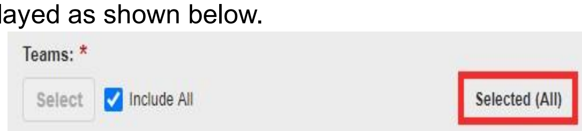
- If you are logged in as an Administrator, you can search for and select any of the teams.
- If you are logged in as a Mentor, you can only search for and select teams of which you are a member. If you are not a member of any team, then No Team displays in the list box.
- By default, only Active teams will be display. Refer to, Edit My Preferences on page 3-147 if you would like to see the Inactive teams along with the Active teams in the search criteria.



13. Click OK to return to the General tab. Under the Teams section, the number of Teams is displayed, as shown below.



Note: If you have checked the Include All, then the Select button will be disabled and “All” will be displayed as shown below.



14. Under the Default Chart Type section field’s drop-down, select the chart type as your default chart type. It means whenever you access this report, the chart type will be shown based on the selection from the drop-down list.

9.3.2 Schedule Tab

The Schedule tab is used to run a report at a later point of time and recursively. For example, if you want to run the report every Friday at 11 PM, you can do that by scheduling the report using the Schedule tab.

Note: All fields marked with a red asterisk (*) are mandatory.

1. To schedule a report, toggle-on the Enable button.

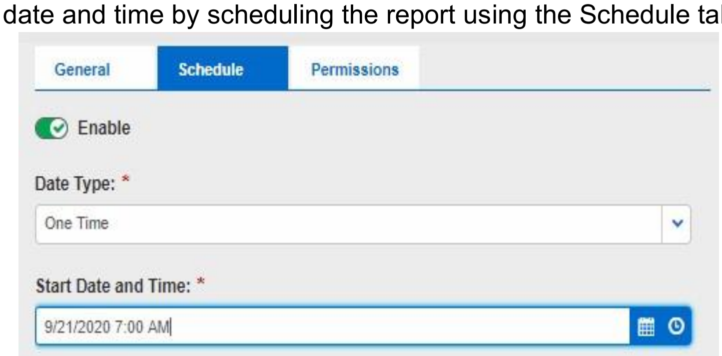
   Note:

   - When the Enable button is toggled on and saved, the report will be available under the Scheduled Reports tab in the Reports window.
   - When the Enable button is not toggled on and saved, the report will be available under the Ad Hoc Reports tab in the Reports window

2. Click on the Date Type field and schedule a report using any of the date types

   - One Time
   - Daily
   - Weekly • Monthly.

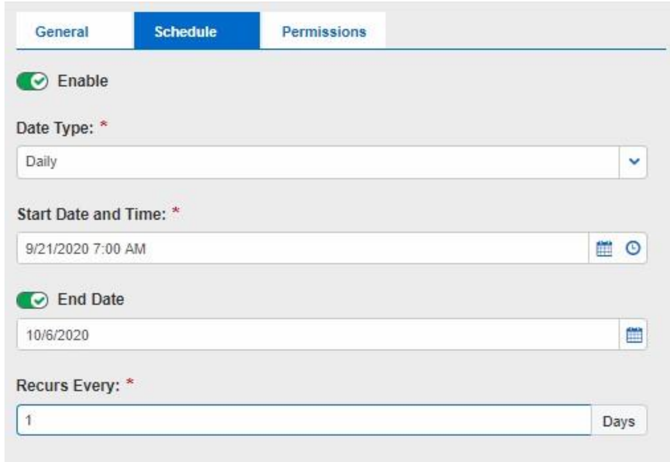
   a. **One Time**: When you need to generate a report for a single time, then select this option. Go to Start Date and Time field, select the date and time based on your requirement, as shown below.
   Example: If you want to run the report for once, on 21st September'20 at 7 AM, then select the date and time by scheduling the report using the Schedule tab.



   b. **Daily**: When you need to generate a report daily, then select this option.

      a. Go to **Start Date and Time** and **End Date**, select the date and time based on your requirement.
      Example: If you want to run the report daily, on 21st September'20 at 7 AM, then select the date and time by scheduling the report using the Schedule tab.

      b. If you are not toggle-on the End Date, then the Aspect Quality system will generate everyday. Or,
      If you want to generate a report daily for a specific time, then toggle-on the End Date button. The End Date field will be enabled and select the date as shown below.



Example: Based on the above screenshot, the system will start to generate the daily report from 21st September'20 at 7:00 AM till 10th October'20.

c. On the Recurs Every field, "1" must be mentioned. If you want to run a report on every alternate day, then type "2" on this field.

Example: The system will start to run the first daily report on 21st September'20, then second daily report on 23rd September'20, third daily report on 25th September'20 and so on till 10th October'20.

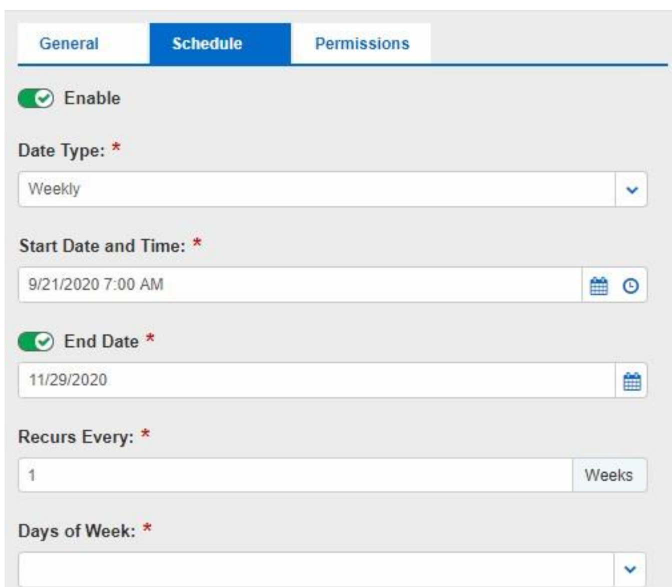
d. **Weekly**: When you need to generate a report for every week, then select this option.

a. Go to Start Date and Time field, select the date and time based on your requirement.

b. If you are not toggle-on the End Date, then the Aspect Quality system will generate for every week.

Or,

If you want to generate a weekly report for some weeks, then toggle-on the End Date button. The End Date field will be enabled and select the date as shown below.

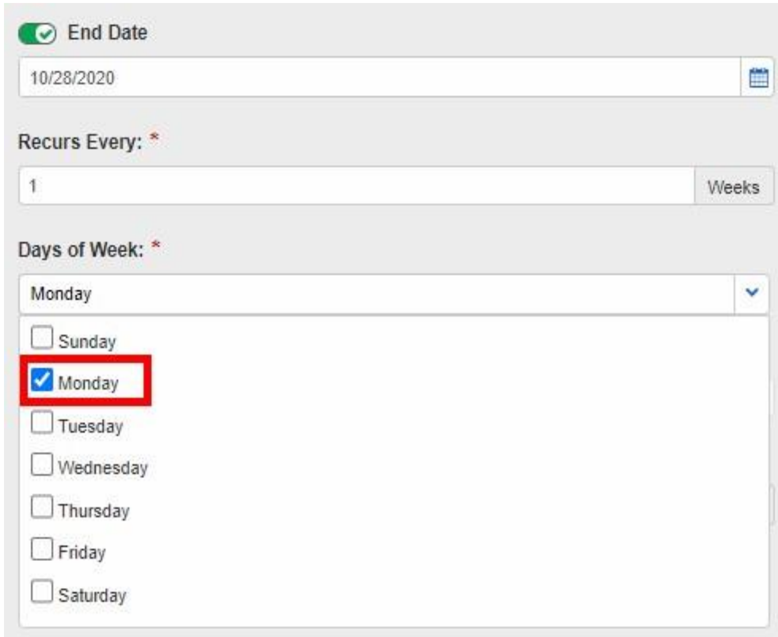


Example: Based on the above screenshot, the system will start to generate the weekly report from 21st September'20 at 7:00 AM till 29th November'20.

c. On the Recurs Every field, number of weeks will be displayed. If you want to run a report on every alternate week, then type "2" on this field.

Example: The system will start to run the first weekly report on 21st September’20, then second daily report on 5th October’20, third daily report on 19th October’20 and so on till 28th November’20.

d. Click on the Days of Week field and select the day when you want to generate the weekly report, as shown below.



Example: On every Monday (from 21st September’20 at 7:00 AM till 28th November’20), the system will generate the weekly report for you.

Note: If you want to run the report for multiple days in a week, then select multiple days from the list.

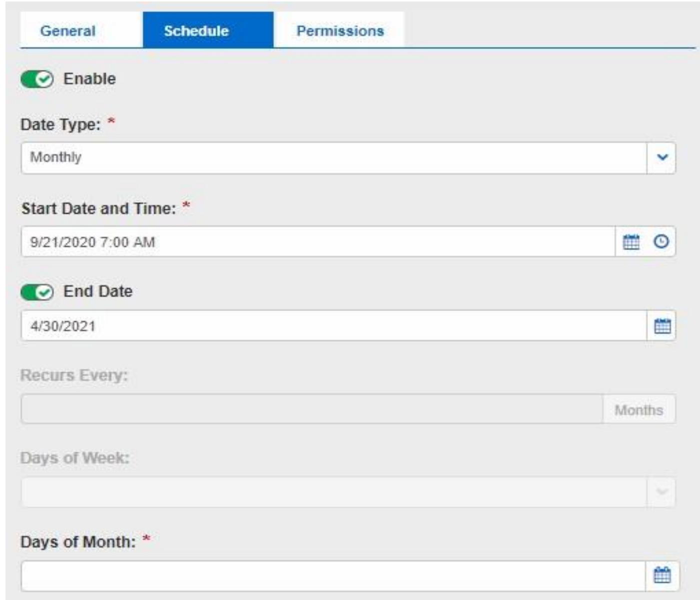
e. **Monthly**: When you need to generate a report for every month, then select this option.

a. Go to Start Date and Time field, select the date and time based on your requirement.

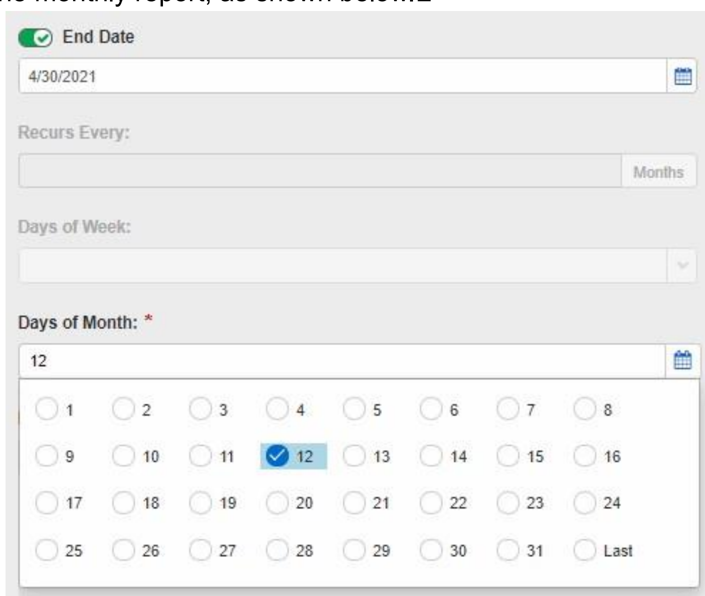
b. If you are not toggle-on the End Date, then the Aspect Quality system will generate for every month.

Or,

If you want to generate a monthly report for some months, then toggle-on the End Date button. The End Date field will be enabled and select the date as shown below.



c. Click on the Days of Month field and select the day or days of a month when you want to run the monthly report, as shown below.



Example: On every 12th day of the month (from 21st September'20 at 7:00 AM till 30th April'21), the system will generate the monthly report for you.

Note: If you want to run the report last day of the month, then it is recommended to select Last from the list. The monthly report will run on the last day of every month.

3. Click on the Retain My Last field and type the number of previous reports which you want to retain.

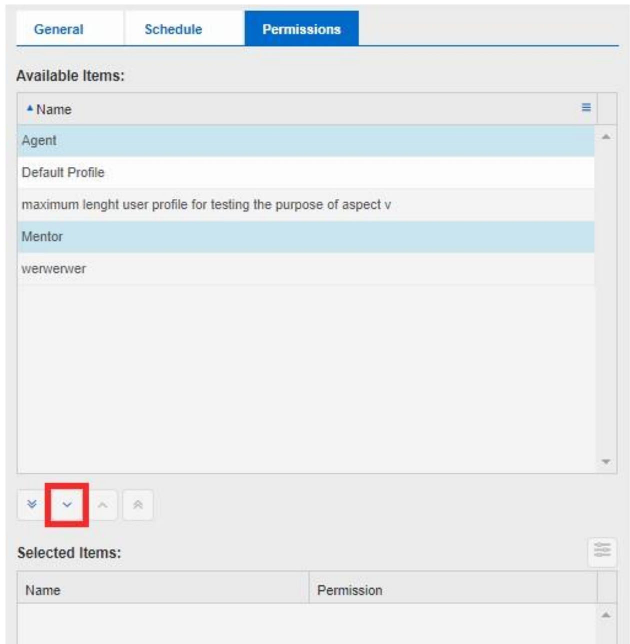
Example: If you type number 5, then the Aspect Quality system will retain the last five reports.

Note: The number must be 1 - 365. The Aspect Quality will not retain the reports if the number exceeds.

9.3.3 Permissions Tab

The Permissions tab helps you to share this report with all the users in the selected user profile(s).

1. To provide permissions, select one or more user profiles under the **Available Items** section.
2. Click on the Add items button as shown below, the selected user profiles will be moved from Available Items to Selected items section.



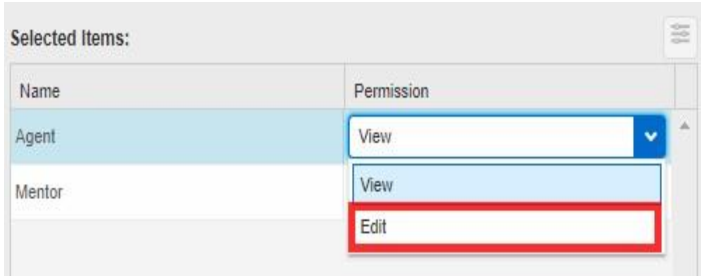
The usage of these buttons are given below.

Button	Name	Description
	Add all items	Adds all user profiles from Available Items to Selected Items section.
	Add items	Adds the selected user profiles from Available Items to Selected Items section.

Button	Name	Description
	Remove items	Removes the selected user profiles from Selected Items section to Available Items.
	Remove all items	Removes all user profiles from Selected Items section to Available Items.

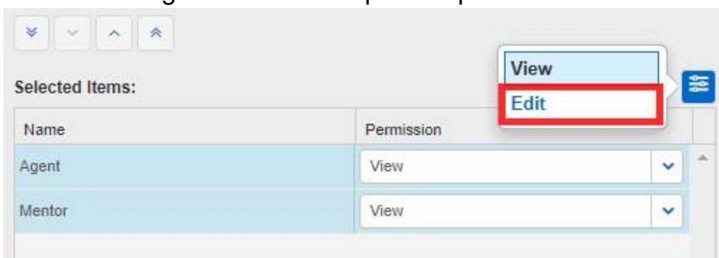
3. To provide edit permission for the report, select the user profile under the Selected Items section.

4. Click on the Permission drop-down and select Edit as shown below.

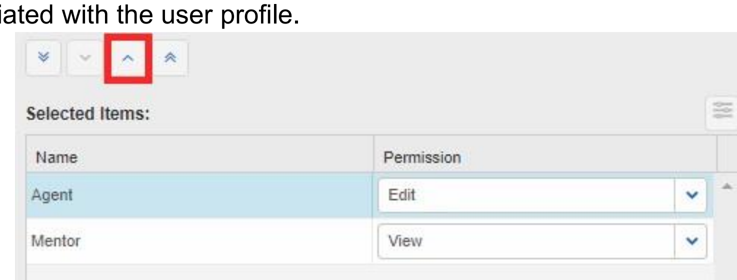


Note:

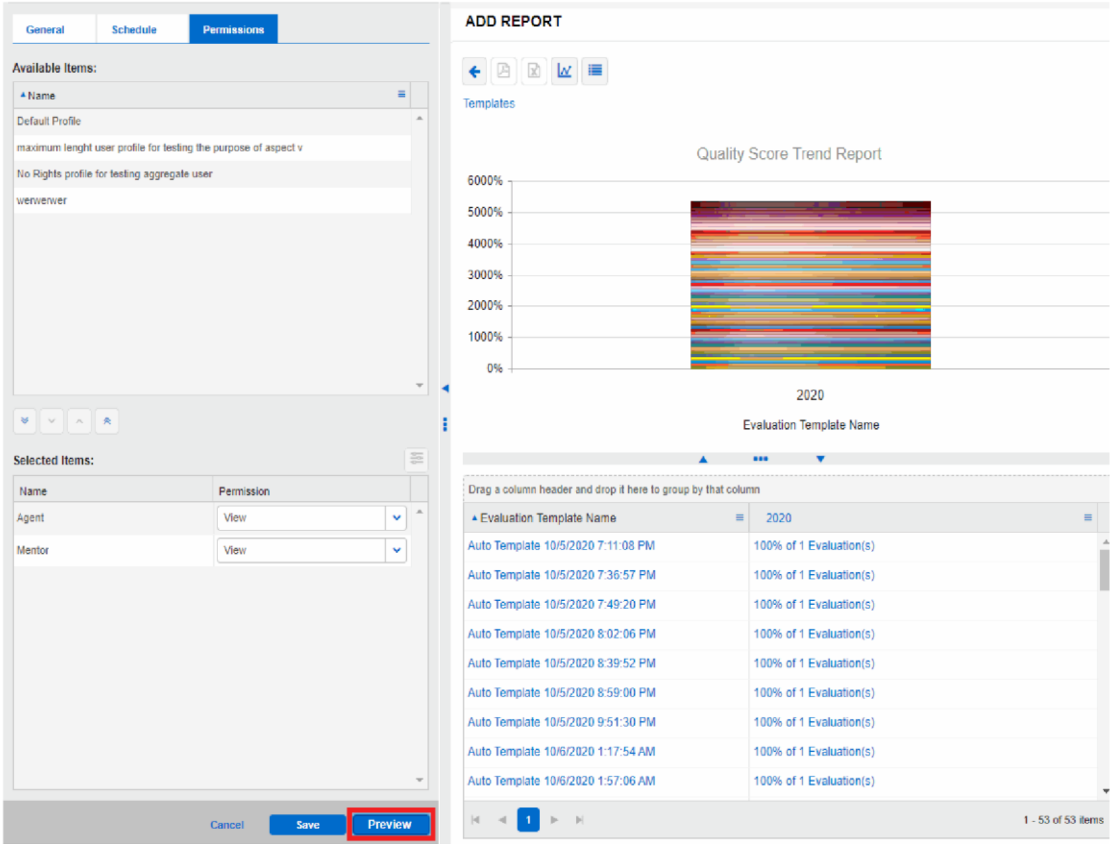
- To provide Edit permission for more than one user profiles, select the user profiles and click on the change selected user profiles permission button as shown below.



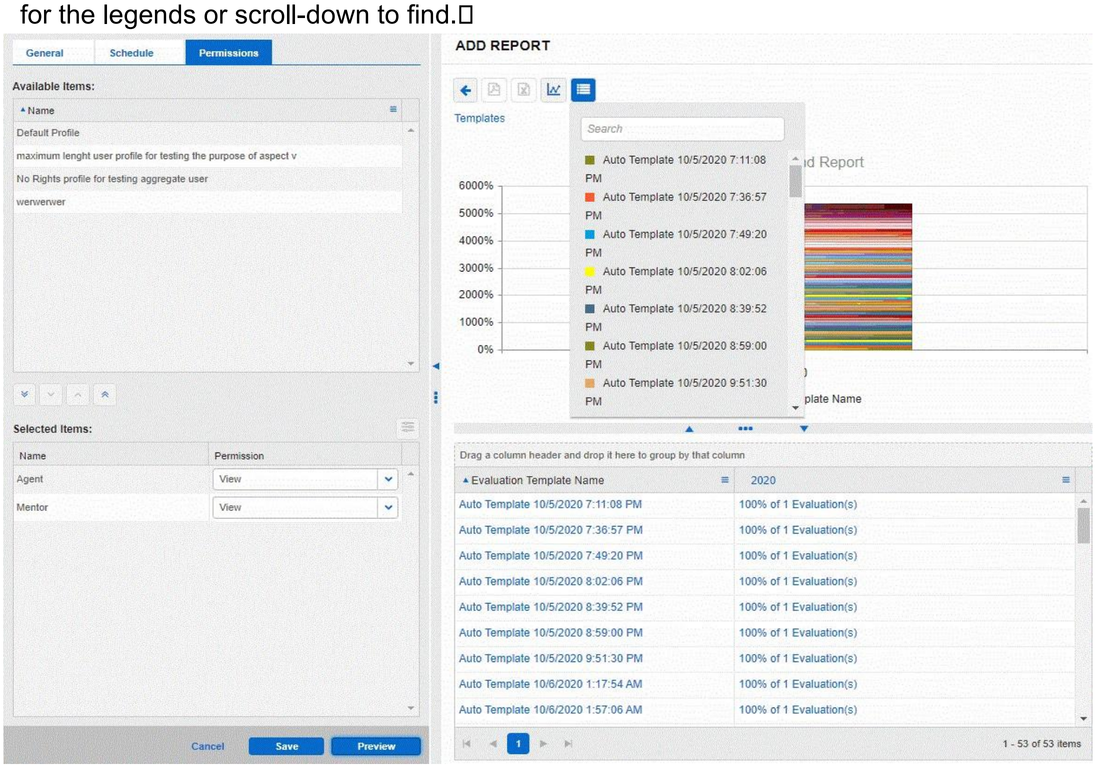
- After providing Edit permission to the user profile, if you remove the user profile from the Selected Items section as shown below, the report will not be shown to the users associated with the user profile.



5. Before saving if you want to preview how the report will appear, click on the Preview button to preview the report on the right side of the window, based on the parameters that you have defined.



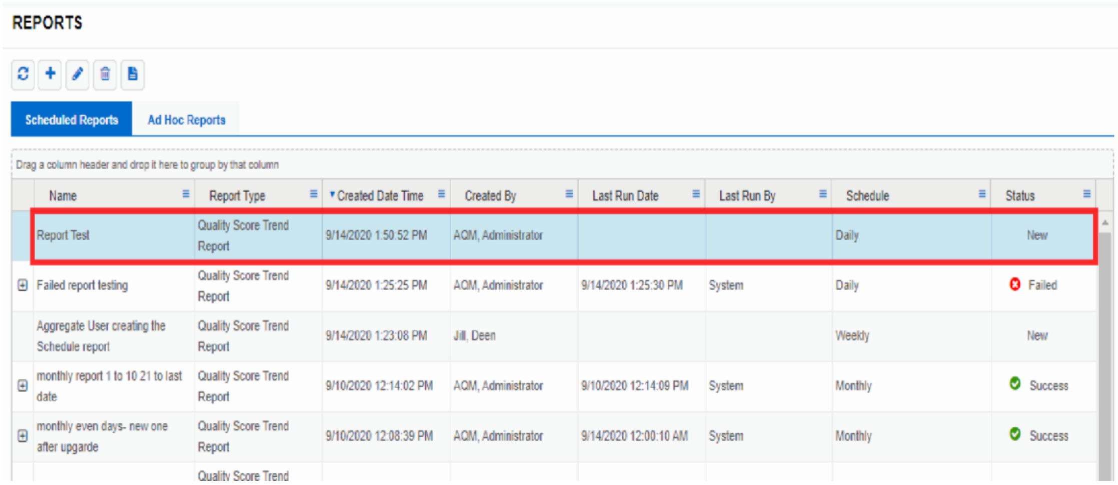
6. (Optional) Click on the Legend button to preview the legends as shown below and search for the legends or scroll-down to find.



Once you click on the any listed legend, the selected legend will be hidden on the chart.

Note: The Legend button will be disabled when data is not available.

7. Click Save to complete the process. The Reports window appears as shown below.

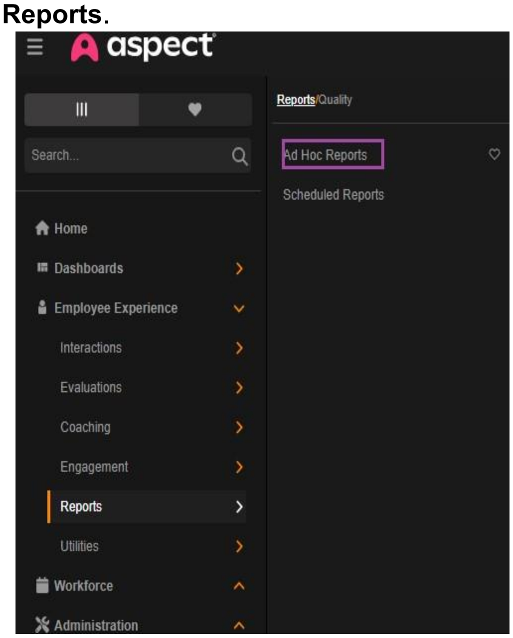


Note: As the Report is scheduled in the Schedule Tab, the report is saved under the Scheduled tab. If the **Enable** button is disabled in the Schedule Tab, then the Report would be saved under the Ad Hoc Reports tab.

