



Aspect Workforce Engagement Management Quality™
Administrator Guide

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Revision History

The table below describes the revision history for Aspect Workforce Engagement Management Quality™ Administrator Guide.

Date	Description	Section
11/7/2025	Rev A, initial Release.	<ul style="list-style-type: none">• Update front and back cover and Legal Notices page• Ability to disable users in WEM-Quality

About this Guide

The manual defines the Aspect Quality system and how it operates. It includes descriptions and step-by-step instructions for implementing essential system functions. It also outlines the procedures required to operate the system and its associated modules.

For information about Training, Technical Support, commenting on the documentation, and a list of additional documentation see the appropriate product Release Notes document on the [Alvaria documentation portal](#).

Audience

This manual is written for contact center system administrators who manage call center technology and resources, as well as those providing Quality Assurance and Training in the call center. An Administrator should have a basic familiarity with PC features and Microsoft Windows operation. This person should be familiar with using Microsoft Edge to navigate Web-based applications. Familiarity with common window elements such as pop-up windows, list boxes, scroll bars, and other web functionality is helpful.

Note: Aspect Customer Education programs supplement all information contained in this manual. Administrators, Supervisors, and Trainers should attend the Aspect Quality training provided by Aspect before applying the procedures described in this manual.

Organization of this Guide

This guide consists of following chapters:

- [Chapter 1, Aspect Quality Basics](#) describes Aspect Quality and provides an overview of how it operates.
- [Chapter 2, Navigate Aspect Quality](#) describes how Aspect Quality is used in the different phases of the Quality life cycle.
- [Chapter 3, System](#) describes how to add LDAP server with SSL, activate/deactivate LDAP server in Aspect Quality. Also the Server and Site features.
- [Chapter 4, Search for an Interaction](#) describes Aspect Quality users, roles, rights, and permissions that are defined in the User Definition facility.
- [Chapter 5, Assigning Interactions](#) describes how to view and assign an assigned interaction.
- [Chapter 6, Coaching](#) describes how to assign coaching directly from Quality.
- [Chapter 7, Evaluations](#) uses the same scoring process as quality scoring to see how well individual Mentors' scores align with the Master Calibrator scores, to identify issues in the scoring process.
- [Chapter 8, Reporting in Workforce Engagement Management](#) describes the available reports in Workforce Engagement Management - Aspect Quality.
- [Chapter 9, Import](#) describes about how to import metadata and recording files to Aspect Quality.
- [Chapter 10, Aspect Quality Evaluation](#) describes how to create, edit, and duplicate templates.
- [Chapter 11, Recording](#) describes how Aspect Quality uses rules that you define to determine whether the system should record a particular interaction.
- [Chapter 12, Security](#) describes major Security components that are the part of the Aspect Quality.

1. Aspect Quality Basics

This section describes the Aspect Quality™ function within Aspect Workforce Engagement Management feature, and provides an overview of how it operates.

1.1 What is Quality?

Aspect Quality™ is a tool that you use to record voice and window interactions based on customizable business rules. You can retrieve the recordings using advanced search criteria, play the recordings back, and score the recordings for quality and training purposes. Quality integrates with My Account, which you use to take advantage of the environmental definitions (such as agents, agent groups, or teams) to create advanced recording rules and search criteria.

1.1.1 System Benefits

Aspect 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:



1.1.2 Features

Aspect Quality™ features include:

- **Integration with MyAccount for Rule Definition.**

Aspect Quality integrates with MyAccount once you have provisioned Aspect Quality to recognize all agents and agent groups.

- **Browser-based application.**

Quality performs all functions with Microsoft Edge and Safari Firefox, so you have access to Quality from any desktop within a firewall.

- **Record all types of calls.**

Quality automatically records and stores all audio calls: ACD calls, agent-to-agent inbound direct, outbound direct, and outbound blended calls. You may need different or other hardware configurations to record calls between agents, in addition to calls between external calls and agents.

- **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.**

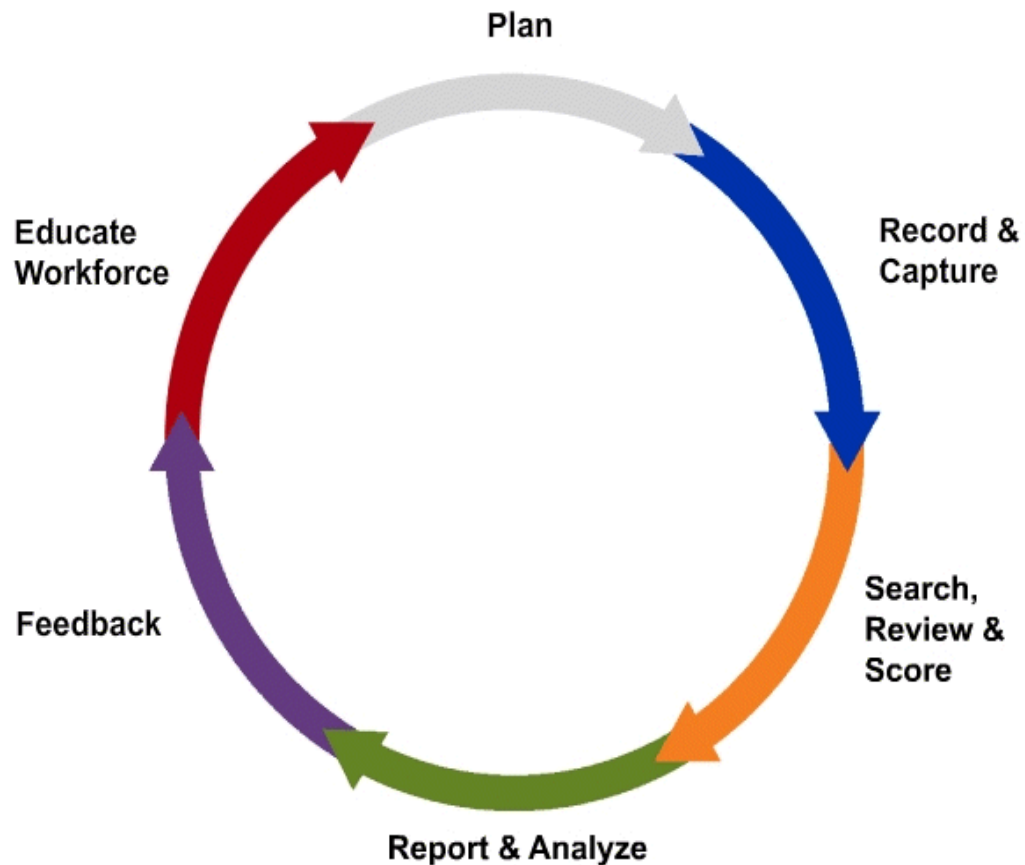
You can use Quality to tailor quality metrics to specific needs. Each call can have its own scorecard with its own unique criteria, or you can grade all calls with a common set of metrics. You can weigh each question and section of the scorecard based on the importance that you assign to each question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

1.2 Lifecycle

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

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

This section briefly describes each phase of the life cycle 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 agent groups
- 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 the specific recordings of interest. A variety of data about each recording is visible, including call history, hold times, Agent Groups, 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 life cycle.

1.3 User Personas

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

Administrators – This role has full unrestricted access to the entire Aspect Quality system. Generally, each Aspect Quality system only has a few Administrators. The administrator role focuses on creating users, rules, and scorecard templates. Administrators also run reports. You must create the Administrator manually in Aspect Quality. The Administrator has full access to

- Play back recordings, view and edit reports, use Customer Measured Quality, and has Administrator privileges within the user interface.
- Create and configure new users along with setting rights and permissions for the following.
 - New Administrator user
 - Mentor
 - Agent
 - None
 - Silent Monitor (**Note:** This option is obsolete and not available)
 - IVR

The major functions an Administrator may perform include:

- Define and configure Mentor rights, including the right to create rules, create scorecard templates, and create and review reports.
- Define and configure Agents that allow Agents the right to review their calls and scorecards for self-evaluation. This includes turning on or off the right for an Agent to review their own recordings.
- Design and create scorecard templates.
- Define rules for recording to determine which calls the system should or should record.
- Configure permissions for Mentors, Teams, Agent Groups, scorecard templates, rules, and reports.

Mentors – this is the role that typically uses the Aspect Quality system to review calls and grade them using scorecard templates. You give Mentors access to recordings by assigning them to teams or Agent Groups. You can also grant Mentors rights to:

- View and Edit Reports
- Create Scorecard templates

- Review or Score Recordings
- Define Rules
- Mark recordings for review by individual agents or teams
- Assign protection flags to save recordings for future use

For any specific rule or template, you can also give a Mentor the ability to view only or modify its contents.

Agents – the agent can log in to Aspect Quality to review interactions but cannot score other agent’s interactions. Typically, you give an agent access only to recordings that a Mentor has flagged for the agent’s attention. In addition, you can grant an agent the right to listen to his or her own calls before any Mentor reviews the calls, since sometimes the business process requires the agents to research what was said on previous calls. You can also grant access to an agent to view a self-evaluation to obtain feedback about his or her own performance.

While monitoring ACD activity, Aspect Quality™ discovers agents that it has not monitored previously, and the system adds the agent definition to the database to keep the agent’s identification in sync with the ACD definition for that agent. You can use information in the rules to allow the agent to log into Aspect Quality with the agent’s ACD logon ID.

In general, Agents can

- Listen to all of their calls before Mentor review.
- Perform self-evaluations, rating their own performance.
- Review other agents’ recordings when assigned by a Mentor.

None – Give the None user role to those agents who you want to record but not allow to log in to the Aspect Quality system. Therefore, None agents cannot review their own calls and score cards in Aspect Quality.

If you need agents with None user roles to review and score recordings, you must configure the agent user in the Aspect Quality system.

The database synchronization with the ACD, predictive dialer, or connector automatically enters Agents into Aspect Quality. However, you must configure these agents as None in the Aspect Quality system if you do not want them to access Aspect Quality.

IVR – The IVR role defines an IVR Port or Station. An Aspect Quality user with an IVR role represents an IVR port or station within the Aspect Quality system. It is mandatory to associate a valid position ID to an IVR port. You can modify any non-Aspect Quality user to act as an IVR port or station.

1.4 Access Rights

You assign all users, except for Administrators, access rights within Aspect Quality. These rights allow users to perform various functions. The system automatically grants Administrators nearly all available rights.

The following table is a list of access rights that you can assign to users based on their selected user role.

Rights	Job Roles			
	Administrator	Mentor	Agent/None	None
Self Review		X	X	
Self Evaluations		X	X	
View Reports	X	X		
Create Reports	X	X		
Create Recording Rules	X	X		
Create Evaluation Templates	X	X		
Create Tasks	X	X		
Download Recordings	X	X		
Export Recordings	X	X		
View Peer Review	X	X		
Grant Peer Review	X	X		
View All Evaluations	X	X		
Edit All Evaluations	X	X		
Assign Evaluations	X	X		
Assign Interactions	X	X		
Delete Interactions	X	X		
Protect Interactions	X	X		
Hide \ Show Interactions	X	X		
View Calibration Events	X	X		
Assign Calibration Events	X	X		

1.5 Basic Configuration of WEM

1. Install Quality builds and WEM builds.
2. Do the configuration in Quality Configuration Utility in Aspect Quality Server2.
 - a. **Note:** Refer *Aspect Quality™ Server Installation Guide* Chapter 4: Using the Configuration Utility.
3. Do the required configurations in Quality web config and WEM web config files.

Quality web config file

- a. Update the “Require https” key to true or false based on you are accessing the web url with http or https.

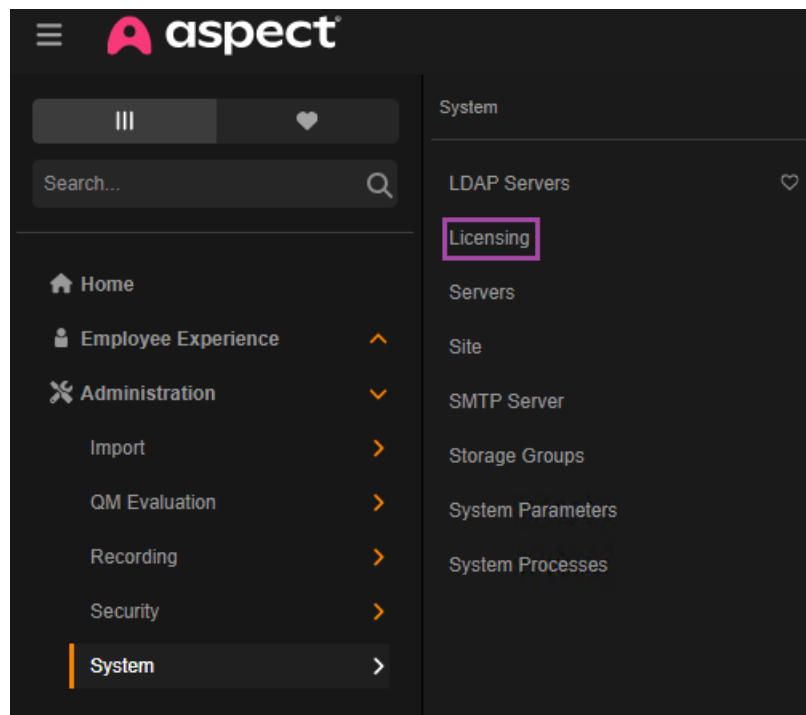
- b. Set Enable antiforgery key to “true or false”. If you want to set it as true, then follow the steps in *Aspect Quality™ WEM Installation Guide* to configure antiforgery key.

WEM web config file

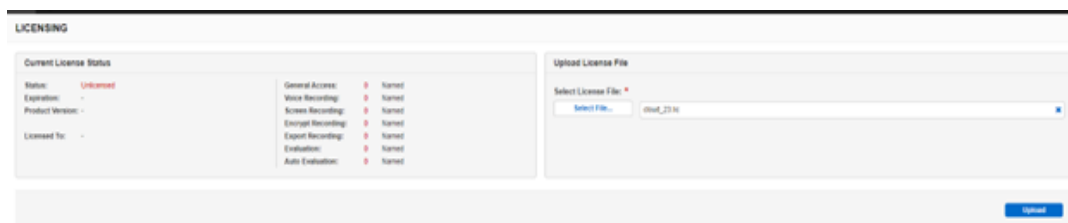
- a. Update the “Require https” key to true or false based on you are accessing the web url with http or https.
 - b. Set Enable antiforgery key to “true or false”. If you want to set it as true then follow the steps in *Aspect Quality™ WEM Installation Guide* to configure antiforgery key.
 - c. Set the “QMBaseURL” - http(s)://servername/qualitywebservice/api.
4. Launch WEM using below url.

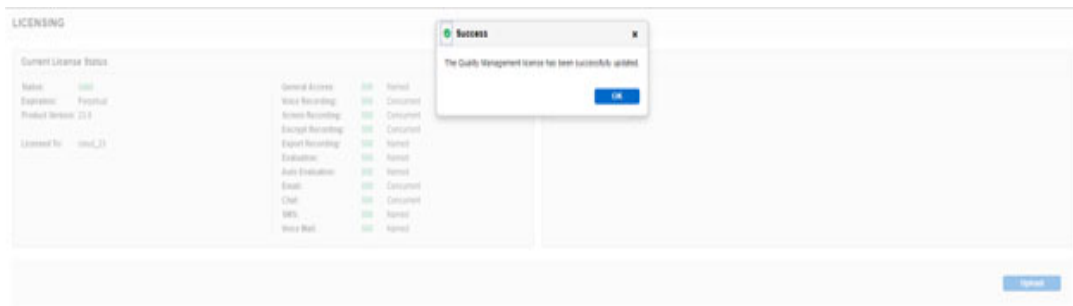
http://<servername>/wfo

- 5. Login as Administrator which you provided as an input during the installation.
- 6. Click on the main menu and Select System > Licensing link.

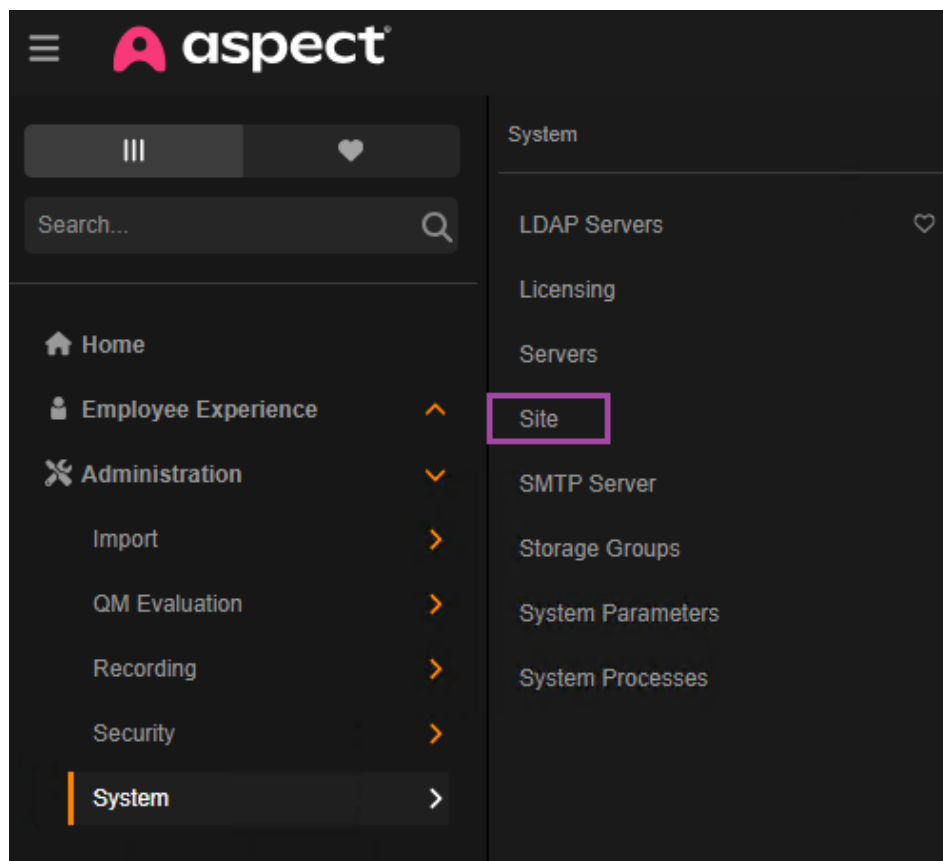


- 7. Upload a valid Quality license.





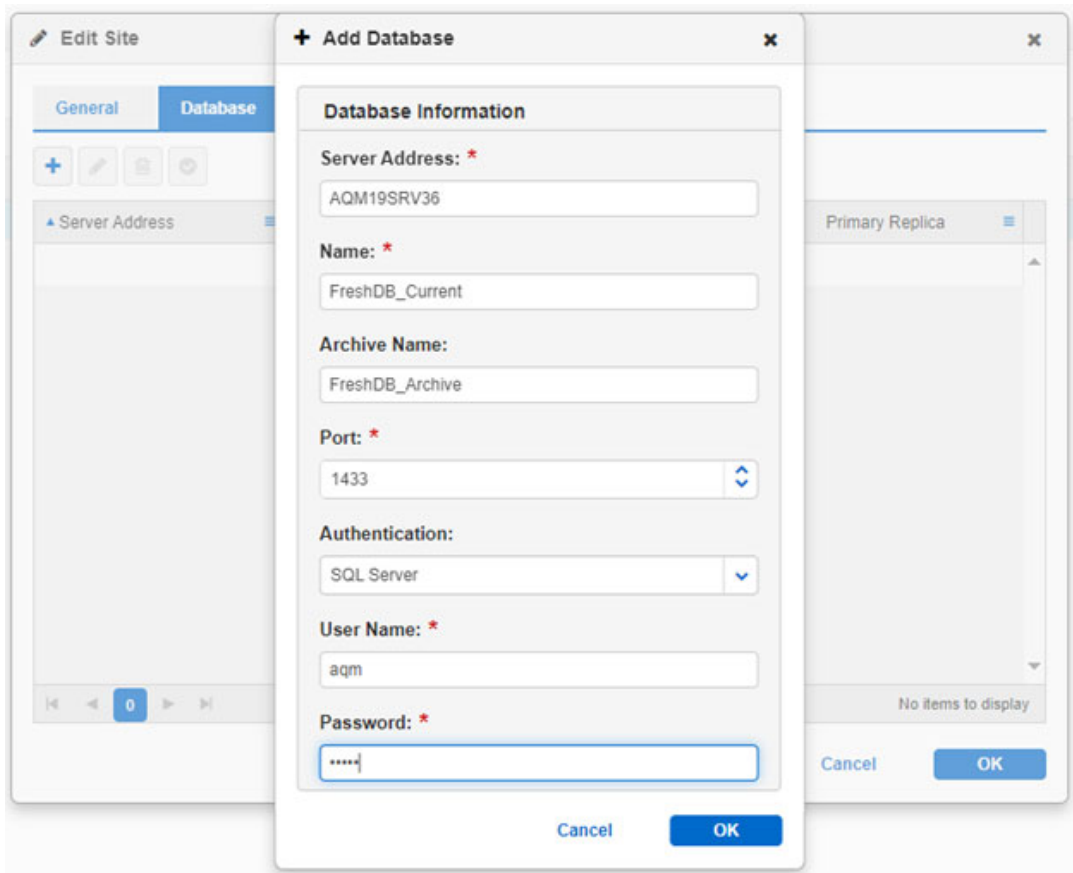
8. Once license is uploaded successfully, sign out and sign in to WEM again.
 - a. **Note:** This is needed to ensure the WEM UI functions properly by considering the uploaded license.
9. Configure Sites and Servers.
 - a. Click on main menu and Navigate to Administration > System > Site link.

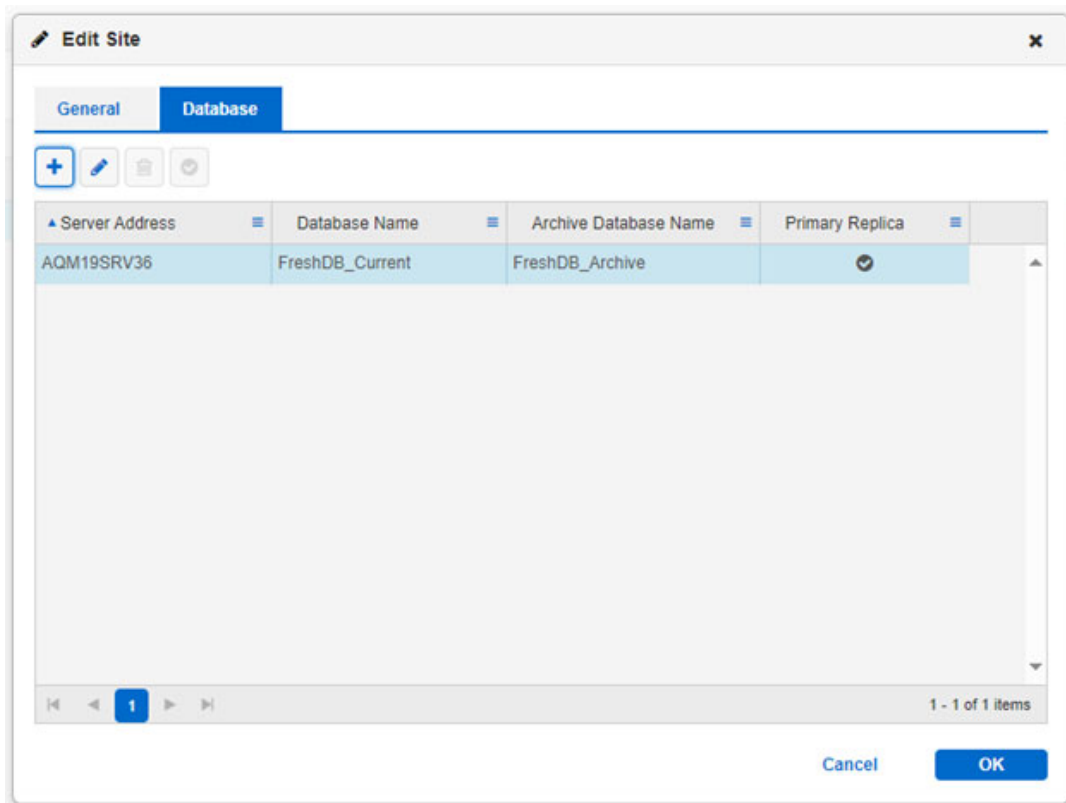


- b. Click on the Edit button.



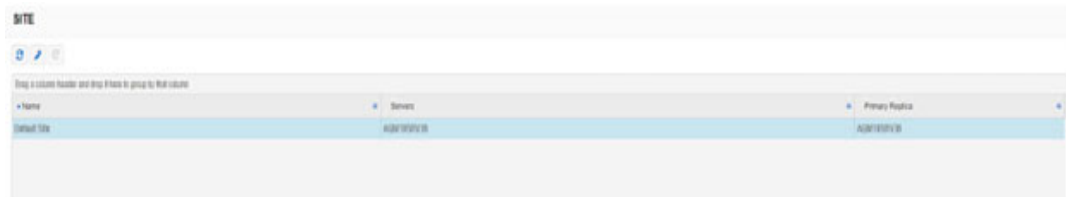
- c. Under Database tab, click on “+” (Add) button.
- d. Enter the database details and click on OK button.



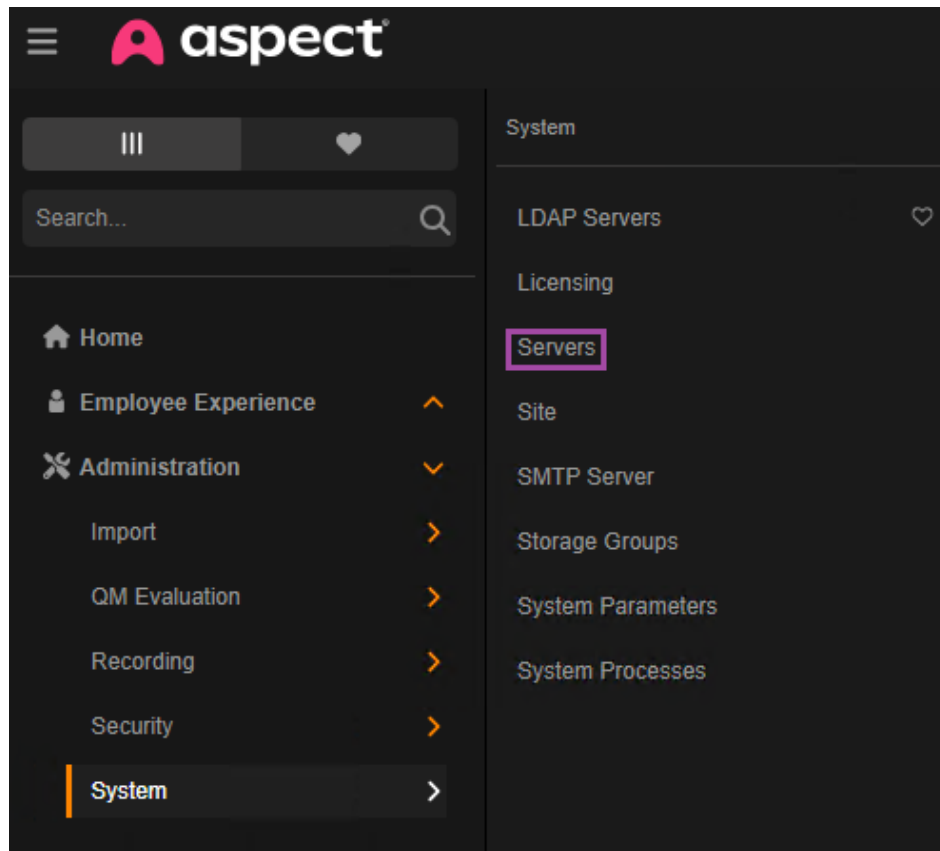


Note: If you are configuring DR then you should enter the secondary replica details and set the Primary Replica accordingly. Refer: <<Provide the DR configuration guide.

e. Click on the OK button to save the site database details.

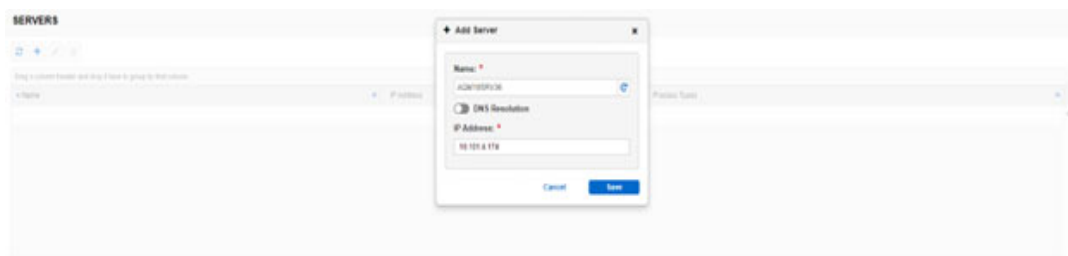


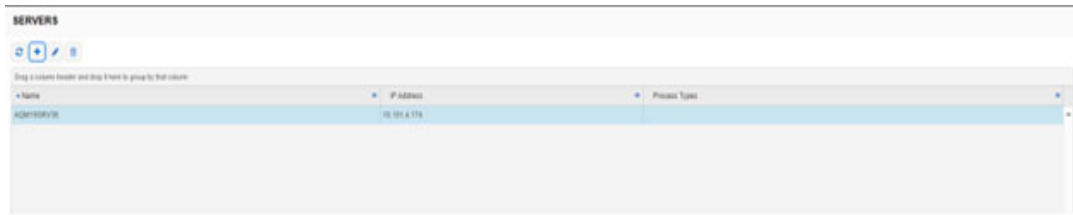
f. Click on main menu and Navigate to Administration > System > Servers link.



- g. Click on “+” (Add) button.
- h. Enter the Server name and IP Address and Save the server.

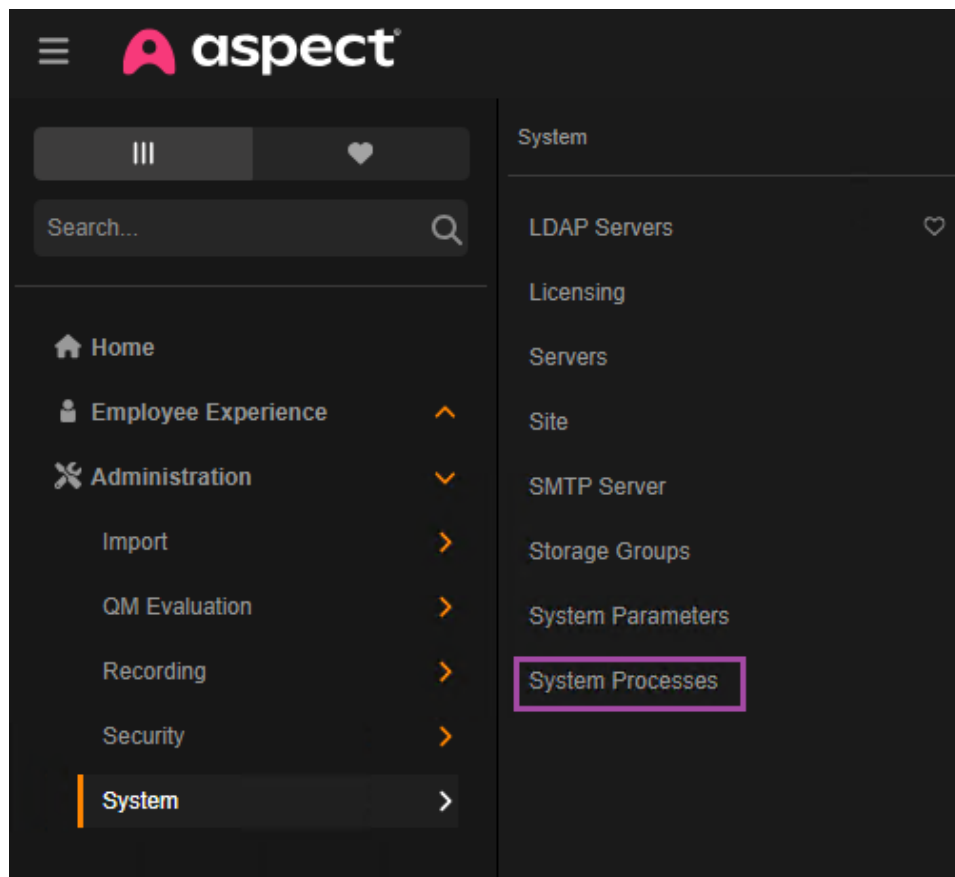
Note: Refer the Section [Servers](#) of WEM Admin guide if you want to know more about how to configure the Servers.

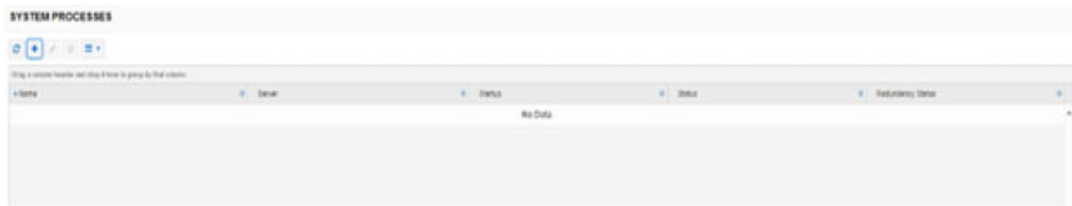




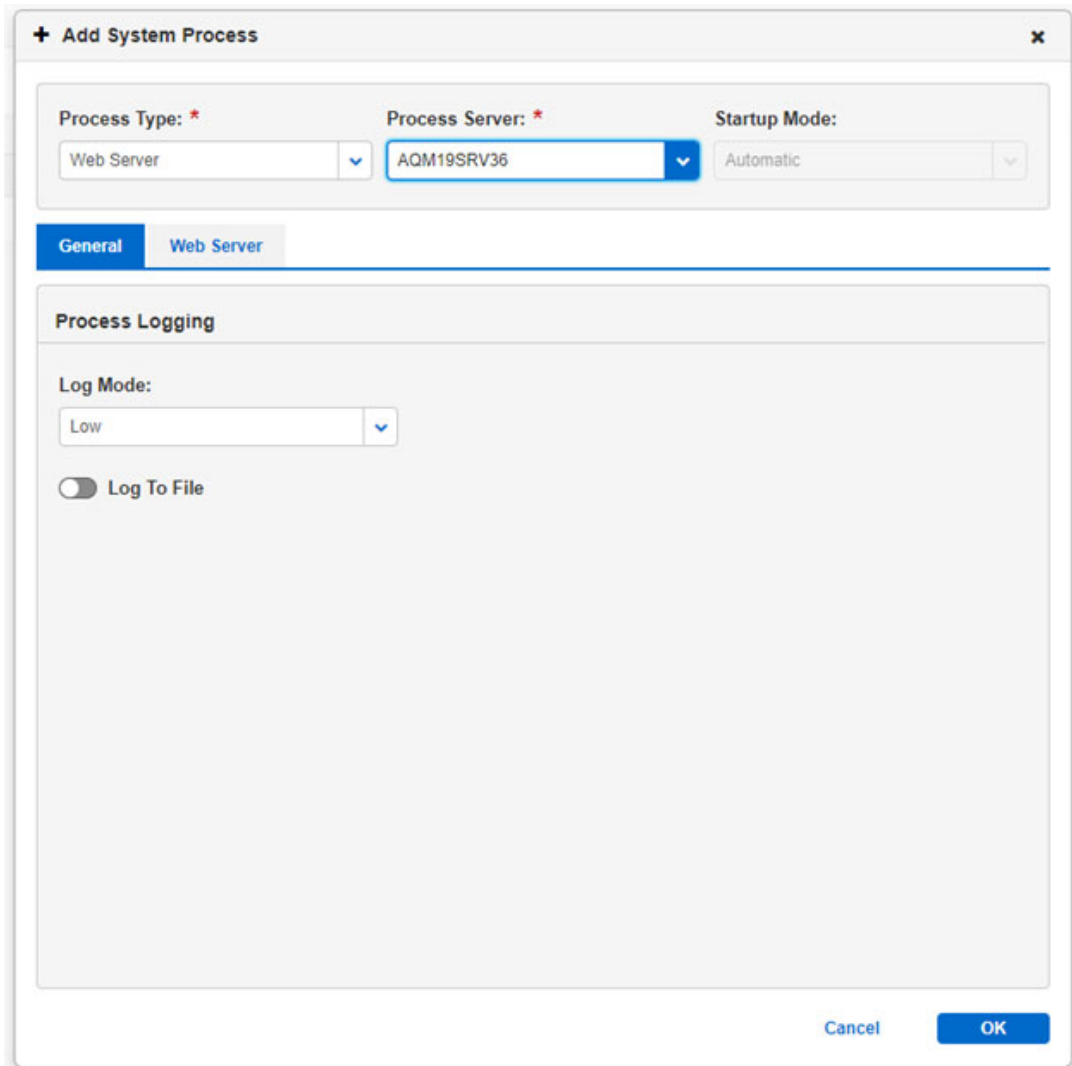
10. Configure the System Processes.