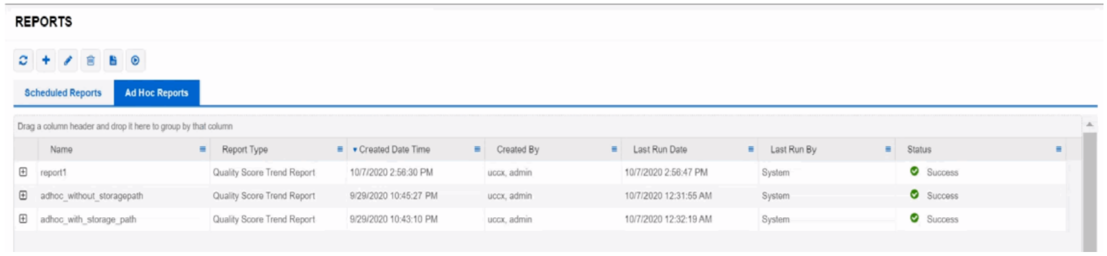
9.3.4 Save an Ad Hoc Report

The Ad Hoc Report helps you to run a report manually based on the requirement. To save an Ad Hoc Report, follow the steps below:

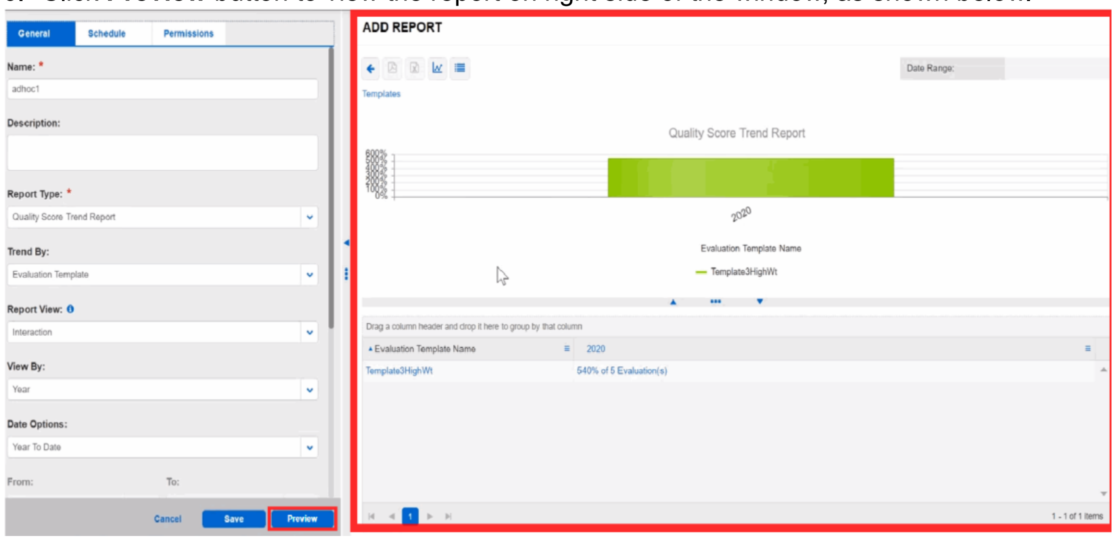
1. Log in to Workforce Engagement Management as an Administrator.
2. Go to **Navigation** bar and click **Employee Experience,** then click **Reports**.
3. Click on **Ad Hoc Reports**.



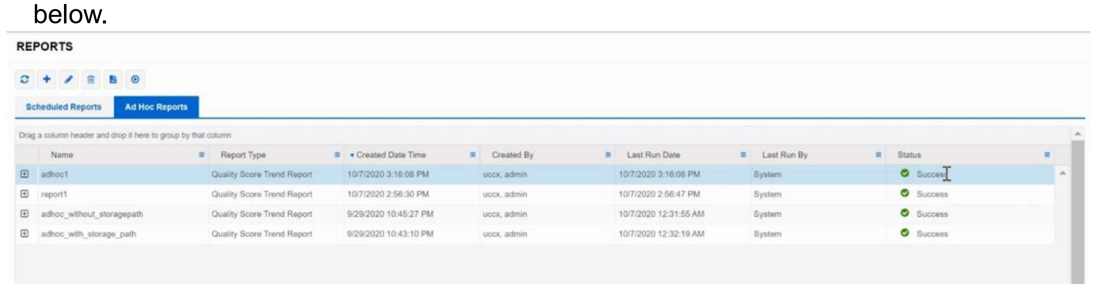
4. The Reports window appears and the Ad Hoc Reports tab is selected as shown below.



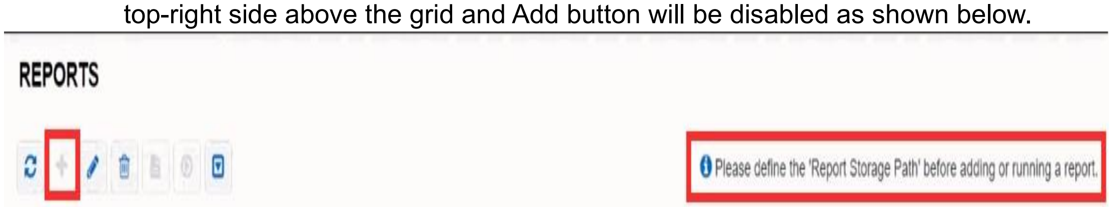
5. Refer from step 1 to step 6 of the Save a Report on page 9-300 section.
6. Click **Preview** button to view the report on right side of the window, as shown below.



7. Click Save to save the Ad Hoc Report and redirects to the REPORTS window, as shown below.



Note: If the Report Storage Path is not defined then an info icon will be displayed on the top-right side above the grid and Add button will be disabled as shown below.



9.3.4.1 Save a Report Based on Trend By Field

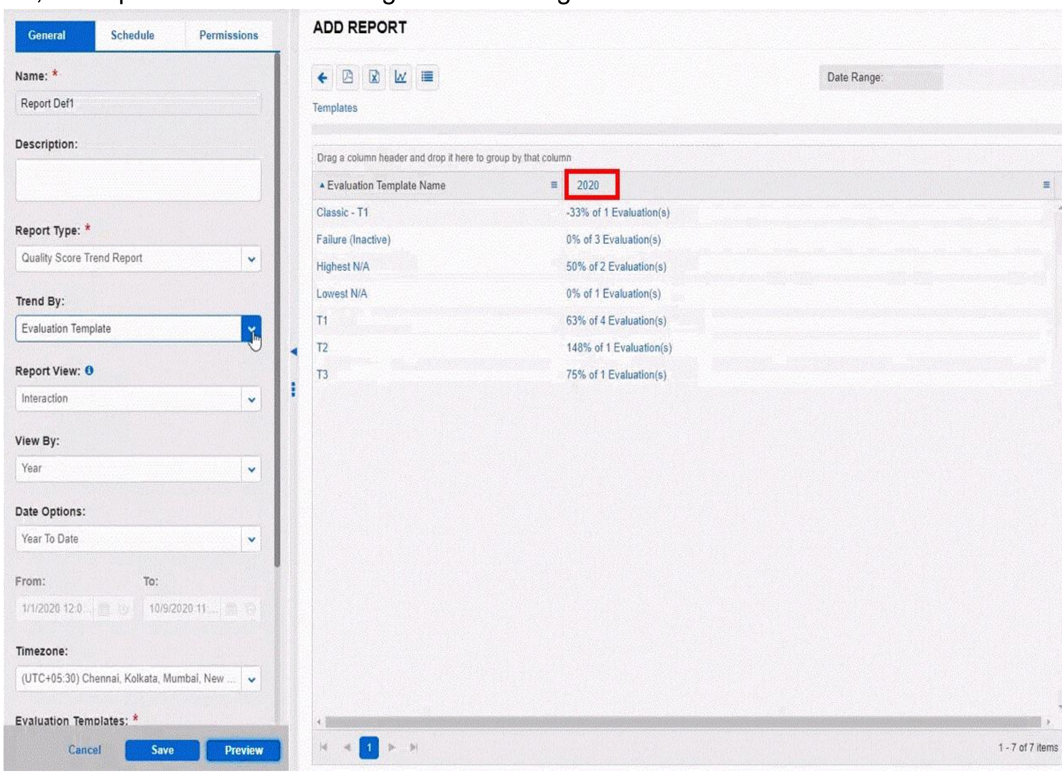
This feature allows you to save the Quality Score Trend Report based on the selected parameter in the Trend By field such as

- Trend By Evaluation Template on page 9-326

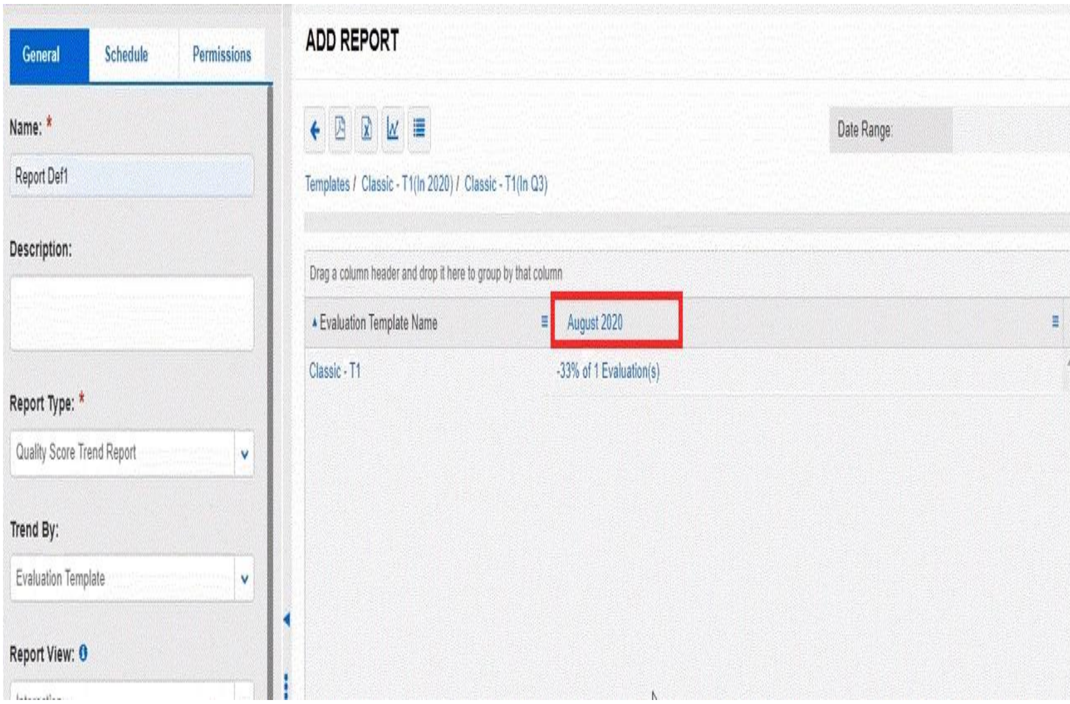
- Trend By Team on page 9-328
- Trend By Agent on page 9-329
- Trend By Work Type on page 9-332
- Trend By Application on page 9-336

9.3.4.1.1 *Trend By Evaluation Template*

Select Evaluation Template from the drop-down list of Trend By field and click on the Preview button, the report will show on the right side of the grid.



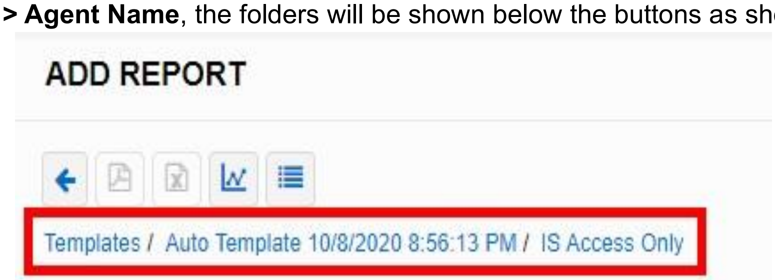
To drill down the report from Year to Quarter for the Evaluation Template, click on the Year as shown above and the following window appears.



Note: Click on Quarter, as shown above, to drill down the report to Month, Week and Date respectively.

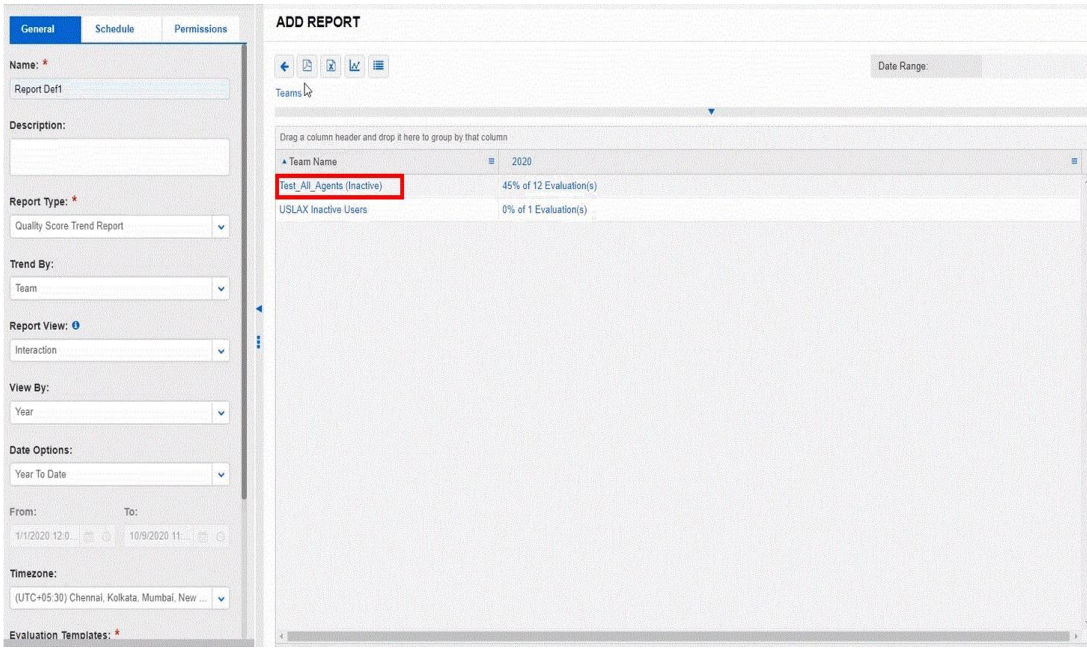
After drilling down the grid (Year column) from **Year > Quarter > Month > Week**, the folders will be shown below the buttons as shown below.

Note: If the Evaluation Template is drilled down from the **Evaluation Template Name > Team Name > Agent Name**, the folders will be shown below the buttons as shown below.

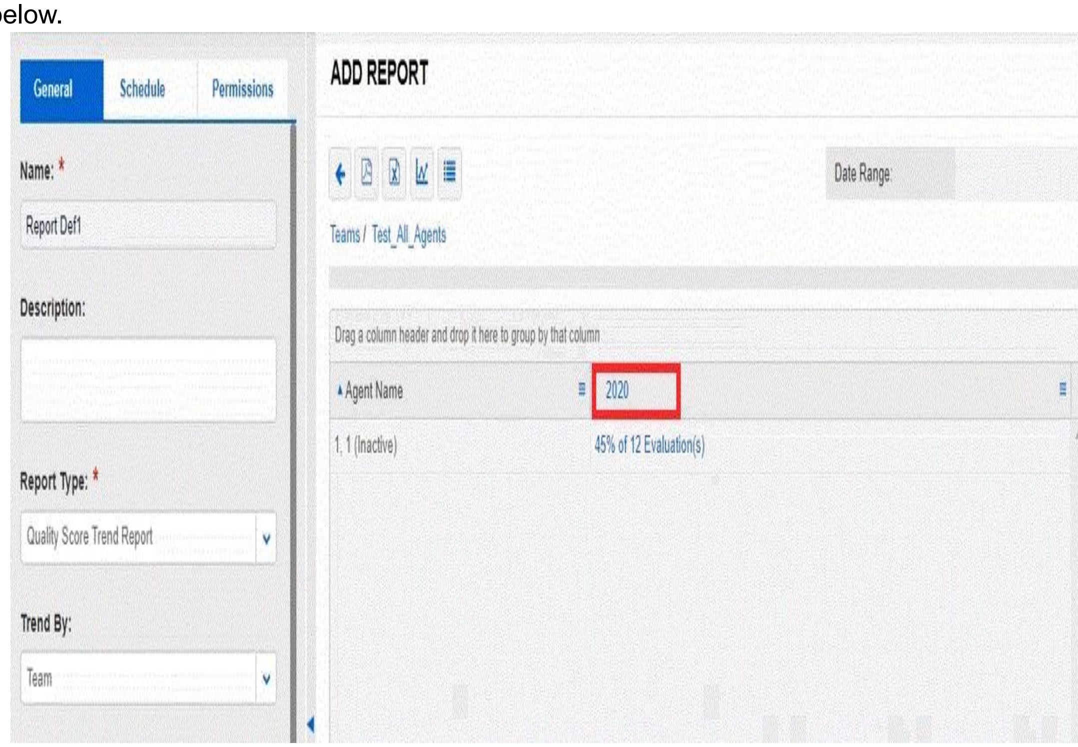


9.3.4.1.2 *Trend By Team*

Select Team from the drop-down list of Trend By field and click on the Preview button, the report will show on the right side of the grid.

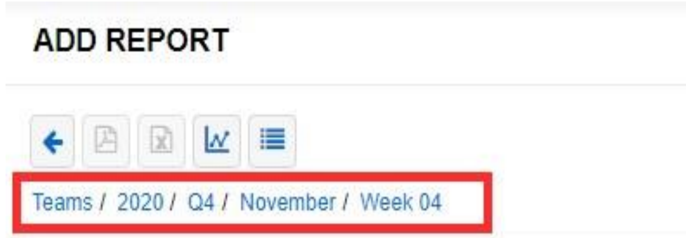


To drill down the report from Team to Agent for the Teams, click on the Team as shown above and the following window appears. It also provides the option to drill down the year, as shown below.



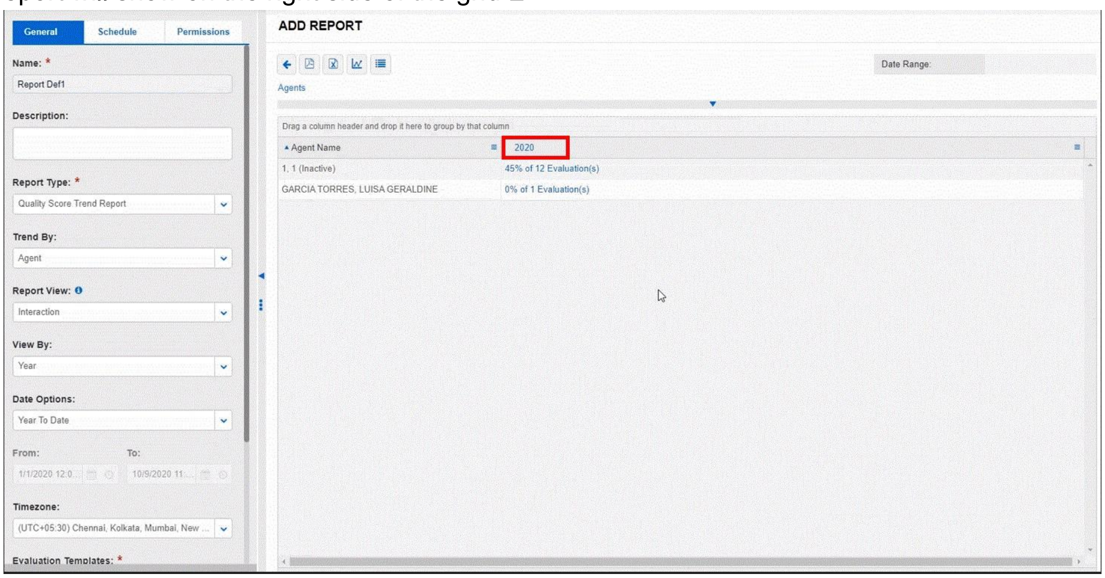
Note: Click on Year, as shown above, to drill down the report to Quarter, Month, Week and Date respectively.

After drilling down the grid (Year column) from **Year > Quarter > Month > Week**, the folders will be shown below the buttons as shown below.

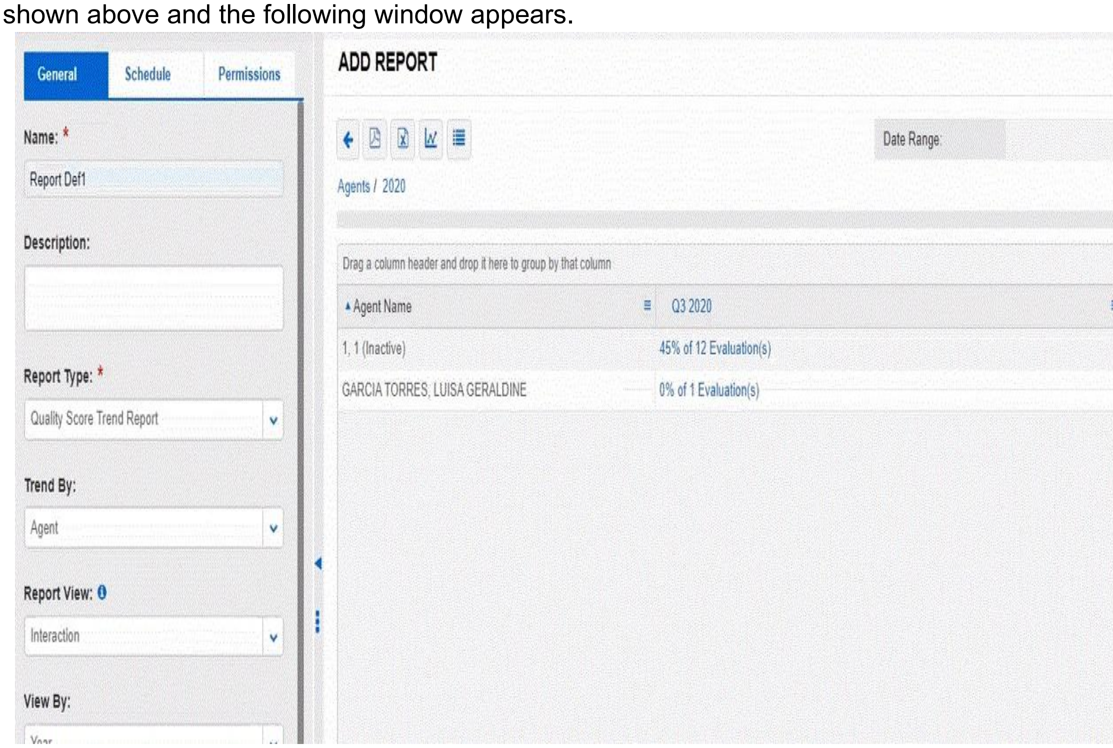


9.3.4.1.3 *Trend By Agent*

Select Agent from the drop-down list of Trend By field and click on the Preview button, the report will show on the right side of the grid.



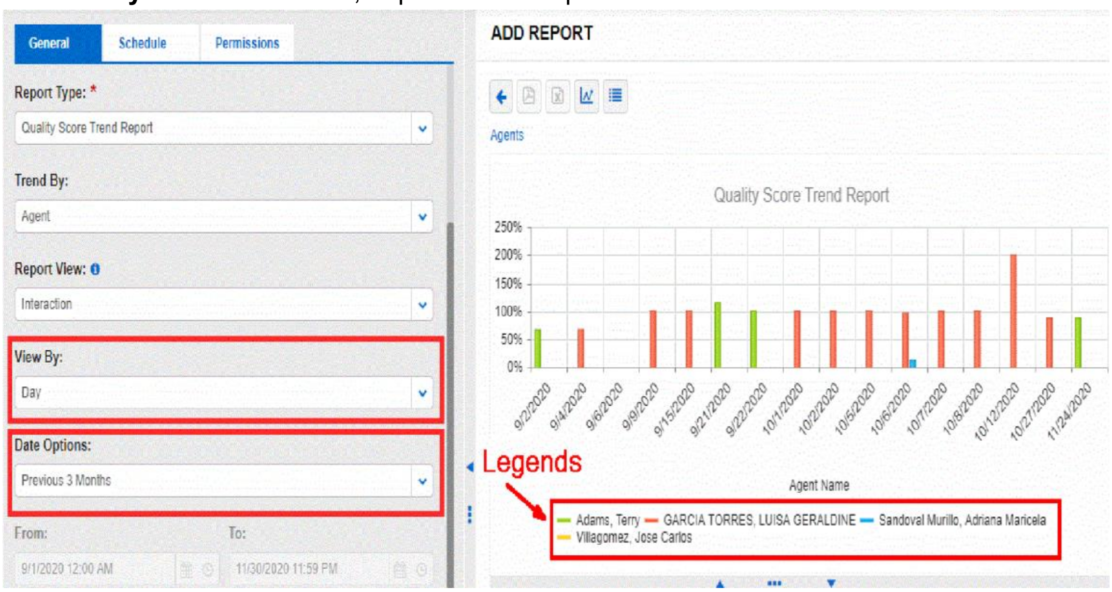
To drill down the report from Year to Quarter for the Evaluation Template, click on the Year as shown above and the following window appears.