- a. Click on main menu and Navigate to Administration > System > “System Processes” link.





- b. Click on the “+” button.
- c. Select “Process Type” as **Web Server** and Select the “Process Server” if you want Mentor to live monitor the agents using MDC if not this step can be ignored.



- d. Select the Log Mode based on the requirement.

- e. Specify the web server root url (The WEM URL to accessed by MDC when the mentor wants to create an evaluation while live monitoring the agent) Root URL format: http(s):/ /<Servername>/wfo.

+ Add System Process

Process Type: * Process Server: * Startup Mode:

General **Web Server**

Web Server Configuration

Root URL: *

Third Party Client Server:

Cancel **OK**

f. Click on the OK button.

SYSTEM PROCESSES

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

Name	Server	Status	Status	Redundancy Status
Web Server	AQM19SRV36	Automatic	Started	

g. Click “+” button to add next process.

h. Select “Process Type” as **Process Manager** and Select the “Process Server”.

+ Add System Process ✕

Process Type: * Process Server: * Startup Mode:

Process Manager AQM19SRV36 Automatic

General Process Manager

Process Logging

Log Mode:

Low

Log To File

Cancel **OK**

- i. Select the Log Mode.

+ Add System Process

Process Type: * Process Server: * Startup Mode:

Process Manager AQM19SRV36 Automatic

General Process Manager

Process Logging

Log Mode:

Extreme

Log To File

Cancel **OK**

j. Click on the OK button.

SYSTEM PROCESSES

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

Name	Server	Startup	Status	Redundancy Status
Process Manager	AQM19SRV36	Automatic	Unknown	
Web Server	AQM19SRV36	Automatic	Started	

k. Click on “+” button to add another process.

l. Select “Process Type” as **Interaction Monitor** and Select the “Process Server”

+ Add System Process
✕

Process Type: *

Process Server: *

Startup Mode:

General

Redundancy

Interaction Monitor

Process Logging

Log Mode:

Log To File

Cancel
OK

m. Select the Log Mode

+ Add System Process

Process Type: * Interaction Monitor

Process Server: * AQM19SRV36

Startup Mode: Automatic

General | Redundancy | **Interaction Monitor**

Process Logging

Log Mode: Extreme

Log To File

Cancel OK

n. Click on the OK button to save the process.

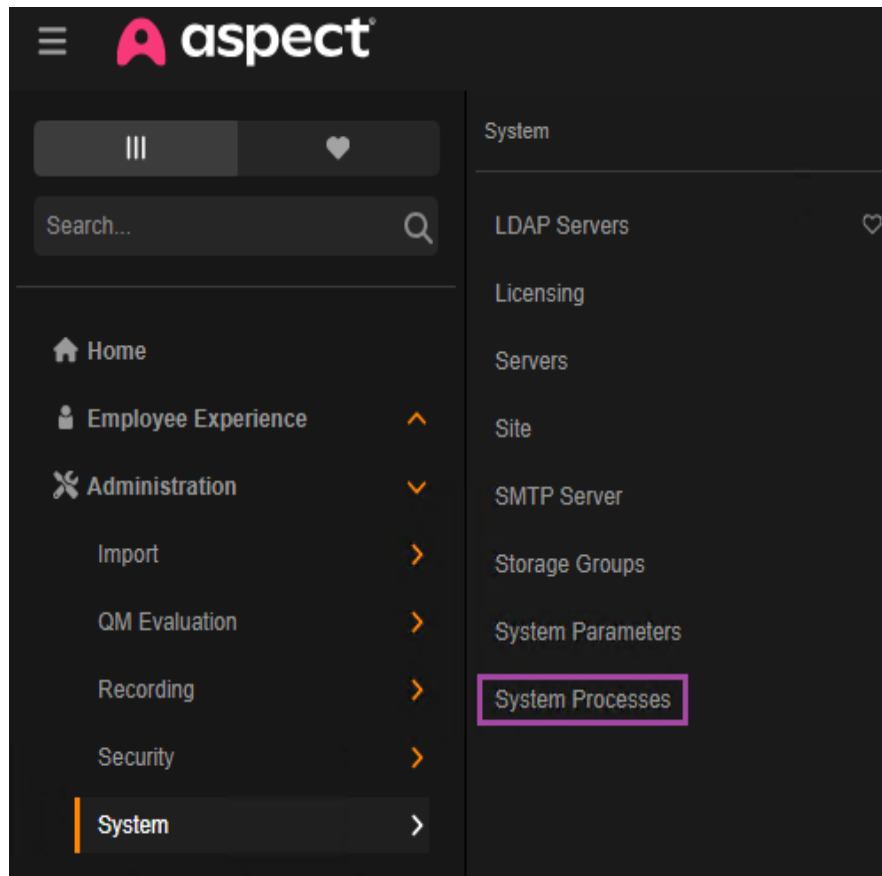
SYSTEM PROCESSES

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

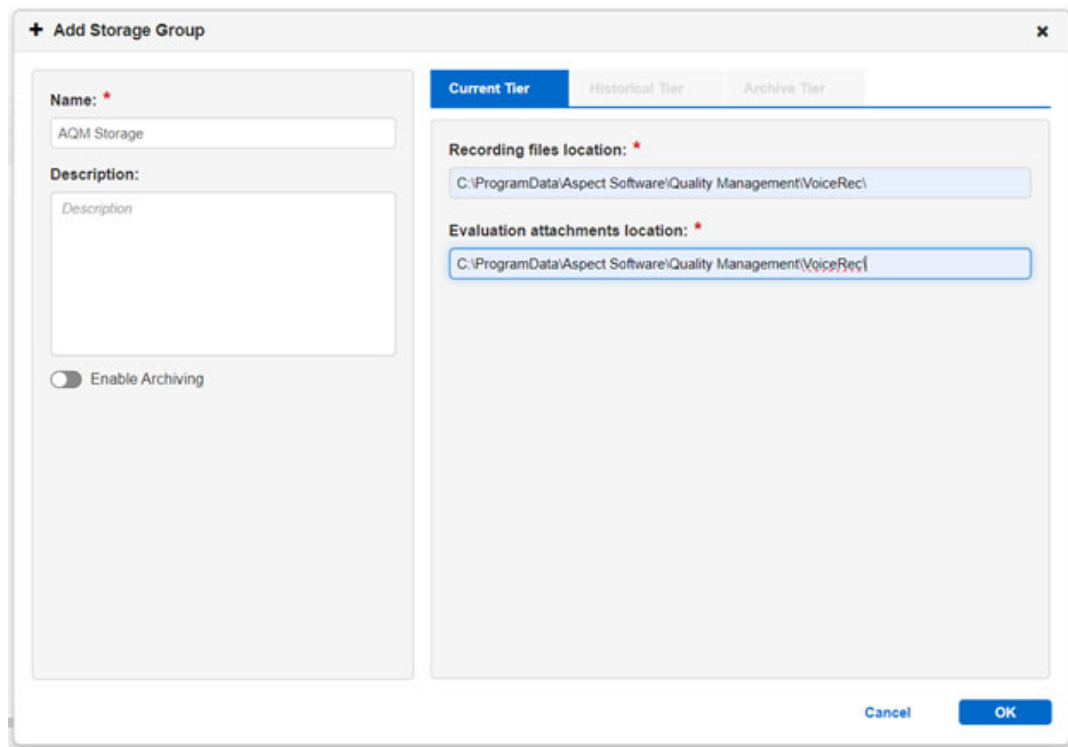
Name	Server	Status	Startup	Redundancy Status
Interaction Monitor	AQM19SRV36	Unknown	Automatic	
Process Manager	AQM19SRV36	Unknown	Automatic	
Web Server	AQM19SRV36	Startup	Automatic	

11. Create **Storage Group**

a. Click on main menu and Navigate to Administration > System > Storage Groups link.



- b. Click on “+” button to add the storage group.
- c. Enter the recording files and evaluation attachment locations and save the storage group.



Note: If you want to Enable Archiving, turn on the “Enable Archiving” toggle button and enter data in all the required fields.

12. Create **Switch (Unified IP Regular CTIPS)**

- a. Create Unified IP Regular CTIPS by referring *Aspect Quality™ Server Install Guide* Appendix E.
- b. Add the switch under Interaction Monitor process.
- c. Exchange the certificates between Unified IP core, core redundant and Quality Servers. The root certificate of unified IP servers should be installed in Quality Server and the root certificate of Quality Server should be installed in the core and core redundant servers

Note: The Quality server should have certificate with FQDN (Fully Qualified Domain Certificate)

- d. Add the Quality server in Unified IP core and core redundant host file.
- e. Add Unified IP server details in Quality Server host file.
- f. Bind the Quality Server FQDN certificate to the Unified IP Call Back Port or Alternatively, you can use NetTCP communication with CTIPS by specifying the certificate thumbprint in InteractionMonitor.exe.config.
- g. Start Quality Service.
- h. Check the Interaction Monitor log for the connection establishment and data sync. Also verify if the users synchronized is appearing under Administrator > Security > Users page for the switch.

- i. Once the data sync is done enable the users for “Audio and Screen Recording” to make the calls.
- j. Create SIP Recording Board.
- k. Create Audio Ports using the recording board.
- l. Create Recording Rules for the switch.
- m. Create Port Manager, File Mover processes. Add the audio ports created above under the Port Manager process and the Storage Groups created under the File Mover process.
- n. Stop and Start the Quality Service.

Note: The Storage group assigned to switch when creating it should be added to the File Mover process.

- o. Check if the audio ports are Ready state by opening the System Monitor.
- p. Login as the agent to “UAD” to record the calls.

13. Unified IP Enhanced CTIPS

- a. Create Unified IP Enhanced CTIPS by referring *Aspect Quality™ Server Install Guide* Appendix E.
- b. Add the switch under Interaction Monitor process.
- c. Exchange the certificates between Unified IP core, core redundant and Quality Servers. The root certificate of unified IP servers should be installed in Quality Server and the root certificate of Quality Server should be installed in the core and core redundant servers.

Note: The Quality server should have certificate with FQDN (Fully Qualified Domain Certificate).

- d. Add the Quality server in Unified IP core and core redundant host file.
- e. Add Unified IP server details in Quality Server host file.
- f. Bind the Quality Server FQDN certificate to the Unified IP Call Back or Alternatively, you can use NetTCP communication with CTIPS by specifying the certificate thumbprint in InteractionMonitor.exe.config.
- g. Start Quality Service
- h. Check the Interaction Monitor log for the connection establishment and data sync. Also verify if the users synchronized is appearing under Administrator > Security > Users page for the switch.
- i. Once the data sync is done enable the users for “Audio and Screen Recording” to make the calls.
- j. Create Recording Rules for the switch.
- k. Create File Mover process. Add the Storage Groups created under the File Mover process.
- l. Create File Receiver Process and add the Storage Groups where the recording files need to be moved.
- m. Create Receiver Groups from WEM

- n. Stop and Start the Quality Service.

Note: The Storage group assigned to switch when creating it should be added to the File Mover process.

- o. Login as the agents to record the call.

14. Avaya

- a. Create Avaya switch by referring *Aspect Quality™ Server Install Guide* Appendix C.
- b. Add the switch under Interaction Monitor process.
- c. Add Avaya server details in Quality Server host file.
- d. Start Quality Service.
- e. Check the Interaction Monitor log for the connection establishment and data sync. Also verify if the users synchronized is appearing under Administrator > Security > Users page for the switch.
- f. Once the data sync is done enable the users for “Audio and Screen Recording” to make the calls.
- g. Create Avaya DMCC Recording Board.
- h. Create DMCC Recording Ports.
- i. Create Recording Rules for the switch.
- j. Create Port Manager, File Mover, processes. Add the audio ports created above under the Port Manager process and the Storage Groups created under the File Mover process.
- k. Stop and Start the Quality Service.

Note: The Storage group assigned to switch when creating it should be added to the File Mover process.

- l. Login as the agents to record the call.

15. Cisco UCCE

- a. Create Cisco UCCE switch by referring *Aspect Quality™ Server Install Guide* Appendix D.
- b. Add the switch under Interaction Monitor process.
- c. Add UCCE server details in Quality Server host file.
- d. Start Quality Service.
- e. Check the Interaction Monitor log for the connection establishment and data sync. Also verify if the users synchronized is appearing under Administrator > Security > Users page for the switch.
- f. Once the data sync is done enable the users for “Audio and Screen Recording” to make the calls.
- g. Configure Cisco UCM to allow BIB recordings.
- h. Create Cisco BIB Recording Board.
- i. Create BIB Recording Ports.
- j. Create Recording Rules for the switch.

- k. Create Port Manager, File Mover processes. Add the audio ports created above under the Port Manager process and the Storage Groups created under the File Mover process.
- l. Stop and Start the Quality Service.

Note: The Storage group assigned to switch when creating it should be added to the File Mover process.

- m. Login as the agents to record the call.

16. Cisco UCCX

- a. Create Cisco UCCX switch by referring *Aspect Quality™ Server Install Guide* Appendix D.
- b. Add the switch under Interaction Monitor process.
- c. Add UCCX server details in Quality Server host file.
- d. Start Quality Service.
- e. Check the Interaction Monitor log for the connection establishment and data sync. Also verify if the users synchronized is appearing under Administrator > Security > Users page for the switch.
- f. Once the data sync is done enable the users for “Audio and Screen Recording” to make the calls.
- g. Configure Cisco UCM to allow BIB recordings.
- h. Create Cisco BIB Recording Board.
- i. Create BIB Recording Ports.
- j. Create Recording Rules for the switch.
- k. Create Port Manager, File Mover processes. Add the audio ports created above under the Port Manager process and the Storage Groups created under the File Mover process.
- l. Stop and Start the Quality Service.

Note: The Storage group assigned to switch when creating it should be added to the File Mover process.

- m. Login as the agents to record the call.

17. Cisco UCM

- a. Install and configure Cisco TSP.
- b. Create Cisco UCM switch by referring *ServerInstall Guide* Appendix D. Also do the configurations on UCM side to do BIB recording.
- c. Add the switch under Interaction Monitor process.
- d. Add UCM server details in Quality Server host file.
- e. Start Quality Service.
- f. Check the Interaction Monitor log for the connection establishment and data sync. Also verify if the users synchronized is appearing under Administrator > Security > Users page for the switch.

- g. Once the data sync is done enable the users for “Audio and Screen Recording” to make the calls.
- h. Create Cisco BIB Recording Board.
- i. Create UCM_SIP Recording Ports.
- j. Create Recording Rules for the switch.
- k. Create Port Manager, File Mover processes. Add the audio ports created above under the Port Manager process and the Storage Groups created under the File Mover process.
- l. Stop and Start the Quality Service.

Note: The Storage group assigned to switch when creating it should be added to the File Mover process.

- m. Login as the agents to record the call.

Edit System Process

Process Type: Interaction Monitor | Process Server: * AQM19SRV36 | Startup Mode: Automatic

General | Redundancy | **Interaction Monitor**

Communication Configuration

TCP Port: * 3880

Switches to Monitor

Available Items: | Selected Items: UIP73

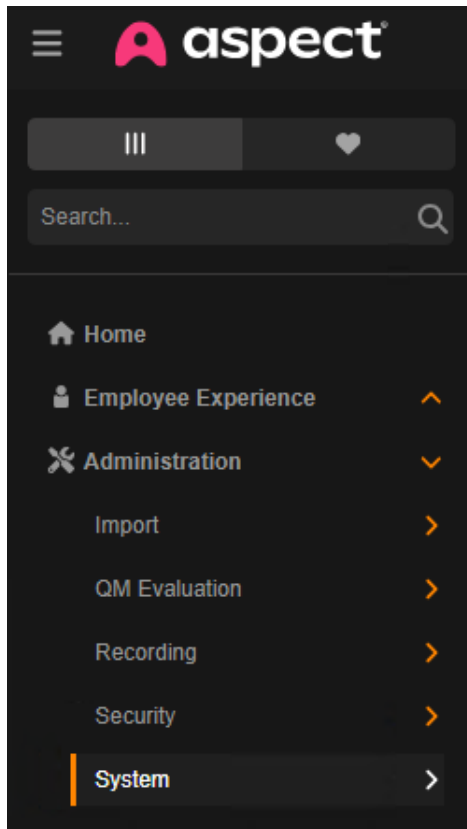
Cancel | **OK**

2. Navigate Aspect Quality

2.1 Access the Administration Area

To access the administration area follow the steps below:

1. Go to the menu.
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 modules in the **Administrator** dashboard.

Feature	Description
Import	<p>Import Jobs - It explains how to import metadata and recording files to Aspect Quality feature in Workforce Engagement Management such as creating import jobs, editing import jobs, activate and deactivate jobs, and so on.</p>
Aspect Quality Evaluation	<p>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.</p> <p>Workforce Configuration - Used for configuring Aspect Workforce server details to upload the agent scores.</p>
Recording	<ul style="list-style-type: none"> • Agent Groups - Agent Groups are the groups of agents defined with the common skill set. • Audio Ports - Used for configuring various types of ports to meet the needs of the call center in terms of recording capacity and security. These are the components that actually record the phone calls and the window activity of the agents. • Locations - Used for configuring storage locations to which the Unified IP software based recordings from specified telephony servers need to be stored. • Receiver Groups - Use Receiver Groups to record on the Telephony Server and transmit the recording files for storage and retrieval in Aspect Quality. You must define at least one Receiver Group for each Unified IP switch with an Enhanced CTIPS integration. • Recording Boards - Provides an interface for recording servers to communicate with the cards or software components of a switch. The recording board should be associated in audio ports to record the calls. • Recording Groups - Used for grouping of one or more Audio ports based on similar criteria (for example, the same switch or the same telephony card). An Administrator can create a Recording Group and give only certain Mentors permission rights to review the calls recorded on the ports in the group(s). • Recording Rules - You can base the rules on a wide variety of criteria, so that you can create general rules that apply to the entire contact center or specific rules that apply only to a particular agent or customer. • Skill Groups - Used for associating one or more Agent Groups that provides the user permission to view interaction details, view evaluation data, score interactions and playback media. • Switches - Each Aspect Quality system integrates with one or more switches, which is used for the environmental definitions (for example: agents, agent groups and teams) within that integration. For each of these switches the configuration procedures need to be performed. • Trunk Channels - When using IVR Recording, you may need to modify existing trunk entities within the Aspect Quality system. • VOIP Tap Points - Used to setup a tap point to tap Session Initiation Protocol (SIP) or Cisco Skinny Call Control Protocol (SCCP) or Avaya H.323 phones registered with Avaya or Cisco system.

Feature	Description
Security	<ul style="list-style-type: none"> • API Users - Used for configuring user accounts to access the API. • Teams - Teams are users grouped together by, for example, schedule or location. You can create, edit, activate/deactivate teams in the Quality system. • User Profiles - User profiles are a way for Administrators to assign rights and permissions to a group of users. • Users - Users are the individual users on the Quality system.
System	<ul style="list-style-type: none"> • LDAP Servers - Used for configuring the LDAP or Active Directory server details from which additional user details can be fetched for authorization in Aspect Quality. • Licensing - When you initially log into Workforce Engagement Management - Quality, you need to set up the permissions to view the Quality features. • Servers - Used for configuring the servers for hosting various Aspect Quality System Processes. • Site - You can associate an agent with a site defined in Aspect Quality, so that the system can invoke the proper recording server when you want an agent's call to be recorded. • SMTP Server - Used for configuring the SMTP server details that sends emails for system alerts and enables user to email evaluations. • Storage Groups - Use storage groups to define how long to store and where to store interactions and evaluation attachments. • System Parameters - Allows system level configuration for certain features. • System Processes - Used for configuring various processes that run within the Aspect Quality Server service.

3. System

The chapter introduces the major components that are the part of the Aspect Quality™ system. As an Administrator, knowing the components helps you to be more productive while using the Aspect Quality system.

The components covered are listed below:

- [LDAP Servers](#)
- [Servers](#)
- [Site](#)
- [SMTP Server](#)
- [Storage Groups](#)
- [System Parameters](#)
- [System Processes](#)

3.1 LDAP Servers

Aspect Quality supports the Lightweight Directory Access Protocol (LDAP) and Active Directory (AD) functionality, which Administrators can use to assign policies, deploy software, and apply critical updates to an organization from a central point. You can also use this functionality to define overall user and group permissions and provide an integration to pull in user login ids, domains, and email addresses into Aspect Quality automatically. The integration can look up and populate the Active Directory or LDAP user name, domain, and email in the Aspect Quality web client. These capabilities allow screen capture and single sign-on to Aspect Quality, based on Windows authentication with Microsoft Active Directory.

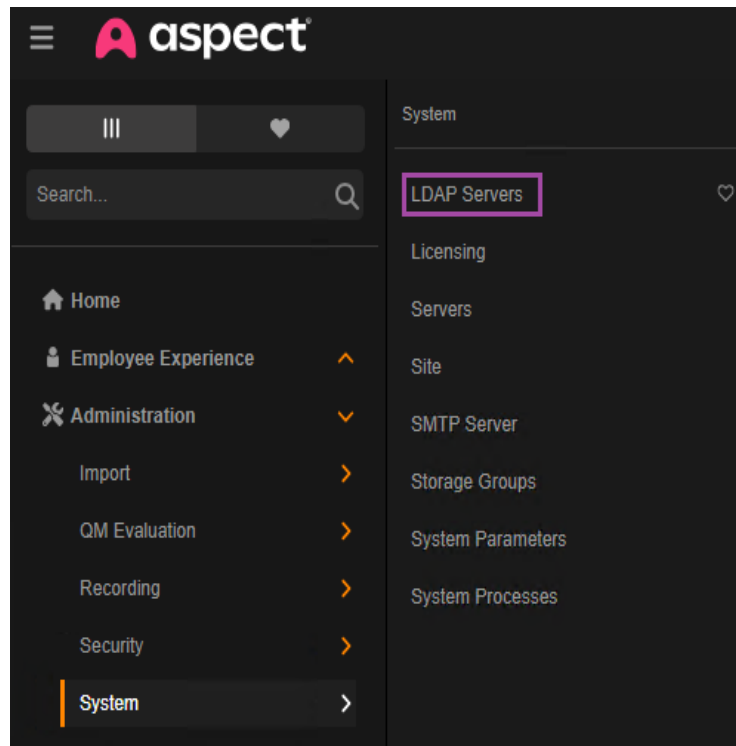
This section describes how to add LDAP server with SSL, activate/deactivate LDAP server in Aspect Quality.

3.1.1 Add LDAP Server

Follow the steps below to add LDAP Server.

1. Go to the main menu.

2. Click **Administration > System > LDAP Servers**.



3. The **LDAP SERVERS** window appears. Click on the **+** button.
4. The Add LDAP Server window appears as shown below.

The 'Add LDAP Server' dialog box contains the following fields and options:

- Server Type:** A dropdown menu with the text 'Select a server type'.
- Domain Name:** A text input field with the placeholder 'Domain Name'.
- Server Address:** A text input field with the placeholder 'Server Address'.
- User Name:** A text input field with the placeholder 'User Name'.
- Port Number:** A spinner input field with the placeholder 'Port Number'.
- Password:** A text input field with the placeholder 'Password'.
- Base DN:** A text input field with the placeholder 'Base DN'.
- Authentication Type:** A dropdown menu with the text 'Select a authentication type'.
- SSL:** A toggle switch currently turned off.
- Sync User Email Address:** A toggle switch currently turned on.

At the bottom right of the dialog are 'Cancel' and 'OK' buttons.

Note: The fields marked (*) are mandatory fields.

5. Click on the **Server Type** drop-down and select **Active Directory** or **LDAP** as per your requirement.
6. Type server address on the **Server Address** field.

7. To mention the port number, click on the **up/down arrows** or type the number of ports on **Port Number** field.
8. In the **Base DN** text box, type the distinguished name of the base object in the LDAP/AD server, where the search begins. **Example:** cn=users,dc=rd1,dc=atc,dc=Aspect,dc=com OR ou=People,dc=concerto,dc=com
9. If you want Aspect EX Quality to connect to LDAP server over Secure Socket Layer, toggle on the SSL toggle button.

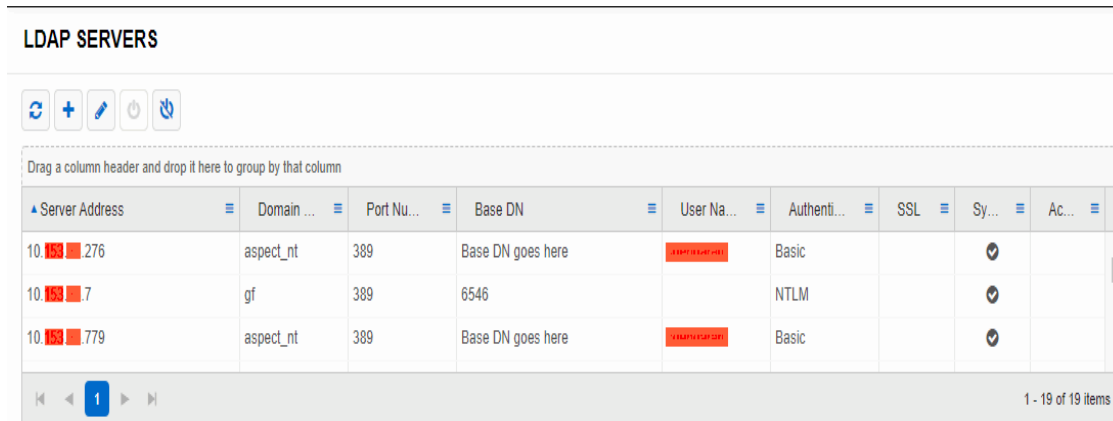
Note:

- Aspect EX Quality uses a secure connection to connect to the LDAP. The default port for the SSL is replace with 636 (389 for Non SSL). In the Server Address text box, you must type the LDAP/AD Server machine name, not the IP address, for Aspect EX Quality to communicate to LDAP/AD over the SSL.
- If you toggled on the SSL toggle button, check mark will be shown under the SSL column on the LDAP Server window.

10. In the **Domain Name** text box, type the domain name of the LDAP/AD server.
11. In the **User Name** text box, type the credentials used to bind with the LDAP/AD server.
Example: Administrator.
12. In the **Password** text box, type the credentials used to bind with the LDAP/AD server.
Example: xyz.
13. Choose you authentication type from the **Authentication Type drop-down** list such as Basic or NTLM.
 - **Basic** - Select this if you want to use Basic Authentication. This requires the user to supply a user name and password. Use this option only with Secure Sockets Layer (SSL), because the Web server obtains the user's credentials unencrypted, ASP.NET applications can impersonate the caller and use their credentials to access network resources.
 - **NTLM** - Select this if you want to use Windows Authentication. Integrated Windows authentication (formerly known as NTLM) means that the server negotiates with the client to determine the protocol to use.

Note: For NTLM authentication type when you leave the username and password fields blank in the LDAP configuration, the default network credentials configured for the Aspect Quality Service in the Interaction Monitor server is used to connect to LDAP/AD.
14. By default, the **Sync User Email Address** toggle button is turned on to pull the user's email IDs, if available, into the LDAP/AD server. If you want to turn off the email syncing feature, toggle-off the toggle button.

15. Click **OK** button to complete the process and the LDAP Server is added on the LDAP SERVERS window.



Note: The grid is sorted based on server address ascending order.

Column	Description
Server Address	The address of the server.
Domain Name	The domain name.
Port Number	The port number of the server.
Base DN	The distinguished name of the base object in the LDAP server.
User Name	The username who added the LDAP server.
Authentication Type	There are two types such as Basic and NTLM.
SSL	The checkmark is shown if the SSL toggle button was toggled-on.
Sync Email	The checkmark is shown if the Sync User Email Address toggle button was toggled-on.
Active	The checkmark is shown if the LDAP server is active.

3.1.2 Activate and Deactivate LDAP Server






After adding a LDAP Server, you can activate and deactivate the LDAP Server. Refer to [Add LDAP Server on page 3-38](#) section.

3.1.3 Activate LDAP Server

Follow the steps below to activate a LDAP Server.

1. After adding the LDAP Server, select the LDAP Server and click **activate** button.

LDAP SERVERS












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

Server Address	Domain ...	Port Nu...	Base DN	User Na...	Authenti...	SSL	Sy...	Ac...
Add LDAP from Classic1	111	636	123	11	Basic	✓	✓	
alvaria	3	3333	333	3	Basic	✓	✓	
from classic Created5	2225	3895	1235	3335	Basic	✓	✓	
LDAP	123	123	123		NTLM		✓	
ord2012dc2	ord2012	636	cn=users,dc=ord2012,dc=labs,dc...	Administrator	Basic	✓	✓	
QM_Win2012_R2	wfo	636	cn=users,dc=wfo,dc=com	Administrator	Basic	✓	✓	
server1	222	2222	3333	22	NTLM	✓		

2. After clicking on activate button, **checkmark** will be shown under the Active column.

LDAP SERVERS

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

Server Address	Domain ...	Port Nu...	Base DN	User Na...	Authenti...	SSL	Sy...	Ac...
Add LDAP from Classic1	111	636	123	11	Basic	✓	✓	
alvaria	3	3333	333	3	Basic	✓	✓	
from classic Created5	2225	3895	1235	3335	Basic	✓	✓	
LDAP	123	123	123		NTLM		✓	
ord2012dc2	ord2012	636	cn=users,dc=ord2012,dc=labs,dc...	Administrator	Basic	✓	✓	
QM_Win2012_R2	wfo	636	cn=users,dc=wfo,dc=com	Administrator	Basic	✓	✓	✓
server1	222	2222	3333	22	NTLM	✓		






1 - 19 of 19 items

3.1.4 Deactivate LDAP Server

Follow the steps below to deactivate a LDAP Server.

1. Select the activated LDAP Server and click on **deactivate** button.

LDAP SERVERS






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

Server Address	Domain ...	Port Nu...	Base DN	User Na...	Authenti...	SSL	Sy...	Ac...
Add LDAP from Classic1	111	636	123	11	Basic	✔	✔	
alvaria	3	3333	333	3	Basic	✔	✔	
from classic Created5	2225	3895	1235	3335	Basic	✔	✔	
LDAP	123	123	123		NTLM		✔	
ord2012dc2	ord2012	636	cn=users,dc=ord2012,dc=labs,dc...	Administrator	Basic	✔	✔	
QM_Win2012_R2	wfo	636	cn=users,dc=wfo,dc=com	Administrator	Basic	✔	✔	✔
server1	222	2222	3333	22	NTLM	✔		

1 - 19 of 19 items

2. After clicking on deactivate button, the Active column will be blank.

LDAP SERVERS

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

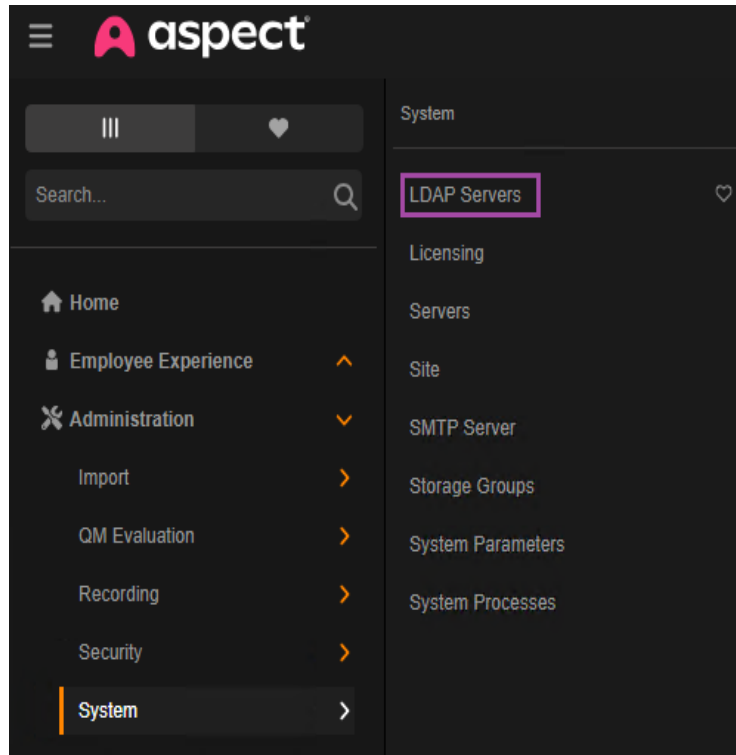
Server Address	Domain ...	Port Nu...	Base DN	User Na...	Authenti...	SSL	Sy...	Ac...
Add LDAP from Classic1	111	636	123	11	Basic	✔	✔	
alvaria	3	3333	333	3	Basic	✔	✔	
from classic Created5	2225	3895	1235	3335	Basic	✔	✔	
LDAP	123	123	123		NTLM		✔	
ord2012dc2	ord2012	636	cn=users,dc=ord2012,dc=labs,dc...	Administrator	Basic	✔	✔	
QM_Win2012_R2	wfo	636	cn=users,dc=wfo,dc=com	Administrator	Basic	✔	✔	
server1	222	2222	3333	22	NTLM	✔		

3.1.5 Edit a LDAP Server

To edit a LDAP Server, perform the following steps.

1. Go to the main menu.

2. Click **Administration > System > LDAP Servers**.



3. Select the LDAP Server and click on the Edit button.

LDAP SERVERS

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

Server Address	Domain ...	Port Nu...	Base DN	User Na...	Authenti...	SSL	Sy...	Ac...
Add LDAP from Classic1	111	636	123	11	Basic	✓	✓	✓
alvaria	3	3333	333	3	Basic	✓	✓	✓
new	44	22	22	44	Basic			✓
NTM	656	546	6546		NTLM	✓	✓	✓
ord2012dc2	ord2012	636	cn=users,dc=ord2012,dc=labs,dc...	Administrator	Basic	✓	✓	✓
QM_Win2012_R2	wfo	636	cn=users,dc=wfo,dc=com	Administrator	Basic	✓	✓	✓
server1	222	2222	3333	22	NTLM	✓		✓

1 - 19 of 19 items

4. The **Edit LDAP Server** window appears.

5. Edit the fields as per your requirement.
Note: Refer to [Add LDAP Server on page 3-38](#) section, step 4 to 15.
6. Click the **OK** button to complete the process.

3.2 Servers

The Aspect Quality has one or more servers that operate on the network to run both the real-time recording of calls and the web pages to search for and play back calls. For large systems, you must have more than one server to handle recording an extensive number of calls at one time. Generally, only Aspect Quality Administrators must identify the Aspect Quality servers.