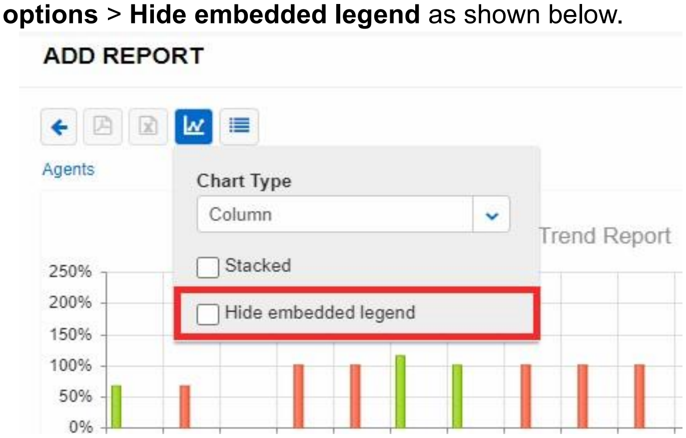
Note:

- Click on Quarter, as shown above, to drill down the report to Month, Week and Date respectively.
- After drilling down the grid (Year column) from **Year > Quarter > Month > Week**, the folders will be shown below the buttons as shown below.

- When **Day** is selected on the **View By** field, then select **Previous 3 months** or **less than 90 days** as shown below, to preview the report.



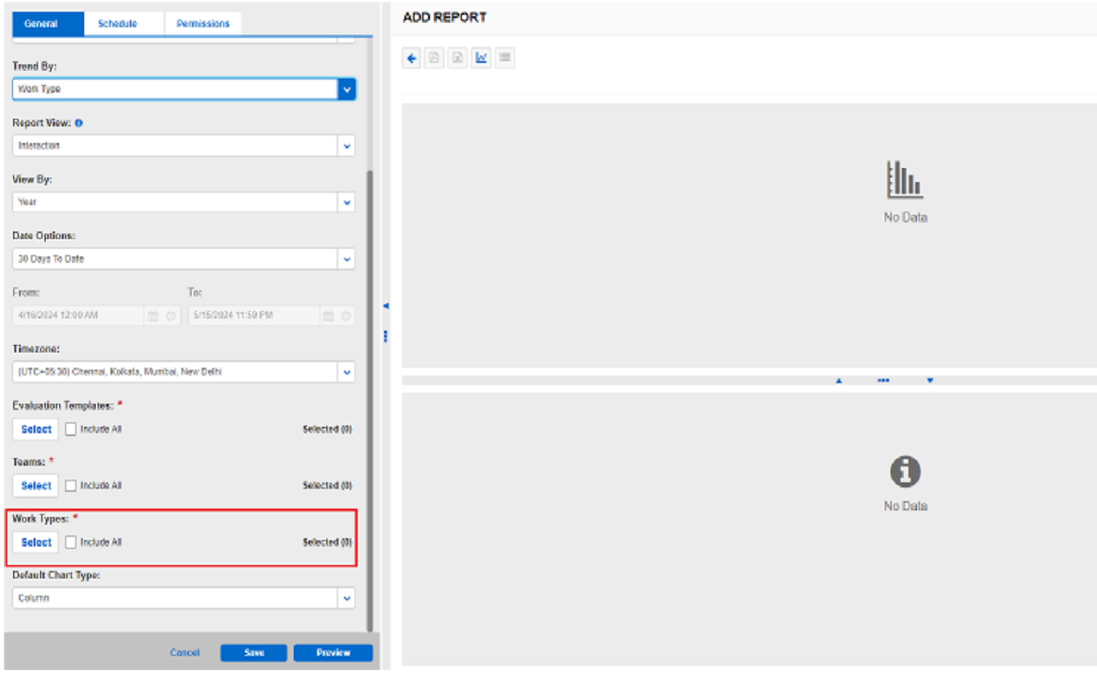
By default, the legends are shown on the preview section. To hide the Legends, click on the **Chart options** > **Hide embedded legend** as shown below.



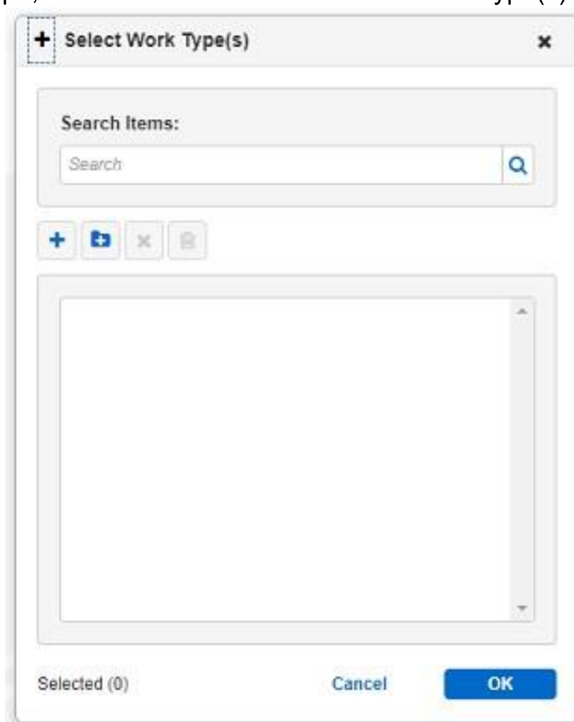
9.3.4.1.4 *Trend By Work Type*

Select Work Type from the drop-down list of Trend By field and the Work Type section is added on the left pane as shown below.

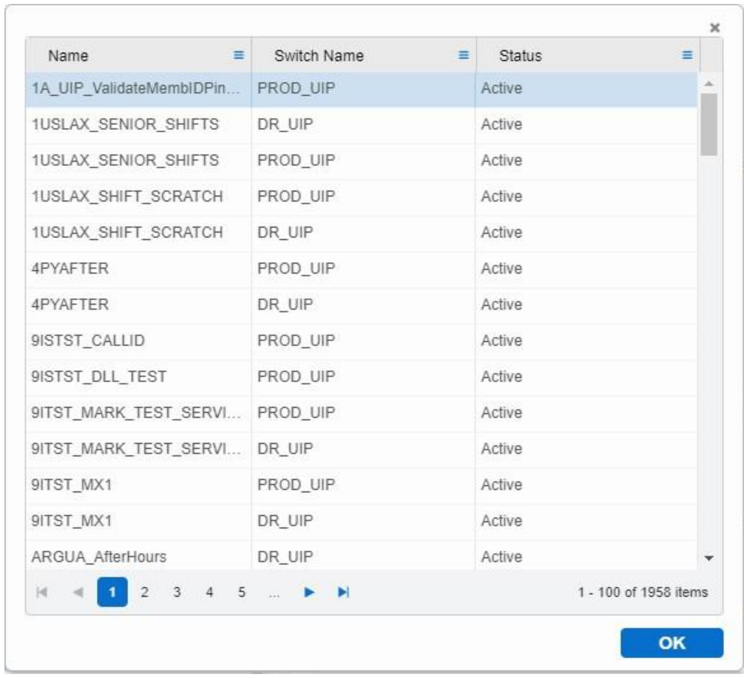
Note: Only users with the Administrator role are able to see the Work Type option under the Trend By field.



1. Under Work Type, click Select button. The Select Work Type(s) window opens.



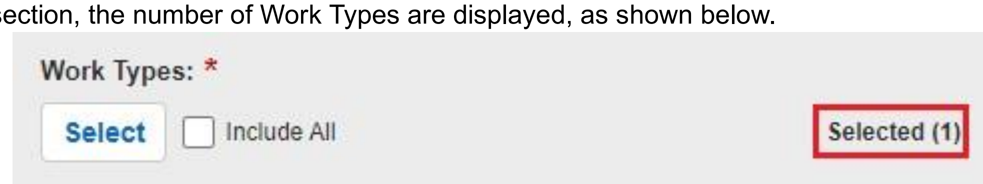
2. Search for a Work Type in the Search Items text box by clicking Search and select Yes. A window opens with the list of available Work Types. Active Work Type(s) display in the list box, and the table is, by default, sorted in ascending alphabetical order.



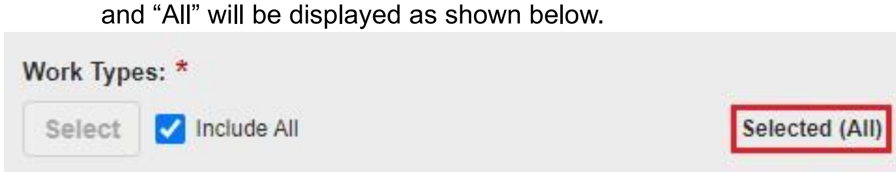
Name	Switch Name	Status
1A_UIP_ValidateMembIDPin...	PROD_UIP	Active
1USLAX_SENIOR_SHIFTS	DR_UIP	Active
1USLAX_SENIOR_SHIFTS	PROD_UIP	Active
1USLAX_SHIFT_SCRATCH	PROD_UIP	Active
1USLAX_SHIFT_SCRATCH	DR_UIP	Active
4PYAFTER	PROD_UIP	Active
4PYAFTER	DR_UIP	Active
9ISTST_CALLID	PROD_UIP	Active
9ISTST_DLL_TEST	PROD_UIP	Active
9ITST_MARK_TEST_SERVI...	PROD_UIP	Active
9ITST_MARK_TEST_SERVI...	DR_UIP	Active
9ITST_MX1	PROD_UIP	Active
9ITST_MX1	DR_UIP	Active
ARGUA_AfterHours	DR_UIP	Active

Note: By default, only Active Work Type will be displayed. Refer to Edit My Preferences on page 3-147, if you would like to see the Inactive Work Type along with the Active Work Type in the search criteria.

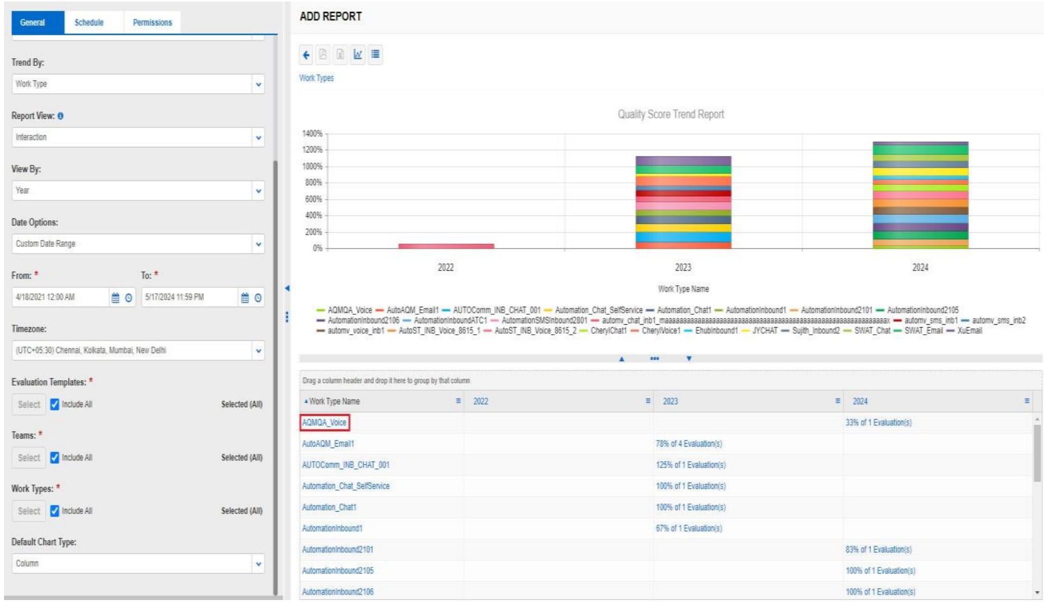
3. Select the Work Type and click OK to return to the General tab. Under the Work Type(s) section, the number of Work Types are displayed, as shown below.



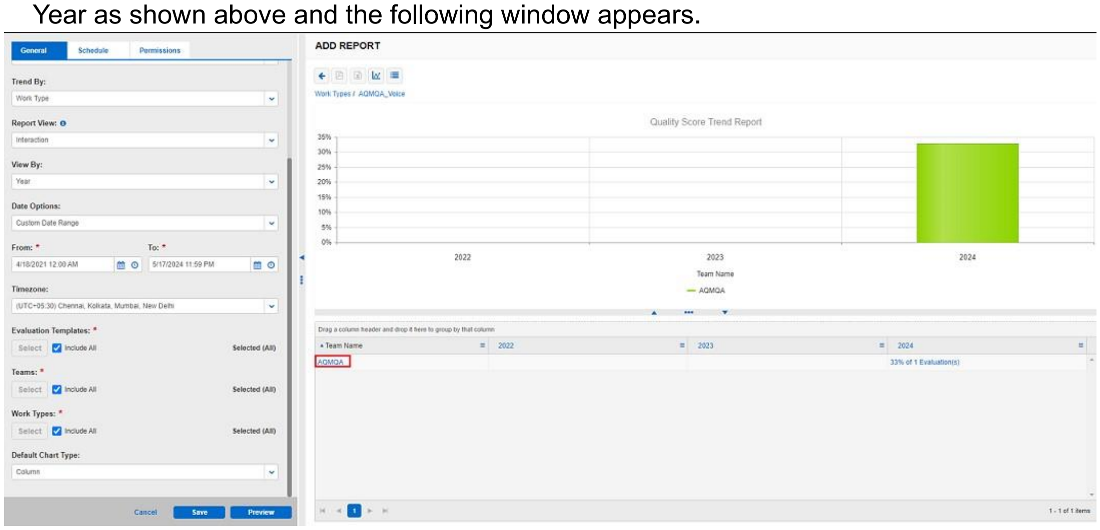
Note: If you have checked the Include All, then the Select button will be disabled and “All” will be displayed as shown below.



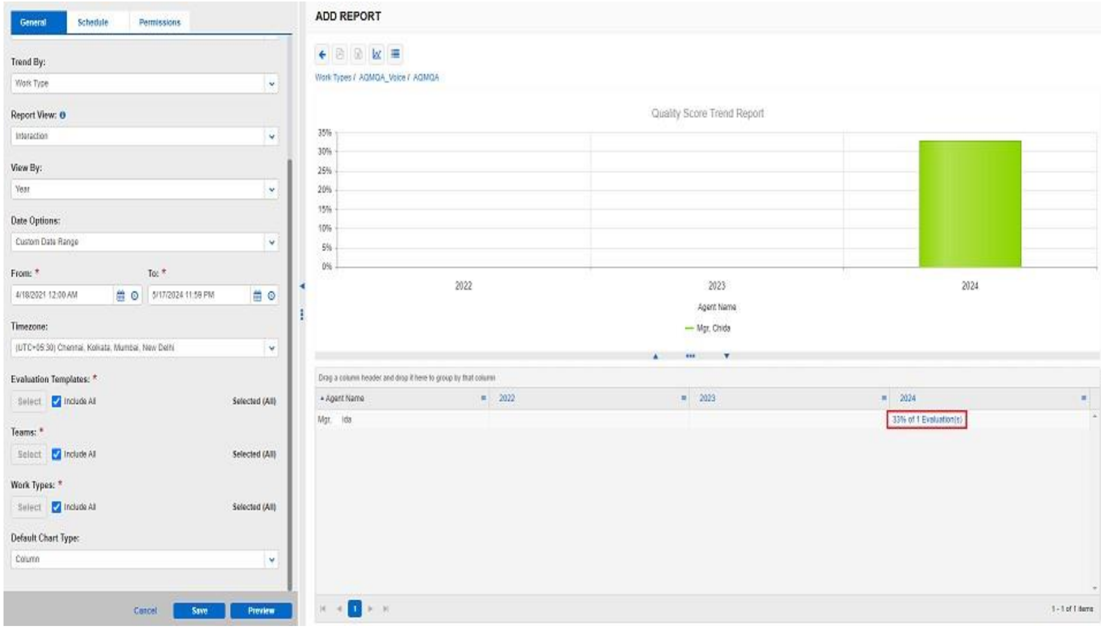
4. Click on the Preview button, the report will show on the right side of the grid.



5. To drill down the report from Work Types to Team for the Evaluation Template, click on the Year as shown above and the following window appears.



- Click on the Team, as shown above, to drill down the report to associated Agents as shown below.

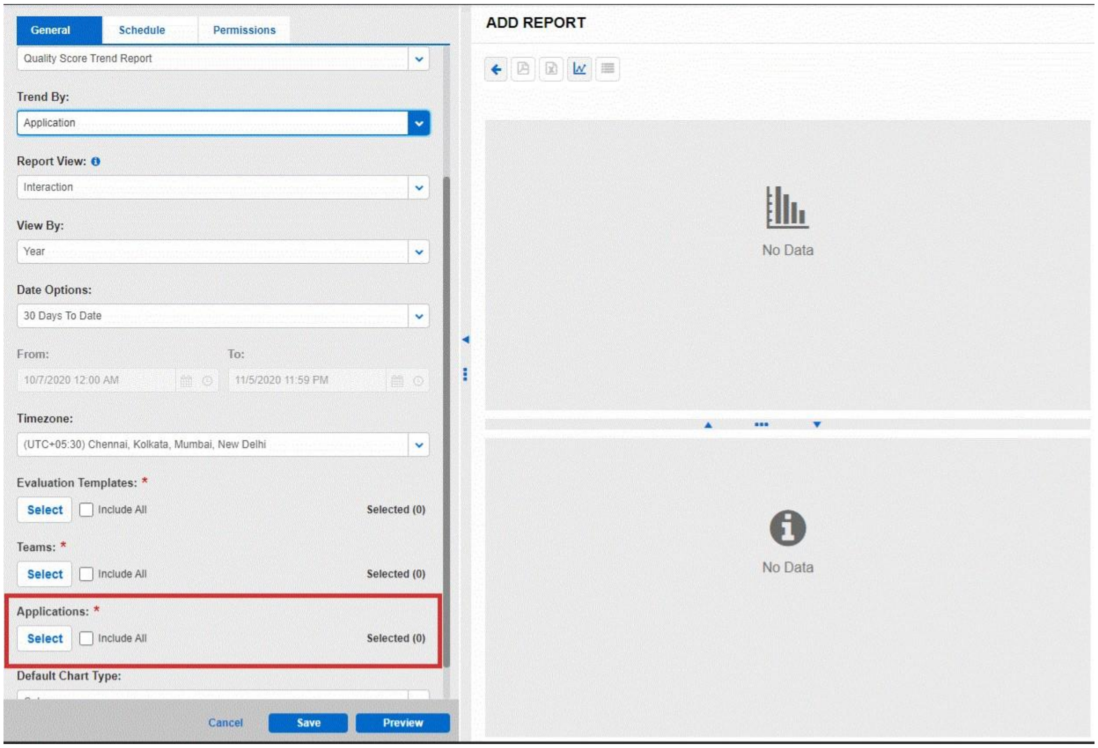


- Also, click on the Year as shown above, to drill down the report to Quarter, Month, Week and Date respectively.

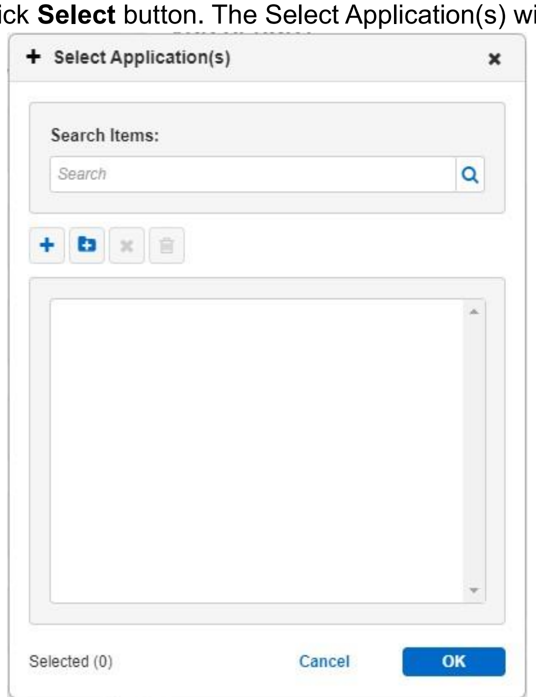
After drilling down the grid (Year column) from **Year > Quarter > Month > Week**, the folders will be shown below the buttons as shown below.

9.3.4.1.5 *Trend By Application*

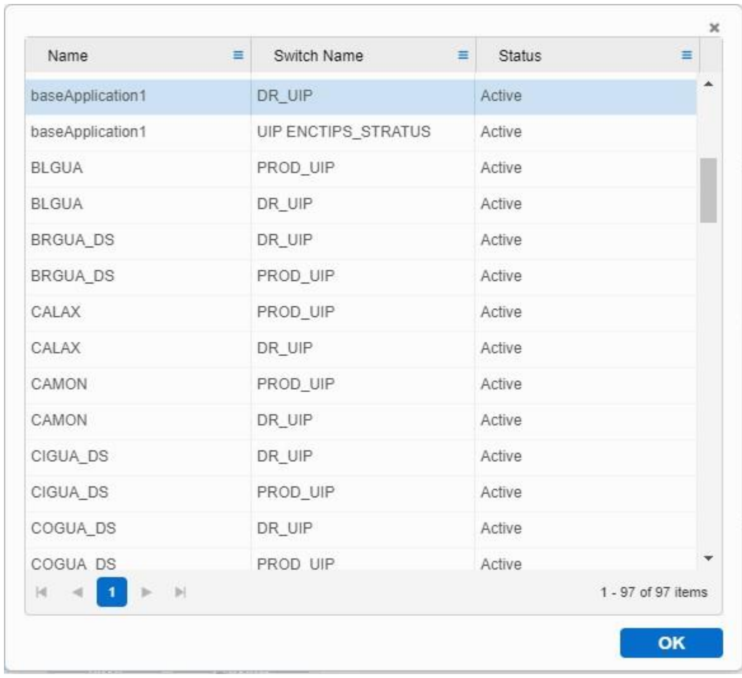
Select Application from the drop-down list of Trend By field and the Application section is added on the left pane as shown below.



1. Under Application, click **Select** button. The Select Application(s) window opens.



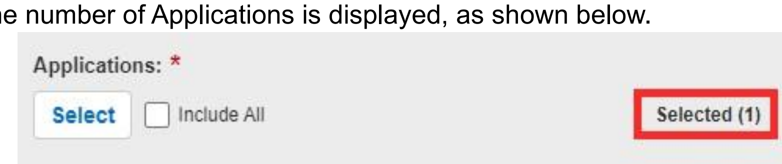
2. Search for an Application in the Search Items text box by clicking Search and select Yes. A window opens with the list of available active teams.



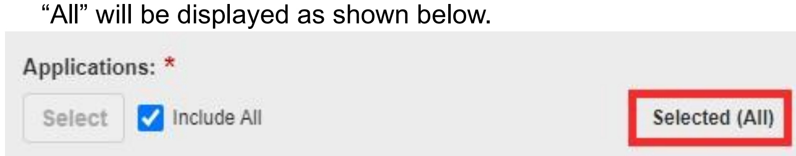
Name	Switch Name	Status
baseApplication1	DR_UIP	Active
baseApplication1	UIP ENCTIPS_STRATUS	Active
BLGUA	PROD_UIP	Active
BLGUA	DR_UIP	Active
BRGUA_DS	DR_UIP	Active
BRGUA_DS	PROD_UIP	Active
CALAX	PROD_UIP	Active
CALAX	DR_UIP	Active
CAMON	PROD_UIP	Active
CAMON	DR_UIP	Active
CIGUA_DS	DR_UIP	Active
CIGUA_DS	PROD_UIP	Active
COGUA_DS	DR_UIP	Active
COGUA_DS	PROD_UIP	Active

Note: If you select the Application criteria in prior versions, you will be able to see both Active and Inactive Application in the Search dialog under the Status column. From Aspect Quality 21.1. By default, only Active Applications will be displayed. Refer to Edit My Preferences on page 3-147, if you would like to see the Inactive Applications along with the Active Applications in the search criteria.

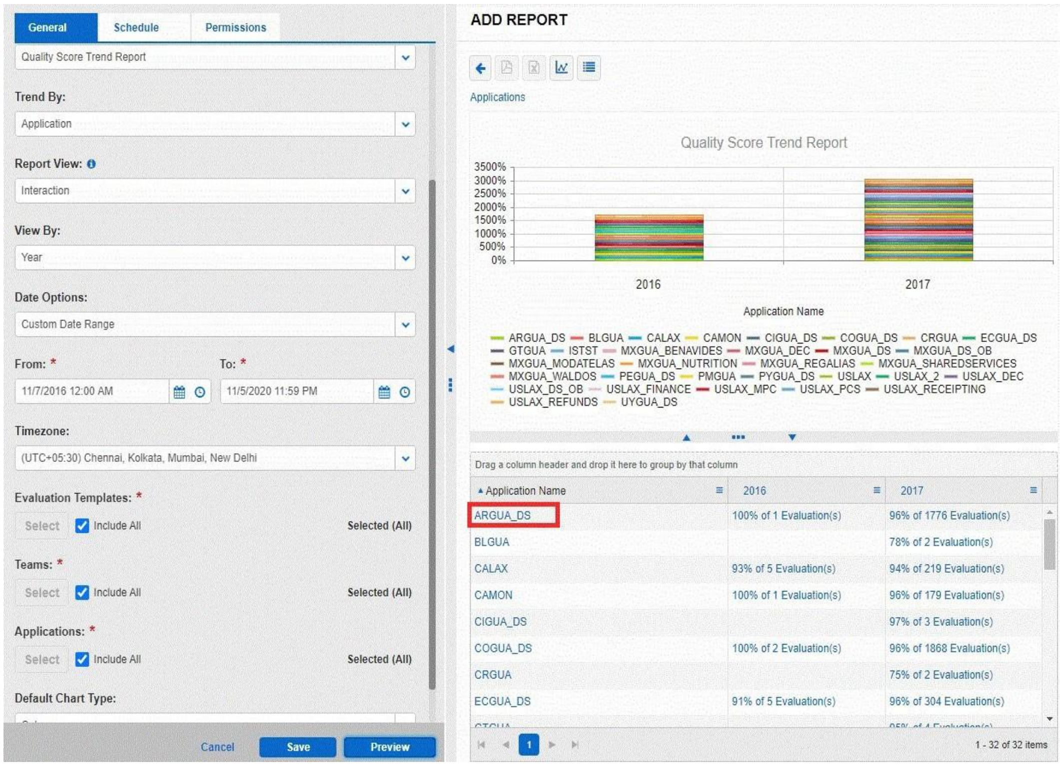
3. Select the Application and click OK to return to the General tab. Under the Applications section, the number of Applications is displayed, as shown below.



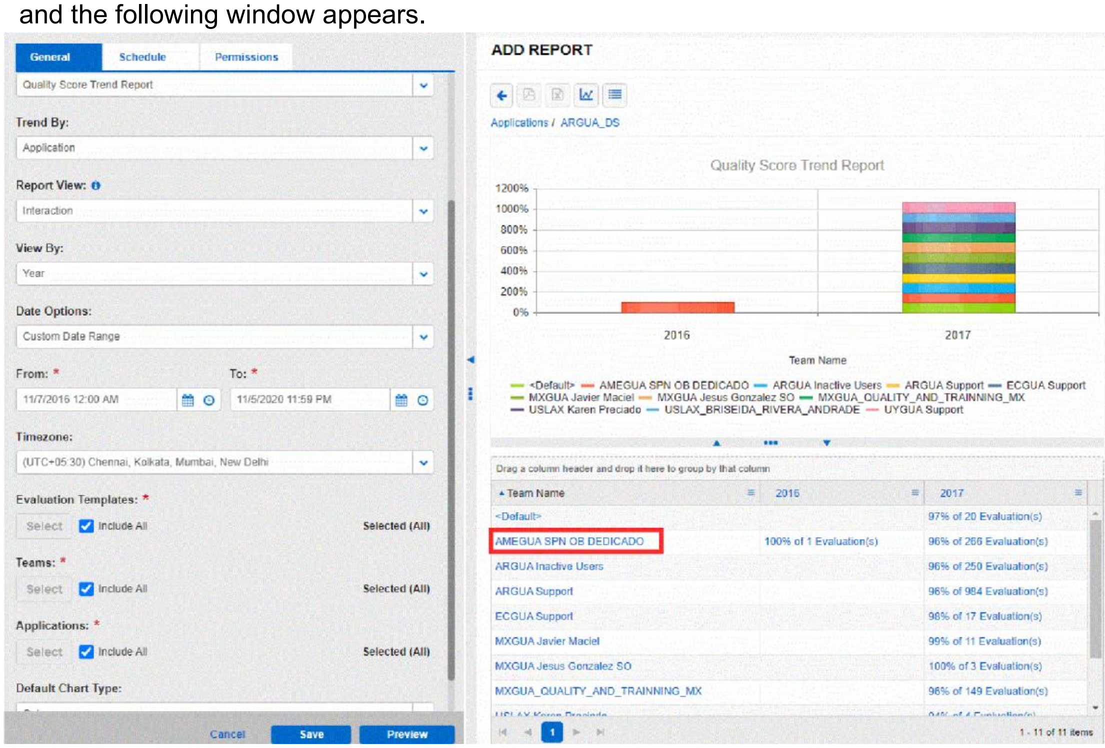
Note: If you have checked the Include All, then the Select button will be disabled and "All" will be displayed as shown below.



4. Click **Preview** button, the report will show on the right side of the grid.

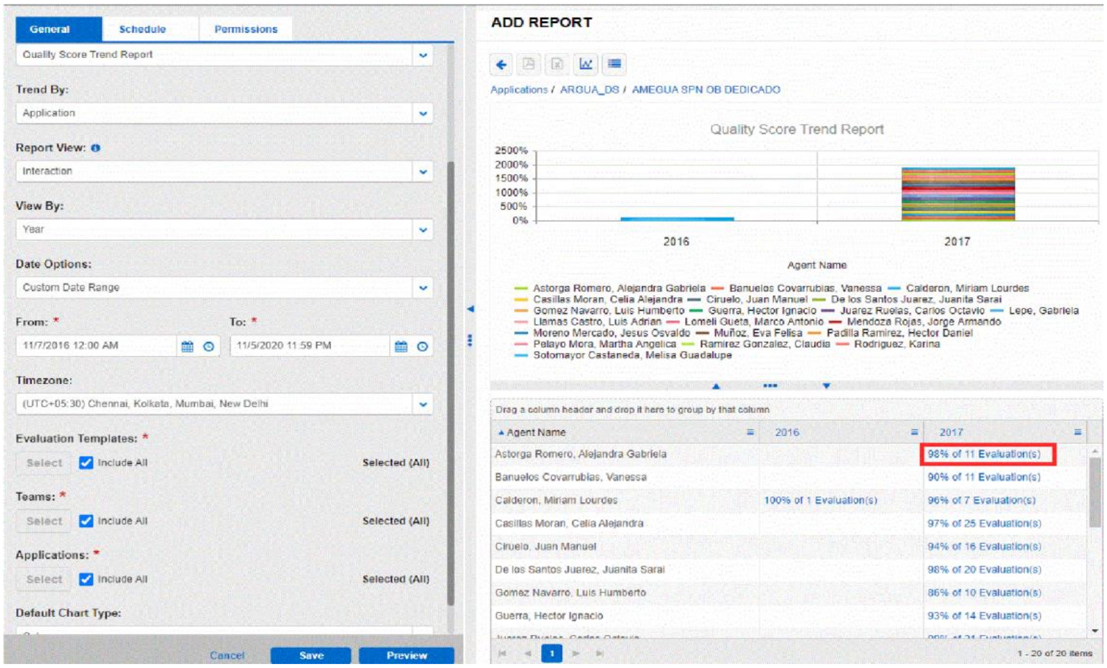


5. To drill down the report from Application to Team, click on the Application as shown above and the following window appears.



Note:

- Click on the Team, as shown above, to drill down the report to associated Agents as shown below.



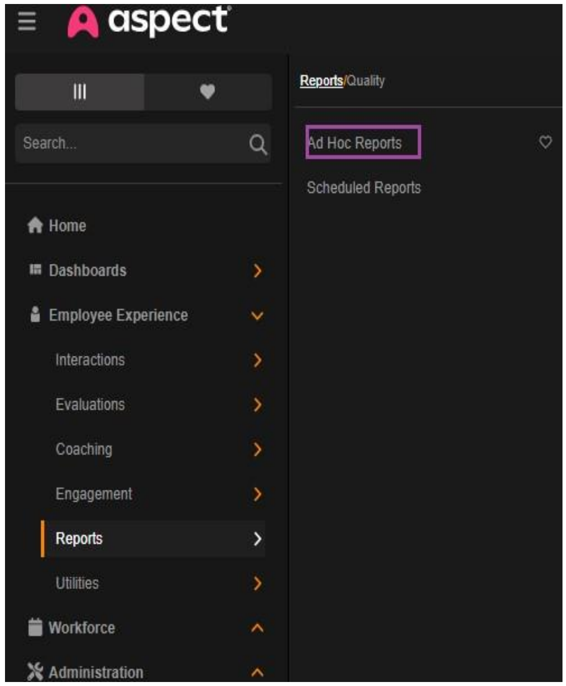
- Also, click on the Year as shown above, to drill down the report to Quarter, Month, Week and Date respectively.

After drilling down the grid (Year column) from **Year > Quarter > Month > Week**, the folders will be shown below the buttons as shown below.

9.3.5 Edit a Report

This feature allows you to edit a report which is already saved under the Scheduled Reports or Ad Hoc Reports tab. Follow the steps below to edit a report.

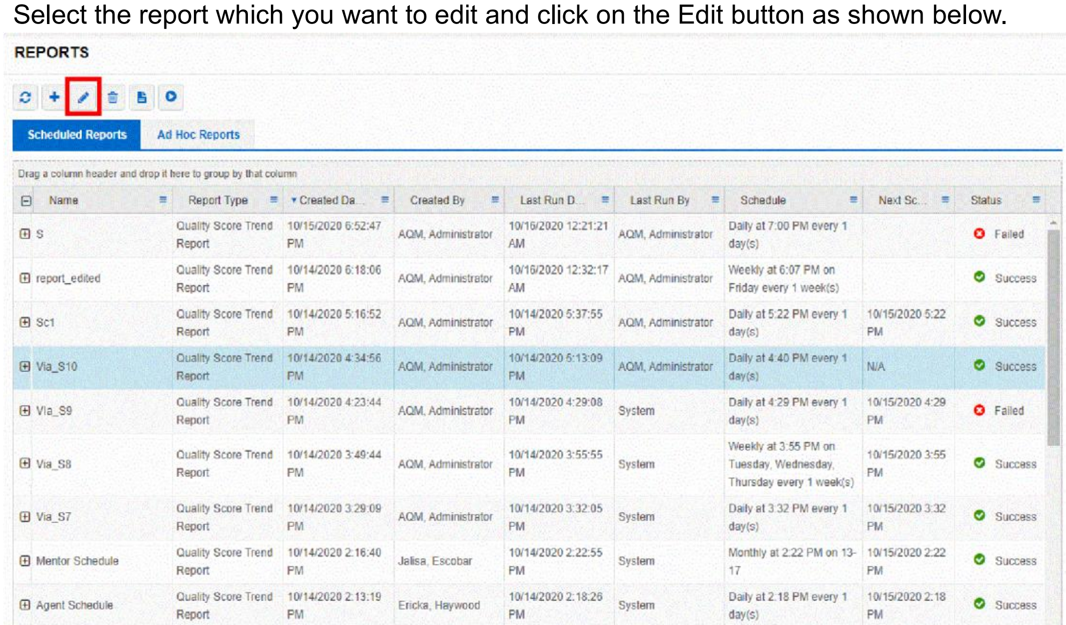
1. Log in to Workforce Engagement Management as an Administrator.
2. Go to **Navigation** bar and click **Employee Experience** and select **Reports,** then select **Quality**.



3. To complete the filter criteria for the report which you want to access, click on **Scheduled Reports** or **Ad Hoc Reports**.

4. The Reports window appears which consists of Scheduled Reports and Ad Hoc Reports tabs. The tab is highlighted based on the selected reports type such as Scheduled Reports or Ad Hoc Reports.

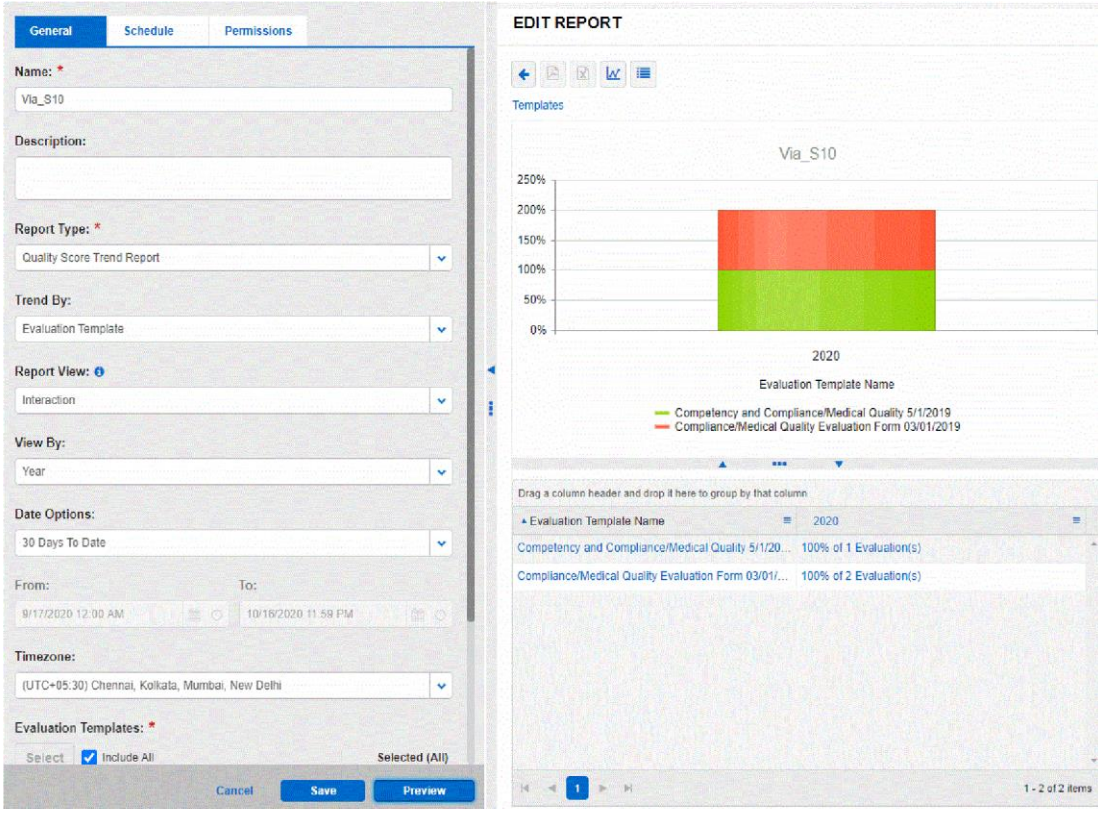
5. Select the report which you want to edit and click on the Edit button as shown below.



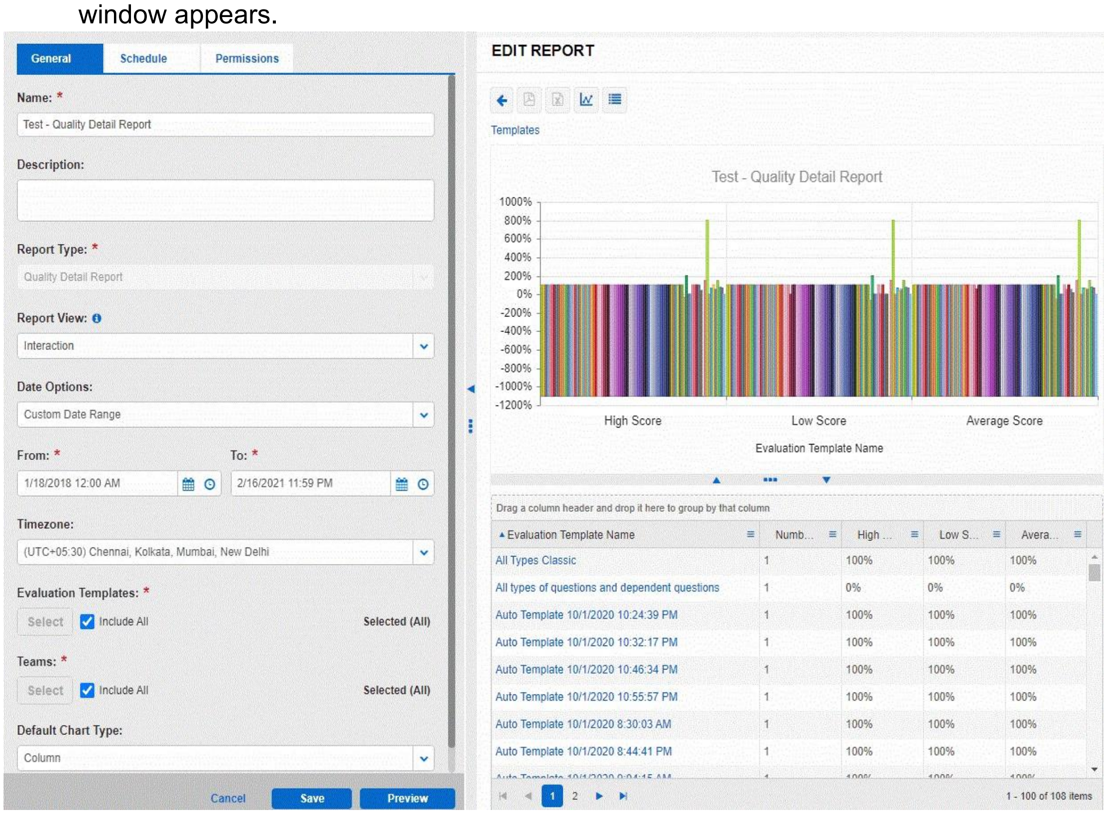
Note: The Edit button is always enabled for the administrator.

6. The EDIT REPORT window appears.

   a. **Quality Score Trend Report:** If you select a Quality Score Trend Report to edit, the following window appears.



b. **Quality Detail Report:** If you select a Quality Detail Report to edit, the following window appears.

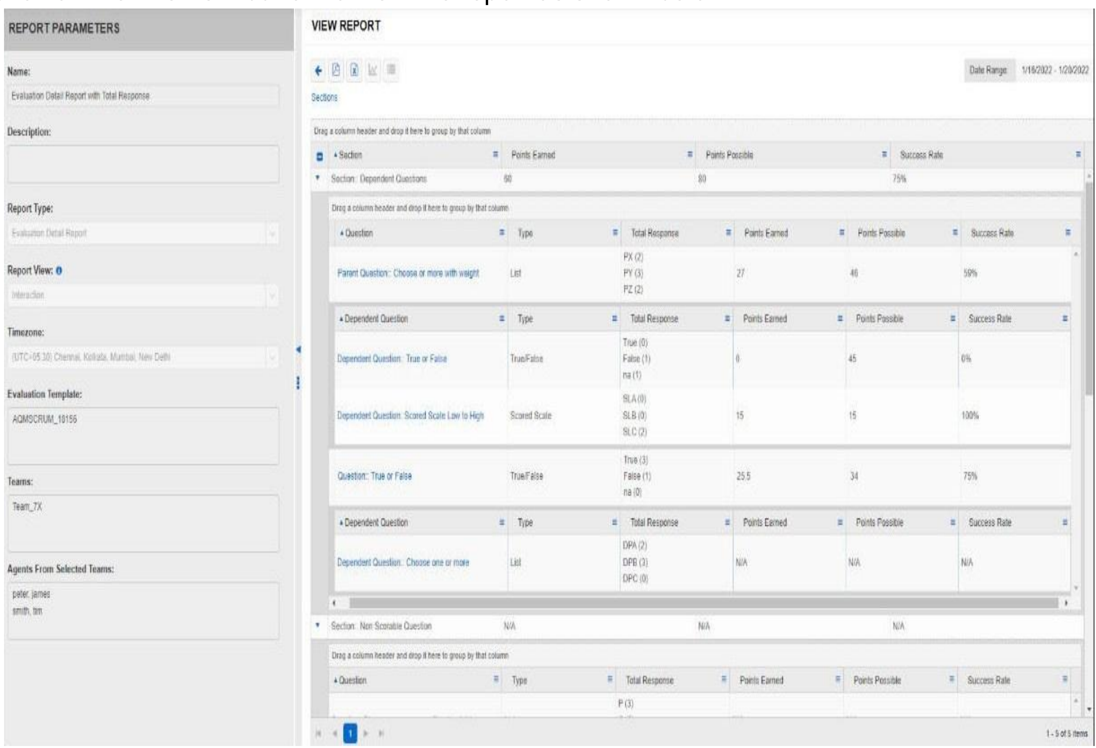


c. **Evaluation Details Report:** If you select an Evaluation Details Report to edit, the following window appears. This report provides the details of a question such as dependent questions, Question Type, Points Earned, Points Possible and Success Rate.

Total Response column displays value for every question type, regardless of parent or a dependent question. It displays all the possible answer choices and number of responses received for each option in the parenthesis.

Note: The Total Response column displays N/A as the answer to free form question type.

Click on the **Preview** button to view the report as shown below:



In the below screenshot, the comment section is displayed for each question. The **Comment** appears below the reviewer's name. Reviewer is the one who has commented on the question during evaluation.

Note: In the Evaluation Detail Report, the order of sections and questions are now displayed as they were defined in the Evaluation form.

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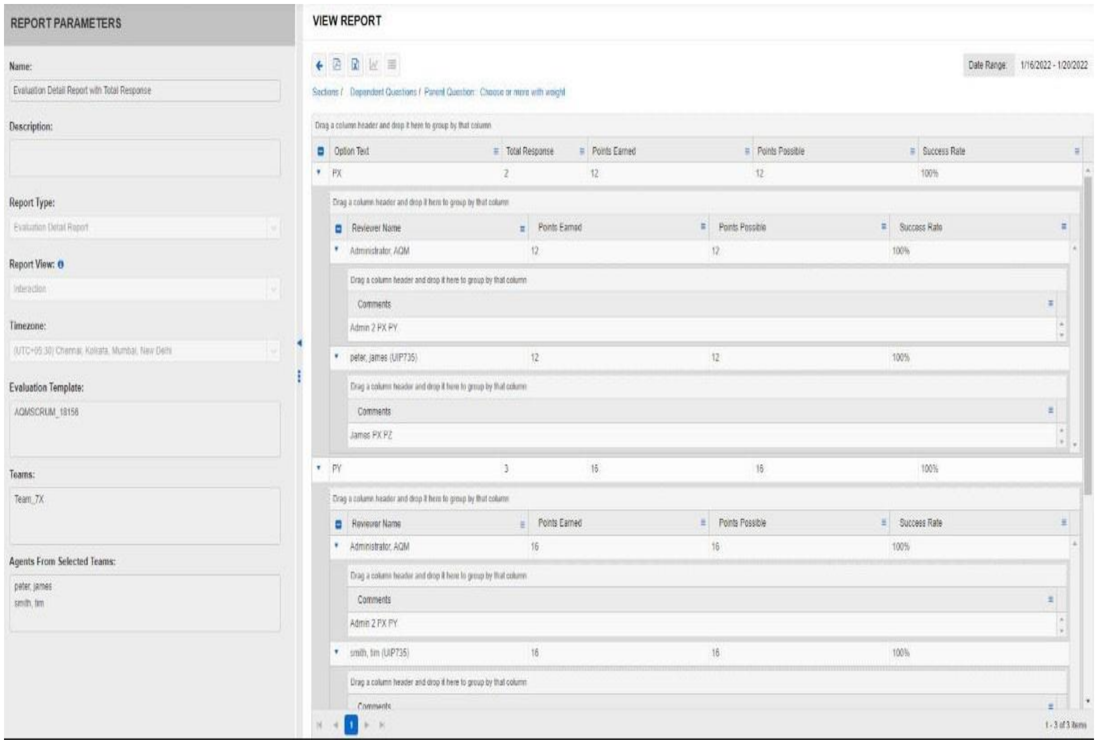


7. Edit the fields under the General Tab, Schedule Tab and Permissions Tab based on the requirement.

8. Before saving the report, click on the Preview button to preview the report.

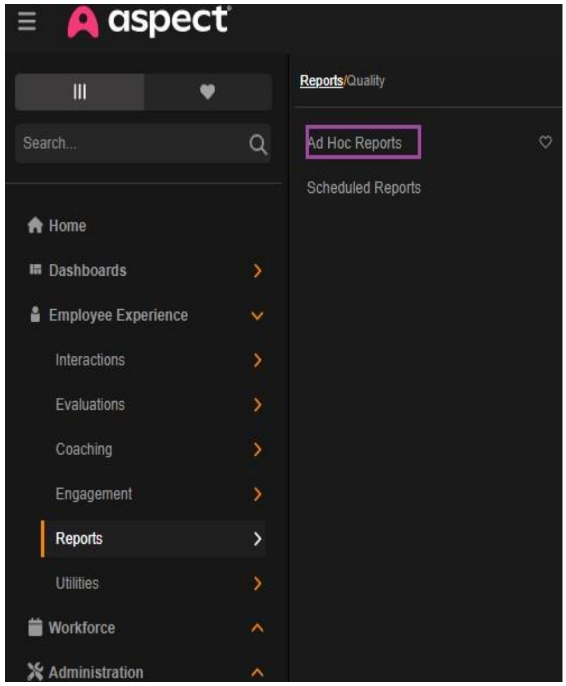
9. Click Save to complete the edit process.