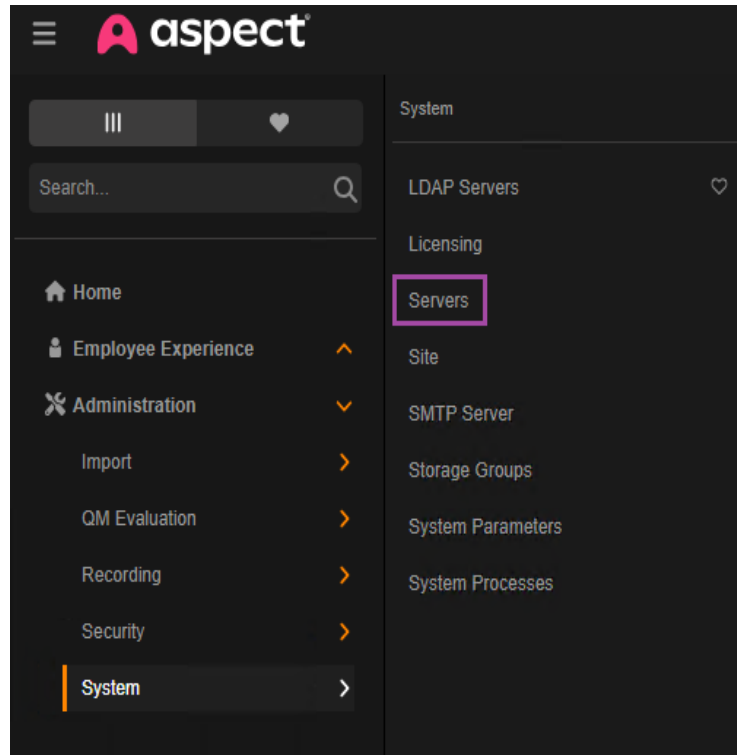
This section describes about how to Navigate, Add, Edit and Delete Servers.

3.2.1 Navigation to the Servers

Follow the steps given below to navigate to the Servers page:

1. Go to the main menu.

2. Click **Administration > System > Servers**.



3. The Servers page appears as given below:

SERVERS




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

Name	IP Address	Process Types
AQMQA5		
AQMSRV03	10.100.49.114	
AQMSRV04	10.100.45.160	
FHSYRETRYTRY	2.2.2.2	
FWE	4.4.4.6	
LOM-AQMSM1		Speech Analyzer
REET	1.1.1.1	
SAEGG	10.100.45.234	
SG-2019B	10.100.45.157	API Web Service, Archiver, Exporter, File Mover, File Receiver, Im, Interaction Monitor, Invitation Manager, Port Manager, Report Man, Web Server, IVR Import
SG-2019C	10.100.49.146	
TEST	10.31.4.133	

1 - 11 of 11 items

4. The Menu buttons on the Servers page are described below:

Icons	Description
Refresh	Refreshes the users grid with latest user changes. Instead of the browser refresh button user can click on this menu button which will refresh only the grid data and not the page.

Icons	Description
Add 	Allows to add a new Server.
Edit 	Updates the details of the selected Server listed on the Servers page.
Delete 	Allows to delete the selected existing Server from the list.

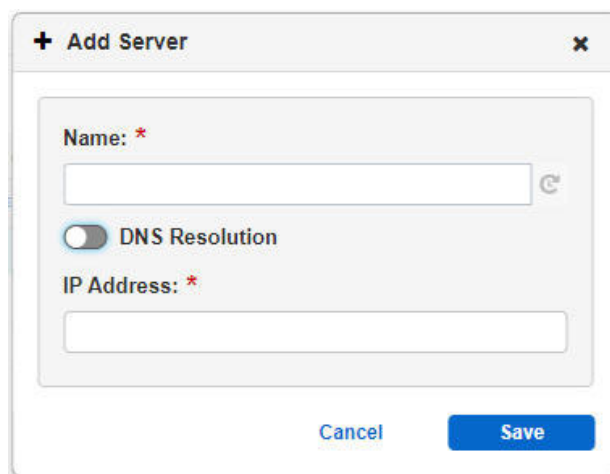
5. The grid columns on the Servers page are described below:

Icons	Description
Name	The Name of the Server.
IP Address	The Servers connected to the IP Address.
Process Types	The Process assigned to run on the Server will be displayed.

3.2.2 Add Servers

To add Servers, perform the following steps:


1. Go to the main menu.
2. Click **Administration > System > Servers**.
3. The Servers page appears.
4. Click on the **Add** icon on the Servers page.
5. The Add Server dialog appears as given below:



Note: The fields marked (*) are mandatory fields.

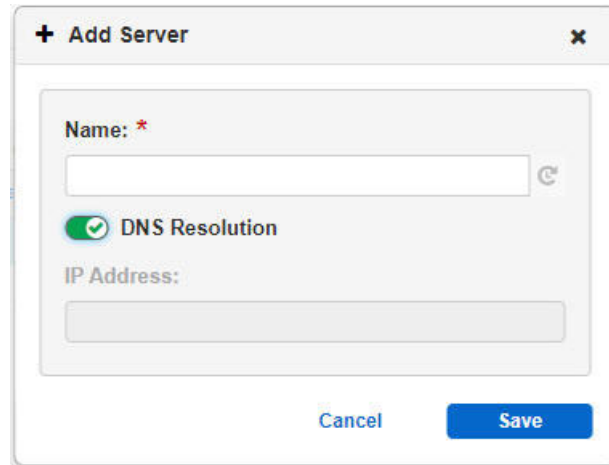
6. Enter the host name of the Server in the **Name** field.

Note: If you enable Secure Communication across the Aspect Quality system, the server name must be the Fully Qualified Domain name (FQDN). Otherwise, the name must be the non-qualified/NetBIOS server name.

7. By default, **DNS Resolution** will be flagged off.
8. Enter the **IP Address** either manually or it can be searched by clicking the Search icon next to the Name field .





Note: When the Search icon is clicked, the IP address field populates with a list of IP addresses resolved with DNS, based on the name that you entered in the Name text box. If the server has been assigned multiple IP addresses, Aspect recommends that you select a specific IP address for Aspect Quality to use on the server, unless DNS resolution only resolves to the single, specific IP address that you want to use.

Note: When DNS Resolution is flagged on, the IP Address text box and the Search icon will be disabled automatically, as shown below:



9. Click the **Save** button to save the given Server to the grid, as shown below:

SERVERS

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

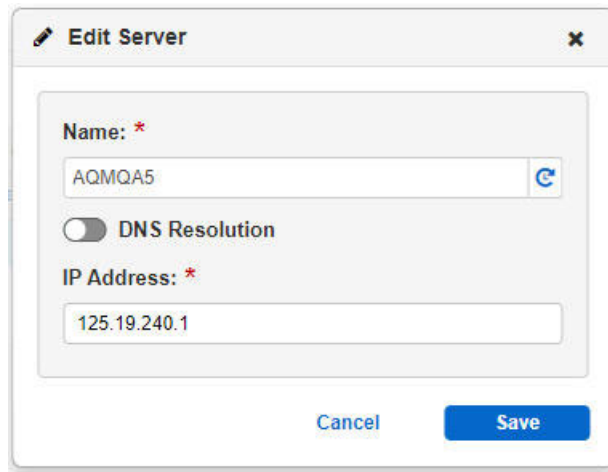
Name	IP Address	Process Types
AQMQA5		
AQMRSRV03	10.100.49.114	
AQMRSRV04	10.100.45.160	
FHSYRETRYTRY	2.2.2.2	
FWE	4.4.4.6	
LOM-AQMMS1		Speech Analyzer
REET	1.1.1.1	
SAEGG	10.100.45.234	
SG-2019B	10.100.45.157	API Web Service, Archiver, Exporter, File Mover, File Receiver, Im Interaction Monitor, Invitation Manager, Port Manager, Report Man Web Server, IVR Import
SG-2019C	10.100.49.146	
TEST	10.31.4.133	

1 - 11 of 11 items

3.2.3 Edit Servers

To edit Servers, perform the following steps:

1. Go to the main menu.
2. Click **Administration > System > Servers**.
3. The Servers page appears.
4. Select the available Server from the grid that needs to be edited and click the **Edit** icon .
5. The **Edit** window appears, as shown below:



6. Edit the fields as per your requirement.
 - Note:** Refer to [Add Servers on page 3-47](#), step 4 to 8.
7. Click the **Save** button to complete the process.





3.2.4 Delete Servers

To delete Servers, perform the following steps:

1. Go to the main menu.
2. Click **Administration > System > Servers**.

3. The Servers page appears, as shown below:

SERVERS

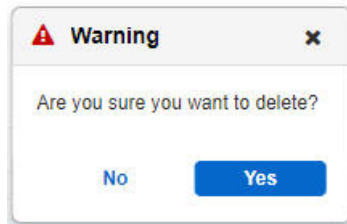





Drag a column header and drop it here to group by that column

Name	IP Address	Process Types
AQMQA5	125.19.240.1	
SG-2019B	10.100.45.157	Archiver, Exporter, File Mover, File Receiver, Interaction Monitor, F Manager, Report Manager, Web Server

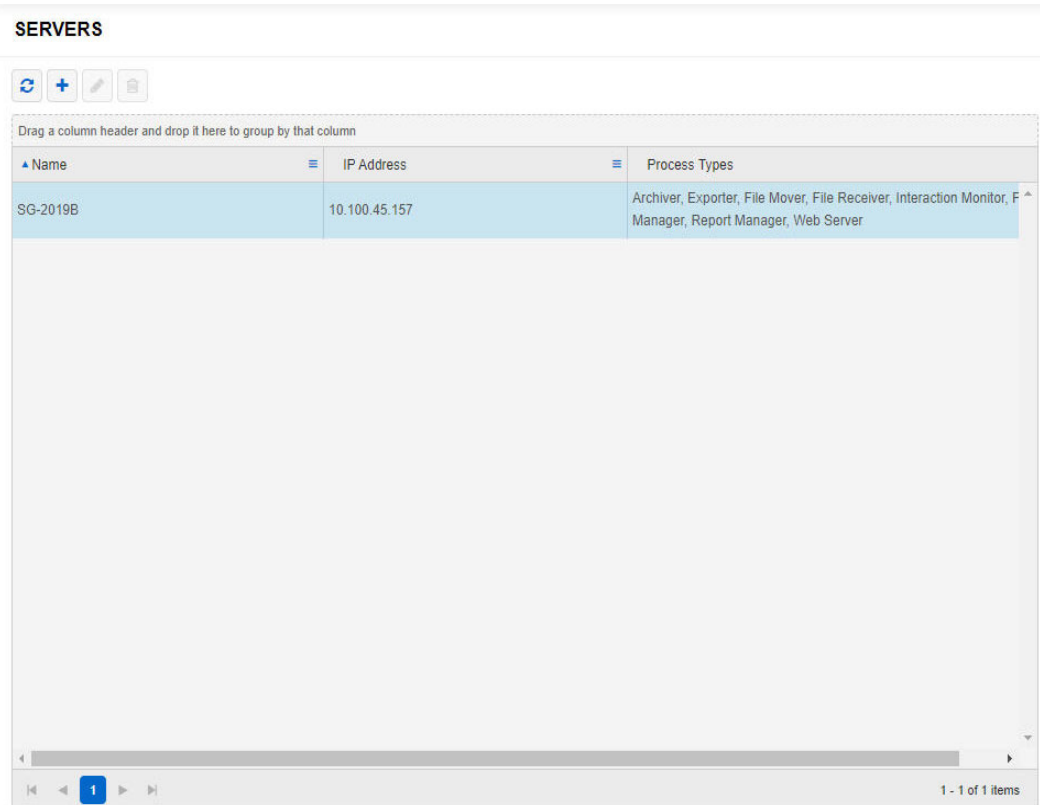
1 - 2 of 2 items

4. Select the available Server from the grid that needs to be deleted and click the **Delete** icon.
5. The Warning dialog box appears to confirm the deletion of the selected Server, as shown below:



6. Click **Yes** to delete or **No** to cancel the deletion of the selected Server.

7. **Yes** option is selected and the listed Server is deleted from the grid, as shown below:



Note: The Delete option for the Servers will be disabled, when one or more process is associated with the Server.

3.3 Site

Only Aspect Quality Administrators can configure the site definition.

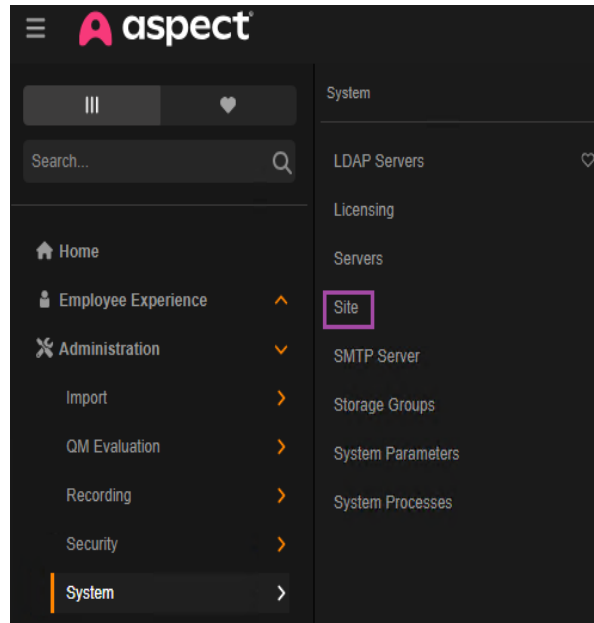
In Aspect Quality, Site allows the user to define the database details. This section describes about Edit and Delete a Site, also how to Add, Edit, Delete a database and set it as a Primary Replica with LDAP Sync.

3.3.1 Navigation to the Site

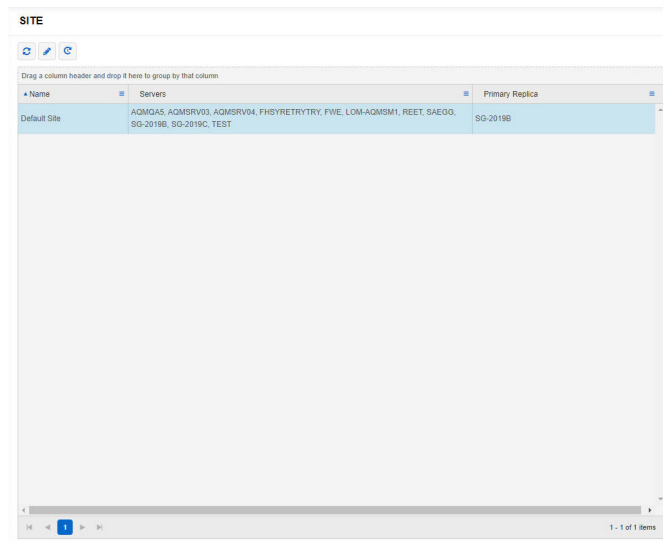
Follow the steps given below to navigate to the Site page:




1. Go to the main menu.




2. Click **Administration > System > Site**.



3. The Site page appears as given below:



4. The Menu buttons    on the Site page are described below:

Icons	Description
Refresh 	Refreshes the users grid with latest user changes. Instead of the browser refresh button user can click on this menu button which will refresh only the grid data and not the page.
Edit 	Updates the details of the selected Site listed on the Site page.
LDAP/AD Sync 	Allows to sync the LDAP/AD details.

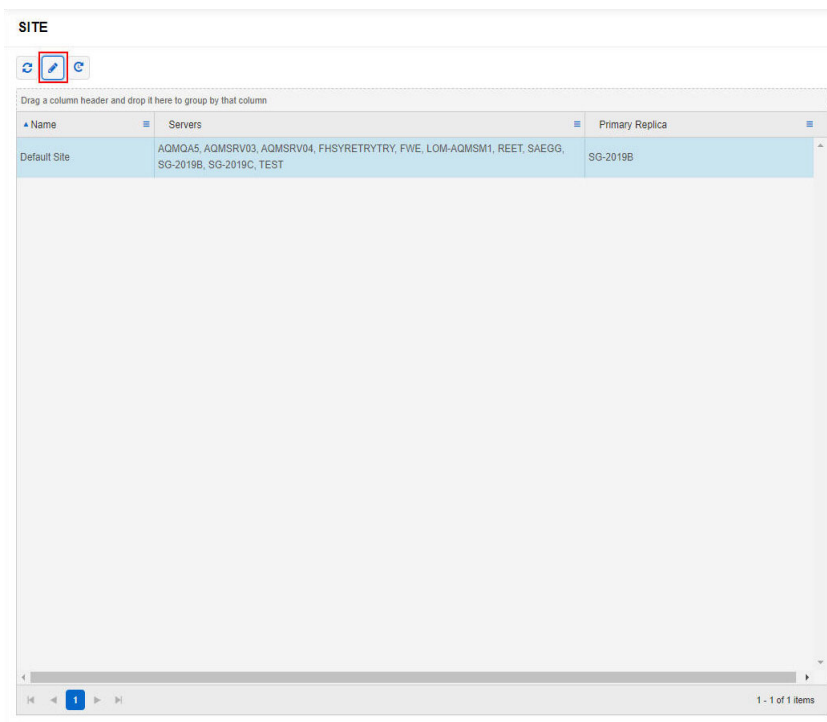
5. The grid columns on the Site page are described below:

Icons	Description
Name	The name of the Site.
Servers	The servers connected to the Site.
Primary Replica	Sets the preferential Database as a primary replica.

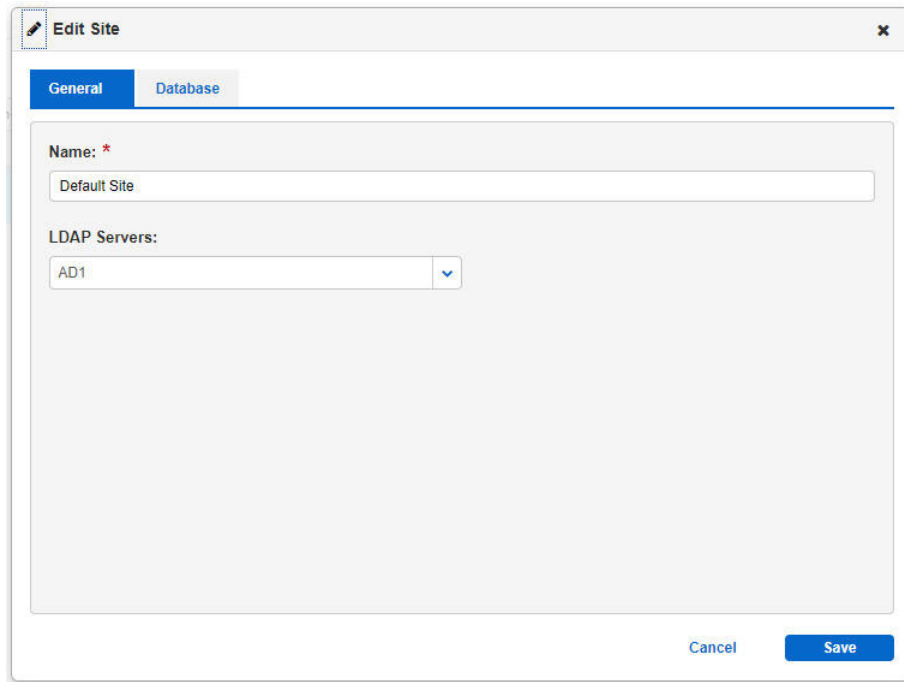
3.3.2 Edit a Site

To edit a Site, perform the following steps:

1. Go to the main menu.
2. Click **Administration > System > Site**.
3. The Site page appears.
4. Select the Site from the **Name** column that needs to be edited and click on **Edit** button.



5. The **Edit Site** window appears to edit the fields as per your requirement.



On the Edit Site window, two tabs are available:

- [General Tab](#)
- [Database Tab](#)

6. Click the **Save** button to save the changes.

3.3.2.1 General Tab

- **Name:** This is the name of the Site that is selected already from the grid for the edit.

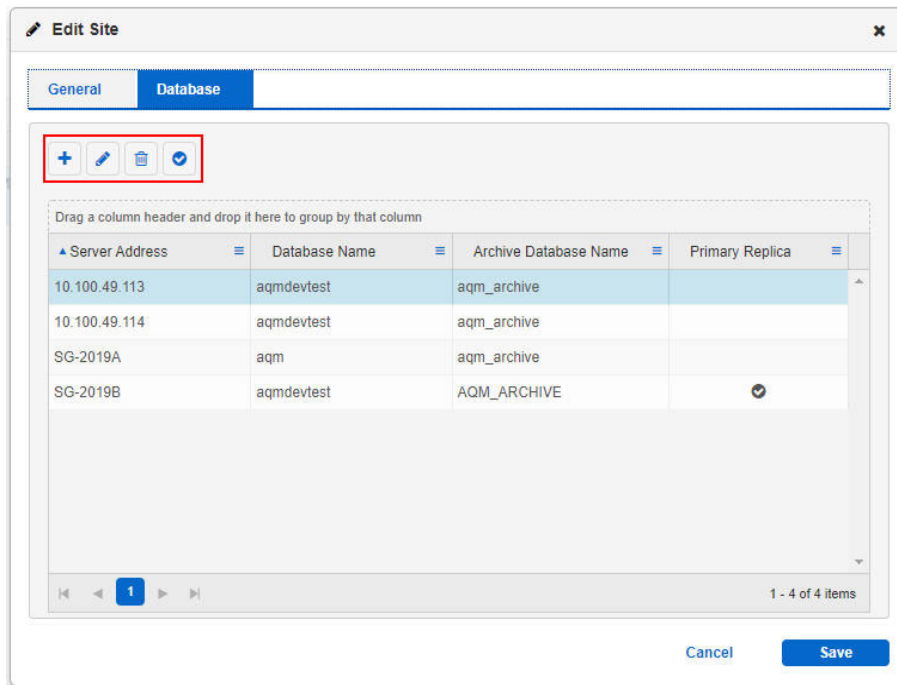
- **LDAP Servers:** This is the list of the available Active LDAP servers that can be selected from the drop-down.

The screenshot shows a dialog box titled "Edit Site" with a close button (X) in the top right corner. It has two tabs: "General" (selected) and "Database". Under the "General" tab, there is a "Name: *" field with a red asterisk indicating it is required, containing the text "Default Site". Below this is an "LDAP Servers:" label followed by a dropdown menu currently showing "AD1". At the bottom right of the dialog, there are two buttons: "Cancel" and "Save".

After editing the required fields, click the **Save** button.

3.3.2.2 Database Tab


- Menu buttons on the **Database** tab are described below:



Icons	Description
Add	Add the database connection string details to the Quality database which is configured in Quality Configuration Utility.
Edit	Updates the database connection string details for the selected database added to the grid.
Delete	Deletes the database connection string details from the Quality.
Set Primary Replica	Sets the selected Database, listed in the grid as primary. All the CRUD (Create, Read, Update and Delete) operations will be done on the database which is set as Primary.

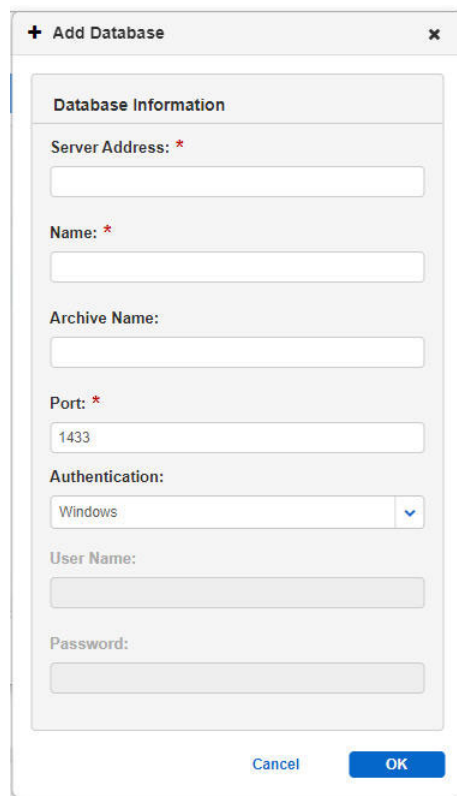
- The grid headers of the Database tab are explained briefly below:

Column	Description
Server Address	This is the Server name of the Aspect Quality database server.
Database Name	This is the name of the Aspect Quality database.
Archive Database Name	If the user wants to archive the data then this database name have to be configured.

Column	Description
Primary Replica	<p>This is the selected database that is listed in the grid as primary. This database has  icon in the Primary Replica column.</p> <p>Note: 1. Delete and Set Primary Replica icons will be disabled for the replica that is set as Primary. 2. Only one database can be set as Primary Replica.</p>

3.3.2.2.1 Add Database

The **Add Database** window appears by clicking the **Add** icon as shown below:



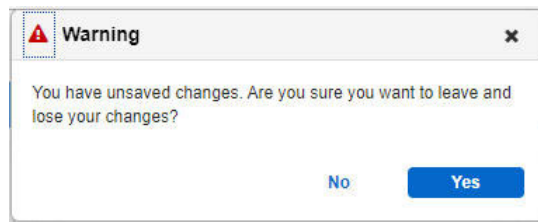
Note: The fields marked (*) are mandatory fields.

The **Database Information** fields are briefly given below:

1. **Server Address:** Server name of the Aspect Quality database server.
2. **Name:** Name of the Aspect Quality database.
3. **Archive Name:** Name of the database that will be available, when the system moves and stores the Archived media metadata.
For example: QM_Archive. The Current/ Historical and Archive databases must reside on the same Microsoft SQL Server instance and use the same credentials for access. If you do not use archiving, you can leave this field empty.

4. **Port:** TCP port number that Aspect Quality uses to communicate with the SQL Server. The default is 1433.
5. **Authentication:** Select the SQL Server option from the drop-down. Once you select the Authentication option, the User Name and Password fields are active.

Note: Aspect Quality supports Windows Authentication for SQL Server access. If you are using Windows Authentication to connect to the Aspect Quality database, you do not need to enter any User Name or Password at this window. When Aspect Quality attempts to access the Aspect Quality database, the Aspect Quality service uses the Windows account during Log On As setting to access the database.
6. **User Name:** SQL Server user name that you use to access the Aspect Quality database.
7. **Password:** Allows you to set the new password or use the existing password to access the Aspect Quality database. When you click on the password field available options list appear.
8. Click the **OK** button to Add the database or **Cancel** button to cancel the database.
9. When the **Cancel** option is selected, the Warning message appears to confirm the cancellation. Select **Yes** to confirm cancellation or **No** to return to the previous screen, as shown below:



3.3.2.2.2 *Edit Database*

Select the existing database from the Database tab that needs to be edited. Click the **Edit** icon and the **Edit Database** window appears as shown below:

1. Edit the fields as per your requirement.

Note: Refer to [Add Database on page 3-57](#) section, step 1 to 8.

2. Click the **OK** button to complete the process.

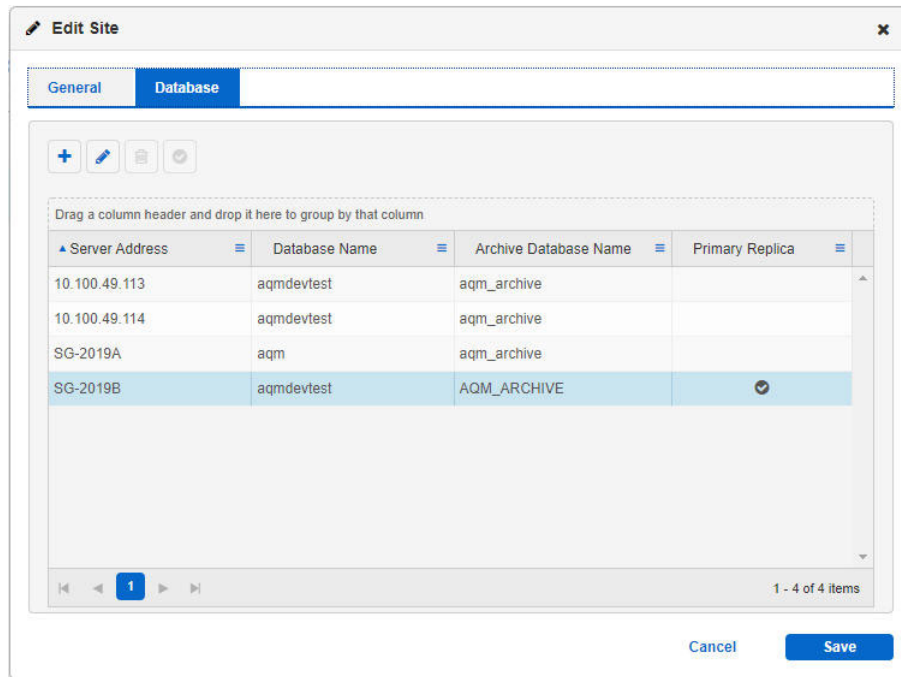
3.3.2.2.3 Delete Database

Select the existing database from the **Edit Site** grid that needs to be deleted.

1. Click the **Delete** icon and the **Warning** window appears to delete database, as shown below:

2. Select **Yes** to delete the database and **No** to cancel the deletion.

Note: Delete button will be disabled for the database in the Edit Site grid that has been set as Primary Replica, as shown below:

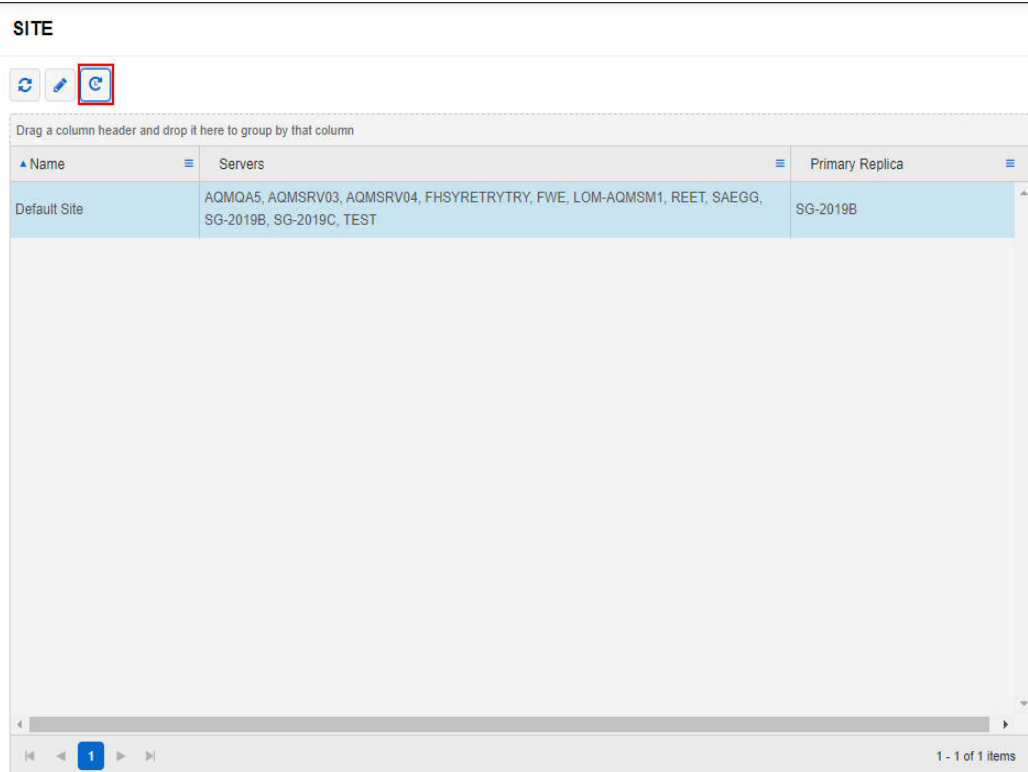


3.3.3 LDAP/AD Sync

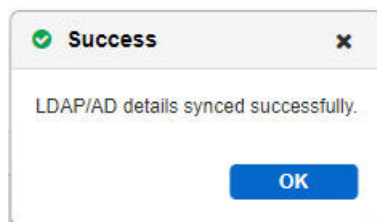
To Sync a Site, perform the following steps:

1. Go to the main menu icon.
2. Click **Administration > System > Site**.
3. The Site page appears.

- Select the Site from the **Name** column that needs to be synced and click on **LDAP/AD Sync** button.



- The LDAP/AD Sync **Success** message window appears, as shown below:



- Click the **OK** button to save the changes.

3.4 SMTP Server

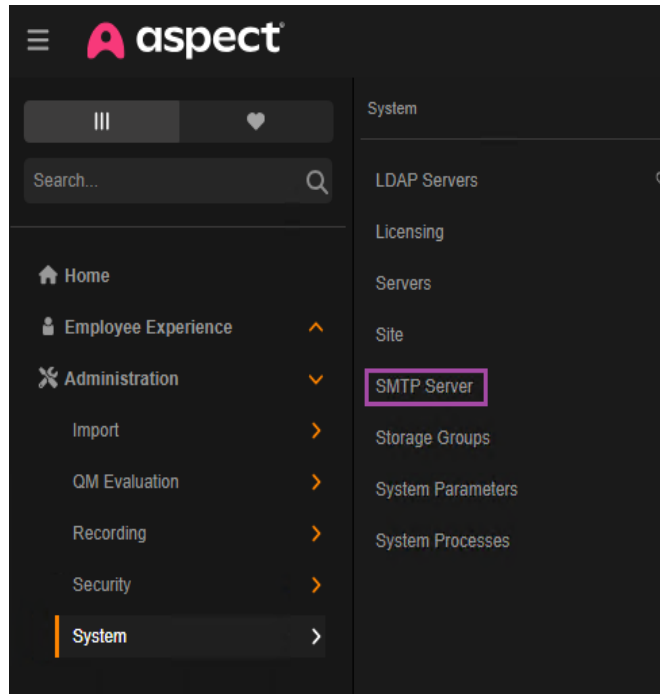
This section describes how to view the existing SMTP Server and how to Add, Edit and Delete the SMTP Server in the system.

Note: Maximum one SMTP Server can be created for any system. So, if a different SMTP Server is required, user can either edit the existing SMTP Server or delete the same and then create a new SMTP Server.

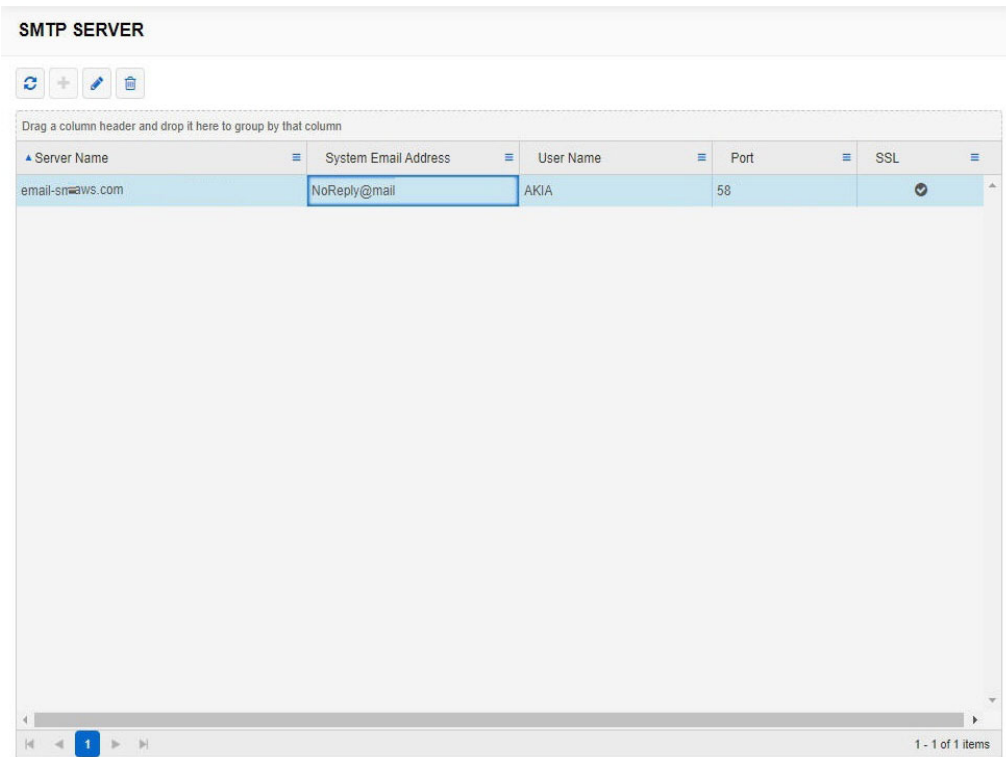
3.4.1 Navigation to SMTP Server





Follow the steps given below to navigate to the SMTP Server page:





1. Go to the main menu.
2. Click **Administration > System > SMTP Server**.



3. The SMTP Server page appears, as given below:



4. The Menu buttons     on the SMTP Server page are described below:

Icons	Description
Refresh 	Refreshes the SMTP server grid with latest SMTP server changes. Instead of the browser refresh button user can click on this menu button which will refresh only the grid data and not the page.
Add 	Adds the new SMTP server to the grid.
Edit 	Edits the SMTP server existing in the grid.
Delete 	Deletes the existing SMTP server listed in the grid.