9.3.6 View a Report

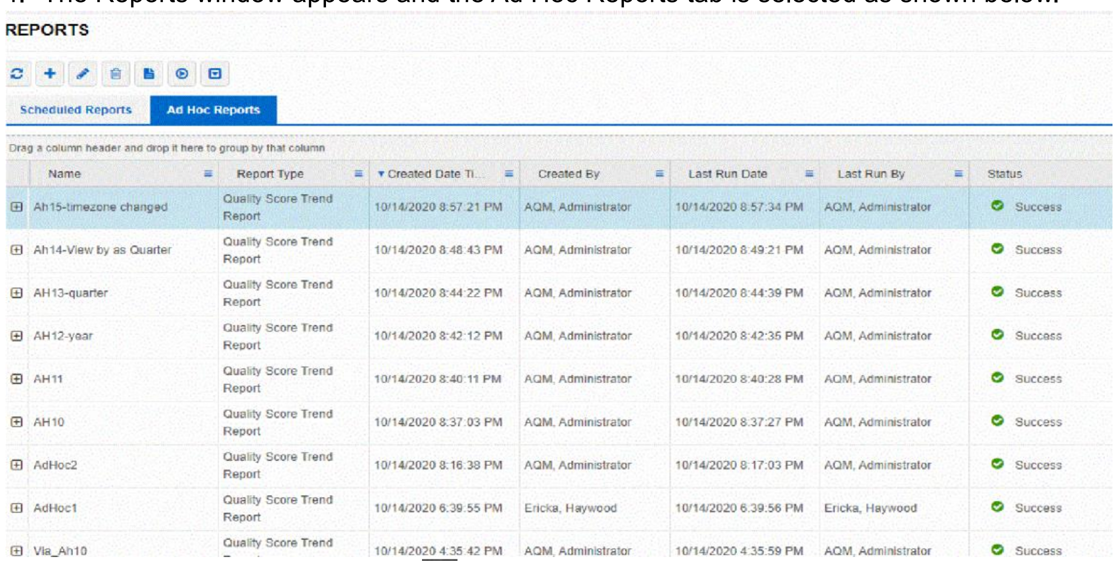
The View Report button helps you to view a Scheduled Report or Ad Hoc Report. To view a Scheduled Reports or Ad Hoc Report, follow the steps below:

1. Log in to Workforce Engagement Management as an Administrator or a Mentor.

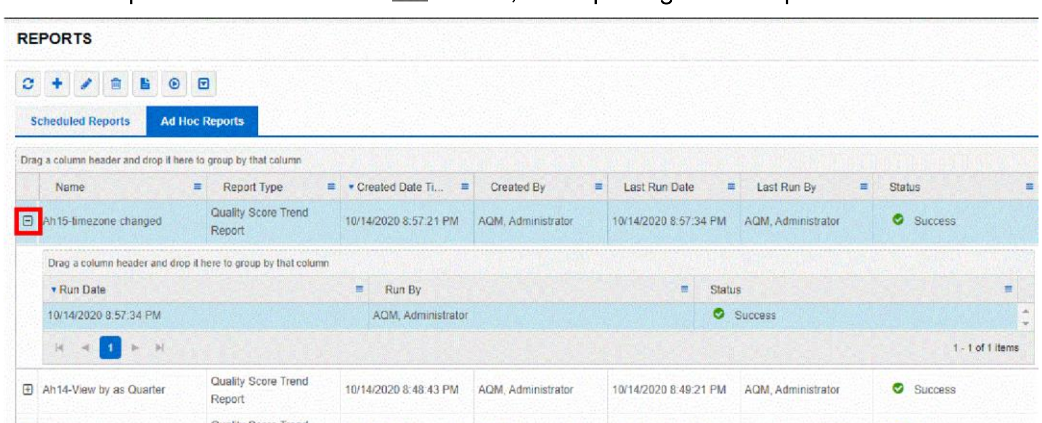
2. Go to **Navigation** bar and click **Quality**.
3. Click on **Scheduled Reports** or **Ad Hoc Reports**.



4. The Reports window appears and the Ad Hoc Reports tab is selected as shown below.

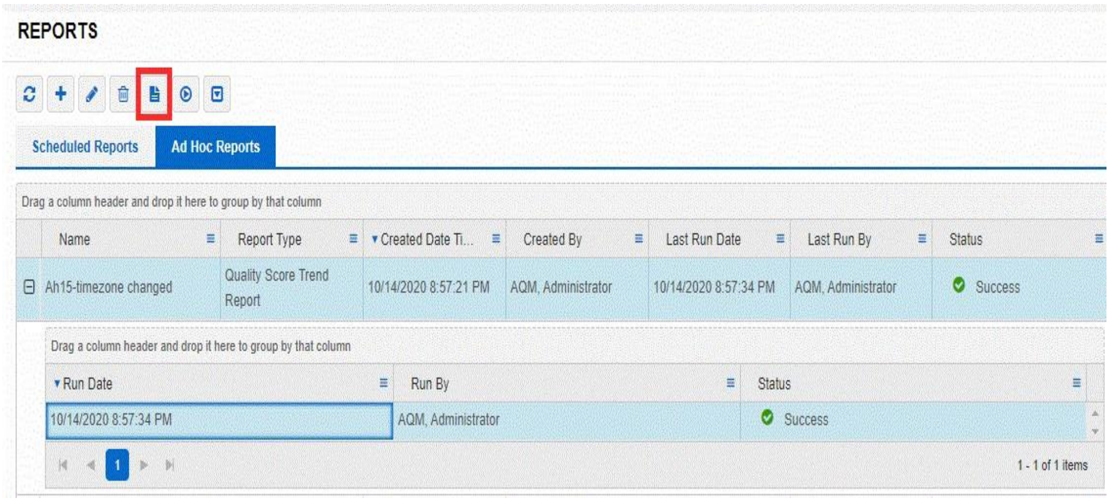


5.Select the report and click on the button, the reports grid will expand as shown below.



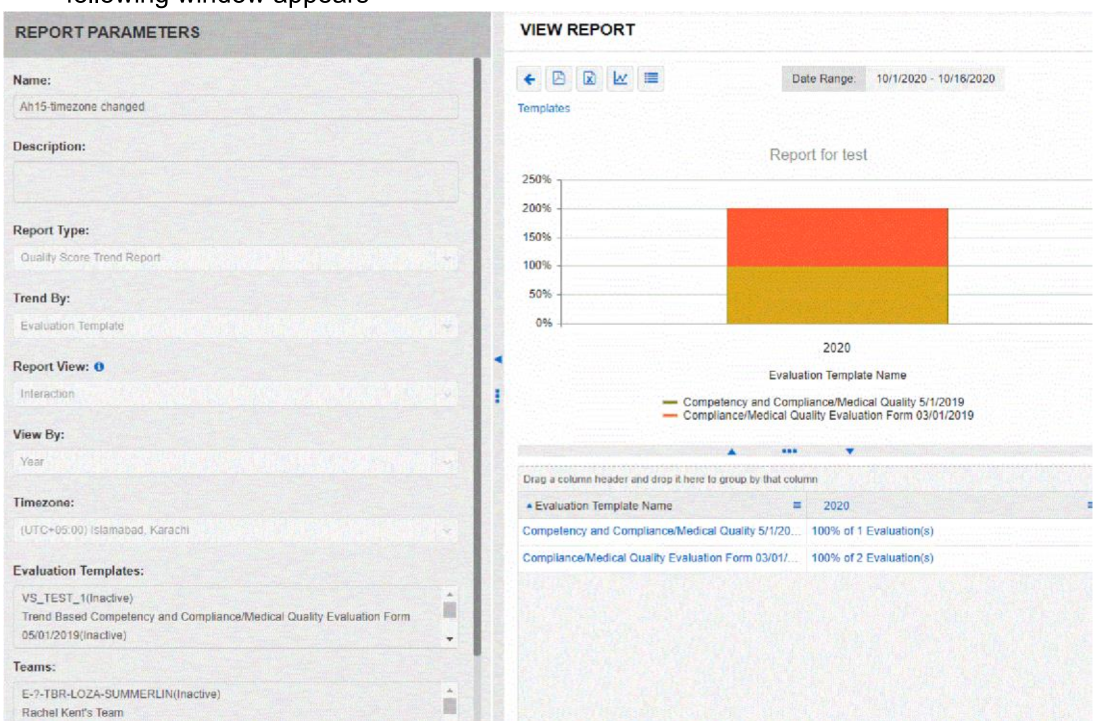
6. Select the report from the expanded grid (Child grid) and click on the View Report

button.

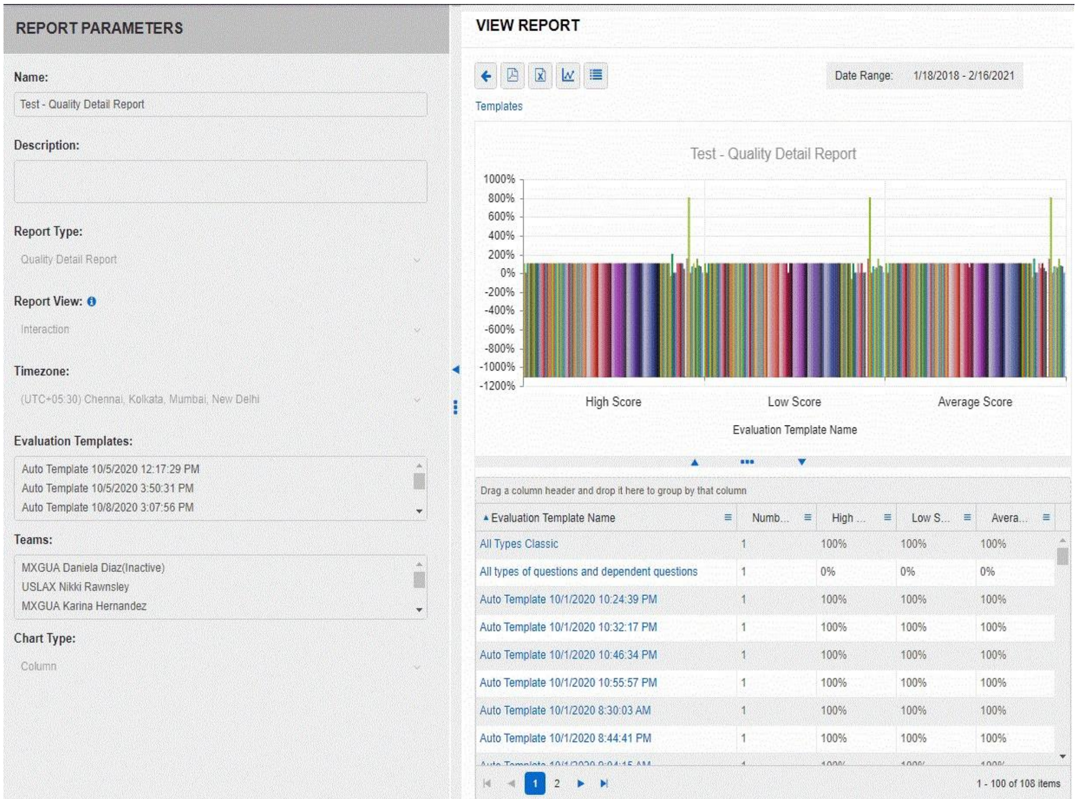


Note: Select a row in the child grid for which you want to view the result.

7. The VIEW REPORT window appears as shown below.
   a. **Quality Score Trend Report:** If you select a Quality Score Trend Report to view, the following window appears



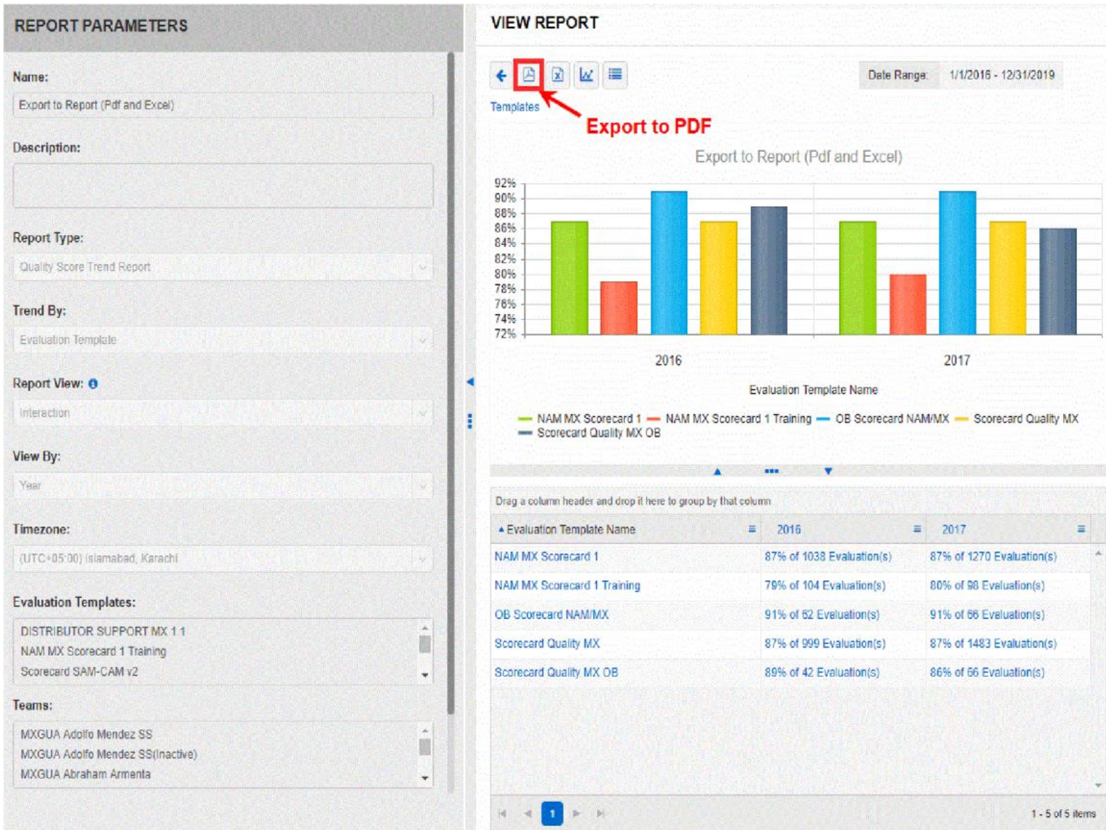
   b. **Quality Detail Report:** If you select a Quality Detail Report to view, the following window appears.



9.3.6.1 Export the Report to PDF

This section describes how to export the report to PDF.

1. Refer View a Report section.
2. Under the View Report, click on the Export to PDF  button to export the report in .pdf format. Refer the below screenshot.



Note:

- The Export to PDF button will be disable if the data is not available for the report or the report is not saved.
- When you select the Export to PDF button, the **Report Parameter**, **Chart** and **Grid** data will be exported to the .pdf file. The first page of the exported .pdf file contains the Report Parameters, the second page contains the Chart data, and the third page contains the Grid data as shown below.

Report Parameter:

REPORT PARAMETERS

Name: Export to Report (Pdf and Excel)

Description:

Report Type: Quality Score Trend Report

Trend By: Evaluation Template

Report View: Interaction

View By: Year

Date Range: 1/1/2016 - 12/31/2019

Timezone: (UTC+05:00) Islamabad, Karachi

Chart Type: Column

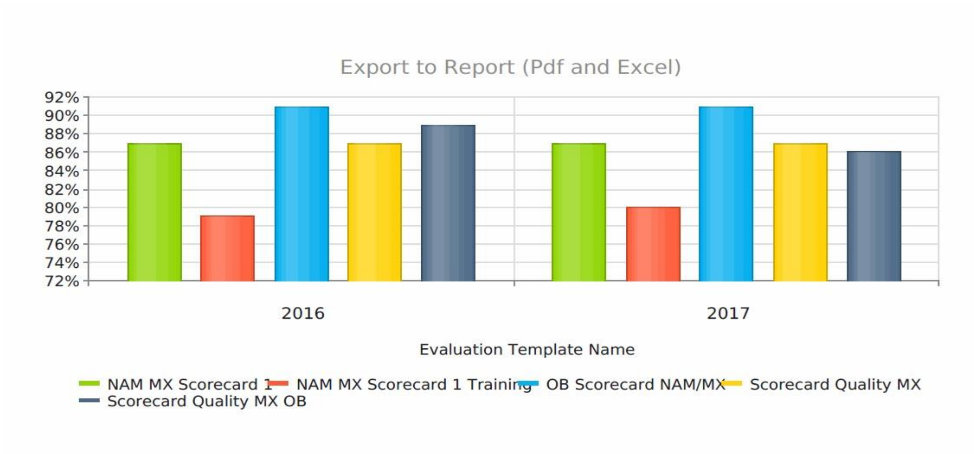
Evaluation Templates:

DISTRIBUTOR SUPPORT MX 1.1, NAM MX Scorecard 1 Training, Scorecard SAM-CAM v2, DISTRIBUTOR SUPPORT MX(Inactive), Outbound Awareness Campaign 2(Inactive), Scorecard Quality MX OB, Outbound Awareness Campaign(Inactive), DISTRIBUTOR RELATIONS MX 1.1, Scorecard Quality MX, Scorecard SAM-CAM v4, DISTRIBUTOR SUPPORT MX 1.2(Inactive), NAM MX Scorecard 2_Test, DISTRIBUTOR RELATIONS MX(Inactive), DISTRIBUTOR RELATIONS MX 1.2(Inactive), NAM MX Scorecard(Inactive), Scorecard SAM-CAM v3, Outbound Awareness Campaign, Template Name with maximum characters to test in Trend Report by Evaluation Template 111111111111111(Inactive), Sales Order Test(Inactive), NAM MX Scorecard 1, SALES ORDER MX 1.2(Inactive), OB Scorecard NAM/MX, 10 Customer - Scorecard

Teams:

MXGUA Adolfo Mendez SS, MXGUA Adolfo Mendez SS(Inactive), MXGUA Abraham Armenta, MXGUA Ahmed Ibrahim(Inactive), MXGUA Ana Rodriguez(Inactive), MXGUA Adolfo Mendez SO(Inactive), AMEGUA Inactive Users, MXGUA Ana Betel(Inactive), Jesus Gonzalez SO(Inactive), MXGUA Ana Rodriguez, <Default>, COGUA Inactive Users, ISPRD_Curtis Wheatley(Inactive), MXGUA Alberto Lomeli(Inactive), MXGUA Ana Betel, BRGUA Support, ISPRD Vanessa Lloja(Inactive), MXGUA Adolfo Mendez(Inactive), MXGUA Adolfo Mendez SS, AlbertTestEntWorkgroup(Inactive), MXGUA Adolfo Mendez(Inactive), AMEGUA Inactive Users, AlbertTestEntWorkgroup(Inactive), MXGUA Ana Betel, MXGUA Alejandro Reguera(Inactive), MXGUA Ahmed Ibrahim(Inactive), BRGUA Support(Inactive), CAMON Dom Schroeder(Inactive), MXGUA Alberto Lomeli(Inactive), MXGUA Andrea Rosales(Inactive), Jesus Gonzalez SO(Inactive), ISPRD_Curtis Wheatley(Inactive), baseAgentWorgroup1, MXGUA Alejandro Reguera(Inactive), Julio Guzman(Inactive), MXGUA Abraham Armenta, MXGUA Adolfo Mendez SO(Inactive), MXGUA Ana Rodriguez

Chart Data:



Grid Data:.

Drag a column header and drop it here to group by that column

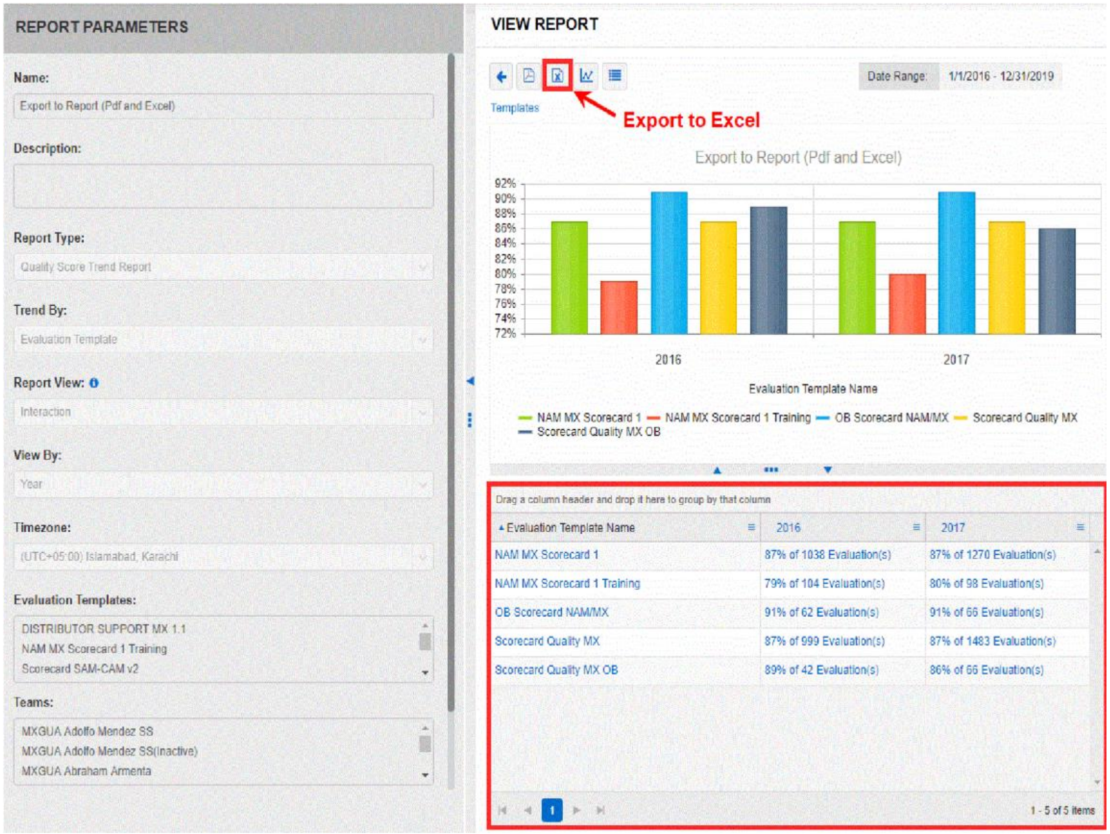
Evaluation Template Name	2016	2017
NAM MX Scorecard 1	87% of 1038 Evaluation(s)	87% of 1270 Evaluation(s)
NAM MX Scorecard 1 Training	79% of 104 Evaluation(s)	80% of 98 Evaluation(s)
OB Scorecard NAM/MX	91% of 62 Evaluation(s)	91% of 66 Evaluation(s)
Scorecard Quality MX	87% of 999 Evaluation(s)	87% of 1483 Evaluation(s)
Scorecard Quality MX OB	89% of 42 Evaluation(s)	86% of 66 Evaluation(s)

1   1 - 5 of 5 items

9.3.6.2 Export the Report to Excel

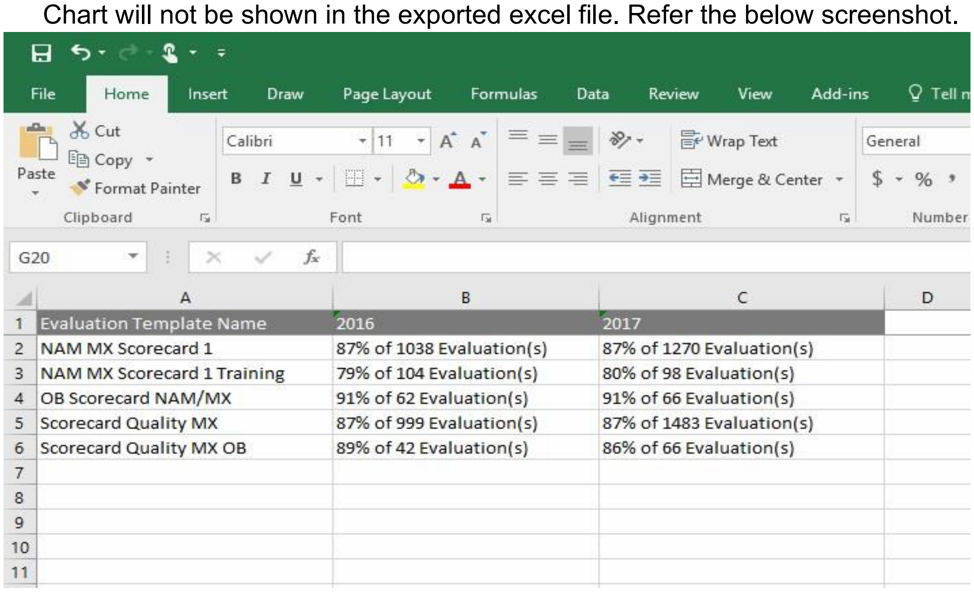
This section describes how to export the report to excel file.

1. Refer View a Report section.
2. Under the View Report, click on the **Export to excel** button to export the report in excel format. Refer the below screenshot.



Note:

- The Export to excel button will be disable if the data is not available for the report or the report is not saved.
- When you select the Export to excel button, **only the Grid data** (highlighted on the above screenshot) will be exported to the excel file. The Report Parameters and the Chart will not be shown in the exported excel file. Refer the below screenshot.

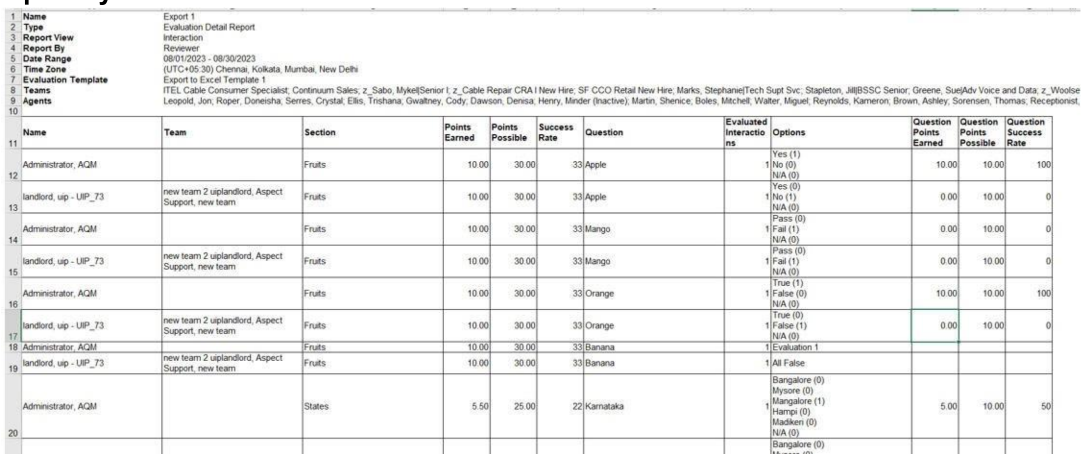


9.3.6.3 Export the Evaluation Detail Report to Excel

This section describes how to export the Evaluation Detail Report to Excel file. This can be done in the following two ways:

1. **Report By: Reviewer** – Reports result will be exported and will be displayed by grouping reviewer for each question.
2. **Report By: Agent** – Reports result will be exported and will be displayed by grouping by agent.

Report by Reviewer



Name	Export 1
Type	Evaluation Detail Report
Report View	Interaction
Report By	Reviewer
Date Range	08/01/2023 - 08/30/2023
Time Zone	(UTC+05:30) Chennai, Kolkata, Mumbai, New Delhi
Evaluation Template	Export to Excel Template 1
Teams	ITEL Cable Consumer Specialist; Continuum Sales; z_Sabo, Mykel|Senior I; z_Cable Repair CRA I New Hire; SF CCO Retail New Hire; Marks, Stephanie|Tech Supt Svc; Stapleton, Jill|BSSC Senior; Greene, Sue|Adv Voice and Data; z_Woolse
Agents	Leopold, Jon; Roper, Doneisha; Serres, Crystal; Ellis, Trishana; Gwaltney, Cody; Dawson, Denisa; Henry, Minder (Inactive); Martin, Shenice; Boles, Mitchell; Walter, Miguel; Reynolds, Kameron; Brown, Ashley; Sorensen, Thomas; Receptionist,

Name	Team	Section	Points Earned	Points Possible	Success Rate	Question	Evaluated Interactions	Options	Question Points Earned	Question Points Possible	Question Success Rate
Administrator, AQM		Fruits	10.00	30.00	33	Apple	1	Yes (1) No (0) N/A (0)	10.00	10.00	100
landlord, uip - UIP_73	new team 2 uiplandlord, Aspect Support, new team	Fruits	10.00	30.00	33	Apple	1	Yes (0) No (1) N/A (0)	0.00	10.00	0
Administrator, AQM		Fruits	10.00	30.00	33	Mango	1	Pass (0) Fail (1) N/A (0)	0.00	10.00	0
landlord, uip - UIP_73	new team 2 uiplandlord, Aspect Support, new team	Fruits	10.00	30.00	33	Mango	1	Pass (0) Fail (1) N/A (0)	0.00	10.00	0
Administrator, AQM		Fruits	10.00	30.00	33	Orange	1	True (1) False (0) N/A (0)	10.00	10.00	100
landlord, uip - UIP_73	new team 2 uiplandlord, Aspect Support, new team	Fruits	10.00	30.00	33	Orange	1	True (0) False (1) N/A (0)	0.00	10.00	0
Administrator, AQM		Fruits	10.00	30.00	33	Banana	1	Evaluation 1			
landlord, uip - UIP_73	new team 2 uiplandlord, Aspect Support, new team	Fruits	10.00	30.00	33	Banana	1	All False			
Administrator, AQM		States	5.50	25.00	22	Karnataka	1	Bangalore (0) Mysore (0) Mangalore (1) Hampi (0) Madikeri (0) N/A (0)	5.00	10.00	50
								Bangalore (0)			

Report Header data:

- **Name**: Name of the report.
- **Type**: The report type, which will be “Evaluation Detail Report”.
- **Report View**: The report view is based on either Interaction or Evaluation.
- **Report By**: The report is based on either Reviewer or Agent’s data.
- **Date Range**: The From and To date of the report.
- **Time Zone**: The time zone selected for the report.
- **Evaluation Template**: The evaluation template name.
- **Teams**: The teams selected to filter the report data.
- **Agents**: The agents selected to filter the report data.

Report results will be displayed in the tabular format as shown in the above screenshot. The column description is as given below:

Name:

- The name of the Reviewer or Agent will be displayed in last name, first name format.
- This displays the reviewer’s name if the “Report By” is selected as “Reviewer” – The User who has created the evaluation.
- It displays the Agent name if the “Report By” is selected as “Agent” – The User for whose interaction, the evaluation was created.

Team:

- The team name of the Reviewer or Agent. If the user is associated with more than one team, then it shows the names of all the teams with "," (comma) separated.

Section Data:

This includes four columns; Section, Points Earned, Points Possible and Success Rate.

- **Section**: Name of the section. Each section's name that is defined in the evaluation template. For each reviewer, the section and question details will be displayed.
- **Points Earned**: This displays the total points the user has earned for that particular section.

  `Formula: Sum of Points earned for each question and dependent question (if exists)/Number of Reviewers`

- **Points Possible**: The total number of points that is possible to earn for the section. This will be the maximum possible max weighted score.

  `Formula: Sum of weights of the question scored with valid option. If the N/A option is selected for the question that question weight will not be considered.`

- **Success Rate**: The percentage rate that the section has earned.

  `Formula: Points Earned/Points Possible`

Question Data:

This includes the column Question, Options, Question Points Earned, Question Points Possible and Question Success Rate.

- **Question**: Name of the question. For each reviewer each question data will be displayed.
- **Options**: The options available for the question along with the number of times the reviewer have selected the option. For example, Yes (1), which indicates the reviewer have selected option 'Yes' one time for the question.
- **Question Points Earned**: The points that is earned for the question by the specific reviewer.

  For example, If a template has a question with Yes/No type and the weight of the option Yes is 10 and Weight of the option No is 0. Now, the option is selected by the reviewer as "Yes" then the Points Earned for the question by the reviewer will be 10.

  Note: If the same reviewer has evaluated more than once using same template, then the Question Points Earned will be calculated as below:

  `Formula: Sum of the weights of the question option selected/Total number of times the evaluation is evaluated`

  Note: For Free Form Text, the text entered by the reviewer will be displayed. If more than one response exists for these question it shows the responses in each line. It will be blank when the option is selected as N/A.

- **Question Points Possible**: This will be the weight of the question.
- **Question Success Rate**: This displays the percentage rate that the question has earned.

  `Formula: Question Points Earned/Question Points Possible`

Report by Agent

Name	Export to Excel (Agent)
Type	Evaluation Detail Report
Report View	Interaction
Report By	Agent
Date Range	08/30/2023 - 08/30/2023
Time Zone	(UTC-08:00) Pacific Time (US & Canada)
Evaluation Template	Export to Excel Template 1
Teams	ITEL Cable Consumer Specialist; Continuum Sales; z_Sabo, Mykel|Senior I; z_Cable Repair CRA I New Hire; SF CCO Retail New Hire; Marks, Stephanie|Tech Supt Svc; Stapleton, Jill|BSSC Senior; Greene, Sue|Adv Voice and Data; z_
Agents	Henry, Minder; landlord, uip

Name	Team	Section	Points Earned	Points Possible	Success Rate	Question	Evaluated Interactions	Options	Question Points Earned	Question Points Possible	Question Success Rate
Henry, Minder - UIP_73	FSX Advisor	Fruits	20.00	30.00	67	Apple	1	Yes (1) No (0) N/A (0)	10.00	10.00	100
Henry, Minder - UIP_73	FSX Advisor	Fruits	20.00	30.00	67	Mango	1	Pass (0) Fail (1) N/A (0)	0.00	10.00	0
Henry, Minder - UIP_73	FSX Advisor	Fruits	20.00	30.00	67	Orange	1	True (1) False (0) N/A (0)	10.00	10.00	100
Henry, Minder - UIP_73	FSX Advisor	Fruits	20.00	30.00	67	Banana	1	Evaluation 1			
Henry, Minder - UIP_73	FSX Advisor	States	10.00	25.00	40	Karnataka	1	Bangalore (0) Mysore (0) Mangalore (1) Hampi (0) Madikeri (0) N/A (0)	5.00	10.00	50
Henry, Minder - UIP_73	FSX Advisor	States	10.00	25.00	40	Andra Pradesh	1	Tirupati (0) Vishakapatnam (1) Vijaywada (1) Ongole (0) Tadipatri (0)	5.00	15.00	33
landlord, uip - UIP_73	new team 2 uiplandlord, Aspect Support, new team	Fruits	0.00	30.00	0	Apple	1	Yes (0) No (1) N/A (0)	0.00	10.00	0
landlord, uip - UIP_73	new team 2 uiplandlord, Aspect Support, new team	Fruits	0.00	30.00	0	Mango	1	Pass (0) Fail (1) N/A (0)	0.00	10.00	0
landlord, uip - UIP_73	new team 2 uiplandlord, Aspect	Fruits	0.00	30.00	0	Orange	1	True (0) False (1)	0.00	10.00	0

The data for the Report by Agent will be the same as explained above for the header and columns in the Report by Reviewer, except the grouping of the sections and questions will be based on each Agent.

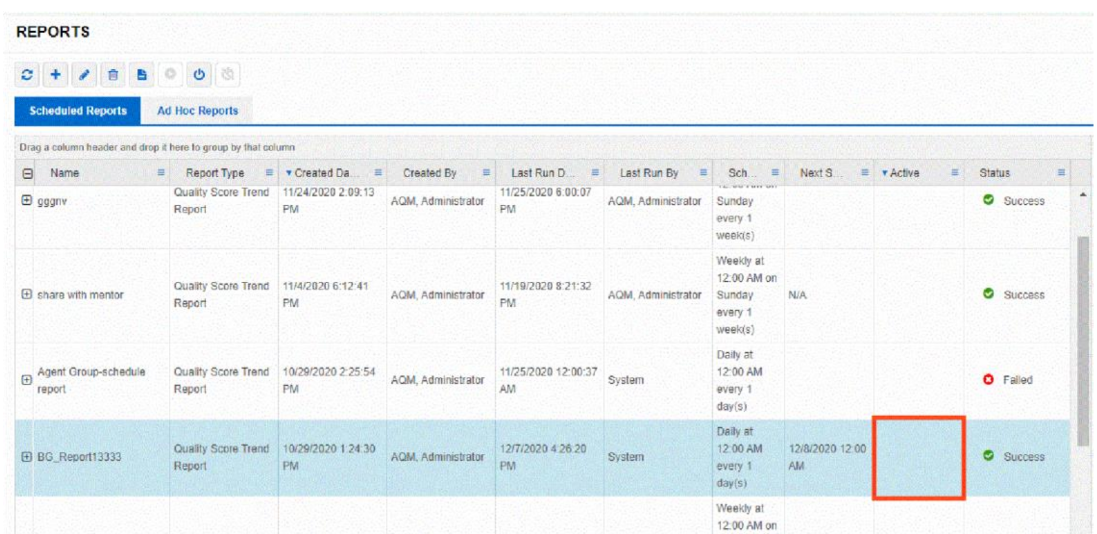
9.3.7 Activate the Report

This feature allows to activate a saved report based on the selected parameters (Refer Save a Report). To activate a report follow the steps below.

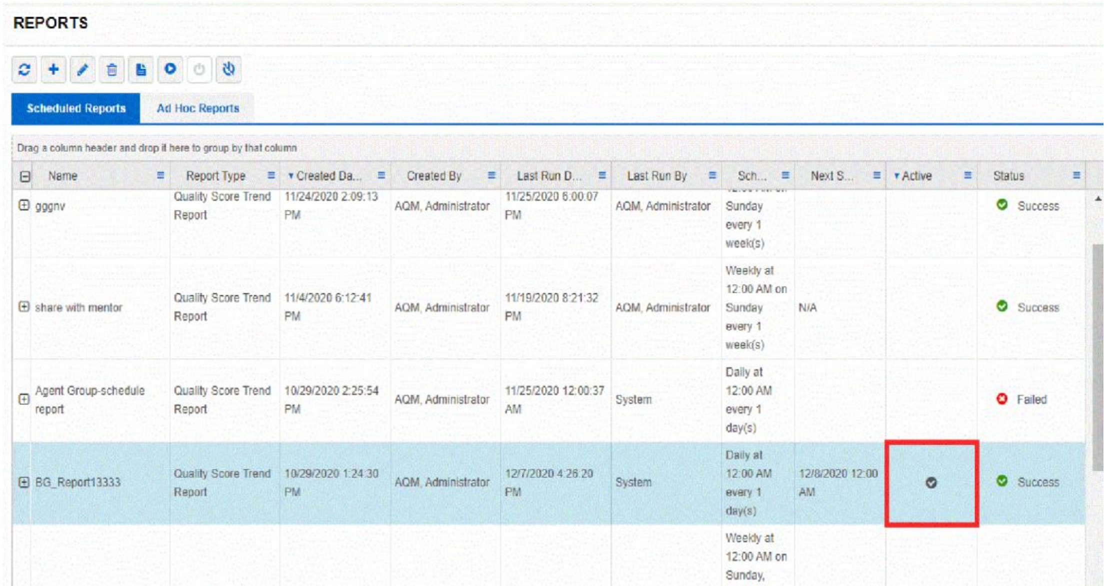
Note:

- The user is able to activate or deactivate a report, if the user is either owner of the report or has an edit permission right for the report.
- If report is deactivated then neither the user is able to run the Ad Hoc Reports nor scheduler will run the Schedule Reports.
- Report result will not be generated when the Deactivated report is edited.
- These operations will be audited.

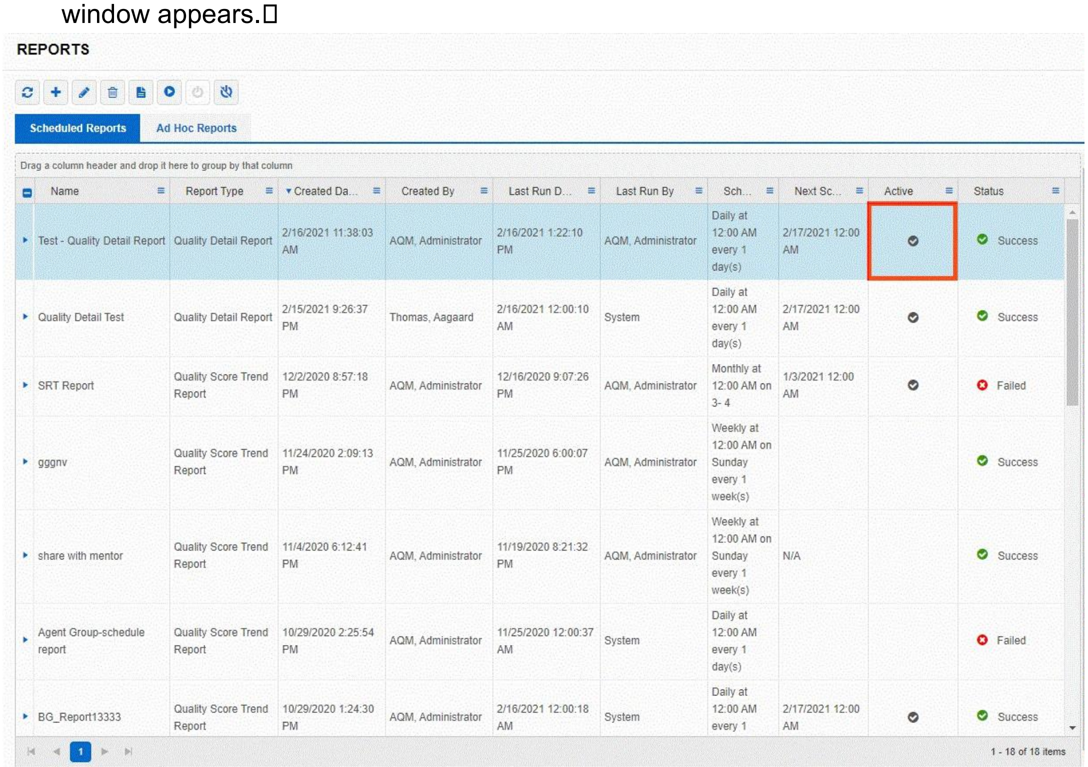
1. Select the report for which the Active column is **blank**, as shown below.



2  button and the checkmark will be shown on the Active column . Click on the **Activate** for the selected report as shown below.



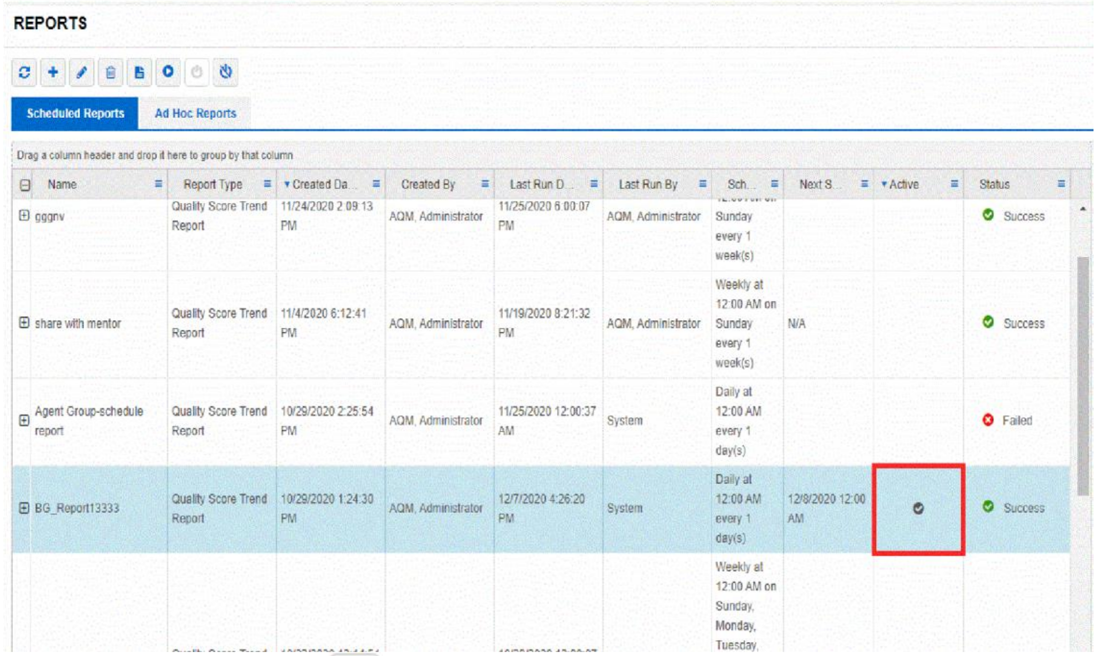
a. **Quality Detail Report:** If you select a Quality Detail Report to activate, the following window appears.



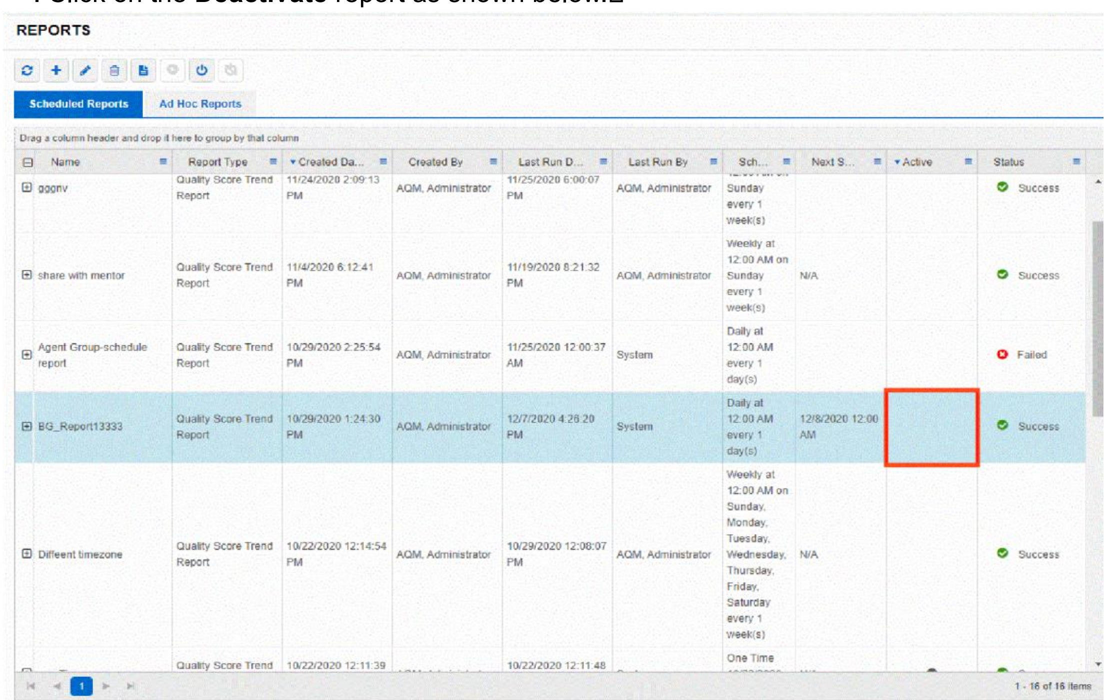
9.3.8 Deactivate the Report

This feature allows to deactivate an activated report. To deactivate the activated report follow the steps below.

1. Select the report for which the Active column is **checked**, as shown below.

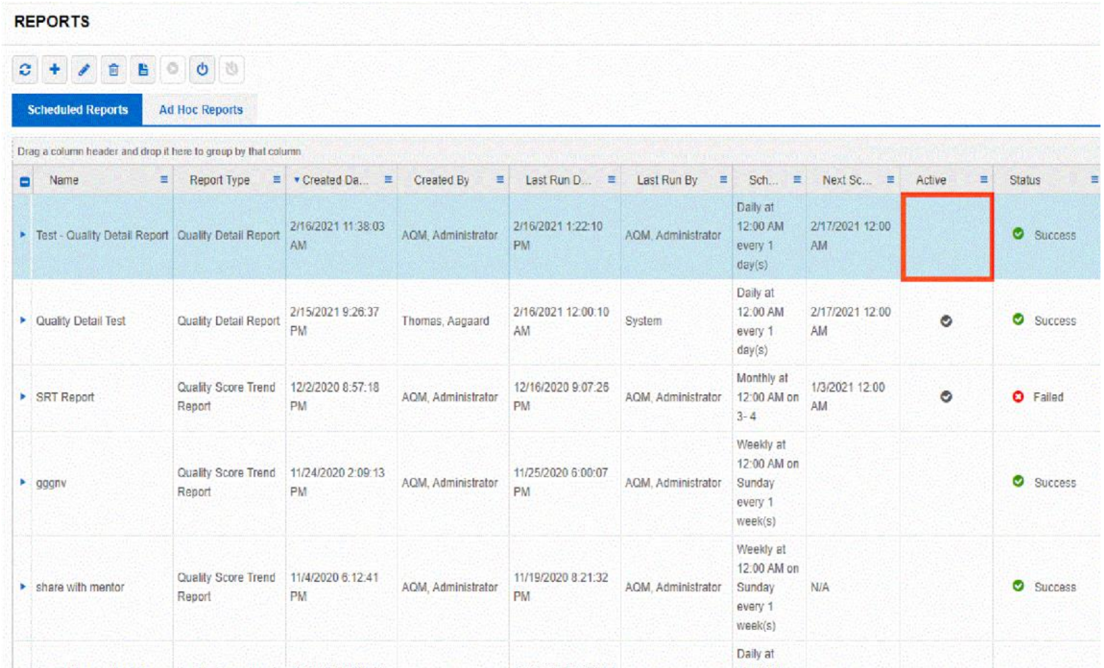


2  button and the Active column will be blank for the selected . Click on the **Deactivate** report as shown below.