5. The grid columns on the SMTP Server page are described below:

Column	Description
Server Name	The name of the SMTP server.
System Email Address	The system will send the e-mails using the specified System Email Address.
User Name	The specified user name will be used to connect to the SMTP server.
Port	The port number will be used by the SMTP server to send e-mails.

Column	Description
SSL	The SMTP server's SSL status is displayed by the checkmark icon, whether SSL was active or not.

3.4.2 Create SMTP Server


To create a new SMTP Server, perform the following steps.

1. Go to the main menu.
2. Click **Administration > System > SMTP Server**.
3. The SMTP Server page appears.
4. Click on the Add button. The Add SMTP Server definition window appears.

Note: The fields marked (*) are mandatory fields.

5. Enter the name or IP Address of the mail server in the **Server Name** text box.
6. Enter the Email address or server address which the system will use to send the Emails in the **System Email Address** text box. The System Email Address is the From e-mail address from which the system seems to send the alerts, and must be a valid SMTP address on the external e-mail system.
7. Enter the name of the user in the **User Name** text box to optionally authenticate the SMTP server for sending e-mail.
8. Enter the password in the **Password** text box for the SMTP user name.
9. Enter the port number to connect to the Email server, either manually or using the arrow keys in the **Port** text box. By default, the port number will be displayed as 25. The Port number value can be entered ranging between 1 to 65535.

10. The **SSL** toggle key is unflagged by default. To enable the STARTTLS SMTP extension for secure connections to the Email server, flag the SSL toggle key.
11. Click **OK** to create the SMTP Server.

By default, the new SMTP Server which is created will be listed in the grid. Now, the Add  button will be disabled and the Edit and Delete buttons will be enabled.

3.4.3 Edit SMTP Server

To edit a SMTP Server, perform the following steps.

1. Go to the main menu.
2. Click **Administration > System > SMTP Server**.
3. The SMTP Server page appears.
4. Select the available SMTP Server from the grid for editing and click the **Edit** icon.
5. The Edit SMTP Server window appears, as shown below.

6. Edit the field values as per your requirement.

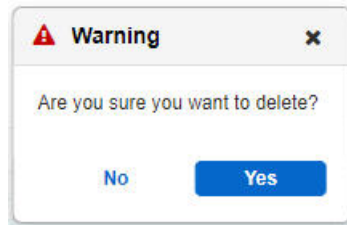
Note: Refer to [Create SMTP Server on page 3-64](#) section, step 4 to 11.
7. Click the **OK** button to complete the process.

3.4.4 Delete SMTP Server

To delete a SMTP Server, perform the following steps.

1. Go to the main menu.

2. Click **Administration > System > SMTP Server**.
3. The SMTP Server page appears.
4. Select the available configured SMTP Server from the grid for deleting and click the **Delete** icon.
5. A warning message appears, if you want to delete or not, as shown below.



6. Select the **Yes** option to delete the listed SMTP Server.

3.5 Storage Groups

This section describes how to view the existing storage groups, and how to create, edit, activate, and deactivate the storage group in the system.

3.5.1 What is a Storage Group?

A storage group defines how long to store and where to store interactions and evaluation attachments.

The storage group can exist in one of the following storage conditions.

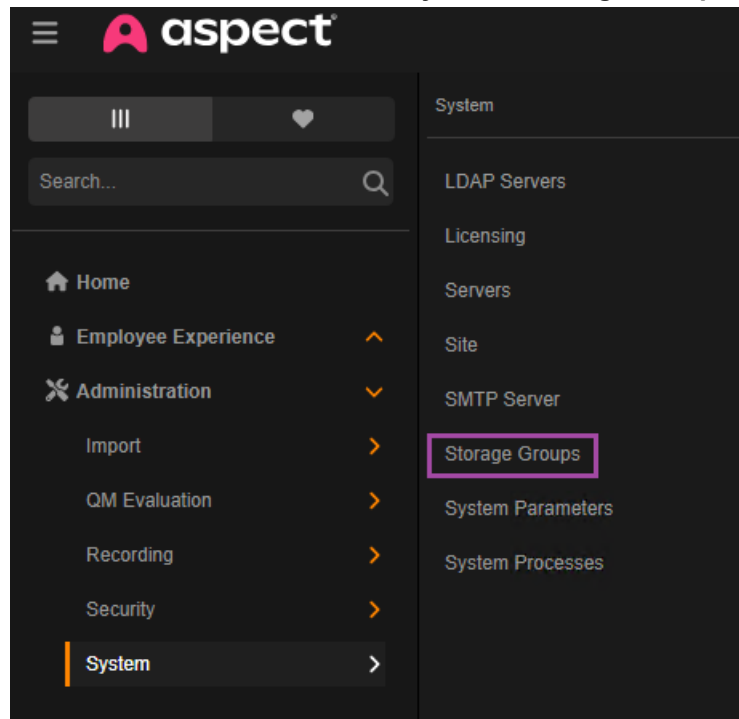
Storage Condition	Description
Active	<ul style="list-style-type: none"> • You can play and evaluate recordings. • Frequently-accessed recordings are stored here. • Example: Store an interaction or an evaluation for 90 days on the Media server.
Historical	<ul style="list-style-type: none"> • You can play recordings. • You can review previously-created evaluations for an interaction. • Less-frequently accessed recordings that are stored here. • Example: Store an interaction or an evaluation for 2 years on the Storage Area Network (SAN).
Archive	<ul style="list-style-type: none"> • You can play recordings. • You can review previously-created evaluations for an interaction. • Interaction records are moved from the Aspect Quality Primary database to the Archive database. • Example: Store an interaction or an evaluation for 5 years on the Network Attached Storage (NAS).

Storage Condition	Description
Elimination point	<ul style="list-style-type: none"> • The place in time at which the system deletes interactions and database records. • Example: Delete interactions older than 5 years.

3.5.2 Storage Group List






This module describes how to view the storage groups that are available in the system.

1. Log in to Workforce Engagement Management as an Administrator.
2. From the main menu, click **Administration > System > Storage Groups..**



The **Storage Groups** page opens with a list of created storage groups displayed in the table.

STORAGE GROUPS




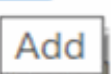

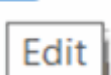










Drag a column header and drop it here to group by that column

Name	Description	Active
3.7 storage		<input checked="" type="checkbox"/>
Avaya_7_storage		<input checked="" type="checkbox"/>
edited	123	
enable archive	dgd	<input checked="" type="checkbox"/>
enter 0 values		<input checked="" type="checkbox"/>
From WFO	created from WFO	<input checked="" type="checkbox"/>
ggggggggg hhhhhhhhh nnnnnnnnn jjjjj kkk mmmmm ggg		<input checked="" type="checkbox"/>
Import Default Storage Group	Storage Group Created for Import Switch by system	<input checked="" type="checkbox"/>
ImportSG		<input checked="" type="checkbox"/>
new		<input checked="" type="checkbox"/>

1 - 15 of 15 items

The following table contains the description of buttons available on the Storage Groups page.

Button	Description
 	Refresh the Storage Groups table
 	Create a new storage group
 	Edit an existing storage group

Button	Description
 	Make a storage group active (available for use)
 	Make a storage group inactive (not available for use)

The following table describes the columns in the Storage Group table.

Column	Description
Name	Name of the storage group
Description	Description of the storage group
Active	If the storage group is active (available for use), then a check mark displays in its row

The maximum number of storage groups records per page is 100. Use the Pagination buttons below the table to navigate to the Next Page, Last Page, Previous Page, or First Page.

3.5.3 Add a New Storage Group

To create a storage group in the system and add archiving details, perform the following steps.

1. On the Storage Groups page, click **Add**.



The Add Storage Group window opens with the Current Tier tab active.

2. In the **Name** text box, type the name of the storage group. The maximum number of characters allowed is 50. The Storage Group name must be unique and is a required field.
Note: All required field are marked with a red asterisk (*).
3. In the **Description** text box, type a description for the storage group. The maximum number of characters allowed is 100.
4. If you are using archiving in the system, select **Enable Archiving**.
With the archiving feature, the media files can exist in a different location during the lifecycle of the media.
By default, the Enable Archiving option is disabled, and Historical Tier and Archive Tier tabs are inactive.

In the Current Tier, only the Recording files location and Evaluation Attachments location fields are available, until you select Enable Archiving. Then, the following fields display.

5. If you selected Enable Archiving, complete the following fields.

Field	Description
Recording files location	Enter a UNC Path where you want all recording/screen capture files for this storage group are to be stored while the interaction with which the files are associated resides within the Current tier. Note: A maximum of 250 characters is allowed.
Evaluation attachments location	Enter a UNC Path where you want all scorecard attachment files for this storage group are to be stored while the interaction with which the files are associated resides within the Current tier. Note: A maximum of 250 characters is allowed.
Pending disposition interaction time limit	Enter or select a numeric value (Max 10000 and Min 0) for the number of days after which you want the system to delete the expired Pending media. Note: This action does not apply to the Protected interaction/media.

Field	Description
Move to Historical after	<p>Enter or select a numeric value (Max 10000 and Min 0) for the number of days after which you want the interaction to qualify for Historical processing.</p> <p>For example, if the interaction was recorded on 5 January 2017, and if the Move to Historical after field is configured as 10 (days), then the system moves the recording files to the Historical location after 15 January 2017.</p> <p>Note: The numeric value must be less than or equal to the Move to Archive after field on the Historical Tier tab.</p>
Delete instead of moving to Historical - Audio Files	<p>To delete the audio media files when processed for Historical tier transition, select Audio Files.</p> <p>Note: This action does not apply to the Protected interaction/media.</p>
Delete instead of moving to Historical - Screen Capture Files	<p>To delete the video media files when processed for Historical tier transition, select Screen Capture.</p> <p>Note: This action does not apply to the Protected interaction/media.</p>
Delete instead of moving to Historical - Chat Transcript Files	<p>To delete the chat transcript files when processed for Historical transition, select Chat Transcript Files.</p> <p>Note: This action does not apply to the Protected interaction/media.</p>
Delete instead of moving to Historical - Email Transcript Files	<p>To delete the email transcript files when processed for Historical transition, select Email Transcript Files.</p> <p>This will also delete any attachments, if present in the Email transcript.</p> <p>Note: This action does not apply to the Protected interaction/media.</p>
Protect for	<p>Enter or select a numeric value (Max 10000 and Min 0) for the number of days after which you want the system to move the protected media from the Current storage locations to the Historical locations.</p> <p>The numeric value must be less than or equal to the value entered in the Historical Tier tab's Protect for field.</p>

6. Select the **Historical Tier** tab.

The screenshot shows a dialog box titled '+ Add Storage Group'. It has three tabs: 'Current Tier', 'Historical Tier' (which is selected), and 'Archive Tier'. On the left side, there are two text input fields: 'Name: *' and 'Description:'. Below these is a checked checkbox labeled 'Enable Archiving'. On the right side, there are four text input fields: 'Recording files location: *', 'Evaluation attachments location: *', 'Move to Archive after: *' (with a dropdown menu set to 'days'), and 'Protect for: *' (with a dropdown menu set to 'days'). Below these are four radio button options under the heading 'Delete instead of moving to Archive:': 'Audio Files', 'Screen Capture Files', 'Chat Transcript Files', and 'Email Transcript Files'. At the bottom right, there are 'Cancel' and 'OK' buttons.

7. If you want to use Historical archiving, use the following table to complete the fields.

Field	Description
Recording files location	Enter a UNC Path where you want all recording/screen capture files for this storage group to be stored while the interaction with which the files are associated resides within the Historical tier. Note: A maximum of 250 characters is allowed.
Evaluation attachments location	Enter a UNC Path where you want all scorecard attachment files for this storage group to be stored while the interaction with which the files are associated resides within the Historical tier. Note: A maximum of 250 characters is allowed.
Move to Archive after	Enter or select a numeric value (Max 10000 and Min 0) for the number of days after which you want the interaction to qualify for Archive processing. For example, if the interaction was recorded on 5 January 2017, and if the Move to Archive after field is configured as 20 (days), then the system moves the recording files to the Historical location after 25 January 2017. Note: The numeric value must be less than or equal to the Move to Historical after in the Current Tier tab.
Delete instead of moving to Archive - Audio Files	To delete the audio media files when processed for Archive transition, select Audio Files . Note: This action does not apply to the Protected interaction/media.

Field	Description
Delete instead of moving to Archive - Screen Capture Files	To delete the video media files when processed for Archive transition, select Screen Capture . Note: This action does not apply to the Protected interaction/media.
Delete instead of moving to Archive - Chat Transcript Files	To delete the chat transcript files when processed for Archive transition, select Chat Transcript Files . Note: This action does not apply to the Protected interaction/media.
Delete instead of moving to Archive - Email Transcript Files	To delete the email transcript files when processed for Archive transition, select Email Transcript Files . Note: This action does not apply to the Protected interaction/media.
Protect for	Enter or select a numeric value (Max 10000 and Min 0) for the number of days after which you want the system to move the protected media from the Historical storage locations to the Archive locations. Note: The numeric value in the Historical Tier tab must be greater than or equal to the value entered in the Current Tier tab's Protect for field.

8. Select the **Archive Tier** tab.

The screenshot shows a dialog box titled '+ Add Storage Group'. It has three tabs: 'Current Tier', 'Historical Tier', and 'Archive Tier', with 'Archive Tier' selected. On the left, there are input fields for 'Name' and 'Description', and a checked checkbox for 'Enable Archiving'. On the right, there are input fields for 'Recording files location' and 'Evaluation attachments location', a toggle for 'Permanently delete Archived items' (which is currently off), and a 'Delete after' spinner set to a value followed by 'days'. At the bottom right, there are 'Cancel' and 'OK' buttons.

9. If you want to use Archiving, use the following table to complete the fields.

Field	Description
Recording files location	Enter a UNC Path where you want all recording/screen capture files for this storage group to be stored while the interaction with which the files are associated resides within the Archive tier. Note: A maximum of 250 characters is allowed.
Evaluation attachments location	Enter a UNC Path where you want all scorecard attachment files for this storage group to be stored while the interaction with which the files are associated resides within the Archive tier. Note: A maximum of 250 characters is allowed.
Permanently delete Archived items	To delete both the Archived media files from the Archive storage location and from the associated metadata stored in the Archive database, select Permanently delete Archived items . Note: This action does not apply to the Protected interaction/media.
Delete after	Enter or select a numeric value (Max 10000 and Min 0) for the number of days (from when the system created the media) that you want to delete the media and the metadata from the Archive storage location and from the Archive database. Note: This action does not apply to the Protected interaction/media.

10. Click **OK**. The new storage group is created and displays in the Storage Groups page in the table.

3.5.4 Edit Storage Group

Use the edit feature to change storage group basic details, including details in the Current Tier, Historical Tier, and Archive Tier tabs.

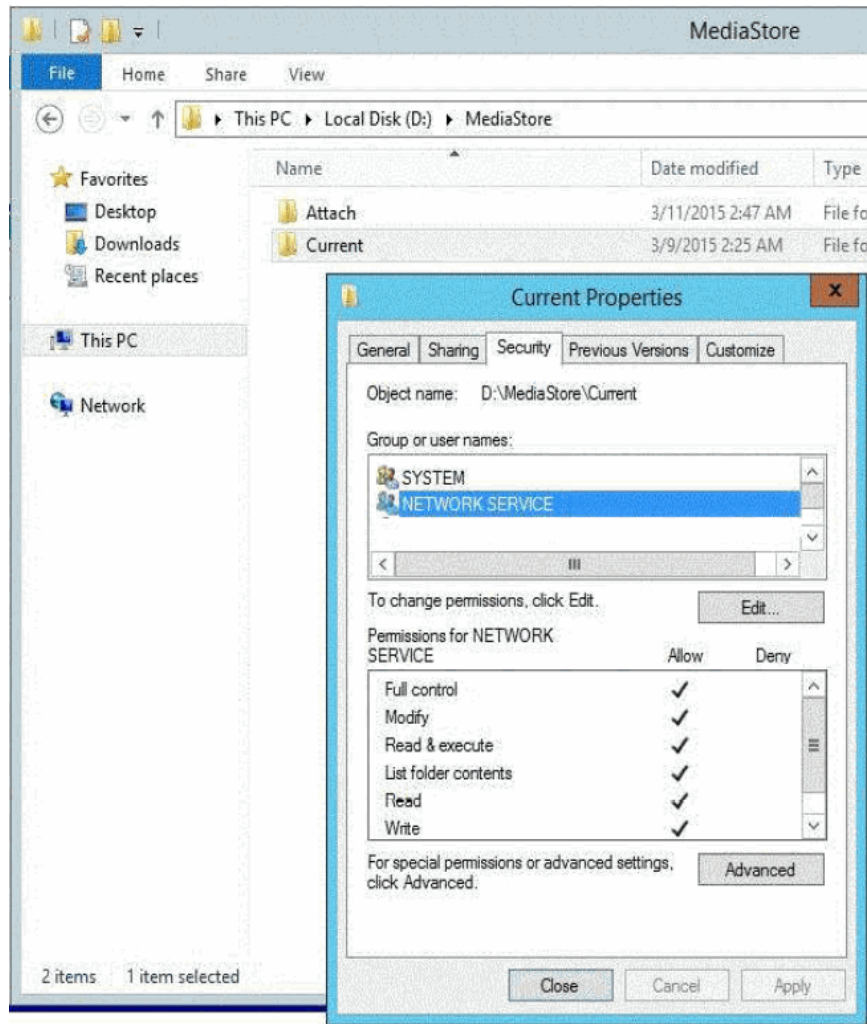
Note: Only an Administrator has permission to edit a storage group.

1. From the Storage Group page, in the table, select the storage group that you want to edit. and click **Edit**.

The Edit Storage Group window opens.

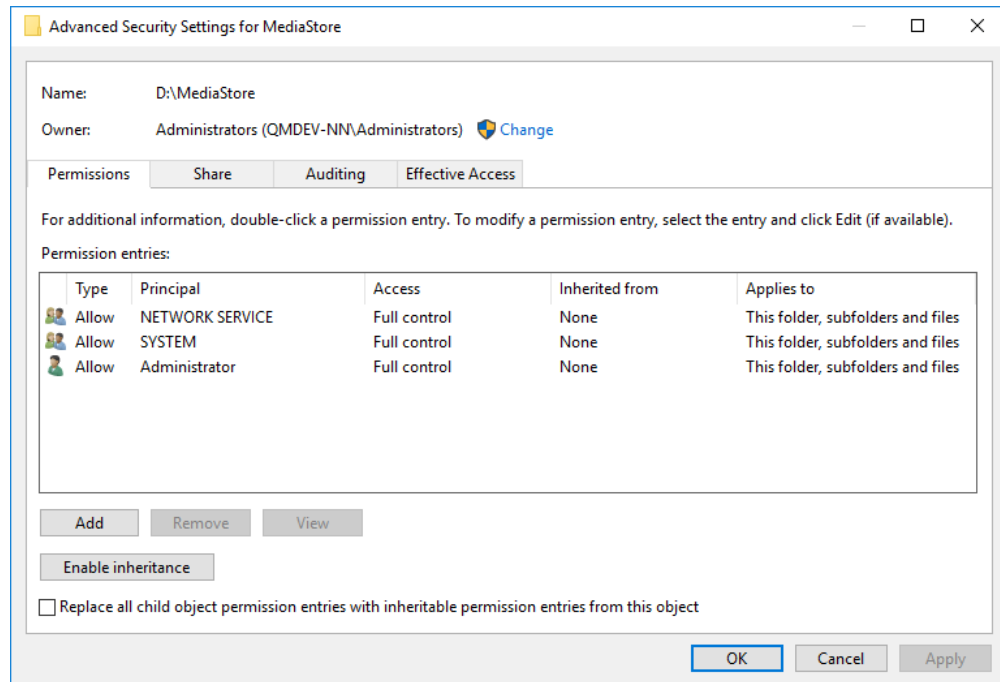
2. Change the fields on the window that you want to edit.
3. Click **OK**. The system saves your changes, closes the Edit Storage Group window, and displays in the Storage Groups page.

Note: For Aspect Quality Media Playback, you must modify the Media Storage Paths (Current Historical and Archive) configured on the Storage Groups, by adding the Network Service, Users and Aspect Quality Service account to the Security Tab and granting Full permission to the Media Storage path.



Note: Enable the inheritable permissions on the Media Storage folder in the Advanced Security Settings for Playback. Verify that you have enabled inheritance and selected Replace all the child object permission entries with inheritable permission entries from this object checkbox.

Note: The Media Storage Folder should not be named as Voicerec since the webserver has a voicerec Folder for caching the File that is played back.



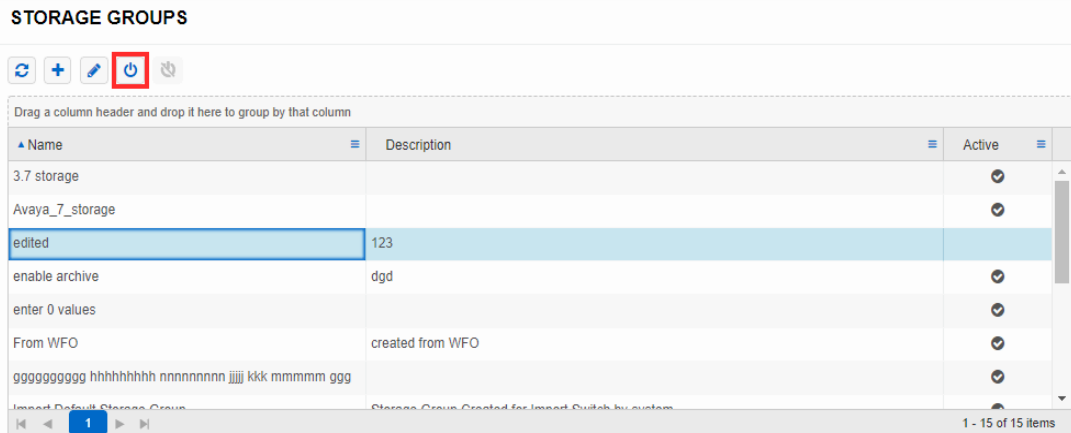
3.5.5 Activate a Storage Group

To make a storage group in the Storage Group page active, perform the following steps.

Note: The Activate button is enabled only for an inactive storage group.

1. On the Storage Groups page, select the storage group that you want to activate from the table.

2. Click **Activate**.



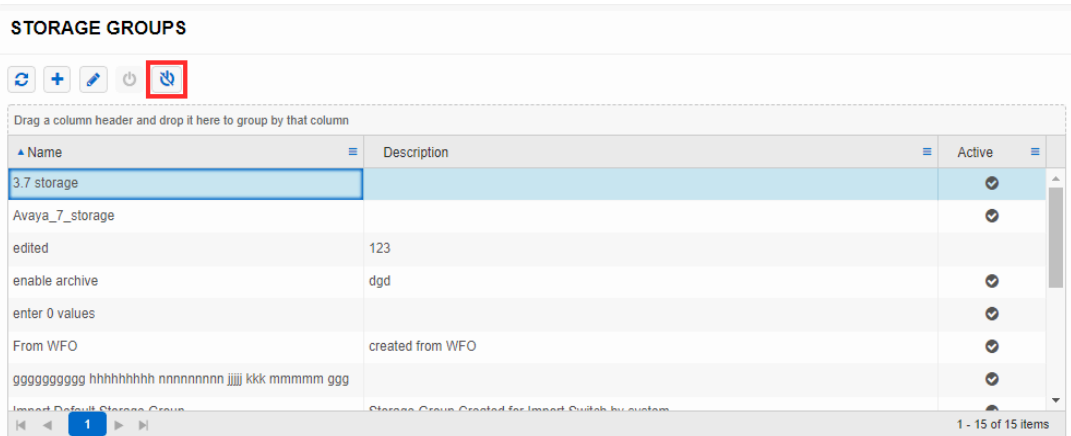
The system activates the Storage Group and refreshes the Storage Group page.

3.5.6 Deactivate a Storage Group

To make a storage group in the Storage Group page inactive, perform the following steps.

Note: The Deactivate button is enabled only for an active storage group.

1. On the Storage Groups page, select the Storage Group that you want to deactivate from the table.
2. Click **Deactivate**.



The system deactivates the Storage Group and refreshes the Storage Group page.

3.6 System Parameters

In Workforce Engagement Management, Performance and Quality consist of various System Parameters. This section describes how to use those System Parameters in Aspect Quality. The System Parameters features are below.

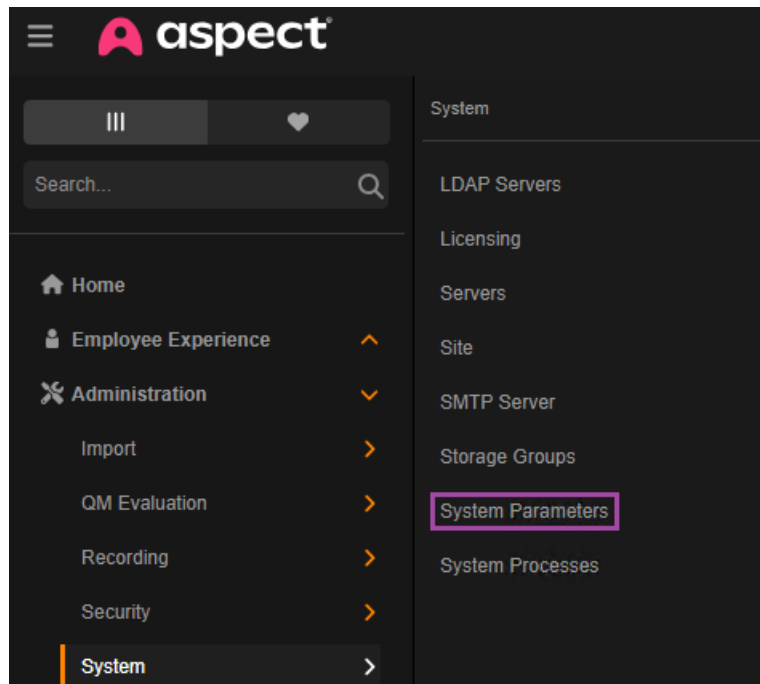
- [Media File Download](#)

- [Report Storage Path](#)
- [Insert Silence During Pause](#)
- [Default Player for Chat Interaction](#)
- [Disqualifying Rule Overrides Parent](#)
- [Use Ani & Dnis From CTI for UIP Switch](#)

3.6.1 Media File Download

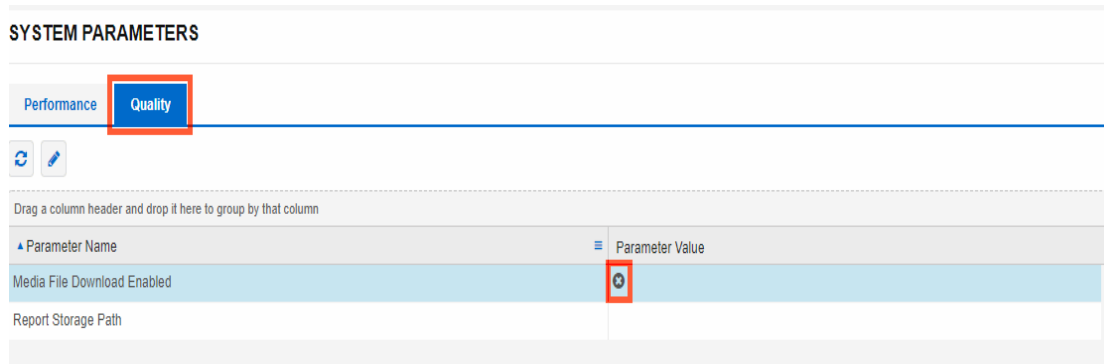
Media File Download feature allows the user to download the media files such as video and audio interactions, audio interactions, screen interactions in the Interaction window or Search Results page. Refer step 2 of [Quick View of Audio Interaction](#) and [Quick View of Voice and Screen Interaction](#) to view the Download button of the interaction. Follow the steps below to enable the Download button.

1. Login to Workforce Engagement Management.
2. Go to Main Menu and click on **Administration > System > System Parameters** as shown below.

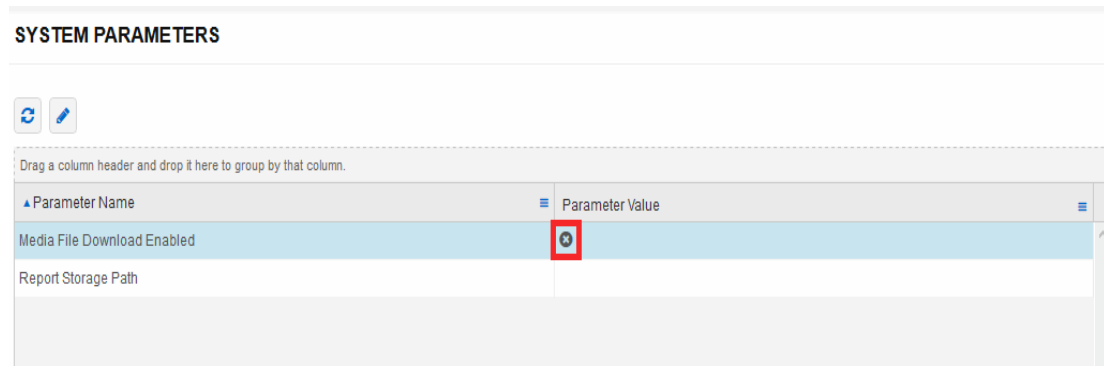


3. The **SYSTEM PARAMETERS** window appears.

- When Aspect Performance is integrated with Aspect Quality, go to the **Quality** tab, as shown below. The **Media File Download Enabled** row is selected under the Parameter Name column by default.

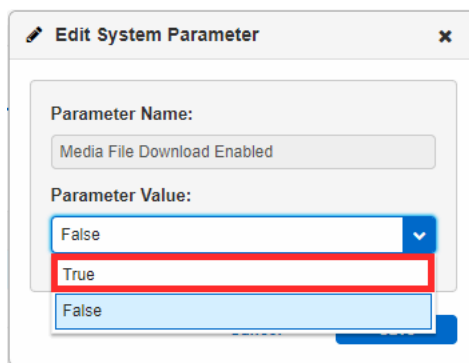


- For standalone Aspect Quality, refer the below screenshot.



Note: When media download is **disabled** for the user, “x” is mentioned under the Parameter Value column.

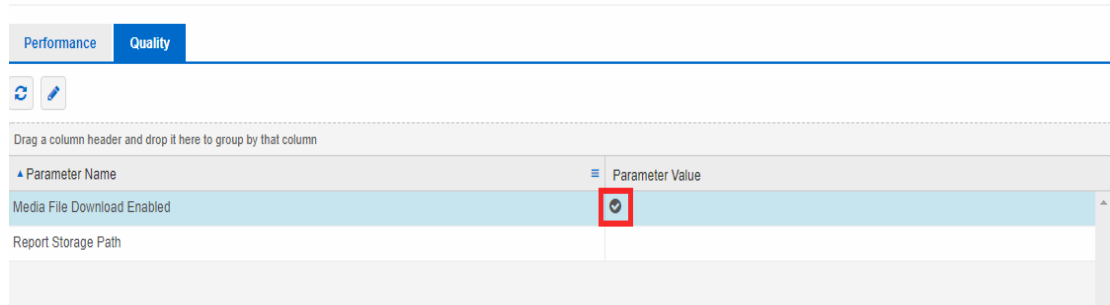
- Click on the **Edit** button and the **Edit System Parameter** pop-up appears.
- Click on the **drop-down list** of **Parameter Value** field and select **True** as shown below.



- Click on the **Save** button to go back to the SYSTEM PARAMETERS window, as shown below.

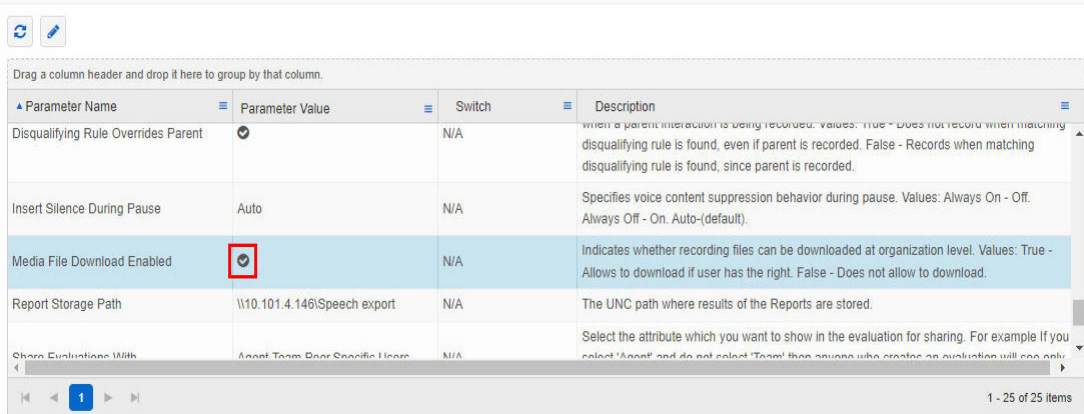
- When Aspect Performance is integrated with Aspect Quality .

SYSTEM PARAMETERS



- For standalone Aspect Quality, refer the below screenshot.

SYSTEM PARAMETERS



Note:

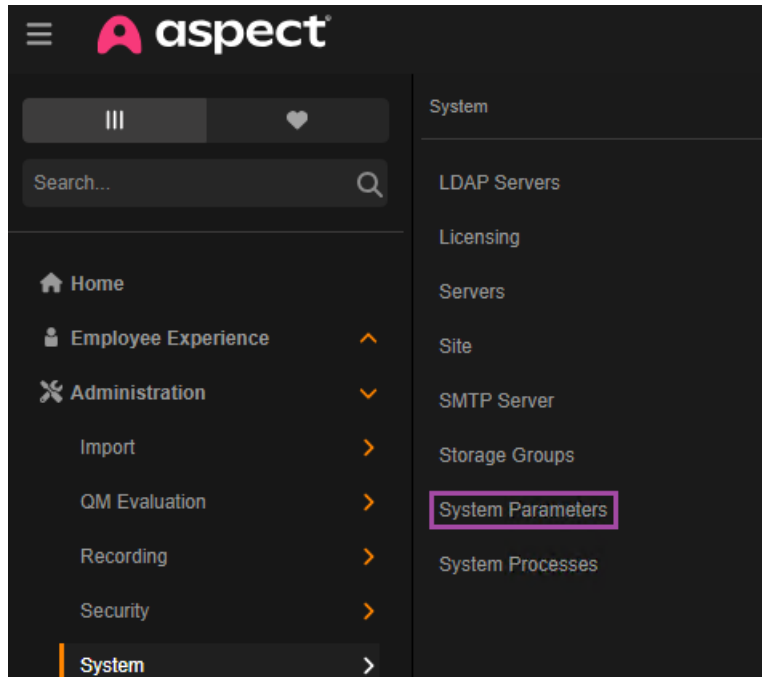
- As media download is **enabled** for the user, the checkmark is mentioned under the Parameter Value column.
- If you change the value for **MediaFileDownloadEnabled** key, then all the users must log out and log in to Workforce Engagement Management UI to effect the changes.