Example: In this scenario, the Daily report was created on 29th October, 2020 and as the report is deactivated, the daily report will not run.

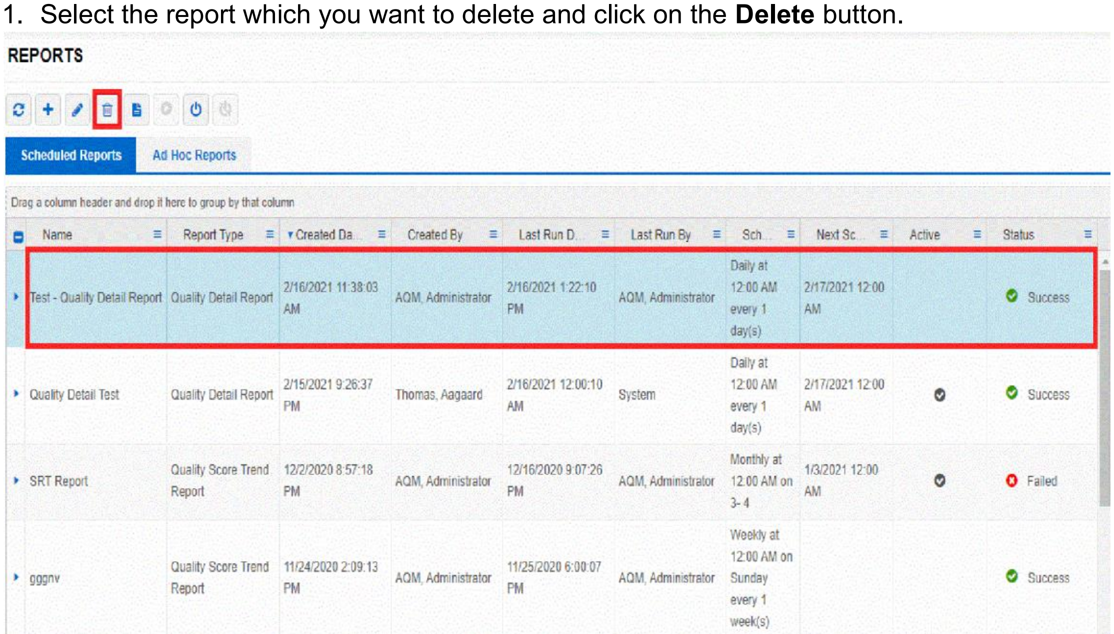
a. **Quality Detail Report:** If you select a Quality Detail Report to deactivate, the following window appears.



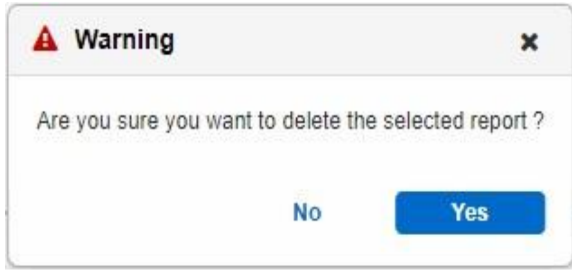
9.3.9 Delete a Report

This feature allows to delete a Quality Detail Report or Quality Score Trend Report. To delete the Quality Detail Report or Quality Score Trend Report report follow the steps below.

1. Select the report which you want to delete and click on the **Delete** button.



2. Click on **Yes** to delete the report from the grid.


Warning
Are you sure you want to delete the selected report ?
No
Yes

10. System Parameters

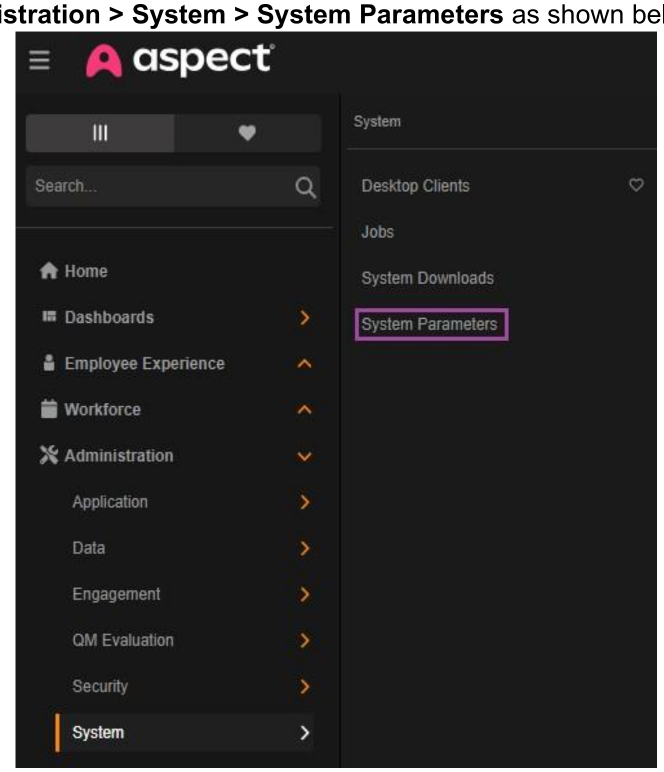
The System Parameters page allows an administrator to change one or more properties that affect the behavior of the system. This section describes how to use those System Parameters in Aspect Cloud Quality. The System Parameters properties are below.

- Disqualifying Rule Overrides Parent
- Insert Silence During Pause
- Media File Download
- Share Evaluations With
- Use Ani & Dnis From CTI for UIP Switch

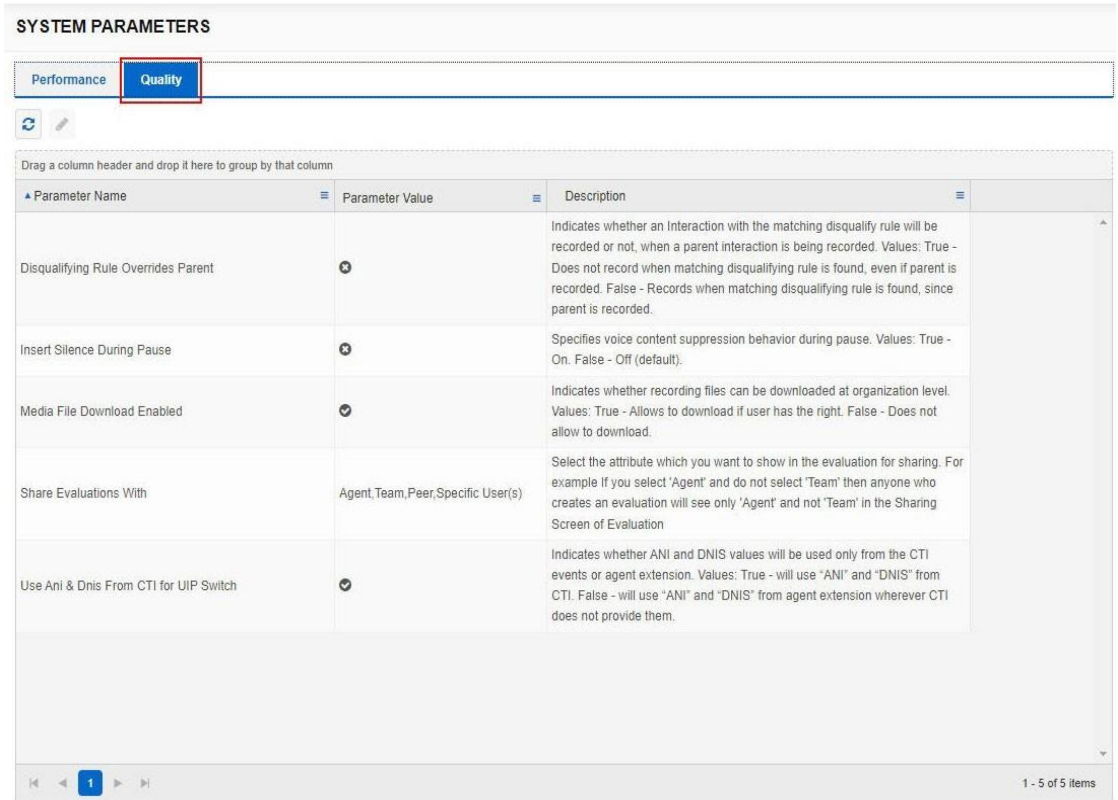
10.1 Navigation to the System Parameters

Follow the steps given below to navigate to the System Parameters page:

1. Go to **Main Menu > Workforce Engagement Management.**
2. Click on **Administration > System > System Parameters** as shown below.



3. The **SYSTEM PARAMETERS** window appears.



10.1.1 Disqualifying Rule Overrides Parent

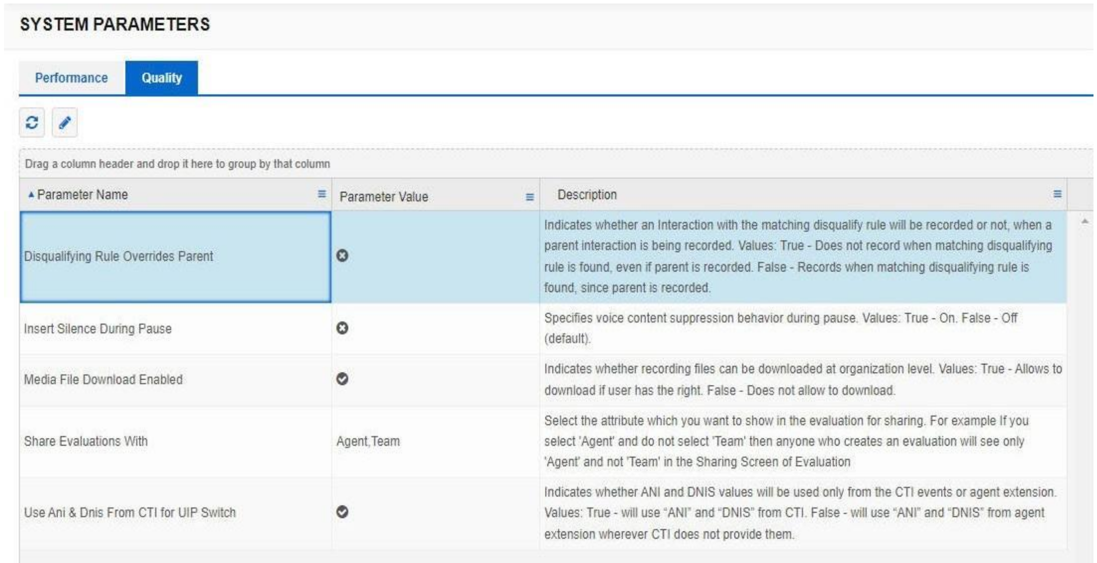
This property indicates whether an Interaction with the matching disqualify rule will be recorded or not, when a parent interaction is being recorded.

Values: True - Does not record when matching disqualifying rule is found, even if parent is recorded. False - Records when matching disqualifying rule is found, since parent is recorded.

Follow the steps below to set the Parameter Value as True.

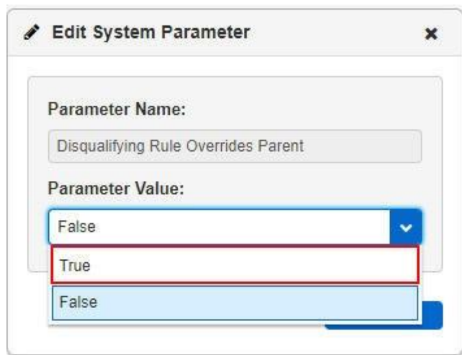
Note: By default, the Parameter Value is False.

1. To edit this property, select **Disqualifying Rule Overrides Parent** row, as shown below.

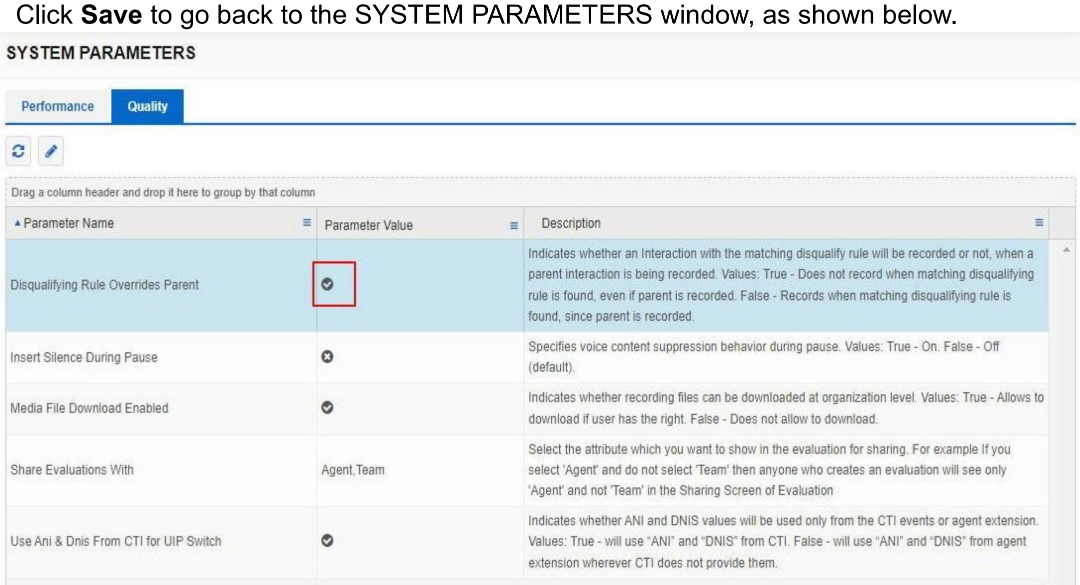


2.Click on the **Edit** button and the **Edit System Parameter** pop-up appears.

3. Click on the **drop-down list** of **Parameter Value** field and select **True** as shown below.



4. Click **Save** to go back to the SYSTEM PARAMETERS window, as shown below.



As Disqualifying Rule Overrides Parent is set **True** for the user, the checkmark is displayed under the Parameter Value column.

10.1.2 Insert Silence During Pause

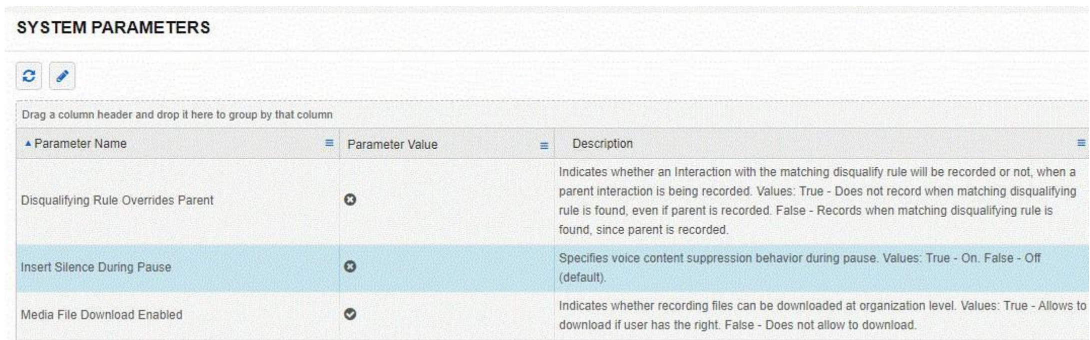
This property allows the administrator to listen to an interaction with or without the pause time duration of the interaction.

Example: During an interaction, the agent can pause the recording while collecting customer information.If this property is set to True, then silence will be inserted into the voice recording for the duration of the pause. If this property is set to False, no silence is inserted into the voice recording. The duration of the paused recording is skipped and not included in the recorded audio file.

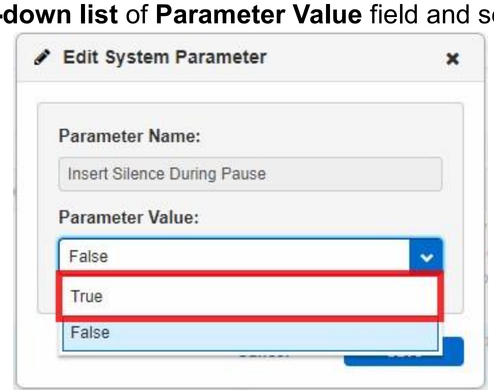
Follow the steps below to set the Parameter Value as True.

Note: By default, the Parameter Value is False.

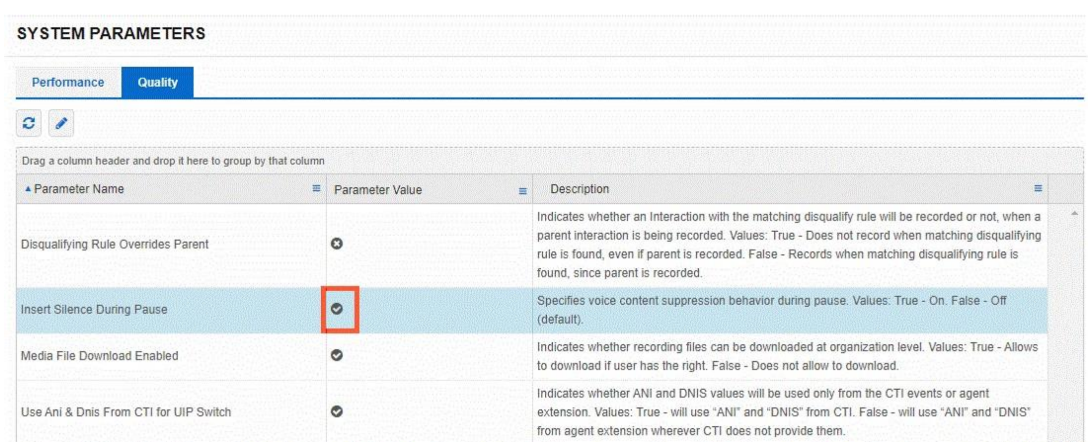
1. To edit this property, select **Insert Silence During Pause** row, as shown below.



2. Click on the **Edit**  button and the **Edit System Parameter** pop-up appears.
3. Click on the **drop-down list** of **Parameter Value** field and select **True** as shown below.



4. Click **Save** to go back to the SYSTEM PARAMETERS window, as shown below.



As Insert Silence During Pause is set **True** for all voice recordings, the checkmark is displayed under the Parameter Value column.

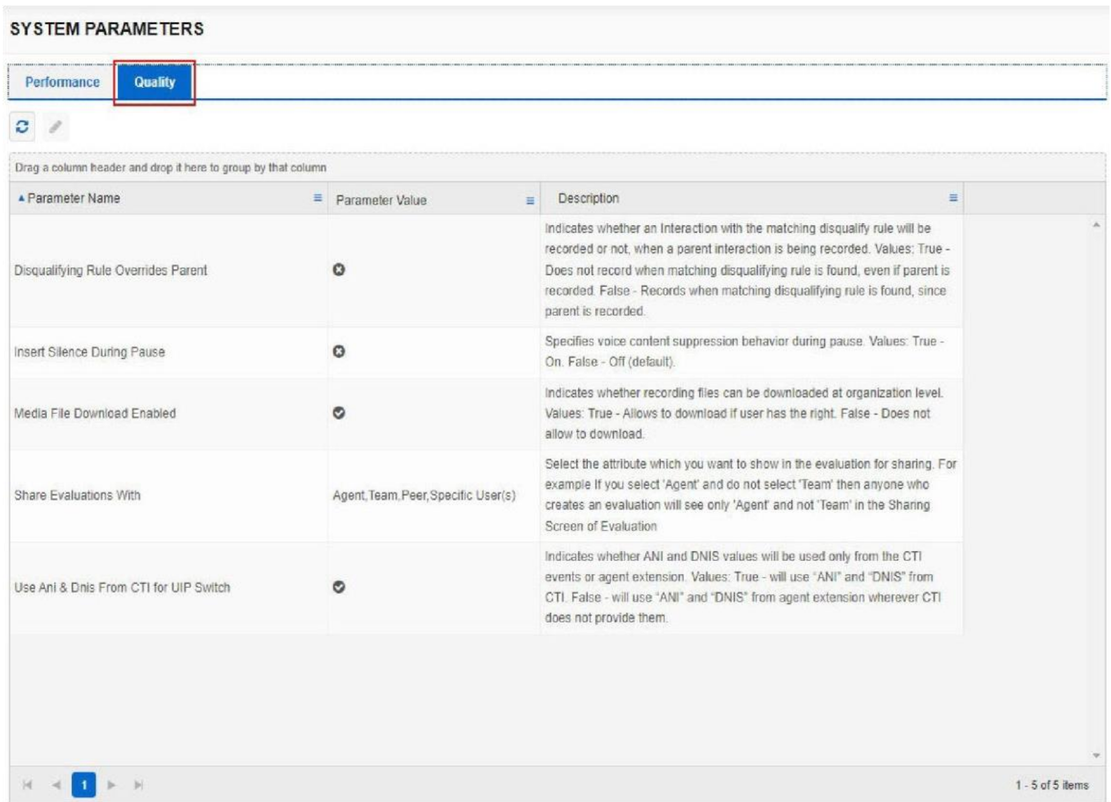
10.1.3 Media File Download

Media File Download property allows the user to download the media files such as video and audio interactions, chat, SMS, and email interactions in the Interaction window or Search Results page. Refer to step 2 of Quick View of Audio Interaction and Quick View of Voice and Screen Interaction to view the Download button of the interaction.

Follow the steps below to enable or disable the Download button.

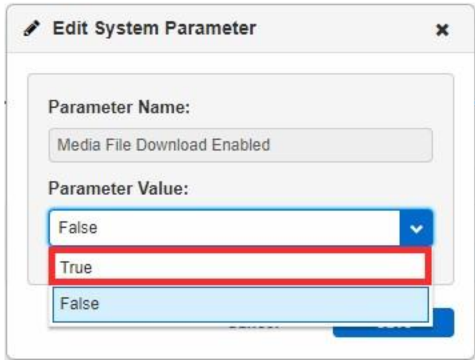
1. Select the **Media File Download Enabled** row.

   - When Performance is integrated with Quality, go to the **Quality** tab, as shown below. The **Media File Download Enabled** row is selected under the Parameter Name column by default.



2.Click on the **Edit** button and the **Edit System Parameter** pop-up appears.

3. Click on the **drop-down list** of **Parameter Value** field and select **True** as shown below.



4. Click on the **Save** button to go back to the SYSTEM PARAMETERS window.

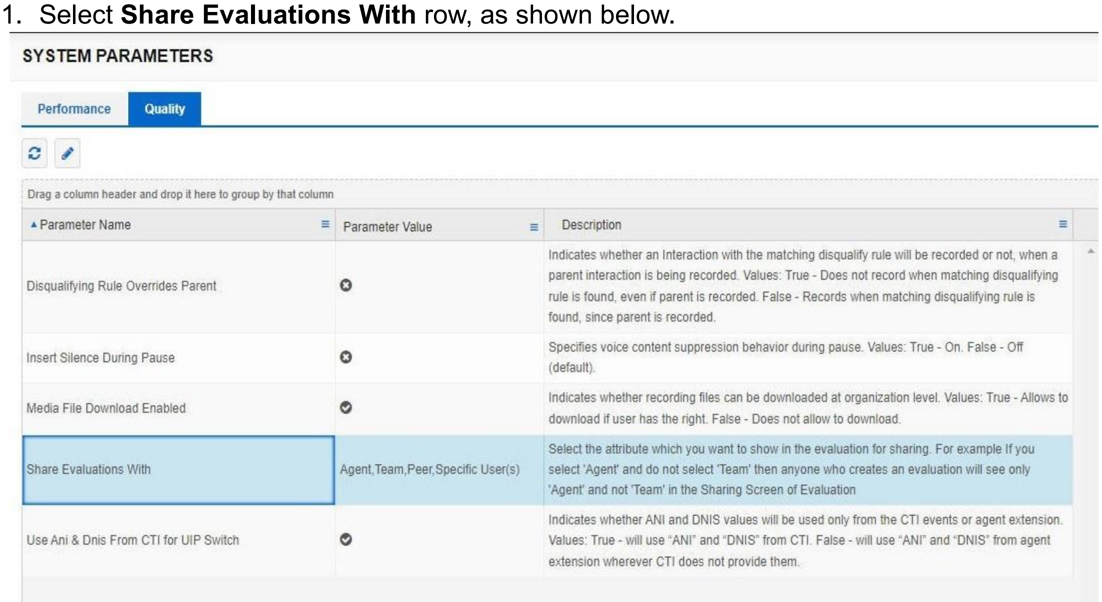
If you change the value for **MediaFileDownloadEnabled** key, then all the users must log out and log in to Workforce Engagement Management UI to effect the changes.

10.1.4 Share Evaluations With

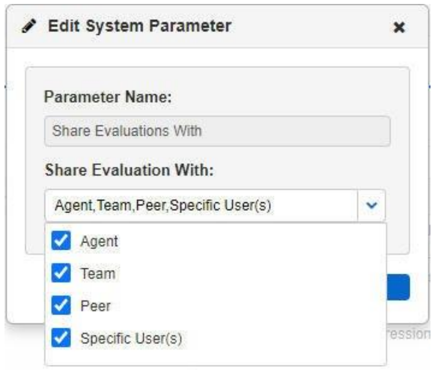
This property allows the administrator to select the attribute which you want to show in the evaluation for sharing. By default, the options of Agent, Team, Peer and Specific User(s) are checked in.
Example: If you select 'Agent' and do not select 'Team' then anyone who creates an evaluation will see only 'Agent' and not 'Team' in the Sharing Screen of Evaluation.

Follow the steps below to set the options for sharing the evaluations.

1. Select **Share Evaluations With** row, as shown below.



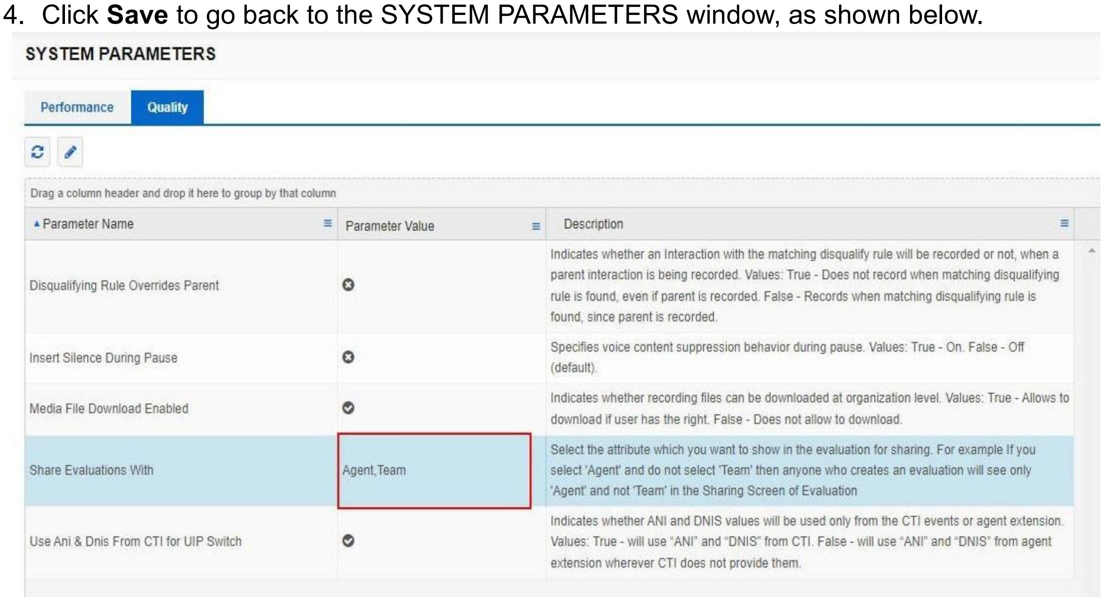
2. Click on the **Edit**  button and the **Edit System Parameter** pop-up appears.
3. Click on the **drop-down list** of **Share Evaluation With** field and select the desired options from the available list as shown below.



Note: By default, all the available Attributes are selected as shown above..

Disable the Peer and Specific User(s) options, so only Agent and Team options are selected.

4. Click **Save** to go back to the SYSTEM PARAMETERS window, as shown below.



As Share Evaluations With **Agent** and **Team** options was selected for the user, the same options are displayed under the Parameter Value column.

10.1.5 Use Ani & Dnis From CTI for UIP Switch

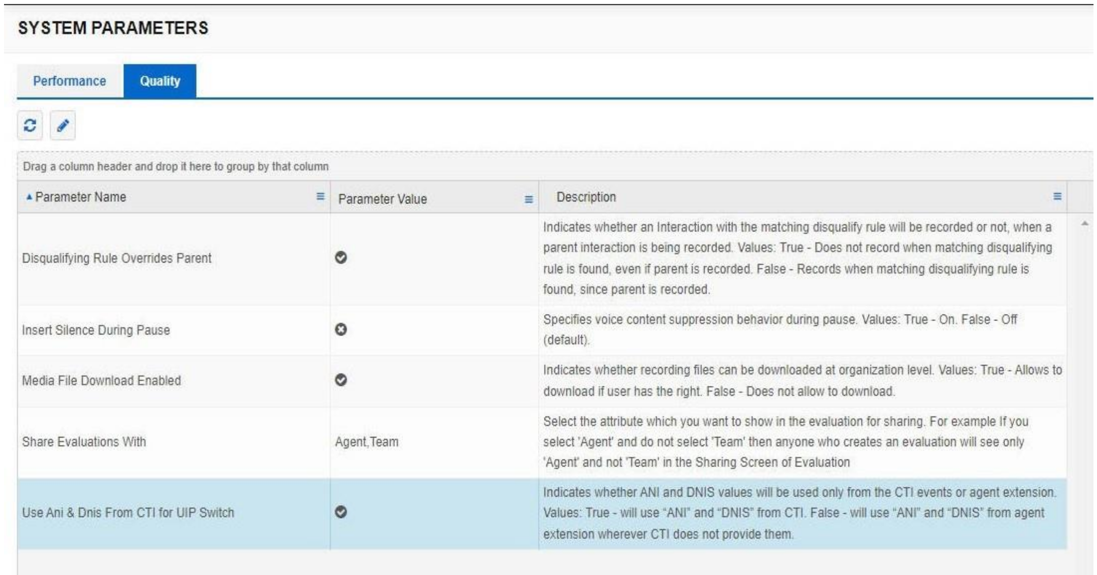
This feature indicates whether ANI and DNIS values will be used only from the CTI events or agent extension.

Values: True - will use “ANI” and “DNIS” from CTI. False - will use “ANI” and “DNIS” from agent extension wherever CTI does not provide them.

Follow the steps below to set the Parameter Value as False.

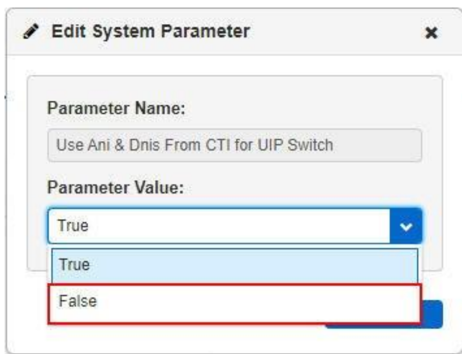
Note: By default, the Parameter Value is True.

1. Navigate to the System Parameters page.
2. The **SYSTEM PARAMETERS** window appears. Select **Use Ani & Dnis From CTI for UIP Switch** row, as shown below.

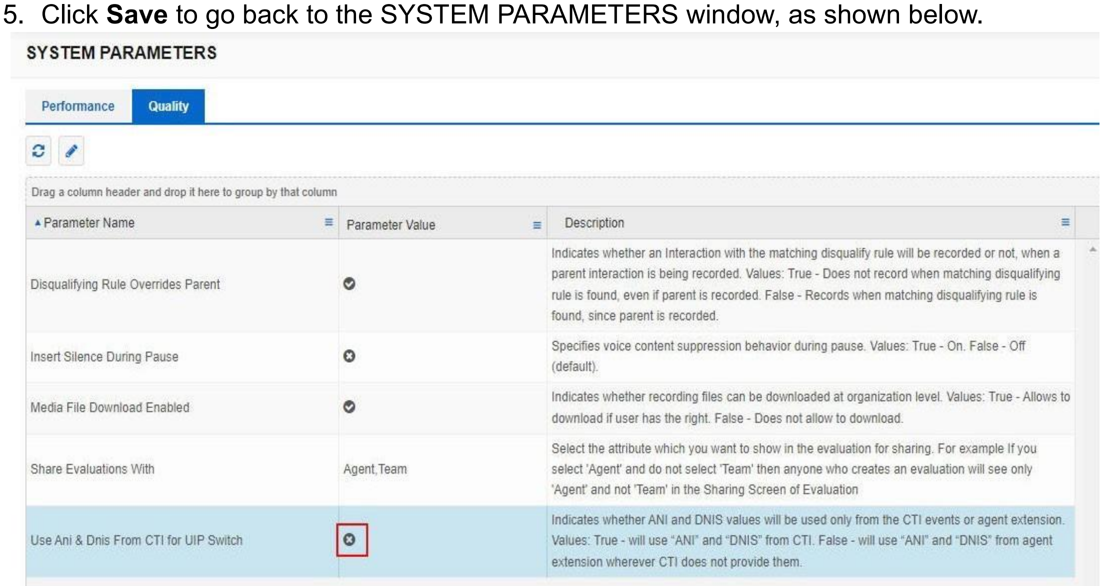


3.Click on the **Edit** button and the **Edit System Parameter** pop-up appears.

4. Click on the **drop-down list** of **Parameter Value** field and select **False** as shown below.



5. Click **Save** to go back to the SYSTEM PARAMETERS window, as shown below.



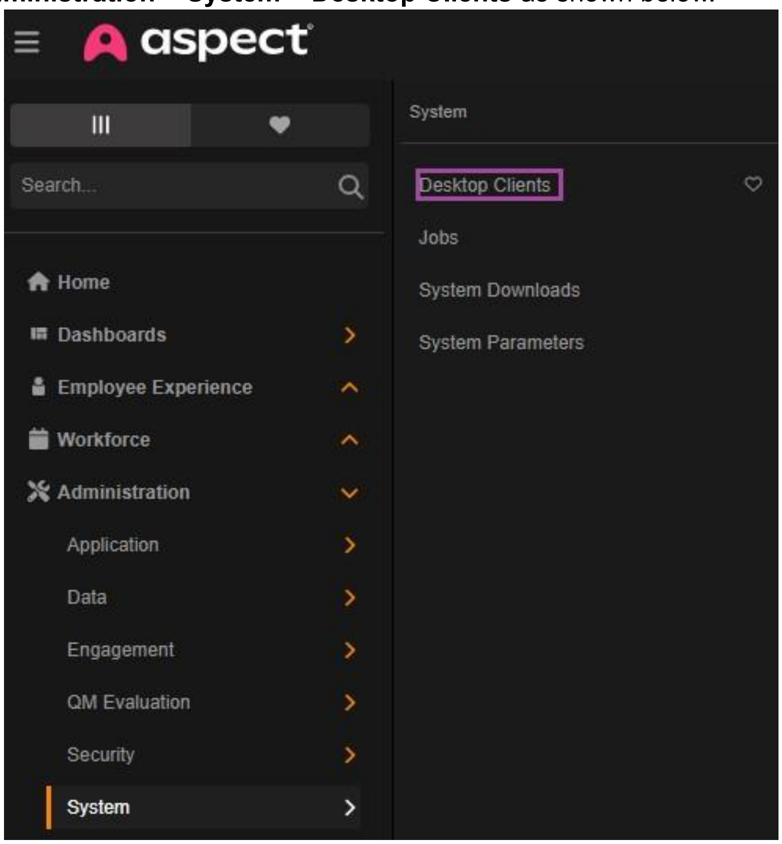
As Use Ani & Dnis From CTI for UIP Switch is set **False** for the user, the cross mark is displayed under the Parameter Value column.

11. Desktop Client

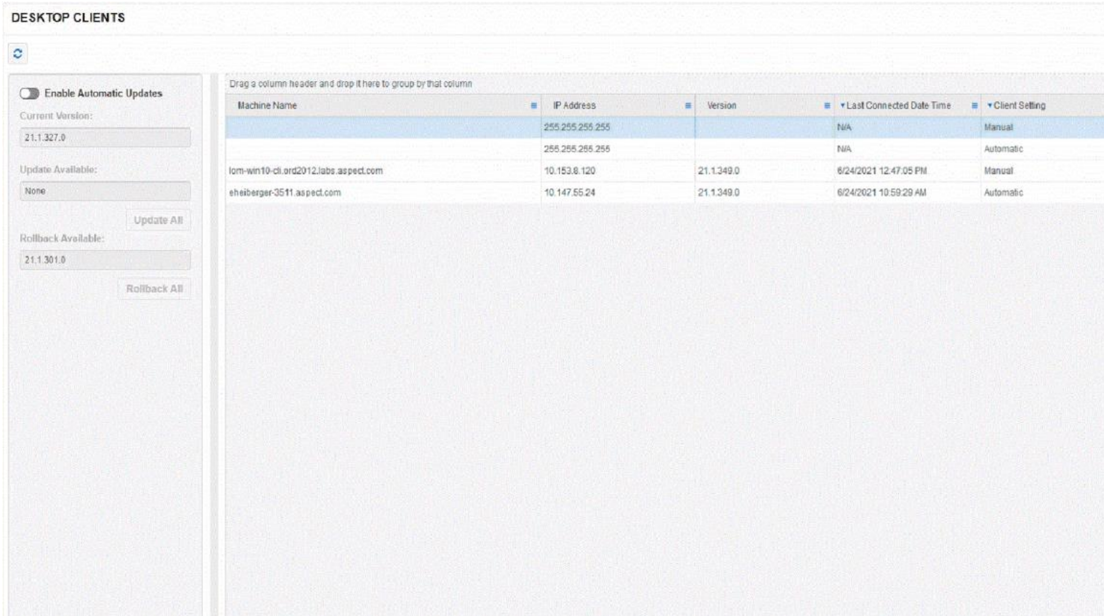
This feature allows you to see what versions of Desktop clients are running for your organization, and this also provides you with the ability to update/rollback all your desktop clients with a single click of a button. Follow the steps below to update the Quality system.

Note: All Team Leads, Managers and Account owner will be able to view this page but only Account owner can Update it, if you want to provide this ability for any other users please reach out to Aspect Customer Care.

1. Go to **Main Menu > Workforce Engagement Management.**
2. Click on **Administration > System > Desktop Clients** as shown below.

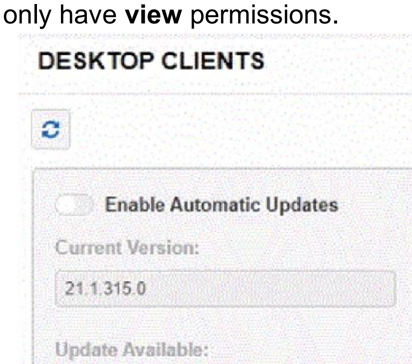


3. The **DESKTOP CLIENTS** window appears.



Column Name	Description
Machine Name	The name of the clients machine where the desktop clients are installed.
IP Address	The IP Address of the machine.
Version	The installed version of the machine.
Last Connected Date Time	The time when the version was updated.
Client Setting	Client Setting has two options: • **Manual:** Indicates that the client machine needs to be upgraded manually. • **Automatic:** Indicates that the client machine will be upgraded automatically to the latest version when a newer version of the desktop client is available.

4. By default, the **Enable Automatic Updates** toggle button is disabled. If you enabled the toggle button, the **Update Available** or **Rollback Available** fields will be enabled.
    - The **Enable Automatic Updates** toggle button will be disabled for Team Leads and Managers, as they only have **view** permissions.

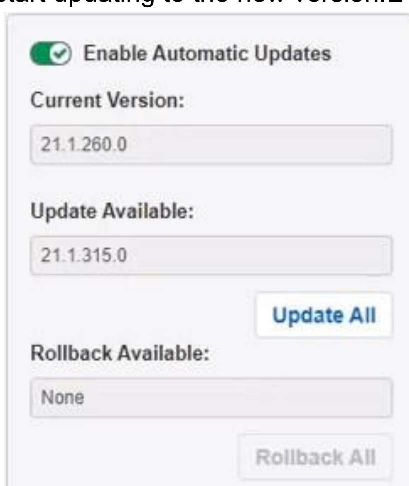


- When the Current Version field and the Update Available field are the same, then the Rollback Available field will be **enabled** and **None** will be displayed on the Update Available field.

Example: On the above screenshot, the Current Version is 21.1.315.0, which is installed in your organization. Hence, there is no new update available and the Update Available field is None.

Note: If you want to go back to the previous version which is mentioned on the Rollback Available (21.1.295.0) field, click on the **Rollback All** button.

- When the Current Version field and the Rollback Available field are **same**, then the Update Available button will be **enabled** and **None** is displayed on the Rollback Available field.
When Aspect publishes a new Hotfix, the Update Available field will show the new version which is available for Installation. Click on the **Update All** button and, all the desktop clients will start updating to the new version.



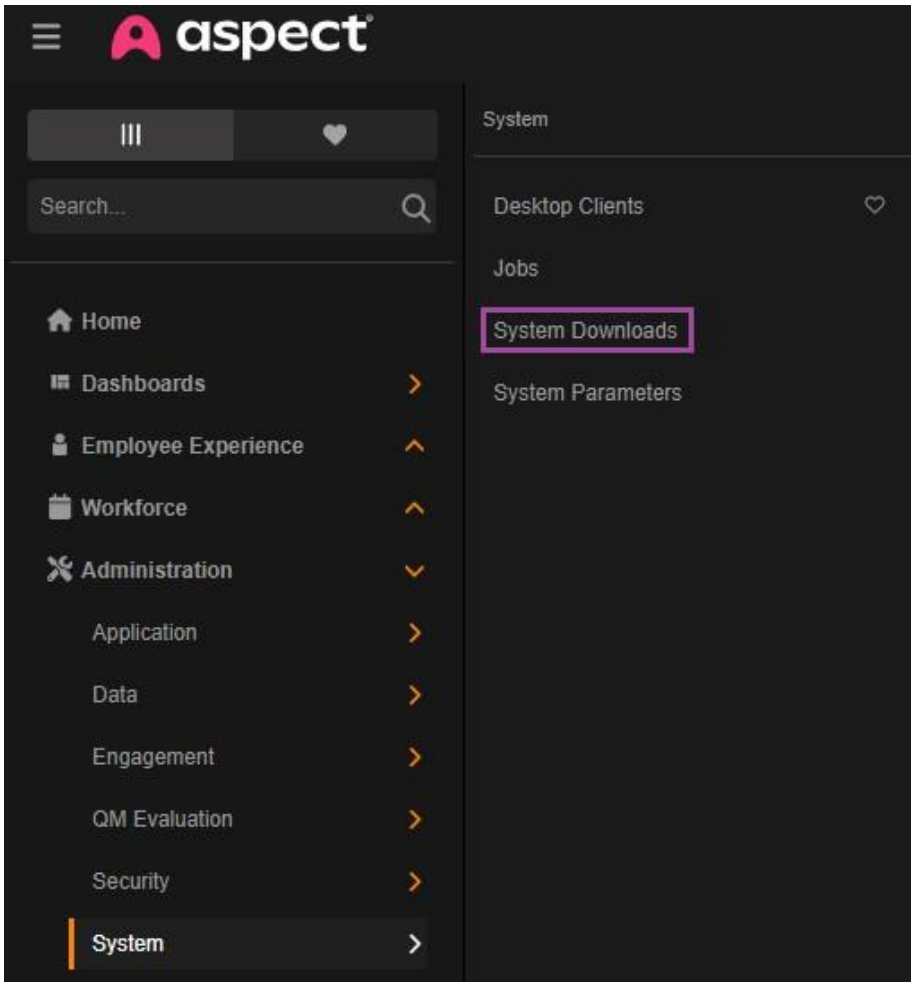
Example: On the above screenshot, the Current Version is 21.1.260.0, which is installed in your organization. When Aspect publishes a new Hotfix , such as 21.1.315.0, the Update All button is enabled.

Note: To update, click on the **Update All** button.

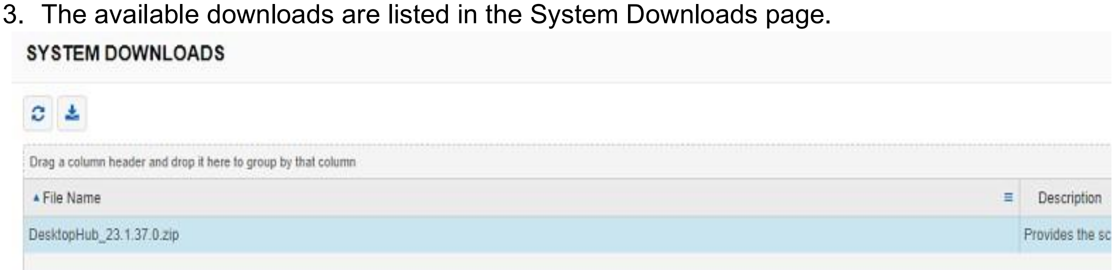
12. System Downloads

The System Downloads section lists all the system files that can be downloaded. Any new system download will be listed on this page and it will also be updated with the latest files for the customer to download.

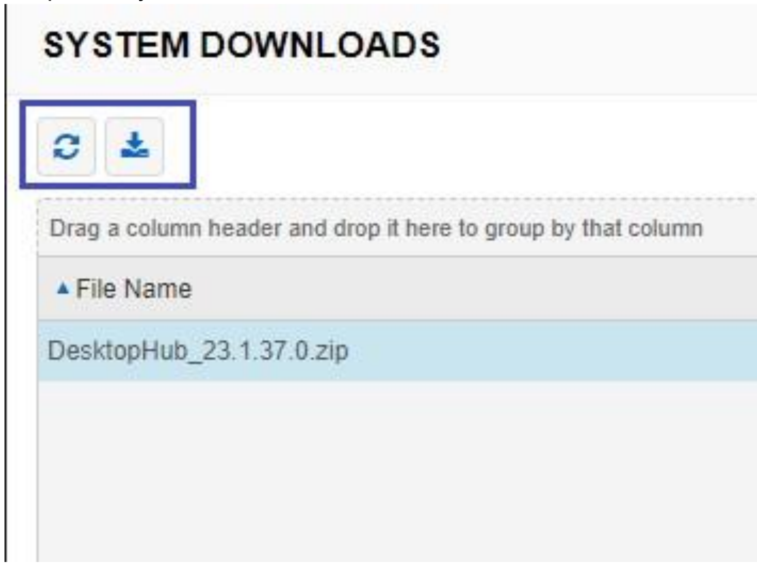
1. Go to **Main Menu > Workforce Engagement Management.**
2. Click on **Administration > System > System Downloads** as shown below.



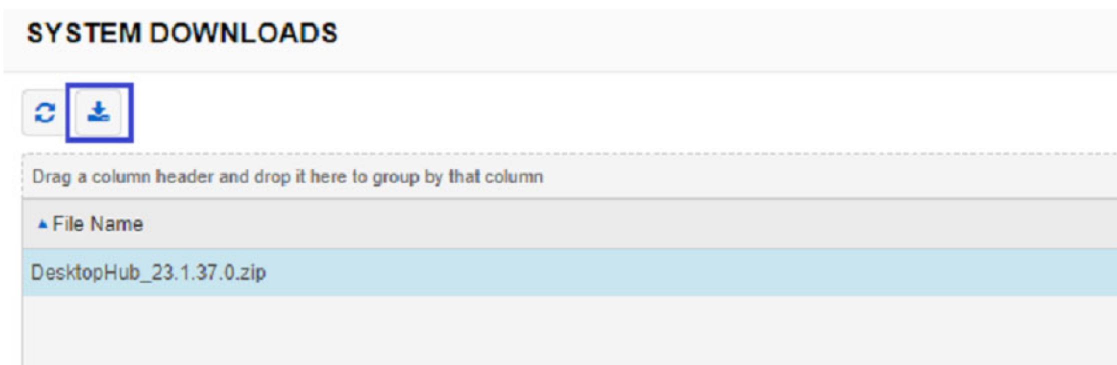
3. The available downloads are listed in the System Downloads page.



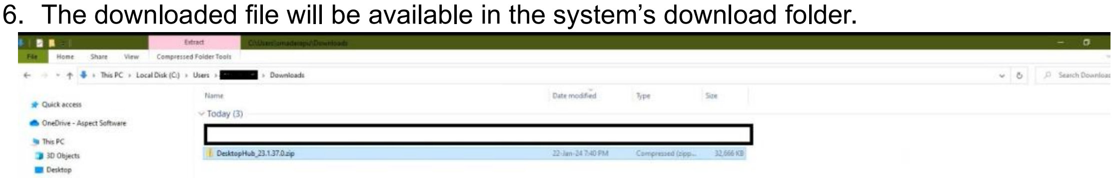
4. The Refresh and Download buttons can be used to refresh the list and download the selected file respectively.



5. The required file can be selected and the download button chosen to begin the download.



6. The downloaded file will be available in the system's download folder.



About Aspect®

Aspect is dedicated to transforming the service economy by humanizing the workforce experience. Their WorkforceOS platform offers a robust workforce management solution that aligns employee preferences with business needs enhancing scheduling, predictive insights, and collaboration tools. Supported by its parent company, Alvaria Inc., which boasts over 50 years of leadership in workforce management technology, Aspect is a trusted partner for large global enterprises across key sectors, including financial services, airlines, automotive, insurance, retail, telecommunications, and utilities. The Aspect WorkforceOS stands out as the only culture-drive n WEM software designed to foster work-life balance while maximizing ROI for businesses. For more details, visit www.aspect.com

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