3.6.2 Report Storage Path

When the administrator generates any Scheduled Report or Ad Hoc Report, the report will store in a UNC path. To add or edit the storage path, the administrator will use Report Storage Path feature on the SYSTEM PARAMETERS window. Follow the steps below to add or edit the Report Storage Path.

1. Login to Workforce Engagement Management.

- Go to Main Menu and click on **Administration > System > System Parameters** as shown below.



- The **SYSTEM PARAMETERS** window appears. Go to the **Quality** tab and select **Report Storage Path** row, as shown below.

SYSTEM PARAMETERS

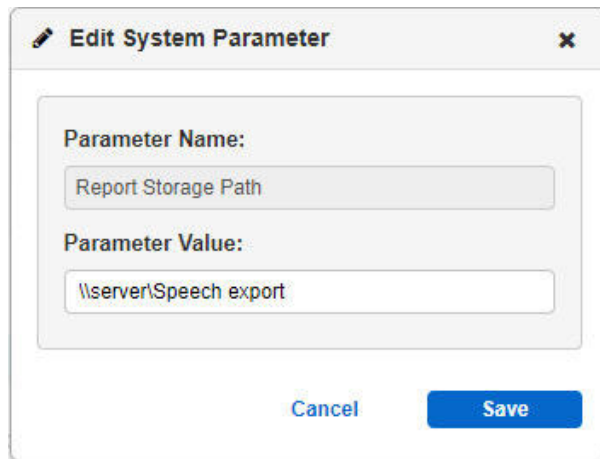
Refresh Edit

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

Parameter Name	Parameter Value	Switch	Description
Media File Download Enabled	<input checked="" type="checkbox"/>	N/A	Indicates whether recording files can be downloaded at organization level. Values: True - Allows to download if user has the right. False - Does not allow to download.
Report Storage Path	\\server\Speech export	N/A	The UNC path where results of the Reports are stored.
Share Evaluations With	Agent,Team,Peer,Specific Users	N/A	Select the attribute which you want to show in the evaluation for sharing. For 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
			Indicates whether ANI and DNIS values will be used only from the CTI events or agent

- Click on the **Edit** button and the **Edit System Parameter** pop-up appears.

5. Type the storage path on the **Parameter Value** field.



6. Click on the **Save** button to go back to the System Parameters window, as shown below.

SYSTEM PARAMETERS

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

Parameter Name	Parameter Value	Switch	Description
Media File Download Enabled	<input checked="" type="checkbox"/>	N/A	Indicates whether recording files can be downloaded at organization level. Values: True - Allows to download if user has the right. False - Does not allow to download.
Report Storage Path	\\server\Speech export	N/A	The UNC path where results of the Reports are stored.
Share Evaluations With	Agent,Team,Peer,Specific Users	N/A	Select the attribute which you want to show in the evaluation for sharing. For 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
			Indicates whether ANI and DNIS values will be used only from the CTI events or agent

3.6.3 Insert Silence During Pause

This feature allows administrators to specify how voice content suppression behaves when an interaction is paused.

Values:

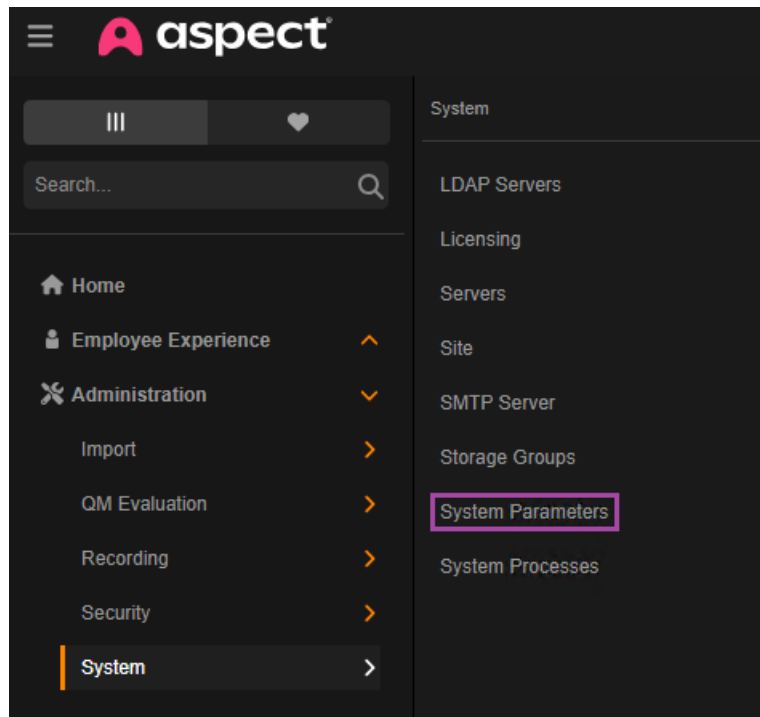
True: Silence is always inserted during the pause period, regardless of whether the agent's screen is being recorded. This results in larger file sizes.

False (default): When the agent's screen is being recorded, silence is inserted into the voice recording to match the length of the video recording. If the agent's screen is not being recorded, no silence is inserted.

Follow the steps below to set the parameter value as True.

1. Login to Workforce Engagement Management.

- Go to Main Menu and click on **Administration > System > System Parameters** as shown below.



- The **SYSTEM PARAMETERS** window appears. Select **Insert Silence During Pause** row, as shown below.

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SYSTEM PARAMETERS

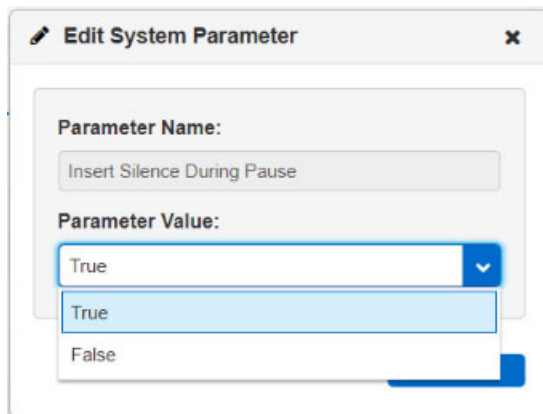
Performance **Quality**

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

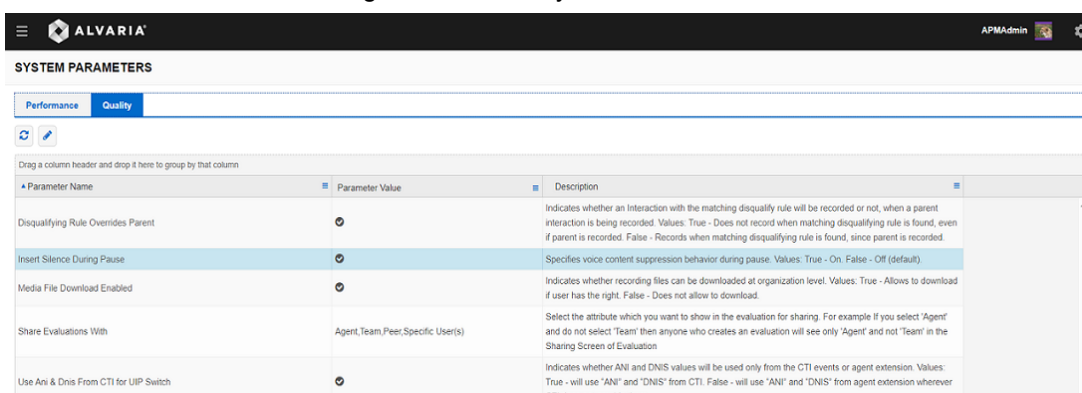
Parameter Name	Parameter Value	Description
Disqualifying Rule Overrides Parent	<input checked="" type="radio"/>	Indicates whether an Interaction with the matching disqualify rule will be recorded or not, when a parent interaction is being recorded. Values: True - Does not record when matching disqualifying rule is found, even if parent is recorded. False - Records when matching disqualifying rule is found, since parent is recorded.
Insert Silence During Pause	<input type="radio"/>	Specifies voice content suppression behavior during pause. Values: True - On, False - Off (default).
Media File Download Enabled	<input checked="" type="radio"/>	Indicates whether recording files can be downloaded at organization level. Values: True - Allows to download if user has the right. False - Does not allow to download.
Share Evaluations With	Agent,Team,Peer,Specific User(s)	Select the attribute which you want to show in the evaluation for sharing. For 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
Use Ani & Dnis From CTI for UIP Switch	<input checked="" type="radio"/>	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 whenever CTI does not provide them.

- Click on the **Edit** button and the **Edit System Parameter** pop-up appears.

5. Click on the **drop-down list** of Parameter Value field and select **True** as shown below.



6. Click on the **Save** button to go back to the System Parameters window, as shown below.



3.6.4 Default Player for Chat Interaction

This feature allows to view a chat interaction in transcript player or screen.

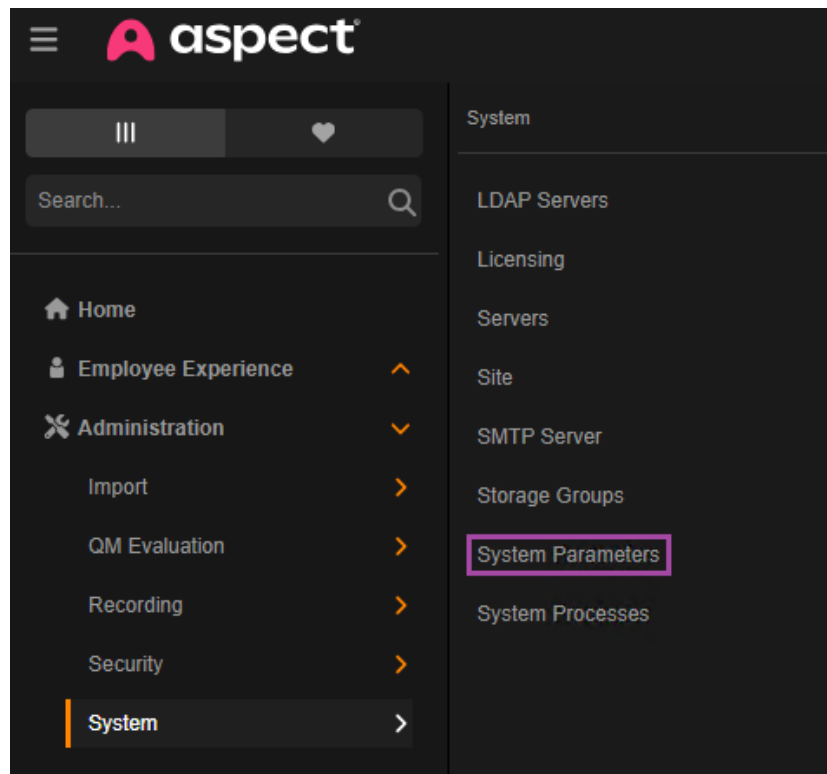
Example: If Chat interaction is recorded with Screen, in search page you can see both transcript and screen players in Quick view. In Interaction View/Evaluation page, if you want to see Screen choose 'Screen' as a option or choose 'Transcript' if you want to see 'Transcript' player.

Follow the steps below to set the Parameter Value as Transcript or Screen.

Note: By default, the Parameter Value is Transcript.

1. Login to Workforce Engagement Management.

2. Go to Main Menu and click on **Administration > System > System Parameters** as shown below.



3. The **SYSTEM PARAMETERS** window appears. Select **Default Player for Chat Interaction** row, as shown below.

SYSTEM PARAMETERS			
Parameter Name	Parameter Value	Switch	Description
Default Player for Chat Interaction	Screen	UIP735	If Chat interaction is recorded with Screen, in search page you can see both transcript at In Interaction View/Evaluation page, if you want to see Screen choose 'Screen' as a opti want to see 'Transcript' player.
Default Player for Chat Interaction	Screen	UIP741	If Chat interaction is recorded with Screen, in search page you can see both transcript at In Interaction View/Evaluation page, if you want to see Screen choose 'Screen' as a opti want to see 'Transcript' player.
Default Player for Chat Interaction	Transcript	TestCTIPS	If Chat interaction is recorded with Screen, in search page you can see both transcript at In Interaction View/Evaluation page, if you want to see Screen choose 'Screen' as a opti want to see 'Transcript' player.
Default Player for Chat Interaction	Screen	CTIPS_To_ECTIPS	If Chat interaction is recorded with Screen, in search page you can see both transcript at In Interaction View/Evaluation page, if you want to see Screen choose 'Screen' as a opti want to see 'Transcript' player.
Disqualifying Rule Overrides Parent	<input checked="" type="checkbox"/>	N/A	Indicates whether an Interaction with the matching disqualify rule will be recorded or not, being recorded. Values: True - Does not record when matching disqualifying rule is found False - Records when matching disqualifying rule is found, since parent is recorded.
Insert Silence During Pause	<input checked="" type="checkbox"/>	N/A	Specifies voice content suppression behavior during pause. Values: True - On. False - O
Media File Download Enabled	<input checked="" type="checkbox"/>	N/A	Indicates whether recording files can be downloaded at organization level. Values: True - the right. False - Does not allow to download.
Report Storage Path	\\qmdev-01\filestore\QM20.11\Reports	N/A	The UNC path where results of the Reports are stored.
Use Ani & Dnis From CTI for UIP Switch	<input checked="" type="checkbox"/>	N/A	Indicates whether ANI and DNIS values will be used only from the CTI events or agent e 'ANI' and 'DNIS' from CTI. False - will use 'ANI' and 'DNIS' from agent extension wher

Note: This Key will be displayed for every UIP switch which provides the ability for the user to change the preference at the switch level.

- Click on the **Edit** button and the **Edit System Parameter** pop-up appears.
- Click on the **drop-down list** of **Parameter Value** field and select the value as you wish, for example, if you want to change from Transcript to Screen then choose **Screen** as shown below.

Edit System Parameter ✕

Parameter Name:

Switch:

Parameter Value:

Screen

Transcript

- Click on the **Save** button to go back to the SYSTEM PARAMETERS window and the Parameter Value will be updated to the selected value, as shown below.

SYSTEM PARAMETERS

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

Parameter Name	Parameter Value	Switch	Description
Default Player for Chat Interaction	Screen	UIP735	If Chat interaction is recorded with Screen, in search page you can see both transcript and sc In Interaction View/Evaluation page, if you want to see Screen choose 'Screen' as a option or want to see 'Transcript' player.
Default Player for Chat Interaction	Screen	UIP741	If Chat interaction is recorded with Screen, in search page you can see both transcript and sc In Interaction View/Evaluation page, if you want to see Screen choose 'Screen' as a option or want to see 'Transcript' player.
Default Player for Chat Interaction	Screen	TestCTIPS	If Chat interaction is recorded with Screen, in search page you can see both transcript and sc In Interaction View/Evaluation page, if you want to see Screen choose 'Screen' as a option or want to see 'Transcript' player.
Default Player for Chat Interaction	Screen	CTIPS_To_ECTIPS	If Chat interaction is recorded with Screen, in search page you can see both transcript and sc In Interaction View/Evaluation page, if you want to see Screen choose 'Screen' as a option or want to see 'Transcript' player.
Disqualifying Rule Overrides Parent	<input type="radio"/>	N/A	Indicates whether an Interaction with the matching disqualify rule will be recorded or not, whe being recorded. Values: True - Does not record when matching disqualifying rule is found, eve False - Records when matching disqualifying rule is found, since parent is recorded.
Insert Silence During Pause	<input type="radio"/>	N/A	Specifies voice content suppression behavior during pause. Values: True - On. False - Off (de
Media File Download Enabled	<input type="radio"/>	N/A	Indicates whether recording files can be downloaded at organization level. Values: True - Allo the right. False - Does not allow to download.

3.6.5 Disqualifying Rule Overrides Parent

This features prevents an interaction from recording even when its parent interaction is being recorded.

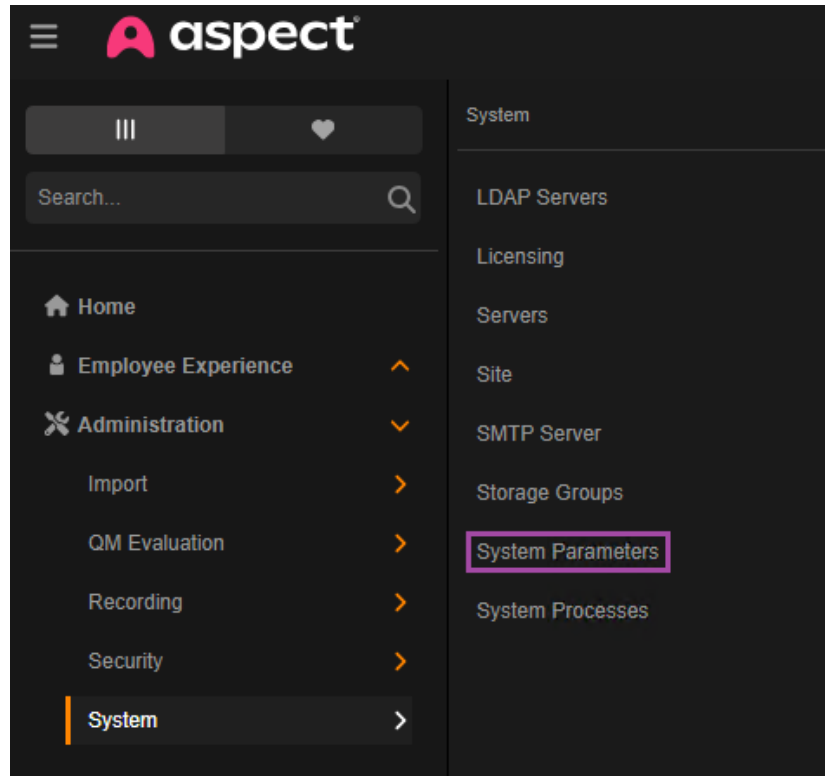
Example: When an ACD call from a customer is recorded (being the parent interaction), the agent puts the customer on hold to consult with another agent. The consult call can be prevented from being recorded by configuring an appropriate disqualify rule to match this interaction along with this parameter value set to true.

Follow the steps below to set the Parameter Value as Transcript or Screen.

Note: By default, the Parameter Value is False.

- Login to Workforce Engagement Management.

2. Go to Main Menu and click on **Administration > System > System Parameters** as shown below.



- The **SYSTEM PARAMETERS** window appears. Select **Disqualifying Rule Overrides Parent** row, as shown below.

SYSTEM PARAMETERS

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

Parameter Name	Parameter Value	Switch	Description
Disqualifying Rule Overrides Parent	Screen	N/A	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.
Insert Silence During Pause	Always off	N/A	Specifies voice content suppression behavior during pause. Values: Always On - Off. Always Off - On. Auto-(default).
Media File Download Enabled	Screen	N/A	Indicates whether recording files can be downloaded at organization level. Values: True - Allows to download if user has the right. False - Does not allow to download.
Report Storage Path	Transcript	N/A	The UNC path where results of the Reports are stored.
Share Evaluations With	Agent, Team, Peer, Specific User(s)	N/A	Select the attribute which you want to show in the evaluation for sharing. For 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
Use Ani & Dnis From CTI for UIP Switch	Screen	N/A	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.

1 - 24 of 24 items

- Click on the **Edit** button and the **Edit System Parameter** pop-up appears.
- Click on the **drop-down list** of **Parameter Value** field and select the value as you wish, for example, if you want to change to True then select **True** as shown below.

Edit System Parameter

Parameter Name:
Disqualifying Rule Overrides Parent

Parameter Value:
False

True

False

Click on the **Save** button to go back to the SYSTEM PARAMETERS window and the Parameter Value will be updated to the selected value, as shown below:

SYSTEM PARAMETERS			
Parameter Name	Parameter Value	Switch	Description
Disqualifying Rule Overrides Parent	<input checked="" type="checkbox"/>	N/A	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.
Insert Silence During Pause	Always off	N/A	Specifies voice content suppression behavior during pause. Values: Always On - Off. Always Off - On. Auto-(default).
Media File Download Enabled	Screen	N/A	Indicates whether recording files can be downloaded at organization level. Values: True - Allows to download if user has the right. False - Does not allow to download.
Report Storage Path	Transcript	N/A	The UNC path where results of the Reports are stored.
Share Evaluations With	Agent,Team,Peer,Specific User(s)	N/A	Select the attribute which you want to show in the evaluation for sharing. For 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
Use Ani & Dnis From CTI for UIP Switch	Screen	N/A	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.

As Disqualifying Rule Overrides Parent is set **True** for the user, the check mark is mentioned under the Parameter Value column.

3.6.6 Use Ani & Dnis From CTI for UIP Switch

This feature allows to populate ANI and DNIS values as received in CTI events from Unified IP switch.

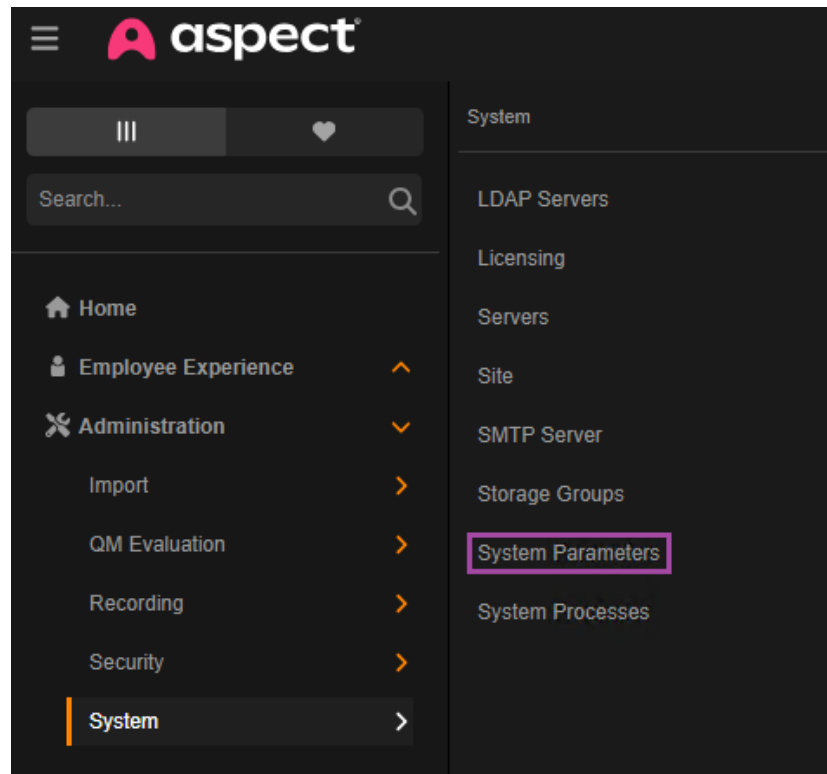
Example: When an agent makes an outbound direct call and the CTI does not contain values for ANI & DNIS, the values will be set as the agent extension and the contact number of other party respectively, if the parameter value is false. For the same case the ANI & DNIS values will be empty, if the parameter value is true.

Follow the steps below to set the Parameter Value as Transcript or Screen.

Note: By default, the Parameter Value is True.

1. Login to Workforce Engagement Management.

2. Go to Main Menu and click on **Administration > System > System Parameters** as shown below.



- The **SYSTEM PARAMETERS** window appears. Select **Use Ani & Dnis From CTI for UIP Switch** row, as shown below.

SYSTEM PARAMETERS			
Parameter Name	Parameter Value	Switch	Description
Disqualifying Rule Overrides Parent	<input checked="" type="checkbox"/>	N/A	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.
Insert Silence During Pause	Always off	N/A	Specifies voice content suppression behavior during pause. Values: Always On - Off. Always Off - On. Auto-(default).
Media File Download Enabled	Screen	N/A	Indicates whether recording files can be downloaded at organization level. Values: True - Allows to download if user has the right. False - Does not allow to download.
Report Storage Path	Transcript	N/A	The UNC path where results of the Reports are stored.
Share Evaluations With	Agent, Team, Peer, Specific User(s)	N/A	Select the attribute which you want to show in the evaluation for sharing. For 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
Use Ani & Dnis From CTI for UIP Switch	Screen	N/A	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.

- Click on the **Edit** button and the **Edit System Parameter** pop-up appears.
- Click on the **drop-down list** of **Parameter Value** field and select the value as you wish, for example, if you want to change to False then select **False** as shown below.

Edit System Parameter ✕

Parameter Name:

Parameter Value:

True
▼

True

False

Click on the **Save** button to go back to the SYSTEM PARAMETERS window and the Parameter Value will be updated to the selected value, as shown below:

SYSTEM PARAMETERS			
Parameter Name	Parameter Value	Switch	Description
Disqualifying Rule Overrides Parent	<input checked="" type="checkbox"/>	N/A	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.
Insert Silence During Pause	Always off	N/A	Specifies voice content suppression behavior during pause. Values: Always On - Off. Always Off - On. Auto-(default).
Media File Download Enabled	Screen	N/A	Indicates whether recording files can be downloaded at organization level. Values: True - Allows to download if user has the right. False - Does not allow to download.
Report Storage Path	Transcript	N/A	The UNC path where results of the Reports are stored.
Share Evaluations With	Agent, Team, Peer, Specific User(s)	N/A	Select the attribute which you want to show in the evaluation for sharing. For 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
Use Ani & Dnis From CTI for UIP Switch	<input type="checkbox"/>	N/A	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.

As Use Ani & Dnis From CTI for UIP Switch is set **False** for the user, the cross mark is mentioned under the Parameter Value column.

3.7 System Processes

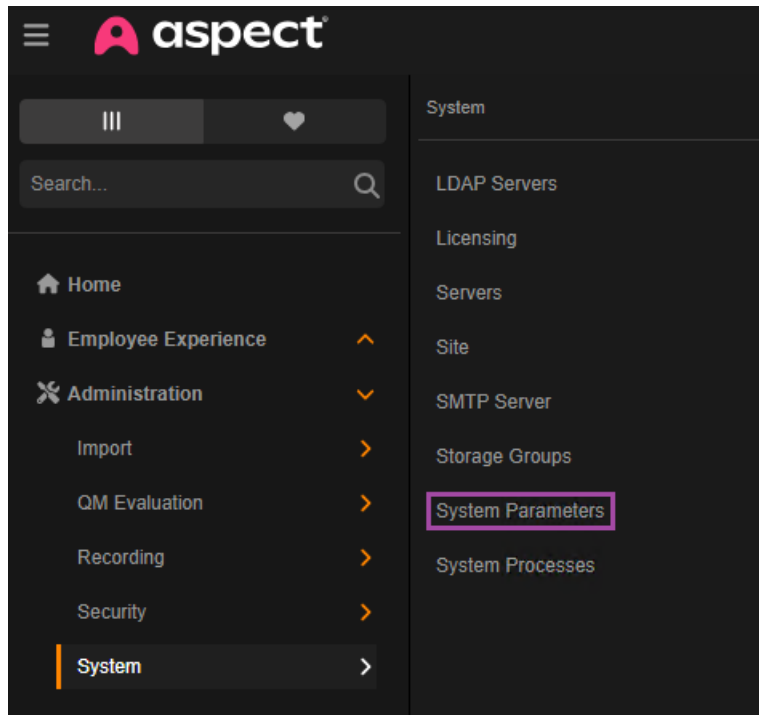
This section describes about the System Processes. To Navigate, Add, Edit, Delete and Start Stop Processes is given below.

3.7.1 Navigation to System Processes

Follow the steps given below to navigate to the System Processes page:

1. Go to the main menu icon.

2. Click **Administration > System > System Processes**.








3. The System Processes page appears as given below:






SYSTEM PROCESSES

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

Name	Server	Startup	Status	Redundancy Status
API Web Service	AQM19SRV13	Automatic	Unknown	
Archiver	AQM19SRV13	Manual	Stopped	
Exporter	AQM19SRV13	Automatic	Started	
File Mover	AQM19SRV13	Automatic	Started	
File Receiver	AQM19SRV13	Automatic	Started	
Interaction Monitor	AQM19SRV13	Automatic	No Communication	
Port Manager	QW-AQM18REC-01	Automatic	Unknown	
Process Manager	AQM19SRV13	Automatic	Started	
Process Manager	QW-AQM18REC-01	Automatic	Unknown	
Report Manager	AQM19SRV13	Automatic	Stopped	
Web Server	AQM19SRV13	Automatic	Started	
Web Server	QW-AQM18REC-01	Automatic	Unknown	

1 - 12 of 12 items

4. The Menu buttons      on the System Processes page are described below:

Icons	Description
Refresh 	Refreshes the System Processes grid with latest system processes changes. Instead of the browser refresh button user can click on this menu button which will refresh only the grid data and not the page.
Add 	Adds the new System Process to the grid.
Edit 	Edits the selected System Processes existing in the grid.
Delete 	Allows to delete the selected existing System Processes from the list.
Action Menu 	Action Menu contains Start, Stop, Terminate, Set to Active and Set as Stand-by . Note: Set to Active and Set as Stand-by will be applicable only for the interaction monitor.

5. The grid columns on the System Processes page are described below:

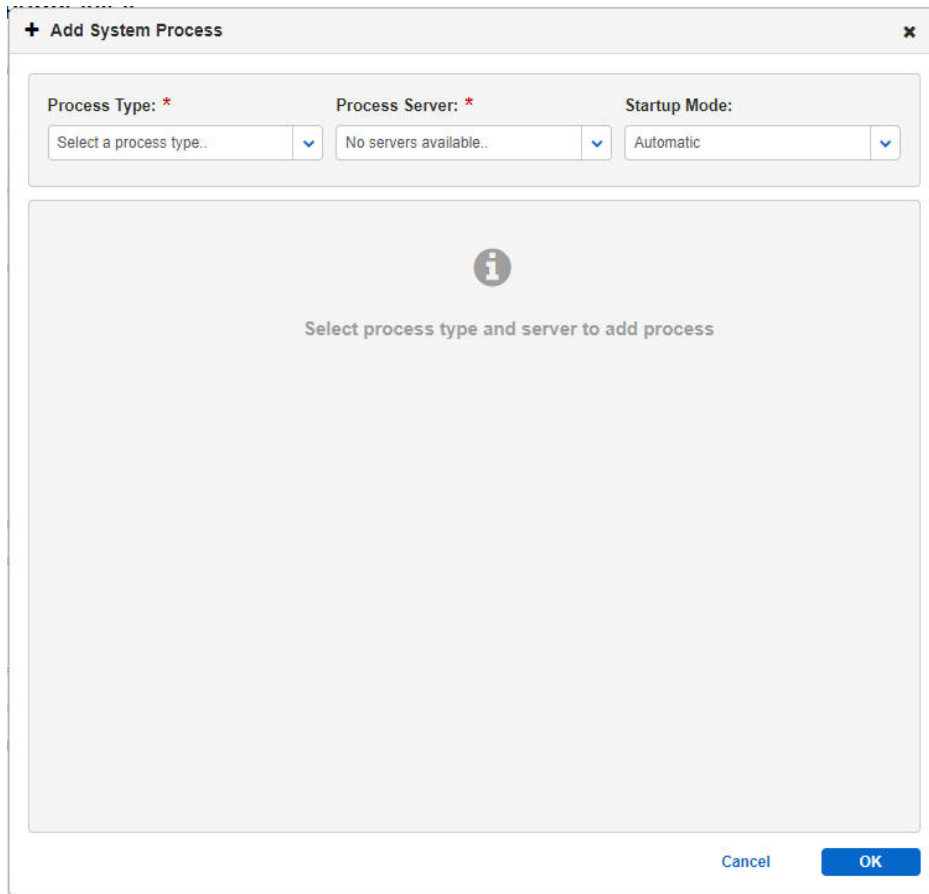
Column	Description
Name	The name of the system processes.
Server	The name of the server.
Startup	Startup is a method of how the Process gets started, when the Quality Service starts. Startup can be either Manual or Automatic.
Status	Indicates status of the process as, No Communication, Started, Starting, Stopped, Stopping, or Unknown.
Redundancy Status	Indicates whether process is active, stand-by, stopped, or unknown by means of specifying the same in the column. Also, it can be blank, without any specification.

3.7.2 Create System Processes

To add System Processes, perform the following steps:

1. Go to the main menu icon.
2. Click **Administration > System > System Processes**.
3. The System Processes page appears, click on the **Add** icon on the System Processes page.

4. The Add System Process dialog appears as given below:



Note: The fields marked (*) are mandatory fields.

5. Following are the three drop-down fields on the Add System Process page:

- Process Type
- Process Server
- Startup Mode

These are given below in details.

6. **Process Type:** By default this field displays, “Select a process type..”. An option needs to be selected from the drop-down list. Based on the selection the associated Process Servers are displayed in the drop-down field.




Once the Process Type and Process Server are selected, other fields appear to configure the Process. These configuration fields are given below, along with the Process Type.

Process Type	Description	Configuration
API Web Service	<p>The API Web Service process is responsible for third party software integrated to Aspect Quality with Web API. This is an optional process.</p> <p>Install the API Web Service on the Aspect Quality Web Server. Only install the API Web Service if one of the following conditions apply:</p> <ul style="list-style-type: none"> Third-party software uses the API to start and stop recordings and update custom information on the recordings. 	<p>General tab:</p> <p>Process Logging section of the window has the below options:</p> <ul style="list-style-type: none"> Log Mode Log To File <p>API Web Service tab:</p> <p>Communication section of the window has the below option:</p> <p>Interaction Monitor Server*</p>

Process Type	Description	Configuration
Archiver	<p>The Archiver process is responsible for archiving the recording files and is an optional process.</p> <p>The recommended server that is used to support the Archiver process is the Aspect Quality Media Server. You only install Archiver, if you want to archive old recordings, or if the monitoring mode is Quality Monitoring with Caching and you want to delete pending recordings.</p> <p>One or more Archiver process can exist per Aspect Quality site. Whether or not to use multiple Archiver processes depends on whether you are implementing distributed recording storage, and if you are distributing current/historical and archive storage locations. Aspect Software recommends that you install Archiver processes on the Aspect Quality Media server, but it is not required, as the Archiver Process is optional.</p>	<p>General tab: Process Logging section of the window has the below options:</p> <ul style="list-style-type: none"> • Log Mode • Log To File <p>Archiver tab: Processing Options section of the window has the below option:</p> <ul style="list-style-type: none"> • Historical Interval*: By default this field displays, “60” minutes. Enter the number of minutes to wait in between system processes of the Historical operation for the Historical qualifying interactions. This interval must be greater than or equal to 1. The system does not allow a value less than 1. • Archive Interval*: By default this field displays, “60” minutes. Enter the number of minutes to wait in between system processes of the Archive operation for the Archive qualifying interactions. This interval must be greater than or equal to 1. The system does not allow a value less than 1. • Storage Groups section: Select the storage group(s) listed under the Available Items window that you want this Archiver to archive Interactions related to media records stored within the storage group and select the Add Item button to move it to the Selected Items window. Same way the storage group(s) listed under Selected Items can be moved to the Available Items window with the help of Remove Item button. <p>Note:</p> <ul style="list-style-type: none"> • Only a single Archiver process can service storage groups. • The Archiver must have access to all storage locations defined within Storage Groups and the switches that also use the Storage Groups serviced by this Archiver instance use. This is necessary because it is possible for an interaction record to have files stored in multiple storage groups when using alternate storages, or when a scorecard attachment is added to a Task. An alternate option is to ensure that all Archiver processes have access to the storage locations defined in all Storage Groups in the site.

Process Type	Description	Configuration
Client Gateway	<p>The Client Gateway process provides connectivity between client desktops and Aspect Quality servers. The Client Gateway process is only used with Aspect Via environments.</p>	<p>General tab:</p> <p>Process Logging section of the window has the below options:</p> <ul style="list-style-type: none"> • Log Mode • Log To File <p>Client Gateway tab:</p> <p>Communication section of the window has the below option:</p> <p>Interaction Monitor Server*</p>
Exporter	<p>Exporter provides background transcoding services to export media from the Workforce Engagement Management user interface. You can configure the Exporter process on any Aspect Quality server, but Aspect recommends that you configure it on the Quality Web Service server.</p>	<p>General tab:</p> <p>Process Logging section of the window has the below options:</p> <ul style="list-style-type: none"> • Log Mode • Log To File <p>Exporter tab:</p> <p>Configuration section of the window has the below option:</p> <p>Exporter Path: In the Export Path text box, enter the directory path of the location where you want to store the temporary export files.</p>

Process Type	Description	Configuration
File Mover	<p>The File Mover process is responsible for moving recordings from the Aspect Quality Recording servers that you define in the site to the Media Storage. It combines audio and video (screen capture) files into a viewable format.</p> <p>Usually, you create one File Mover process for each site. This process runs on the Aspect Quality Media server.</p> <p>If you create more than one File Mover process, each process must run on its own server. You cannot define multiple File Mover processes on one server.</p>	<p>General tab:</p> <p>Process Logging section of the window has the below options:</p> <ul style="list-style-type: none"> • Log Mode • Log To File <p>File Mover tab:</p> <p>Communication section of the window has the below option:</p> <p style="padding-left: 20px;">Interaction Monitor Server*</p> <p>File Transfer Configuration section of the window has the below option:</p> <p>TCP Port*: In the TCP Port text box enter the default value 3881. File Mover listens for the connection on the TCP port, and you should never need to change the port number.</p> <p>Storage Groups window:</p> <p>Select the storage group(s) listed under the Available Items window for which you want this File Mover to accept files and select the Add Item button to move it to the Selected Items window. Same way the storage group(s) listed under Selected Items can be moved to the Available Items window with the help of Remove Item button.</p> <p>Note: Any number of File Mover processes can service storage groups. If it is necessary to limit which File Movers are used to transfer files for a storage group from a particular file producing process (for example, Port Manager, IVR Import, Agent Desktop Client, and Mentor Desktop Client), you can accomplish this when you configure the file-producing process itself.</p>




Process Type	Description	Configuration
File Receiver	<p>Use the File Receiver process to create an association between File Receiver process(es) and Unified IP telephony servers for a switch. Receiver Groups only apply to Unified IP switch definitions configured to use Enhanced CTIPS.</p> <p>You can use Receiver Groups to record on the Telephony Server and transmit the recording files for storage and retrieval in Aspect Quality.</p> <p>You must configure the File Receiver process and Receiver Groups for Aspect Enhanced CTIPS connector integrations. The Aspect Quality system allows multiple receivers for redundancy and efficient network configurations. Create at least one Aspect Quality File Receiver process for each Unified IP switch with Enhanced CTIPS integration.</p>	<p>General tab:</p> <p>Process Logging section of the window has the below options:</p> <ul style="list-style-type: none"> • Log Mode • Log To File <p>File Receiver tab:</p> <p>File Receiver section of the window has the below options:</p> <p>Media Transfer Port*: In the Media Transfer Port text box enter the default value 3890. You should never need to change the port number. This port must be open on the Aspect Quality server so that the Unified IP servers can reach the File Receiver system.</p> <p>Preferred Media Storage section of the window has the below options:</p> <ul style="list-style-type: none"> •  Click Add icon to Add preferred media storage. The Add Media Storage Preference window opens. •  Click Edit icon. The Edit Media Storage Preference window opens. •  Click Delete icon. <p>After selecting the Switch to be deleted that is listed under the grid, click the Delete button.</p>
Importer	<p>After the import job is created and When the schedule reaches for the job the import job will run.</p>	<p>General tab:</p> <p>Process Logging section of the window has the below options:</p> <ul style="list-style-type: none"> • Log Mode • Log To File

Process Type	Description	Configuration
Interaction Monitor	<p>The Interaction Monitor process is the central process in an Aspect Quality system. All other Aspect Quality processes, including the Aspect Quality Desktop Client application, communicate with the Interaction Monitor. In addition, the Interaction Monitor handles all switch communication and data synchronization.</p> <p>You create only one Interaction Monitor process per Aspect Quality site and install the process on the Primary server. However, to implement redundancy, you can install an additional redundant Interaction Monitor process on a backup server.</p> <p>Although system allows to create n number of Interaction Monitor processes, but it's recommendable to have only one or maximum two (Primary Interaction Monitor and Redundant Interaction Monitor) of these processes.</p> <p>Note: Because this process is the central process, and all other Aspect Quality processes use this process, the Interaction Monitor process is a required process; you must configure it.</p>	<p>General tab: Process Logging section of the window has the below options:</p> <ul style="list-style-type: none"> • Log Mode: Once the system is running, you may want to go back and change the Log Mode to Normal. • Log To File <p>Redundancy tab: Primary server redundancy allows an Interaction Monitor process to run simultaneously on two servers. Throughout normal execution, one Interaction Monitor process would be active while the other would be on stand-by. If the active Interaction Monitor fails and other Aspect Quality processes can no longer access it, the second Interaction Monitor would detect the failure, become active, and all of the Aspect Quality processes would then connect to that active Interaction Monitor. There is also a manual failover process, for example, for a planned outage.</p> <p>Note: If you configure an all-in-one server (Primary, Media, Web, and redundant server all on the same server), you cannot establish redundancy. Aspect Software recommends that you configure more than one server if you are planning to configure a redundant server. Also, if a server configuration file is present on the Primary server, then that same server configuration file must exist on the Redundant server.</p> <p>Alternate Process Configuration section of the window has the below options:</p> <ul style="list-style-type: none"> • Server*: From the Server drop-down list box, select the name of the server on which the redundant Aspect Quality process runs. • Startup Mode: Select Automatic, or else the Interaction Monitor process does not run unless initiated from the web interface. <p>Alternate Process Logging section of the window has the below options:</p> <ul style="list-style-type: none"> • Log Mode • Log To File

Process Type	Description	Configuration
		<p>Redundancy Communication section of the window has the below options:</p> <ul style="list-style-type: none"> • Communication Port*: Enter the number of the TCP port that you want to communicate with the redundant Interaction Monitor processes. The Redundant TCP port number (default is 4880), must be different than the Primary TCP port number. • Startup Timeout*: Enter the amount of time, in seconds, that you want either of the redundant Interaction Monitor processes to wait to start up. This is the amount of time you want before communication establishes with the Interaction Monitor's redundant peer, before the redundant process acknowledges a process failure and becomes the active Interaction Monitor process. <p>Note: The recommended values for the Startup Timeout and Disconnection Timeout for the Interaction Monitor redundancy parameters are both 30 seconds in duration.</p> <ul style="list-style-type: none"> • Disconnection Timeout*: Enter the amount of time, in seconds, either of the redundant Interaction Monitor processes wait to re-establish communications with its redundant peer after a disconnection, before assuming a process failure occurred and become the active Interaction Monitor process. <p>Note: After you define the redundant Interaction Monitor process, the process displays twice on the Processes window, and each process lists to which server it belongs. The process displays twice so that you can monitor both processes running on different servers. If you edit one of the Interaction Monitor process definitions, you modify the other process at the same time.</p> <p>Interaction Monitor tab: Communication Configuration section of the window options are:</p> <ul style="list-style-type: none"> • TCP Port*: In the TCP Port text box enter the default value 3880. The Interaction Monitor listens for the connection on the TCP port, and you should never change the port number. • Monitor Switches window: Select the required switch(es) listed under the Available Items window and click the Add Item button to move it to the Selected Items window. Same way the switch(es) listed under Selected Items can be moved to the Available Items window with the help of Remove Item button.

Process Type	Description	Configuration
IVR Import	<p>The IVR Import process is a process that you use specifically when integrating to Unified IP switch(es). It is responsible for importing call data and recording files for IVR calls which the Unified IP system has recorded. This allows IVR calls that the Unified IP system has recorded for the user to search, view, and play back from within the Aspect Quality System.</p>	<p>General tab:</p> <p>Process Logging section of the window has the below options:</p> <ul style="list-style-type: none"> • Log Mode • Log To File <p>IVR Import tab:</p> <p>IVR Import Configuration section of the window has the below options:</p> <ul style="list-style-type: none"> • Import Switch*: From the drop-down list, select the Unified IP switch that exports M3 recordings. • Import Directory*: Enter the full path of the Unified IP recording store that you use for IVR exports. • VOXDirectory*: Enter the full path of the VOX files within the recording store. • MatchField*: Enter the name of the XML field to filter IVR imports. • Match Expression*: Enter a regular expression (a pattern syntax for matching string texts) to match the contents of the Match Field. The system only imports Unified IP recordings with matching values into Aspect Quality. Use the default match parameters unless otherwise instructed by Aspect Technical Support. The recommended defaults are: Match Field: Filename Match Expression: ^M3_Contact <p>Note: The configuration strings are case-sensitive.</p> <p>If the system is not using distributed recording storages across three or more distinct geographic locations where the locations share the storage groups as alternate storages, then click Save. The Processes window opens with the IVR Import process in the list.</p> <p>File Mover Selection Criteria section of the window has the below option:</p> <p>File Mover: By default “Any available File Mover” option is selected. Select one of the criteria listed in the drop-down list box to limit which File Mover processes that the IVR Import process uses to transfer media files.</p> <p>If the system is not utilizing distributed recording storages, or if the files produced by the IVR Import process are to be exclusively stored in the default Storage Group defined for the UIP switch, then click Save. The Processes window opens with the IVR Import process in the list.</p>

Process Type	Description	Configuration
		<p>Preferred Media Storage section of the window has the below options:</p> <ul style="list-style-type: none"> • Override Default Storage toggle key: This enables the Primary Storage Group and the Alternate Storage Group drop-down lists. • Primary Storage Group: To override the default Storage Group assigned to the selected Unified IP switch, from the Primary Storage Group drop-down list, select the storage group in which you want this IVR Import to primarily store recording files created for the selected Unified IP switch. • Alternate Storage Group: To override the default Storage Group assigned to the selected Unified IP switch, from the Alternate Storage Group drop-down list, select the storage group in which you want this Port Manager to alternately store recording files created for the selected Unified IP switch if the Primary Storage Group is unavailable. If you do not want to use an alternate storage group, keep the default value None.
Port Manager	<p>The Port Manager process is responsible for starting and stopping audio ports on the Recording Server, for hardware- and software-based recording, and for initiating one or more PREC processes.</p> <p>Create one Port Manager process for each Aspect Quality Recording server.</p>	<p>General tab:</p> <p>Process Logging section of the window has the below options:</p> <ul style="list-style-type: none"> • Log Mode • Log To File <p>Port Manager tab:</p> <p>Communication section of the window has the below option:</p> <p>Interaction Monitor Server*</p> <p>If the system is not using distributed recording storages across three or more distinct geographic locations where the location share the storage groups as alternate storages, then click Save. The Processes window opens with the Port Manager process in the list.</p> <p>File Mover Selection Criteria section of the window has the below option:</p> <p>File Mover: By default “Any available File Mover” option is selected. Select one of the criteria listed in the drop-down list box to limit which File Mover processes that the IVR Import process uses to transfer media files.</p> <p>If the system is not utilizing distributed recording storages, then click Save. The Processes window opens with the Port Manager process in the list.</p>

Process Type	Description	Configuration
		<p>Preferred Media Storage section of the window has the below options:</p> <ul style="list-style-type: none">  Click Add icon to Add preferred media storage. The Add Media Storage Preference window opens.  Click Edit icon. The Edit Media Storage Preference window opens.  Click Delete icon. <p>After selecting the Switch to be deleted that is listed under the grid, click the Delete button.</p>
Process Manager	<p>The Process Manager process connects to all Aspect Quality servers using the Web application. The system reports the status of all processes configured on that server to the Process Manager.</p> <p>Configure one Process Manager process for each Aspect Quality server. Do not install this on the Database server.</p> <p>Note: This is a required process; you must configure it.</p>	<p>General tab:</p> <p>Process Logging section of the window has the below options:</p> <ul style="list-style-type: none"> Log Mode Log To File <p>Process Manager tab:</p> <p>Communication Configuration section of the window options are:</p> <ul style="list-style-type: none"> TCP Port*: In the TCP Port text box enter the default value 3882. The Process Manager listens for the connection on the TCP port, and you should never change the port number.
Report Manager	<p>The Report Manager Process is responsible for running on-demand and scheduled reports, and refreshing overseas report templates against the database.</p> <p>Configure one Report Manager process for each Aspect Quality site on the Aspect Quality Web Server.</p> <p>Note: To run reports for Aspect Quality, you must configure this process; it is required.</p>	<p>General tab:</p> <p>Process Logging section of the window has the below options:</p> <ul style="list-style-type: none"> Log Mode Log To File <p>Report Manager tab:</p> <p>Communication Configuration section of the window options are:</p> <ul style="list-style-type: none"> TCP Port*: In the TCP Port text box enter the default value 3883. The Report Manager listens for the connection on the TCP port, and you should never change the port number.
VOIP Tap	<p>Use this process only for VOIP implementations. Install one VOIP Tap process on each Aspect Quality server that has an AudioCodes SmartWORKS HPX board configured. Voice Over IP Tap processes are available only for Cisco, and Unified IP configurations with Aspect Quality.</p>	<p>General tab:</p> <p>Process Logging section of the window has the below options:</p> <ul style="list-style-type: none"> Log Mode Log To File <p>VOIP Tap tab:</p> <p>Communication section of the window has the below option:</p> <p>Interaction Monitor Server*</p>

Process Type	Description	Configuration
Web Server	<p>The Web Server process allows you to specify the sample root URL and Third Party Client server.</p> <p>Configure one Web Server process for each Aspect Quality site on the Aspect Quality Web Server.</p>	<p>General tab:</p> <p>Process Logging section of the window has the below options:</p> <ul style="list-style-type: none"> • Log Mode • Log To File <p>Web Server tab:</p> <p>Web Server Configuration section of the window has the below options:</p> <ul style="list-style-type: none"> • WEM URL*: Enter the URL that web clients use to browse to the Aspect Quality website. <p>Note: Use a valid WEM URL because the Aspect Quality system connects to this URL when the Mentor creates an evaluation from the Mentor Desktop Client using Live Monitor. WEM URL is mandatory for Web Server configuration.</p> <ul style="list-style-type: none"> • Third Party Client Server <p>Note: Leave the Third Party Client Server field blank.</p>

Note: The fields marked (*) are mandatory fields.

- **Log Mode**

Select from the options listed in the drop-down. The available options are Low, Normal, High, and Extreme.

Note: During initial Aspect Quality system testing, set the log mode to Extreme.

- **Log To File**

Log To File toggle key needs to be flagged, if you want the information logged to a file.

- **Interaction Monitor Server***

By default this field displays, "Select a server..". Select the Server name from the options available in the drop-down list, where the Interaction Monitor process runs.

- **File Mover**

The File Mover drop-down list box has the following options:

Option	Description
Any available File Mover	Any File Mover that services one of the storage groups in which the media file can be stored.
File Mover must exist within same location as this process	The File Mover must be assigned to the same location as this Process ₁ or it must exist on the same server as this Process ₁ .
File Mover must exist within same location as storage group	The File Mover must be assigned to the same location as one of the storage groups in which the media file can be stored.
File Mover must exist within same location as this process or storage group	The File Mover must be assigned to the same location as this Process ₁ , it must exist on the same server as this Process ₁ , or it must be assigned to the same location as one of the storage groups in which the media file can be stored.

Note: Here Process₁ can be IVR Import or Port Manager.

- **Add Media Storage Preference**

From the **Switch*** drop-down list, select the switch that you want to configure for this Process₂.

From the **Primary Storage Group*** drop-down list, select the storage group where you want this Process₂ to primarily store the recording files that are created for the specified switch.

From the **Alternate Storage Group** drop-down list, select the storage group that you want this Process₂ to alternately store recording files that are created for the specified switch if the Primary Storage Group is unavailable. If you do not want an alternate storage group, then keep the default value of **None**.

Click **OK**. The Add Media Storage Preference window closes and the Process Definition window is refreshed with the new media storage preference.

Note: Here Process₂ can be File Receiver or Port Manager.

- **Edit Media Storage Preference**

Edit the Primary Storage Group* and Alternate Storage Group as required.

Note: The Switch once created cannot be changed, so the Switch option will be disabled.

7. **Process Server:** By default this field displays, "No servers available..". After the Process Type is selected, this field displays, "Select a server..". The associated options available needs to be selected from the drop-down list.

Note: For VOIP TAP Process from the Process Server drop-down list box, select the name of the server where you configured the AudioCodes SmartWORKS HPX board.

8. **Startup Mode:** By default this field displays, the first option listed in the drop-down. The available options are:
 - Automatic
 - Manual

From the Startup Mode drop-down list box, select **Automatic** for the processes. If you select Manual, then after the Aspect Quality service starts, the process does not run unless initiated from the web interface.

Note: By default Startup Mode option is always selected as Automatic for API Web Service, Client Gateway, Process Manager, and Web Server Processes. So the Startup Mode option is disabled for these processes.

9. Click **Save**. The Process which is created will be listed in the grid.

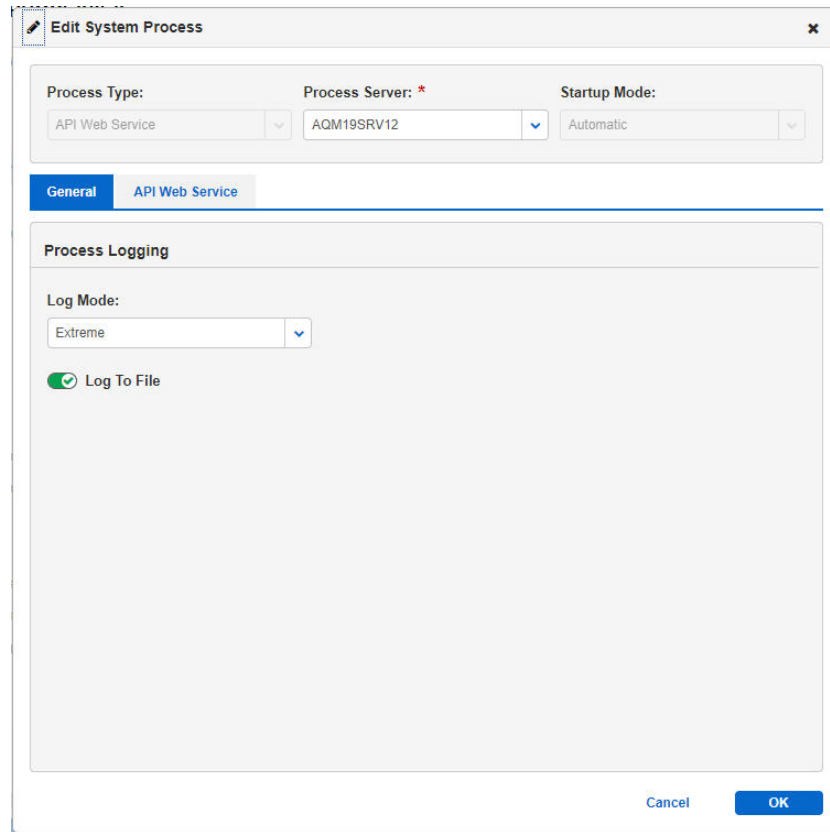
Note: Process Manager is a mandatory process service and every server should have one Process Manager. So Process Manager has to be created, else you cannot stop the service.

3.7.3 Edit System Processes

To edit System Processes, perform the following steps.

1. Go to the main menu icon.
2. Click **Administration > System > System Processes**
3. The System Processes page appears.
4. Select the available System Processes from the grid that needs to be edited and click the **Edit** icon.

5. The Edit Process window appears with General tab active as shown below:



Note: The **Process Type** cannot be updated for any System Processes that is already created and it will remain disabled for Edit Process option.

6. Edit the fields as per your requirement.

Note: Refer to [Create System Processes on page 3-97](#) section, step 5 to 8.

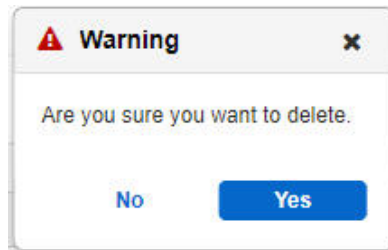
7. Click the **OK** button to complete the process.

3.7.4 Delete System Processes

To delete System Processes, perform the following steps.

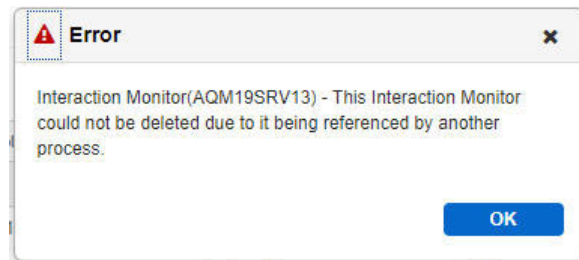
1. Go to the main menu icon.
2. Click **Administration > System > System Processes**
3. The System Processes page appears.
4. Select the available System Processes from the grid that needs to be deleted and click the **Delete** icon.

5. The Warning dialog appears as shown below.




6. Select the **Yes** option to delete the process.

Note: The **Interaction Monitor** cannot be deleted directly for any System Processes, as it is internally used by API Web Services and Client Gateway. You should first delete the dependents, that is API Web Services and Client Gateway processes to further delete the Interaction Monitor process. Else a warning message appears as shown below.



3.7.5 Action Menu

Action Menu  comprises of below options to set the Services to:

- **Start:** Start option will start the process.
- **Stop:** Stop option will stop the process.
- **Terminate:** Terminate option will terminate the process.
- **Set to Active:** Set to Active will set Interaction Monitor process to active.
- **Set as Standby:** Set as Stand-by will set Interaction Monitor process to stand-by.

Following points should be noted with respect to Action menu options:

- Web Server process is always running, as it runs on Internet Information Services (IIS), as selected in the grid, in the below image. No Action Menu operations can be performed on Web Server process.

- Without starting the Services, all the options in the Action menu will be disabled and **Status** column is shown as **Unknown** in the grid by default, as shown below.

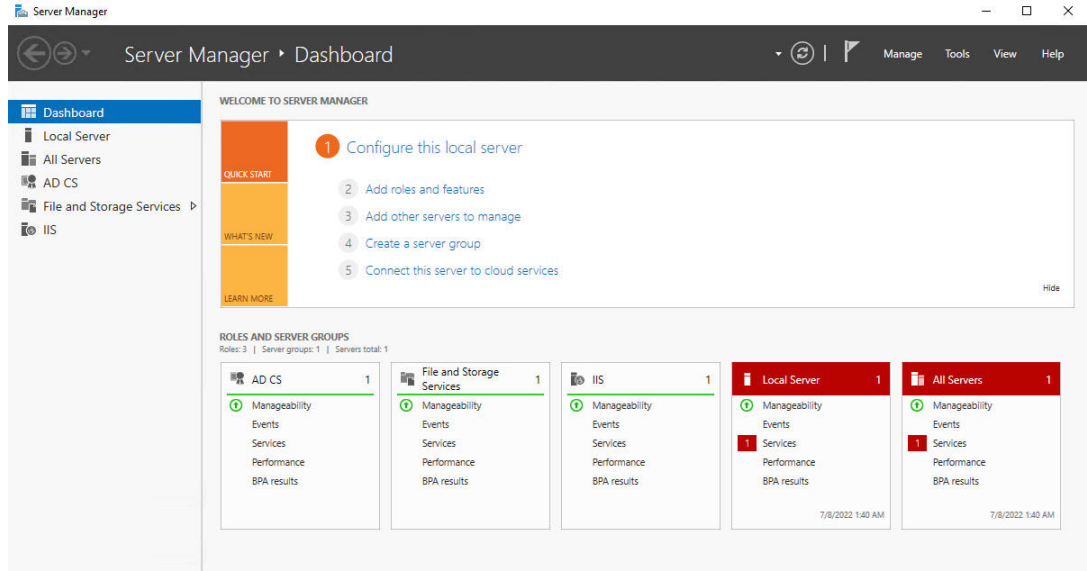
SYSTEM PROCESSES

Name	Startup	Status	Redundancy Status
API Web Serv	Automatic	Unknown	
Archiver	Manual	Unknown	
Client Gateway	Automatic	Unknown	
Exporter	Automatic	Unknown	
File Mover	Automatic	Unknown	
File Receiver	Automatic	Unknown	
File Receiver	Automatic	Unknown	
File Receiver	Automatic	Unknown	
Importer	Automatic	Unknown	
Interaction Monitor	Automatic	Unknown	Unknown
Interaction Monitor	Automatic	Unknown	Unknown
IVR Import	Automatic	Unknown	
Port Manager	Automatic	Unknown	
Process Manager	Automatic	Unknown	
Process Manager	Automatic	Unknown	
Report Manager	Automatic	Unknown	
VoIP Tap	Automatic	Unknown	
Web Server	Automatic	Started	

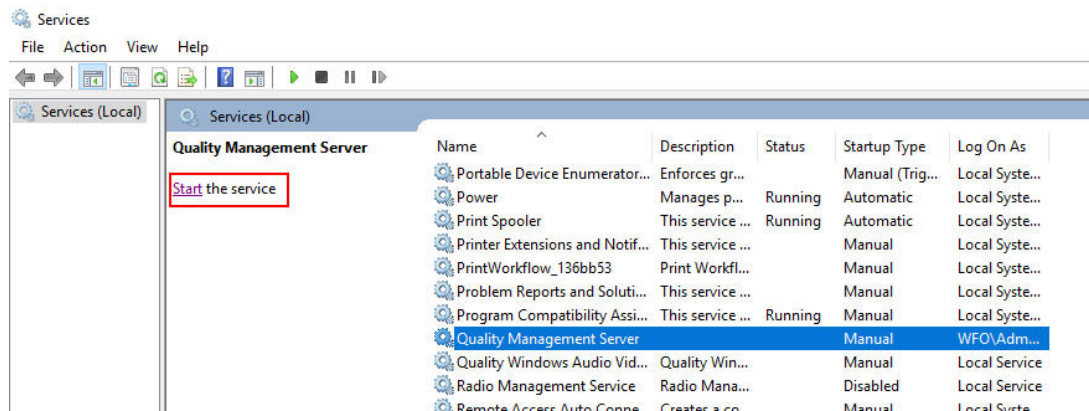
3.7.5.1 Setting Services to Startup Type

1. Login to Aspect Quality Primary Server.

- From the task bar on the desktop, click the Server Manager icon. The Server Manager window opens.








- In the right corner of the Server Manager window, select **Tools > Services**. The Services window opens.
- Sort by the Name column from A-Z, if required.
- In the right pane, select Quality Management Server.



- Click **Start** to start the services.
 - Note:** Process Manager must be created to start the Quality Service, otherwise it cannot be switched to running state.
- Once the Service is started, the Status changes in the System Processes grid to **Started**, only for **Automatic** Startup Mode.
 - For **Manual** Startup Mode the status will be **Stopped**.

You have just started the Primary server service.

SYSTEM PROCESSES

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

Name	Server	Startup	Status	Redundancy Status
API Web Service	AQM19SRV12	Automatic	Unknown	
Archiver	AQM19SRV12	Manual	Stopped	
Client Gateway	AQM19SRV12	Automatic	Unknown	
Exporter	AQM19SRV12	Automatic	Started	
File Mover	AQM19SRV12	Automatic	Started	
File Receiver	AQM19SRV13	Automatic	Unknown	
File Receiver	AQMQA5	Automatic	Unknown	
File Receiver	AQM19SRV12	Automatic	Started	
Importer	AQM19SRV12	Automatic	Started	
Interaction Monitor	AQM19SRV13	Automatic	Unknown	Unknown
Interaction Monitor	AQM19SRV12	Automatic	Stopped	Unknown
IVR Import	AQM19SRV12	Automatic	Started	
Port Manager	AQM19SRV12	Automatic	Started	
Process Manager	AQM19SRV13	Automatic	Unknown	
Process Manager	AQM19SRV12	Automatic	Started	
Report Manager	AQM19SRV12	Automatic	Started	
VoIP Tap	AQM19SRV12	Automatic	No Communication	
Web Server	AQM19SRV12	Automatic	Started	

1 - 18 of 18 items

Note: Notice the API Web Service and Client Gateway shows Status as Unknown, as these services will be used by third party.

Other processes which shows as Unknown status, it means the Aspect Quality services are not running, it cannot be stated whether those services were Started, Stopped or Terminated.

The Archiver process, it shows the status as Stopped, because Startup mode is Manual. To start this service, select the Archiver process from the grid and go to Action Menu. The Start option will be enabled to start the service, as shown below.

SYSTEM PROCESSES

Name	Startup	Status	Redundancy Status
API Web Serv	Automatic	Unknown	
Archiver	Manual	Stopped	
Client Gatewa	Automatic	Unknown	
Exporter	Automatic	Started	
File Mover	Automatic	Started	
File Receiver	Automatic	Unknown	
File Receiver	Automatic	Unknown	
File Receiver	Automatic	Started	
Importer	Automatic	Started	
Interaction Monitor	Automatic	Unknown	Unknown
Interaction Monitor	Automatic	Stopped	Unknown
IVR Import	Automatic	Started	
Port Manager	Automatic	Started	
Process Manager	Automatic	Unknown	
Process Manager	Automatic	Started	
Report Manager	Automatic	Started	
VoIP Tap	Automatic	No Communication	
Web Server	Automatic	Started	

1 - 18 of 18 items

- Those services which are in the Started status, will have the Stop and Terminate options enabled in the Action Menu. Either you can Stop or Terminate the process, then the Status column will be updated to Stopped in both the scenarios.

SYSTEM PROCESSES

Name	ID	Startup	Status	Redundancy Status
API Web Serv	RV12	Automatic	Unknown	
Archiver	RV12	Manual	Stopped	
Client Gatewa	RV12	Automatic	Unknown	
Exporter	AQM19SRV12	Automatic	Started	
File Mover	AQM19SRV12	Automatic	Started	
File Receiver	AQM19SRV13	Automatic	Unknown	
File Receiver	AQMQA5	Automatic	Unknown	
File Receiver	AQM19SRV12	Automatic	Started	
Importer	AQM19SRV12	Automatic	Started	
Interaction Monitor	AQM19SRV13	Automatic	Unknown	Unknown
Interaction Monitor	AQM19SRV12	Automatic	Stopped	Unknown
IVR Import	AQM19SRV12	Automatic	Started	
Port Manager	AQM19SRV12	Automatic	Started	
Process Manager	AQM19SRV13	Automatic	Unknown	
Process Manager	AQM19SRV12	Automatic	Started	
Report Manager	AQM19SRV12	Automatic	Started	
VoIP Tap	AQM19SRV12	Automatic	No Communication	
Web Server	AQM19SRV12	Automatic	Started	

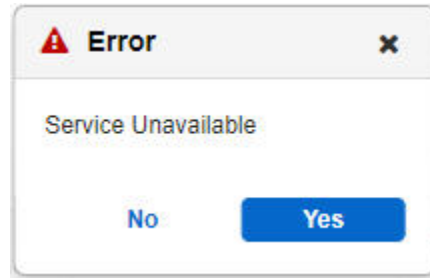
Note: Stop is a graceful stop with allowing the background tasks to be completed successfully and then stop the process. Terminate is when all the current ongoing tasks in the process memory are stopped forcefully immediately.

Note: In case of Interaction Monitor process, if the status in the Redundancy Status column is Active then the Set as Stand-by option in Action Menu will be enabled. If it is already in the Stand-by status in the Redundancy Status column, then Set to Active option will be enabled and you can set the Interaction Monitor to Active status.

Set to Active and Set as Stand-by are only functional for Interaction Monitor process.

- When the Aspect Quality Service is stopped, WEM goes to unauthorized state. Any Action Menu operations that are performed during that time, will show an error message, as given

below. Then this needs IIS to be reset for the application pool reset. Once IIS is reset, the WEM services will be available again.



10. When you finish starting the service, close the Service window.

4. Search for an Interaction

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

SEARCH RESULTS: ALL

Search Type: New Search

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

<input type="checkbox"/>	Channel	Direction	Type	Date Time	Duration	Agent	Extension	Analytics	ANI	DNIS	Status	Hidden
<input type="checkbox"/>		None	Task	9/21/2022 2:34:58 PM	0:00:00	User3, Agent						
<input type="checkbox"/>		None	Task	9/21/2022 2:31:00 PM	0:00:00	Chidananda, Puttappa						
<input type="checkbox"/>		None	Task	9/21/2022 2:25:53 PM	0:00:00	Devi, Anu						
<input type="checkbox"/>		None	Task	9/21/2022 2:09:29 PM	0:00:00	User3, Agent						
<input type="checkbox"/>		None	Task	9/21/2022 2:07:52 PM	0:00:00	User3, Agent						
<input type="checkbox"/>		None	Task	9/21/2022 2:00:16 PM	0:00:00	User3, Agent						
<input type="checkbox"/>		None	Task	9/21/2022 12:00:58 PM	0:00:00	User3, Agent						
<input type="checkbox"/>		None	Task	9/21/2022 11:55:19 AM	0:00:00	User3, Agent						
<input type="checkbox"/>		None	Task	9/21/2022 11:44:42 AM	0:00:00	User3, Agent						
<input type="checkbox"/>		None	Task	9/20/2022 2:57:47 PM	0:00:00	Chidananda, Puttappa						
<input type="checkbox"/>		None	Task	9/20/2022 2:18:39 PM	0:00:00	Martinez, Chavez, Jessica						

1 - 11 of 11 items 1 to 11 of 11 records

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*. Refer the [Interaction Menu](#) section.

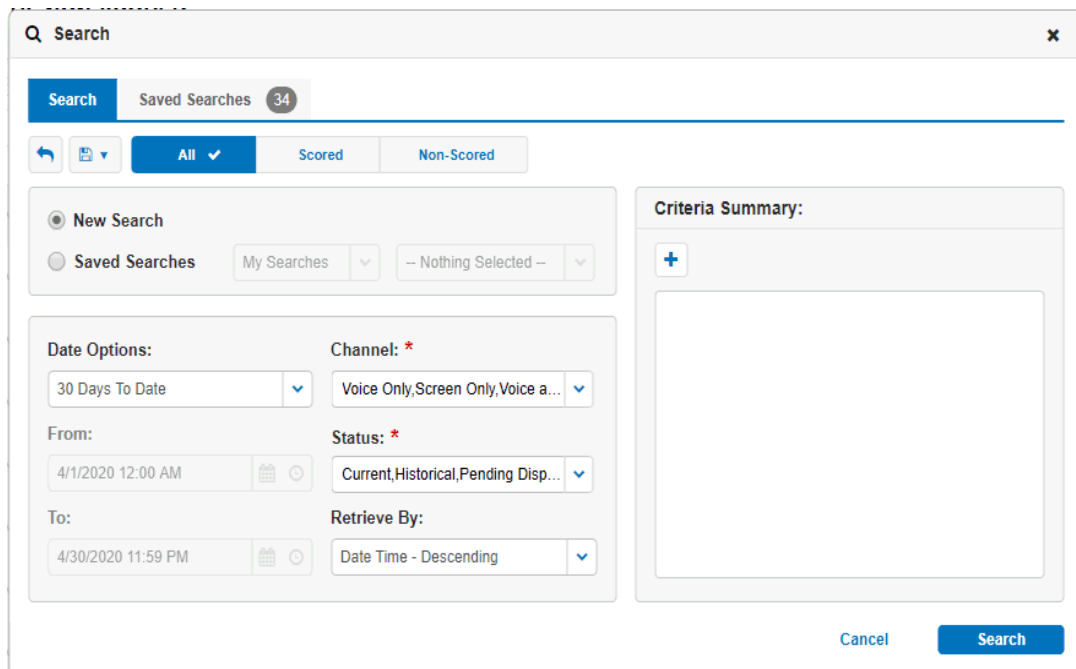
You can use interactions using one or multiple criteria.

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, Agent Groups, ANI and DNIS information.

4.1 Performing a Search

In the Quality Search Results window, you can build queries to search for specific voice recording. You can use single or multiple criterias for media searches.

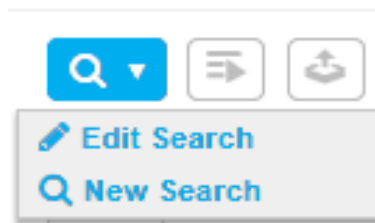
1. Go to main **Menu > Employee Experience> Interaction > Search**. The Search window opens.



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 Search Evaluations 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**.

4.1.1 Configure Search Results Grid

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



4.1.1.1 All View

In All view, the user will see the interactions which do not have an accessible evaluation and accessible evaluation grouped under the interaction. Select **All** to view scored and 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: ALL** will be appeared as shown below.

SEARCH RESULTS: ALL

Search Type: New Search

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

<input type="checkbox"/>	Channel	Direction	Type	Date Time	Duration	Agent	Extension	Analytics	ANI	DNIS	Status	Hidden
<input type="checkbox"/>		None	Task	9/21/2022 2:34:58 PM	0:00:00	User3, Agent						
<input type="checkbox"/>		None	Task	9/21/2022 2:31:00 PM	0:00:00	Chidananda, Puttappa						
<input type="checkbox"/>		None	Task	9/21/2022 2:25:53 PM	0:00:00	Devi, Anu						
<input type="checkbox"/>		None	Task	9/21/2022 2:09:29 PM	0:00:00	User3, Agent						
<input type="checkbox"/>		None	Task	9/21/2022 2:07:52 PM	0:00:00	User3, Agent						
<input type="checkbox"/>		None	Task	9/21/2022 2:00:16 PM	0:00:00	User3, Agent						
<input type="checkbox"/>		None	Task	9/21/2022 12:00:58 PM	0:00:00	User3, Agent						
<input type="checkbox"/>		None	Task	9/21/2022 11:55:19 AM	0:00:00	User3, Agent						
<input type="checkbox"/>		None	Task	9/21/2022 11:44:42 AM	0:00:00	User3, Agent						
<input type="checkbox"/>		None	Task	9/20/2022 2:57:47 PM	0:00:00	Chidananda, Puttappa						
<input type="checkbox"/>		None	Task	9/20/2022 2:18:39 PM	0:00:00	Martinez, Chavez, Yessica						

1 - 11 of 11 items | 1 to 11 of 11 records

Note: The interactions which have accessible evaluations are recognized by the button on the first column.

4.1.1.2 Scored View

In Scored view, the user will see the accessible evaluations which are grouped under the interaction. Select **Scored** 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.

The screenshot shows a table with the following columns: Channel, Dir..., T., Date Time, Du..., A..., Ext..., An..., D., Status, and Tea... The table contains several rows of task data, including dates like 10/6/2022 2:50:54 PM and 9/21/2022 2:13:18 PM, and various agent names like Godhuggi, Bhagya and 1467, Cisco IP Communi... The status column shows green checkmarks in circles.

Click the Expand button, as highlighted in below image to view the results for the scored evaluation.

The screenshot shows the same table as above, but the second row (dated 9/21/2022 2:13:18 PM) is expanded. Below the main table, a detailed evaluation table is shown with the following columns: Quality Score (%), Point Score, Pass/Fail, Status, Template Name, Created By, and Created Date Time. The data for this row is: 833%, 50/6, Pass, Complete, Karthi Template, Administrator, ADM, and 9/15/2022 5:17:57 PM.

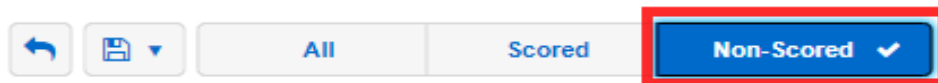
The following table describes the column names on the expanded grid.

Column Name	Description
Quality Score	The evaluation score in percentage.

Column Name	Description
Point Score	The evaluation score in “Total Points earned/Total Points Possible”. Eg: 5/10 (earned 5 points out of 10 possible points).
Pass/Fail	The evaluation score in Pass/Fail format.
Status	The status of an evaluation.
Template Name	Name of an evaluation template.
Created By	The creator of the evaluation.
Created Date Time	The date and time when the evaluation is created.
To Review	The reviewer (such as Agent, Team, Peer) who is assigned to review the evaluation.
Assigned Evaluation	Evaluations which are assigned to you by other users will be available in this search criteria.
Reviewed By Recorded Agent	The review status of the evaluation which is assigned to the recorded agent.
Do Not Show in Report	When the evaluation is used for the training purpose, a checkmark appears in this column.
Coaching	When the coaching is required for the evaluation, a checkmark appears in this column.
Evaluation ID	The ID of the Evaluation, which is stored in the database.

4.1.1.3 Non-Scored View

In Non-Scored view, the user will see the interactions which do not have an accessible evaluation. 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.

SEARCH RESULTS: NON-SCORED

Search Type: New Search

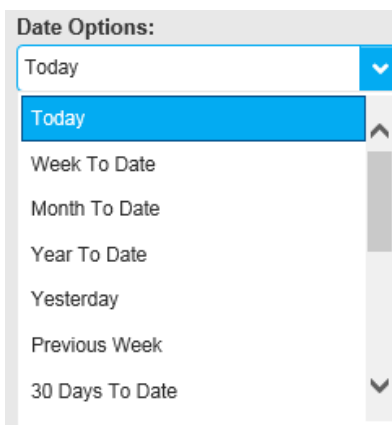
Drag a column header and drop it here to group by that column

Chan...	Direction	Type	Date Time	Hidden	Duration	Agent	Extension
<input type="checkbox"/>	Inbound	ACD Call	7/11/2022 3:13:41 PM		0:00:07	Godimp3	
<input type="checkbox"/>	Inbound	ACD Call	7/11/2022 3:13:41 PM		0:00:07	Godimp3	
<input type="checkbox"/>	Inbound	ACD Call	7/11/2022 3:13:41 PM		0:00:07	Godimp3, Bhagyamp3	12321
<input type="checkbox"/>	Inbound	Inbound Direct Call	7/11/2022 3:13:41 PM		0:00:07	Godimp3, Bhagyamp3	
<input type="checkbox"/>	Outbound	Outbound Dialer Call	7/11/2022 3:13:41 PM		0:00:07	Godimp3, Bhagyamp3	12321
<input type="checkbox"/>	Outbound	Outbound Direct Call	7/11/2022 3:13:41 PM		0:00:07	Godimp3, Bhagyamp3	
<input type="checkbox"/>	Inbound	ACD Call	7/11/2022 3:13:41 PM		0:00:07	Godimp3	
<input type="checkbox"/>	Inbound	ACD Call	7/11/2022 3:13:41 PM		0:00:07	Godimp3	
<input type="checkbox"/>	Inbound	ACD Call	7/11/2022 3:13:41 PM		0:00:07	Godimp3	
<input type="checkbox"/>	Inbound	ACD Call	7/11/2022 3:13:41 PM		0:00:07	Godimp3	
<input type="checkbox"/>	Inbound	ACD Call	7/11/2022 3:13:41 PM		0:00:07	Godimp3	
<input type="checkbox"/>	Inbound	ACD Call	7/11/2022 3:13:41 PM		0:00:07	Godimp3	
<input type="checkbox"/>	Inbound	ACD Call	7/11/2022 3:13:41 PM		0:00:07	Godimp3	
<input type="checkbox"/>	Inbound	ACD Call	7/11/2022 3:13:41 PM		0:00:07	Godimp3	
<input type="checkbox"/>	Inbound	Inbound Direct Call	7/11/2022 3:13:41 PM		0:00:07	Godimp3, Bhagyamp3	12321
<input type="checkbox"/>	Outbound	Outbound Dialer Call	7/11/2022 3:13:41 PM		0:00:07	Godimp3, Bhagyamp3	
<input type="checkbox"/>	Inbound	Inbound Direct Call	7/11/2022 3:13:41 PM		0:00:07	Godimp3, Bhagyamp3	12321

1 - 100 of 573 items | 1 to 573 of 573 records

4.1.2 Select a Date Option

In the Edit Search pane, a Date Options drop-down list is available.



From this drop-down list box, select a date range. The following is a list of options in the drop-down list box. Notice that as the date option is selected from the drop-down list box, the date

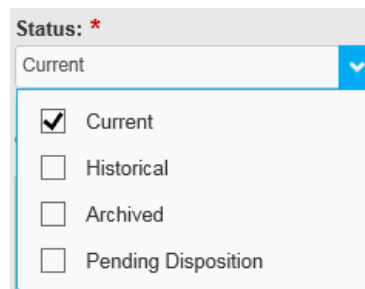
range automatically populates in the From and To fields. You cannot change the From and To fields unless you select the Custom Date Range option from the drop-down list box.

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.
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.

Date Option	Description
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.

4.1.3 Select a Status

From the Status drop-down list box, filter interactions based on the Status of the interaction by selecting any combination of the Current or Pending check boxes.



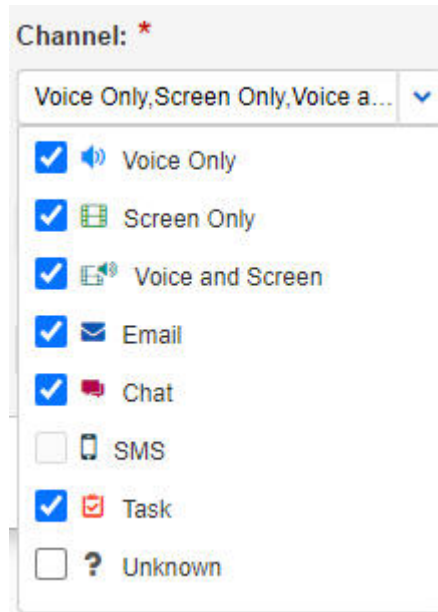
Select at least one Status to perform a search. Each option is described in the following table.

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.
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.

Status Option	Description
Pending Disposition	<p>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.</p> <p>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.</p>

4.1.4 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, or a text.



Note: Channels are only enabled for selection if you have an appropriate license installed.

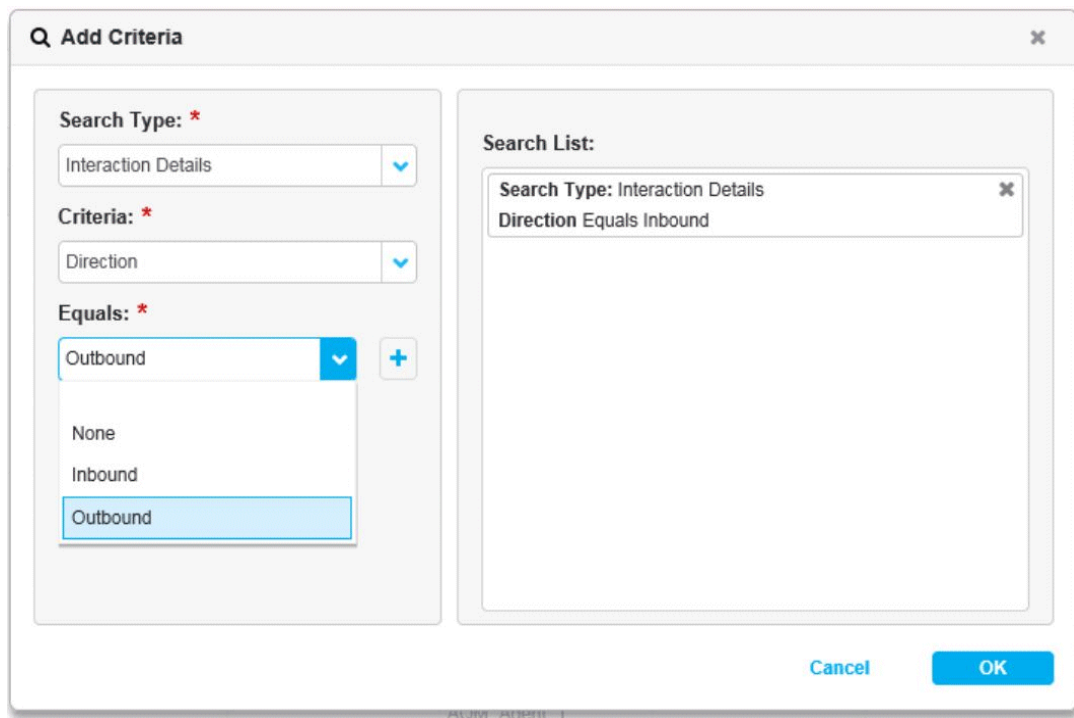
From the Channel drop-down list box, select one or more check boxes by which you want to search. Each option is described in the following table.

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 that have only email interaction

Channel	Definition
Chat	Interactions that have only chat interaction
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.

4.1.5 Select Criteria

Click on **Add Criteria** button, the Add Criteria window opens.

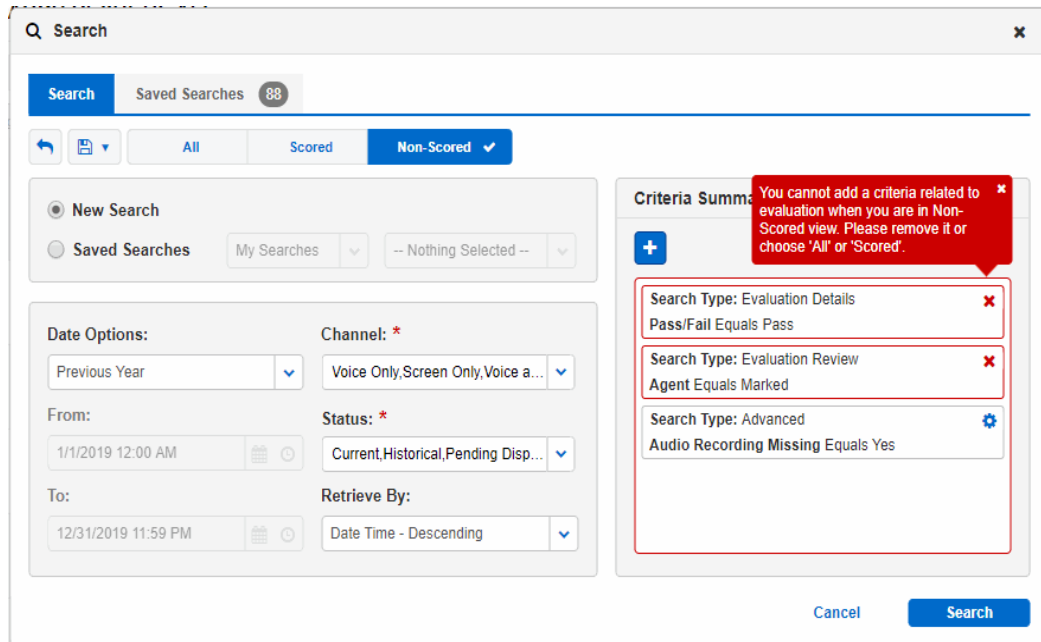


4.1.5.1 Search Types and Criteria

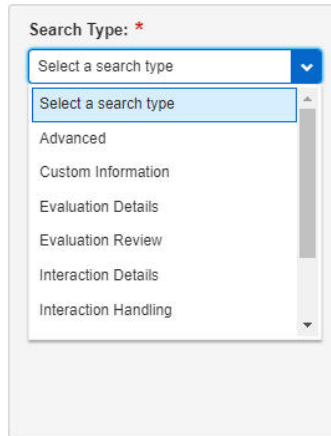
The following table contains the search types of criteria which will be added under the Criteria Summary.

Interaction Search	Aspect Quality Evaluation
<ul style="list-style-type: none"> • Advanced • Custom Information • Interaction Details • Interaction Handling • Interaction Statistics • Recording Information 	<ul style="list-style-type: none"> • Advanced • Custom Information • Evaluation Details • Evaluation Review • Interaction Details • Interaction Handling • Interaction Statistics • Recording Information

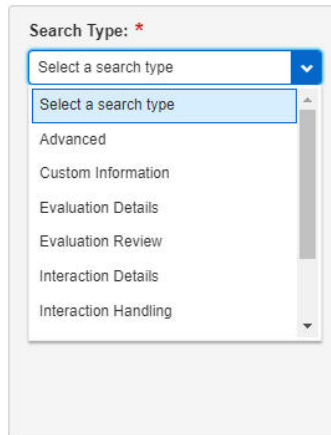
Note: Evaluation Details and Evaluation Review are available if the user has selected the **All** or **Scored** button in the Search dialog. When the user has selected **Evaluation Details** or **Evaluation Review** search type and toggled to **Non-Scored** button then click on Search, a **validation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



The Interaction Search criteria Search Type menu.



The Aspect Quality Evaluation criteria Search Type menu.



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

4.1.5.1.1 **Advanced**

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

Criteria - Select:	Description - Options displayed
Audio Recording Ended Early	<p>When a call recording is stopped in Aspect Quality (integrated with regular CTIPS switch) before the call ends in Unified IP.</p> <p>From the Equals drop-down list box, select</p> <ul style="list-style-type: none"> • Yes • No <p>Click on (+) to add the criteria under the Search List section.</p>

Criteria - Select:	Description - Options displayed
Audio Recording Expected	<p>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.</p> <p>From the Equals drop-down list box, select</p> <ul style="list-style-type: none"> • Yes (based on the above status) • No (Not recorded) <p>Click on (+) to add the criteria under the Search List section.</p>
Audio Recording Missing	<p>When Audio Recording is expected and the audio filename is not updated in Aspect Quality database, the audio recording is considered as missing.</p> <p>From the Equals drop-down list box, select</p> <ul style="list-style-type: none"> • Yes • No <p>Click on (+) to add the criteria under the Search List section.</p>
Audio Recording Silent	<p>When voice content is not available in the recording.</p> <p>From the Equals drop-down list box, select</p> <ul style="list-style-type: none"> • Yes • No <p>Click on (+) to add the criteria under the Search List section.</p>
Audio Recording Started Late	<p>When audio recording is started in Aspect Quality (integrated with regular CTIPS switch) after the actual start of the call in Unified IP.</p> <p>From the Equals drop-down list box, select</p> <ul style="list-style-type: none"> • Yes • No <p>Click on (+) to add the criteria under the Search List section.</p>
Host ID	<p>It represents the Call ID of the switch.</p> <p>From the Show items with value that is drop-down list box, select</p> <ul style="list-style-type: none"> • Contains • Ends with • Equals • Equals None • Starts with <p>Then, in the Entry text box, type the Host Id by which you want to search.</p>
Interaction ID	<p>Aspect Quality creates a unique interaction ID for each interaction.</p> <p>From the Show items with value that is drop-down list box, select</p> <ul style="list-style-type: none"> • Equals <p>Then, in the Entry text box, type the Interaction Id by which you want to search.</p> <p>Note: An Interaction Id is represented as a GUID (Globally Unique Identifier).</p>

Criteria - Select:	Description - Options displayed
Partial Audio Recording	<p>When a recording started late or ended early than expected, those recordings are retrieved using this search criteria.</p> <p>From the Equals drop-down list box, select</p> <ul style="list-style-type: none"> • Yes • No <p>Click on (+) to add the criteria under the Search List section.</p>
Phone Foul	<p>When the Phone Foul happened during the conversation, those interactions are retrieved using this search criteria.</p> <p>From the Equals drop-down list box, select</p> <ul style="list-style-type: none"> • Yes • No <p>Click on (+) to add the criteria under the Search List section.</p>
Screen Recording Expected	<p>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.</p> <p>From the Equals drop-down list box, select</p> <ul style="list-style-type: none"> • Yes • No <p>Click on (+) to add the criteria under the Search List section.</p>
Transcript File Name	<p>There is a Chat Transcript file.</p> <p>From the Show items with value that is drop-down list box, select</p> <ul style="list-style-type: none"> • Contains • Ends with • Equals • Equals None • Starts with <p>Then, in the Entry text box, type the transcript file number by which you want to search.</p>
Screen Recording Missing	<p>When Screen Recording is expected and the screen filename is not updated in Aspect Quality database, the screen recording is considered as missing.</p> <p>From the Equals drop-down list box, select</p> <ul style="list-style-type: none"> • Yes • No <p>Click on (+) to add the criteria under the Search List section.</p>

Criteria - Select:	Description - Options displayed
Message ID	From the Show items with value that is drop-down list box, select <ul style="list-style-type: none"> • 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.
Thread ID	From the Show items with value that is drop-down list box, select <ul style="list-style-type: none"> • 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.
Universal Call ID	From the Show items with value that is drop-down list box, select <ul style="list-style-type: none"> • Contains • Ends with • Equals • Equals None • Starts with Then, in the Entry text box, type the Universal Caller ID 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 <ul style="list-style-type: none"> • 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 <ul style="list-style-type: none"> • 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).

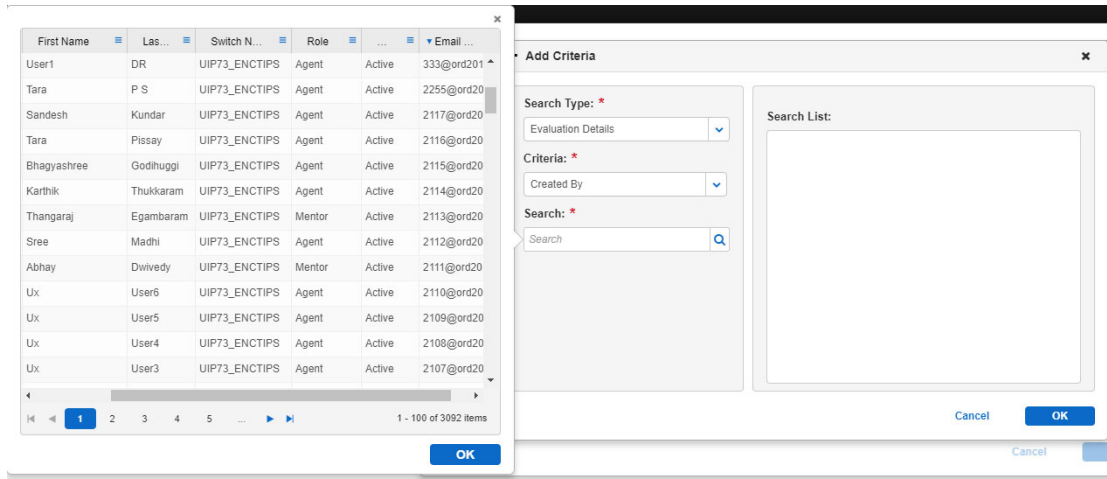
4.1.5.1.2 Custom Information

Custom Information are variable criteria made available to Aspect 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:	Description - Options displayed
<p><Custom Information>*</p> <p>*Variable metadata from CTI. Examples include:</p> <ul style="list-style-type: none"> • D5 (UCCE 11.5 HPX) • DNIS (Default Import Switch - Inactive) <p>Note: The associated switch is mentioned with the Criteria. Not only, it is a drop-down list, its a combo box, where you can also type the Criteria and the matching items will also appear at the top.</p>	<p>From the Show items with value that is drop-down list box, select</p> <ul style="list-style-type: none"> • Contains • Ends with • Equals • Equals None • Starts with <p>Then, in the Entry text box, type the custom information by which you want to search.</p>

4.1.5.1.3 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:	Description - Options displayed
Assigned Evaluations	<p>Evaluations which are assigned to you by other users will be available in this search criteria.</p> <p>Note: Evaluations are assigned from Workforce Engagement Management UI.</p> <p>Select Shared with me from Equals drop-down, then click on (+) button.</p>
Created By	<p>Search text box.</p> <ul style="list-style-type: none"> 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. <p>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..</p>
Created Date Time	<p>In the From and To fields, specify a date range.</p> <p>By default, the From date is set 30 days prior to the current date and the current date is set as the To date.</p>
Pass/Fail	<p>The Equals drop-down list box displays the options</p> <ul style="list-style-type: none"> N/A Pass Fail

Criteria - Select:	Description - Options displayed
Percentage Score	From the Show items with value that is drop-down list box, select <ul style="list-style-type: none"> • 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 <ul style="list-style-type: none"> • 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. <p>Note: By default, only Active templates will be displayed. Refer to Edit My Preferences on page 4-239, if you would like to see the Inactive templates along with the Active templates in the search criteria.</p>
Do Not Show in Report	When the evaluation is used for training purpose, a check mark will be mentioned in this column. <p>The Equals drop-down list box displays the options</p> <ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> 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. <p>Note: Evaluations can be shared through Agent, Team, and Peer Review.</p>
Agent	<ul style="list-style-type: none"> Logged in user. Users who have shared the evaluations with the logged in user. <p>Note: Evaluations can be shared through Agent, Team, and Peer Review.</p>

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.

4.1.5.1.4 Evaluation Review

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

Criteria - Select:	Description - Options displayed
Agent	The Equals drop-down list box displays the options Marked or Not Marked. <ul style="list-style-type: none"> 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. <ul style="list-style-type: none"> 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:	Description - Options displayed
Reviewed By Recorded Agent	<p>Retrieves the recorded interaction based on whether the agent has or has not reviewed the agent's own evaluation.</p> <p>From the Equals drop-down list box, select</p> <ul style="list-style-type: none"> • Yes • No <p>Click on (+) to add the criteria under the Search List section.</p>
Team	<p>The Equals drop-down list box displays the options Marked or Not Marked.</p> <ul style="list-style-type: none"> • 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.

4.1.5.1.5 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: A chat initiated by a customer is stored as an interaction in Aspect Quality. Only when the Agent replies to the customer's chat, is the interaction displayed for the users in the Workforce Engagement Management UI. Then, the Agent interaction contains the chat conversation of both the Agent and the customer.

Criteria - Select:	Description - Options displayed
ANI (Automatic Number Identification)	<p>ANI represents the calling phone number.</p> <p>From the Show items with value that is drop-down list box, select</p> <ul style="list-style-type: none"> • Contains • Ends with • Equals • Equals None • Starts with <p>Then, in the Entry text box, type the number by which you want to search.</p>
Assigned Interactions	<p>Recordings assigned to you by a peer will be available in Assigned Interactions. Select Shared with me from Equals drop-down, then click on (+) button.</p>

Criteria - Select:	Description - Options displayed
Customer Email Address	<p>This criteria uses to find the interactions based on the registered email address of the customer.</p> <p>From the Show items with value that is drop-down list box, select</p> <ul style="list-style-type: none"> • Contains • Ends with • Equals • Equals None • Starts with <p>Then, in the Entry text box, type the registered email ID by which you want to search.</p>
Customer Name	<p>This criteria uses to find the interactions based on the registered name of the customer.</p> <p>From the Show items with value that is drop-down list box, select</p> <ul style="list-style-type: none"> • Contains • Ends with • Equals • Equals None • Starts with <p>Then, in the Entry text box, type the registered name by which you want to search.</p>
Hidden	<p>Hidden feature is only available when the user has Hide/Show Interactions right flagged in the user profile.</p> <p>From the Equals drop-down list box, select</p> <ul style="list-style-type: none"> • Yes - Interactions which are reserved for Hide/Show Interaction • No - Interactions which are not reserved for Hide/Show Interaction. <p>Click the (+) button to add the criteria under the Search List section.</p>
DNIS (Dialed Number Identification Service)	<p>DNIS represents the number that the caller dialed.</p> <p>From the Show items with value that is drop-down list box, select</p> <ul style="list-style-type: none"> • Contains • Ends with • Equals • Equals None • Starts with <p>Then, in the Entry text box, type the number by which you want to search.</p>

Criteria - Select:	Description - Options displayed
Device Position	Unique ID used to identify a device or phone. From the Show items with value that is drop-down list box, select <ul style="list-style-type: none"> • 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. <ul style="list-style-type: none"> • None • Inbound • Outbound
Extension	Extension number of the device. From the Show items with value that is drop-down list box, select <ul style="list-style-type: none"> • Contains • Ends with • Equals • Equals None • Starts with Then, in the Entry text box, type the number by which you want to search.
Message Count	The total number of messages. From the Show items with value that is drop-down list box, select <ul style="list-style-type: none"> • Equals • Greater than • Greater than or equals • Less than • 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.
Protected	Prevents interaction from being deleted. From the Equals drop-down list box, select <ul style="list-style-type: none"> • Yes
Switch	From the Equals drop-down list box, select the switch which you want to search. Click on (+) to add the criteria under the Search List section.

Criteria - Select:	Description - Options displayed
Task Name	It is a non-recording evaluation. From the Show items with value that is drop-down list box, select <ul style="list-style-type: none"> • 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. <ul style="list-style-type: none"> • ACD Call • Campaign Outbound Email • Chat • IVR Call • Inbound Direct Call • Inbound Email • Manual Outbound Email • Outbound Dialer Call • Outbound Direct Call • Task • Unknown
Email Subject	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 <ul style="list-style-type: none"> • Contains • Ends with • Equals • Equals None • Starts with Then, in the Entry text box, type the email subject by which you want to search.

4.1.5.1.6 *Interaction Handling*

Criteria - Select:	Description - Options displayed
Agent	Search text box. <ul style="list-style-type: none"> • 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 Mentors and Administrators.

Criteria - Select:	Description - Options displayed
Agent Group	Search text box. <ul style="list-style-type: none"> 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. <p>Note: This option is only available for Mentors and Administrators.</p>
Application	Search text box. <ul style="list-style-type: none"> 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. <p>Note: This option is only available for Mentors and Administrators.</p>
Initial Agent Group	<ul style="list-style-type: none"> 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. <p>Note: This option is only available for Mentors and Administrators.</p>
Initial Skill Group	Search text box. <ul style="list-style-type: none"> You can search without entering any filter value. A table displays a list of all active skill groups with their associated switch. You can also search by typing the partial or the complete Skill Group name.
Precision Queue	Search text box. <ul style="list-style-type: none"> You can search without entering any filter value. A table displays a list of all active precision queue with their associated Cisco UCCE switch. You can also search by typing the partial or the complete Precision Queue name.
Skill Group	A group of agent groups called as Skill Group. Search text box. <ul style="list-style-type: none"> You can search without entering any filter value. A table displays a list of all active skill groups with their associated switch. You can also search by typing the partial or the complete Skill Group name.
Team	Search text box. <ul style="list-style-type: none"> 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...

Column Name	Description
User Name	The user name configured in the Aspect Quality User Definition window.
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 (Inactive or Active) of the user.
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 4-239](#), if you would like to see the Inactive users along with the Active users in the search criteria.

It is also applicable for the **Agent Group**, **Application**, and **Team** criteria.

4.1.5.1.7 *Interaction Statistics*

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

Criteria - Select:	Description - Options displayed
Duration	From the Show items with value that is drop-down list box, select <ul style="list-style-type: none"> • 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 <ul style="list-style-type: none"> • 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 <ul style="list-style-type: none"> • 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:	Description - Options displayed
Total Hold Time	<p>When an agent places the call on hold multiple times, the sum of all hold duration is the Total Hold Time.</p> <p>From the Show items with value that is drop-down list box, select</p> <ul style="list-style-type: none"> • Equals • Greater Than • Greater Than or Equals • Less Than • Less Than or Equals • Not Equals <p>Then, in the Entry text box, type the time (format: 00:00:00) by which you want to search.</p>

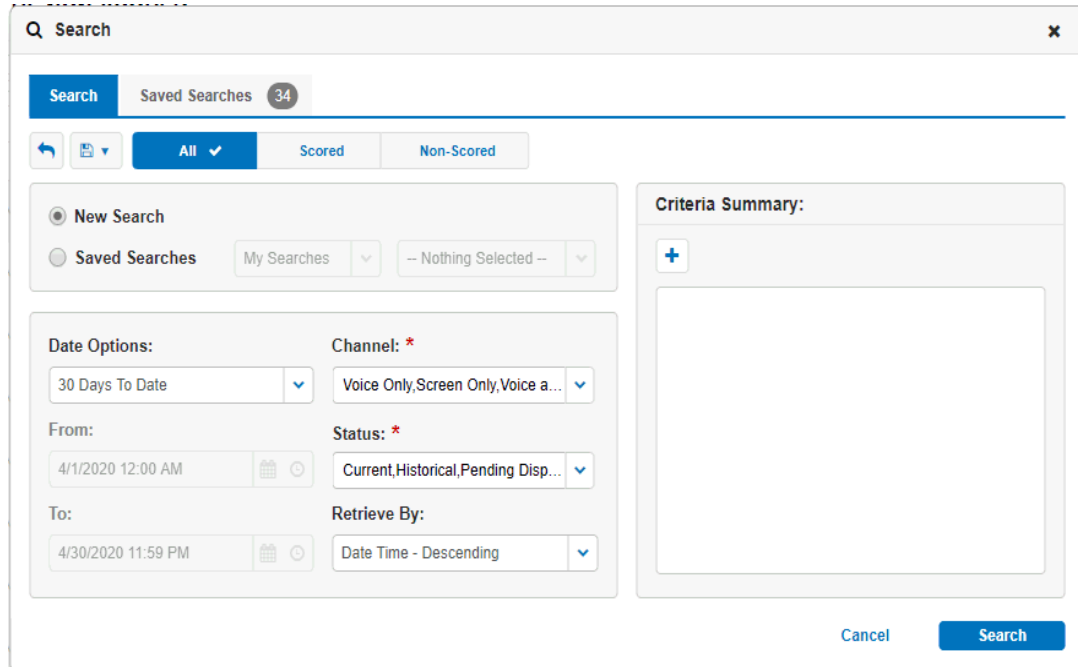
4.1.5.1.8 Recording Information

Criteria - Select:	Description - Options displayed
Audio Port	The port through which Aspect Quality recorded the audio. Type the port number in the Contains text box by which you want to search.
Audio Port Description	From the Show items with value that is drop-down list box, select <ul style="list-style-type: none"> • Contains • Ends with • Equals • Equals None • Starts with Then, in the Entry text box, type the port number by which you want to search.
Imported	An interaction imported to the Aspect Quality. From the Equals drop-down list box, select <ul style="list-style-type: none"> • Yes
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 Group	Group of audio recording ports named as Recording Group. Search text box. <ul style="list-style-type: none"> • 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. This option is only available for Mentors and Administrators.
Recording Reason	From the Contains drop-down list box, select any one or multiple options based on the requirement <ul style="list-style-type: none"> • 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 <ul style="list-style-type: none"> • Contains • Ends with • Equals • Equals None • Starts with Then, in the Entry text box, type the terminal number by which you want to search.

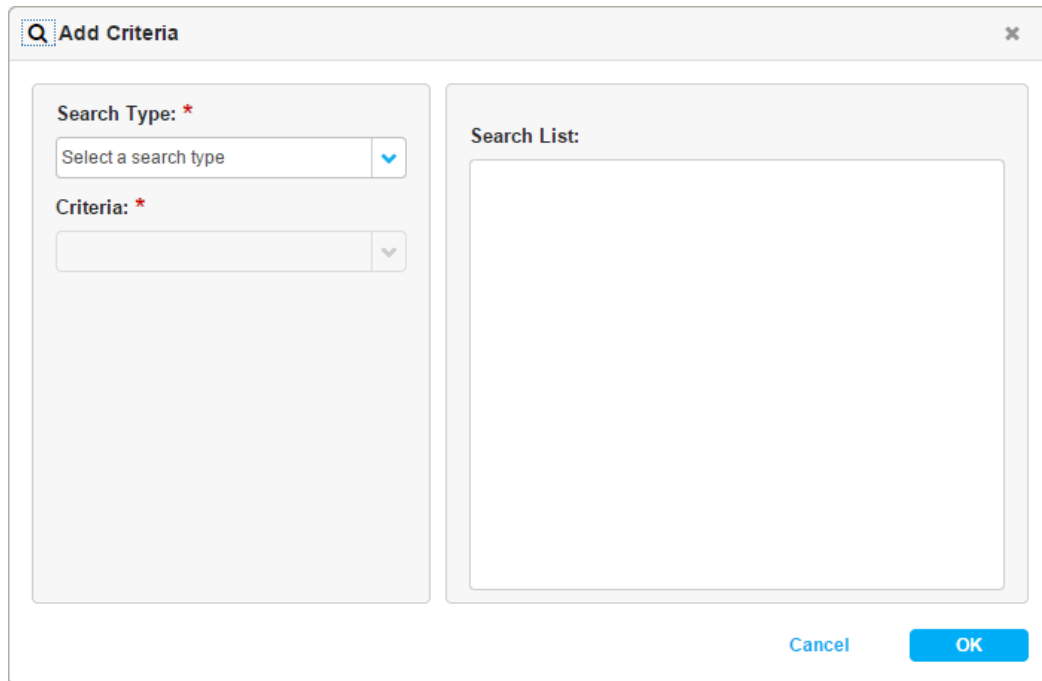
4.1.5.2 Add Criteria

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

1. On the Search window, click **Add Criteria**.



The Add Criteria window opens.

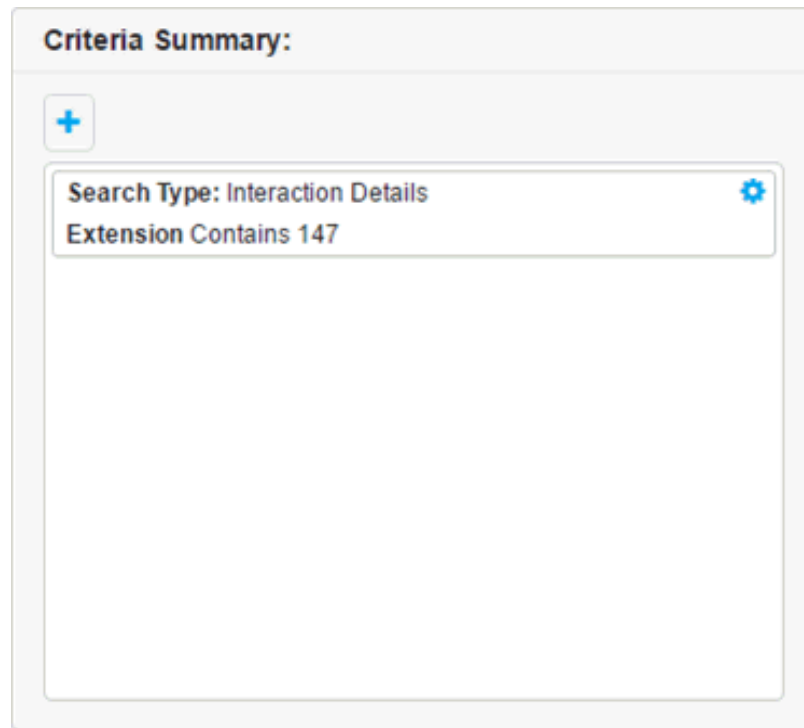


2. From the drop-down list box, select a **Search Type**.
3. From the drop-down list box, select **Criteria**.
4. Depending on the search type and criteria that you selected, based on the tables in [Search Types and Criteria](#), select the remaining criteria and enter the remaining values.
5. Click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

The criteria displays in the Search List.

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

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



- 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.
- When finished adding all criteria, click **OK**. The Search Results displays with the results of the search in the list.
- Click **Search**. The Search Results window opens.

Note: For information about the search results, see [Using the Search Results Window](#).

4.2 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 4-120](#).) This includes understanding how to use the tools on the window, such as:

- [Pagination](#)
- [Group Search Results](#)
- [Resize Columns](#)
- [Use the Search Results Menu](#)

SEARCH RESULTS: ALL

Search Type: New Search

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

<input type="checkbox"/>	Channel	Direction	Type	Date Time	Duration	Agent	Extension	Analytics	ANI	DNIS	Status	Hidden
<input type="checkbox"/>		None	Task	9/21/2022 2:34:58 PM	0:00:00	User3, Agent						
<input type="checkbox"/>		None	Task	9/21/2022 2:31:00 PM	0:00:00	Chidananda, Puttappa						
<input type="checkbox"/>		None	Task	9/21/2022 2:25:53 PM	0:00:00	Devi, Anu						
<input type="checkbox"/>		None	Task	9/21/2022 2:09:29 PM	0:00:00	User3, Agent						
<input type="checkbox"/>		None	Task	9/21/2022 2:07:52 PM	0:00:00	User3, Agent						
<input type="checkbox"/>		None	Task	9/21/2022 2:00:16 PM	0:00:00	User3, Agent						
<input type="checkbox"/>		None	Task	9/21/2022 12:00:58 PM	0:00:00	User3, Agent						
<input type="checkbox"/>		None	Task	9/21/2022 11:55:19 AM	0:00:00	User3, Agent						
<input type="checkbox"/>		None	Task	9/21/2022 11:44:42 AM	0:00:00	User3, Agent						
<input type="checkbox"/>		None	Task	9/20/2022 2:57:47 PM	0:00:00	Chidananda, Puttappa						
<input type="checkbox"/>		None	Task	9/20/2022 2:18:39 PM	0:00:00	Martinez, Chavez, Yessica						

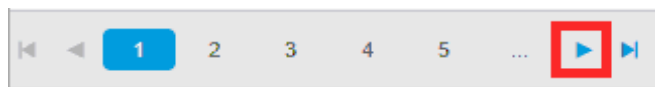
1 - 11 of 11 items

100 items per page

1 to 11 of 11 records

4.2.1 Pagination

By default, the system displays the interactions that you answered within a selected time period (refer [Select a Date Option](#)), based on the selected view such as **All**, **Scored** and **Non-Scored** (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.

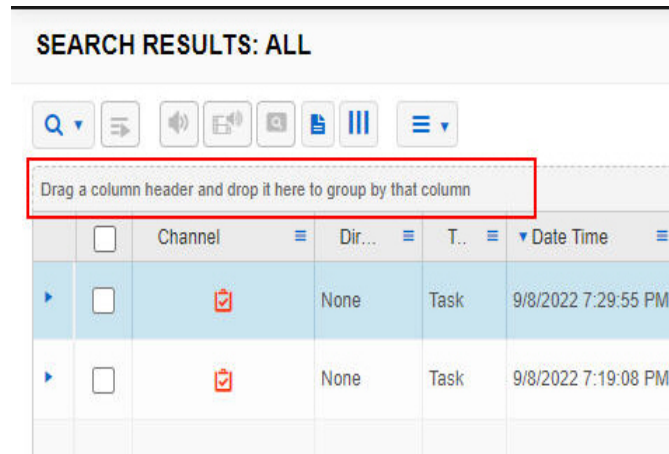
Example: The administrator is searching with a date range from 1st Jan 2019 to 31st December 2019 and there are a total of 12397 records available in the database. To view the next 1000 records or the last 1000 records, click on the pagination controls as shown below.



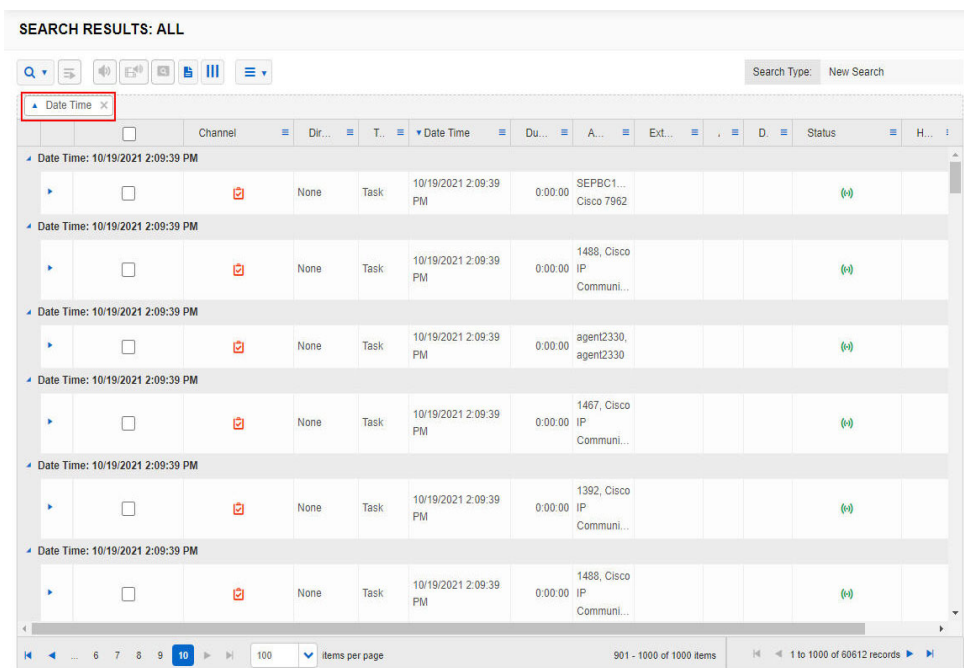
Note: In this scenario, if you click on the button, the last 397 records will appear. The pagination will be shown like “12001 to 12397 of 12397 records” at the bottom-right of the window.

4.2.2 Group Search Results

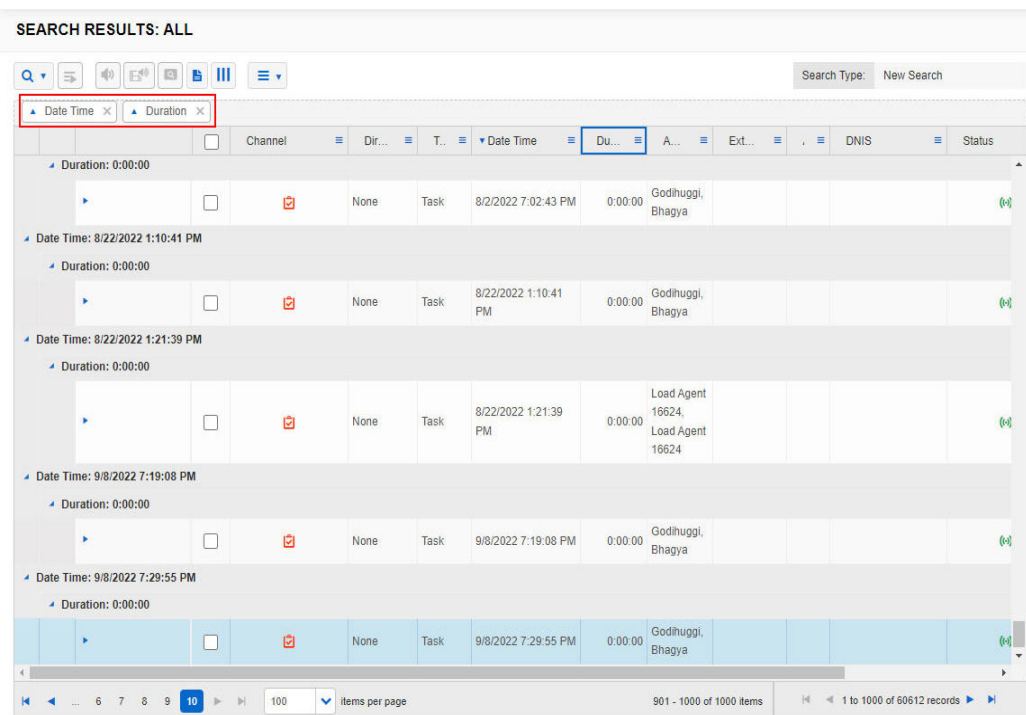
You can group data by column when you drag-and-drop the column from the table header to the top of the table where it says **Drag a column header and drop it here to group by that column**.



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.

4.2.3 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.

4.2.4 Use the Search Results Menu

Once you view a set of search results in Search or Search Evaluations window, you have access to a drop-down menu from the triple-bar 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 Search Evaluations

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.

SEARCH RESULTS: ALL

Search Type: New Search

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

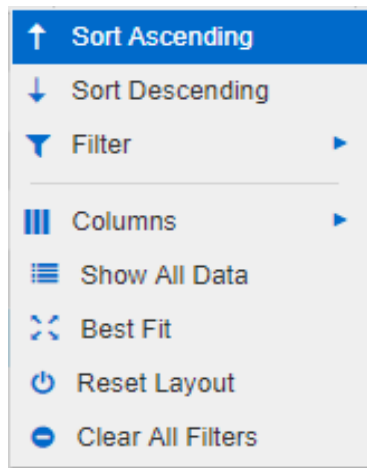
	Channel	Direction	Type	Date Time	Duration	Agent	Ext...	ANI	D.	Status	Hide
▶	☑	None	Task	9/8/2022 7:29:55 PM	0:00:00	Godhugli, Bhagya				🟢	
▶	☑	None	Task	9/8/2022 7:19:08 PM	0:00:00	Godhugli, Bhagya				🟢	
▶	☑	None	Task	8/22/2022 1:21:39 PM	0:00:00	Load Agent 16624, Load Agent 16624				🟢	
▶	☑	None	Task	8/22/2022 1:10:41 PM	0:00:00	Godhugli, Bhagya				🟢	
▶	☑	None	Task	8/2/2022 7:02:43 PM	0:00:00	Godhugli, Bhagya				🟢	
▶	☑	None	Task	7/28/2022 10:12:22 PM	0:00:00	agent10, uccx				🟢	
▶	☑	None	Task	7/14/2022 4:19:32 PM	0:00:00	1467, Cisco IP Communicator				🟢	

4.2.4.1 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.

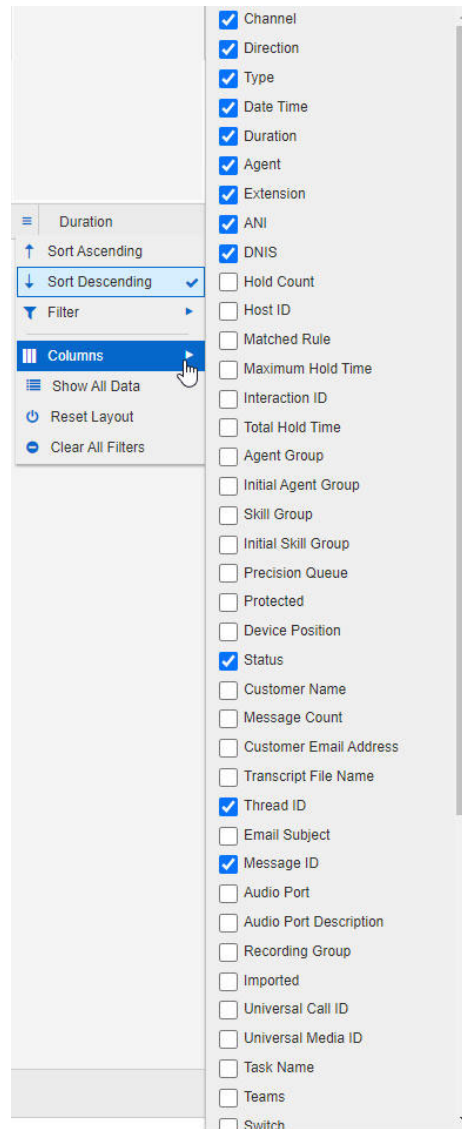
You can sort any of the columns that display in the search results, although only a default list of columns display.

To sort any column, click the triple-bar 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.



4.2.4.2 Add or Remove Column Names

You can remove or add the columns that you want to view by clicking the triple-bar icon next to any column name and selecting **Columns**.



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

Note: For descriptions on each column name, see [Column Names on page 4-181](#).

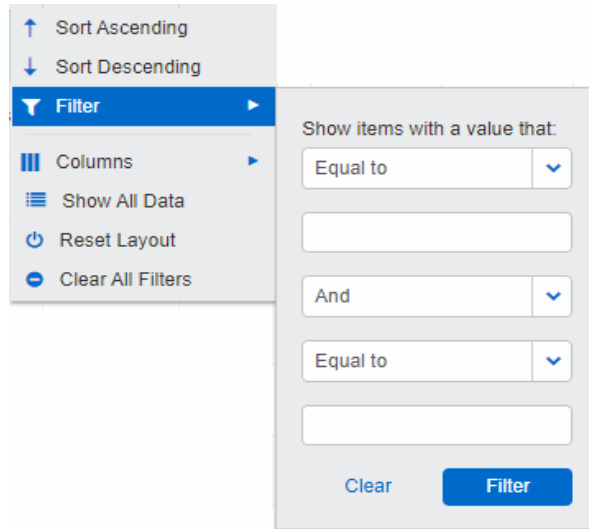
4.2.4.3 Filter Criteria

From the Search Results or Scorecard Interactions 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 4, Search for an Interaction](#).

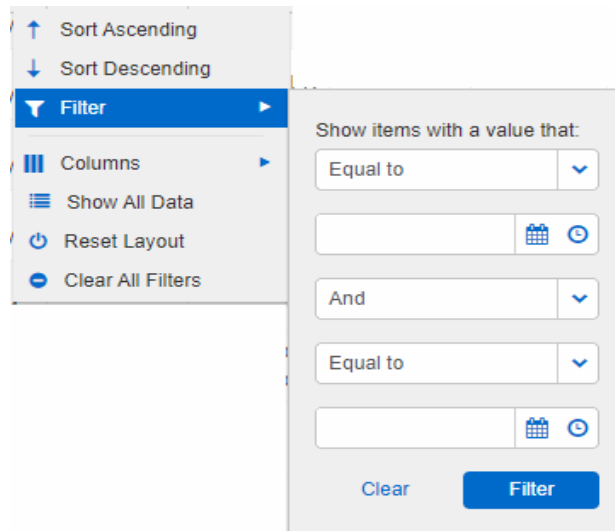
To change the criteria of a column, perform the following steps.

1. Click the triple-bar 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.

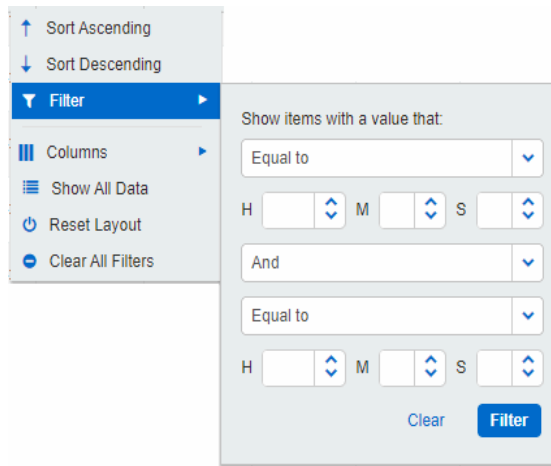
For example, if you want to change the criteria for the Channel, Direction, Agent, Extension, ANI, DNIS, or Status columns, the Filter drop-down list displays the following.



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.



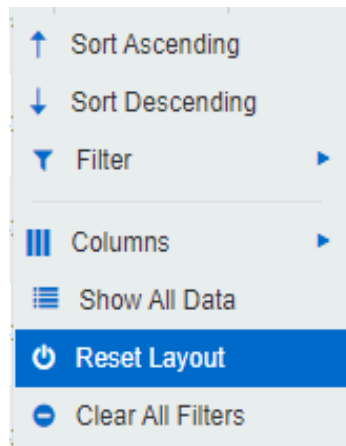
3. Change the Filter criteria.

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

4. Click **Filter**. The Search Results automatically update.

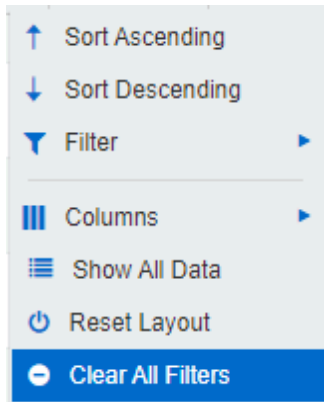
4.2.4.4 Reset Layout

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



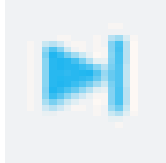
4.2.4.5 Clear All Filters

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



A default of 100 results per page displays. Use the following buttons to move between the pages.

Button Icon	Description
	First Page
	Previous Page
	Next Page

Button Icon	Description
	Last Page

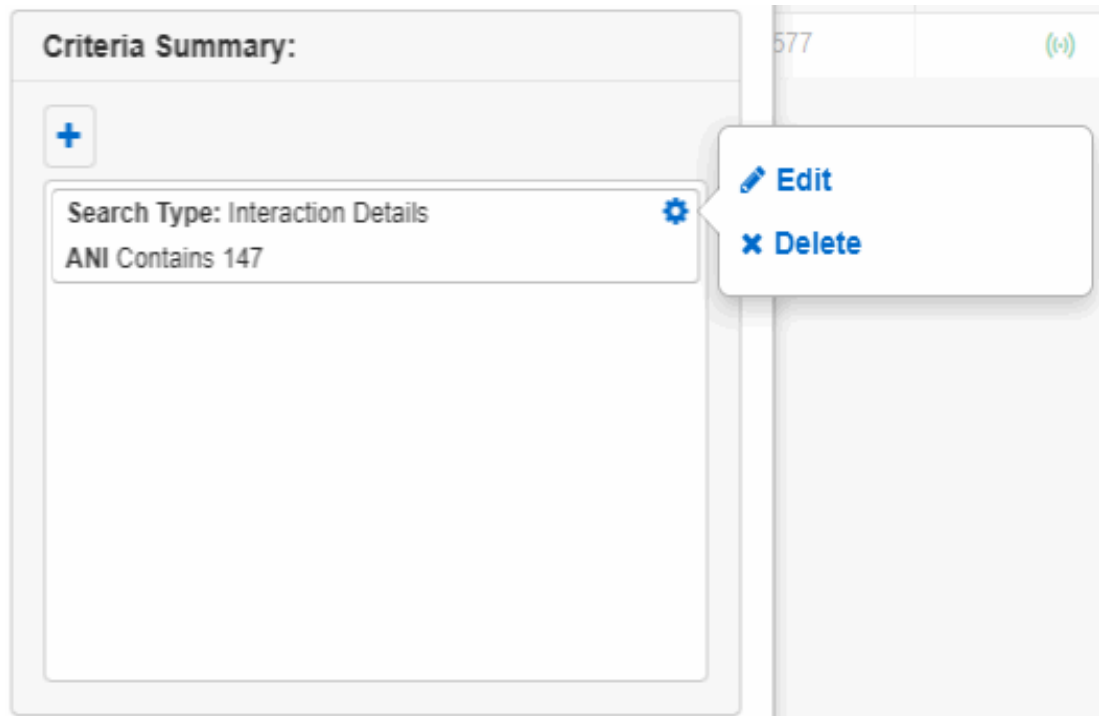
Once you have located the Agent on which you want to search, you can either double-click the row of the agent, or you can select the row and click **OK**. The Agent displays in the Search List on the Add Criteria pane.

Note: You can add more than one Agent to the Search List.

4.2.5 Edit or Delete Criteria

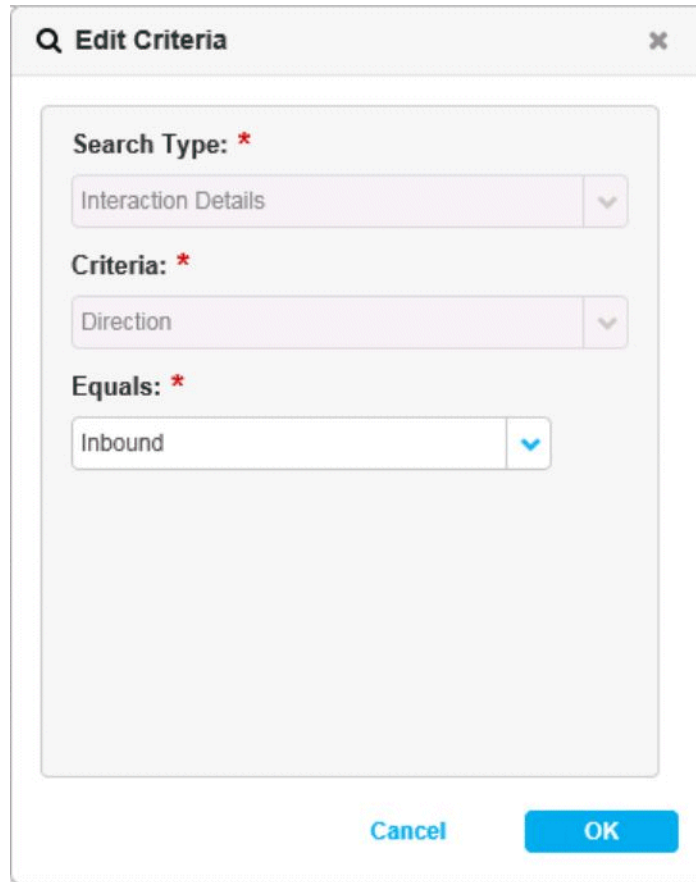
Follow the steps below to edit or delete the criteria in the Criteria Summary.

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.



The screenshot shows a dialog box titled "Edit Criteria". It contains three dropdown menus, each with a red asterisk indicating a required field. The first dropdown is labeled "Search Type:" and has "Interaction Details" selected. The second dropdown is labeled "Criteria:" and has "Direction" selected. The third dropdown is labeled "Equals:" and has "Inbound" selected. At the bottom of the dialog, there are two buttons: "Cancel" and "OK".

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**.

4.2.6 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.

INTERACTION

Agent: Godihuggi, Bhagyashree Date Time: 1/25/2019 2:10:57 AM

Evaluation: None

Details Actions Evaluation Annotations Attachments

Interaction Details:

Interaction ID: 1E4F689E-E22E-4686-B7DF-3389A92BFAC2
 Type: ACD Call
 Switch: Default Import Switch (Inactive)
 Host ID: N/A
 UCID: N/A
 Extension: N/A
 Device Position: N/A
 ANI: N/A
 DNIS: N/A
 Task Name: N/A
 Assigned Interactions: No
 Hidden: Yes

Channel	Direction	Date Time
Inbound	Inbound	1/25/2019 2:10:57 AM
Outbound	Outbound	8/29/2018 3:57:06 AM
Outbound	Outbound	8/29/2018 4:02:26 AM
Inbound	Inbound	8/29/2018 4:02:26 AM
Outbound	Outbound	8/28/2018 7:30:31 AM
Inbound	Inbound	8/29/2018 2:13:53 AM
Inbound	Inbound	8/29/2018 3:56:17 AM

Note: The View Transcript Player will be hidden in the Interaction View Detail Page, if the selected chat interaction mediafilestatus is marked as deleted. Check below screenshot for reference.

INTERACTION

Agent: b. vijendar Date Time: 10/22/2021 2:43:40 PM

Evaluation: None

Details Actions Evaluation Annotations Attachments

Interaction Details:

Interaction ID: BC75A0C2-BFE9-48FC-965F-898922DB7A3E
 Type: Chat
 Switch: UIP STRATUS
 Task Name: N/A
 Assigned Interactions: No
 Hidden: No

Interaction Handling:

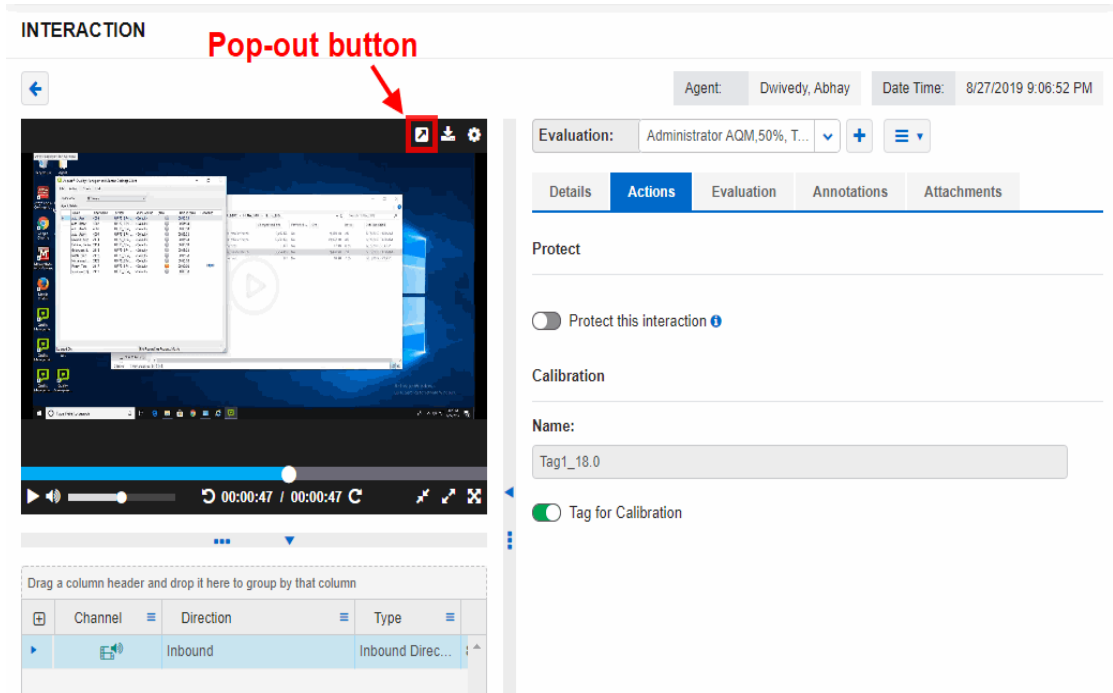
Agent: b. vijendar
 Application: baseApplication1
 Agent Group: CHATVJ
 Initial Agent Group: CHATVJ
 Skill Group: N/A
 Initial Skill Group: N/A
 Teams: baseAgent/Workgroup1

Interaction Statistics:

Channel	Direction	Type
Inbound	Inbound	Chat

4.2.6.1 Media Player Pop-out

This feature allows you to view a Voice and Screen Interaction in another window. It helps you to view the interaction in another window and do other tasks simultaneously. Click on the **Pop-out** button, as shown below.

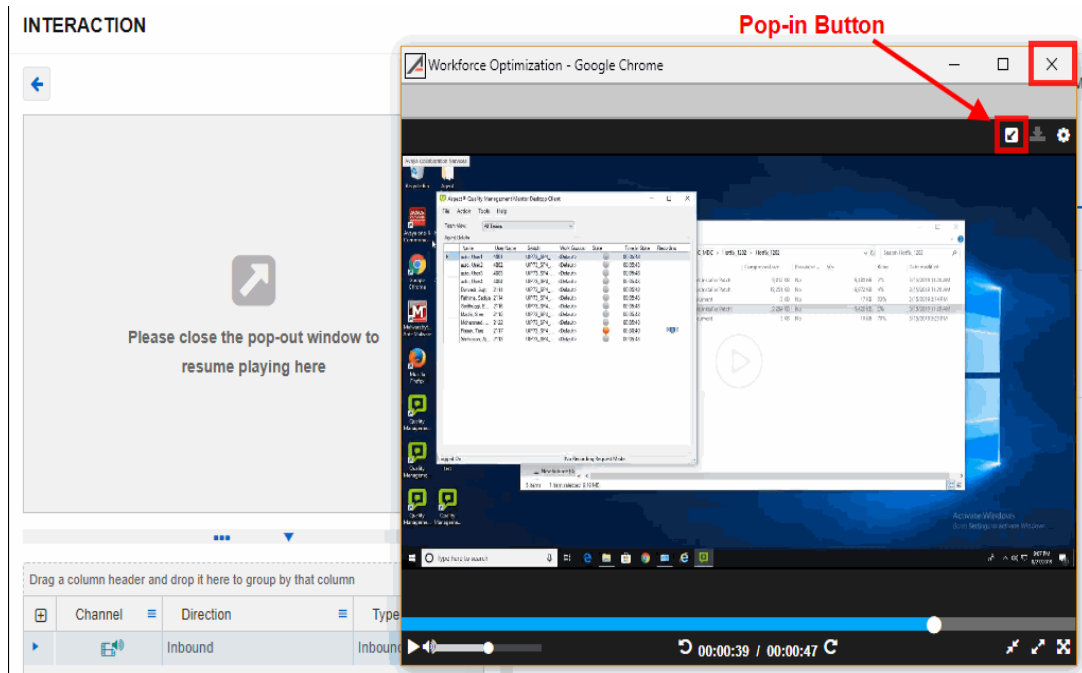


Note:

- The Pop-out option is only available for Voice and Screen Interactions.
- If you click on the Pop-out button while the video is in progress, the video will be paused at the same duration on the pop-out window.
- You can resize the Pop-out window based on your requirement. Hence if you resize down the Pop-out window to a certain size, the media player controls will overlap on each other.
- The Pop-out window which you closed earlier and in future when you click on the Pop-out button, the pop-out window size and position will be retained the same on the parent window.
- When you want to move away from the page or select another interaction in the playlist or related interactions grid, a warning message will be displayed to notify you that the pop-out window needs to be closed.
- The settings for media player controls such as volume, playback speed, duration, and so on, will be carried over to the next active media player.
- In a multi-monitor environment, the pop-out window can be moved to a different monitor from the parent window.
- When an annotation is created with pop-up media player open, clicking on play button in the corresponding annotation does not start playback. This is expected behavior as the browsers restrict auto play due to security until a manual action is done in the pop-up window.

- When an annotation is created with pop-up media player open, clicking on play button in the corresponding annotation does not start playback. This is expected behavior as the browsers restrict auto play due to security until a manual action is done in the pop-up media player.

The interaction will be opened in another window. Click on **Pop-in** button to resume playing on the Interaction window.



Note: When you click on the Pop-in button, the pop-out window will close, and the video will be paused on the Interaction window.

4.3 Viewing Search Results

To viewing the search results, refer [Pagination](#).

4.3.1 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.

- In the Search Results pane, in the left column, select the check boxes of the interactions that you want to open in the playlist.

SEARCH RESULTS: ALL

Search Type: New Search

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

<input type="checkbox"/>	Channel	Direction	Type	Date Time	Duration	Agent	Extension	Analytics	ANI	DNIS	Status	Hidden
<input type="checkbox"/>		None	Task	9/21/2022 2:34:58 PM	0:00:00	User3, Agent						
<input type="checkbox"/>		None	Task	9/21/2022 2:31:00 PM	0:00:00	Chidananda, Puttappa						
<input type="checkbox"/>		None	Task	9/21/2022 2:25:53 PM	0:00:00	Devi, Anu						
<input type="checkbox"/>		None	Task	9/21/2022 2:09:29 PM	0:00:00	User3, Agent						
<input type="checkbox"/>		None	Task	9/21/2022 2:07:52 PM	0:00:00	User3, Agent						
<input type="checkbox"/>		None	Task	9/21/2022 2:00:16 PM	0:00:00	User3, Agent						
<input type="checkbox"/>		None	Task	9/21/2022 12:00:58 PM	0:00:00	User3, Agent						
<input type="checkbox"/>		None	Task	9/21/2022 11:55:19 AM	0:00:00	User3, Agent						
<input type="checkbox"/>		None	Task	9/21/2022 11:44:42 AM	0:00:00	User3, Agent						
<input type="checkbox"/>		None	Task	9/20/2022 2:57:47 PM	0:00:00	Chidananda, Puttappa						
<input type="checkbox"/>		None	Task	9/20/2022 2:18:39 PM	0:00:00	Martinez, Chavez, Yessica						

1 - 11 of 11 Items | 1 to 11 of 11 records

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

- Click on **Create Playlist** button.

SEARCH RESULTS: ALL



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

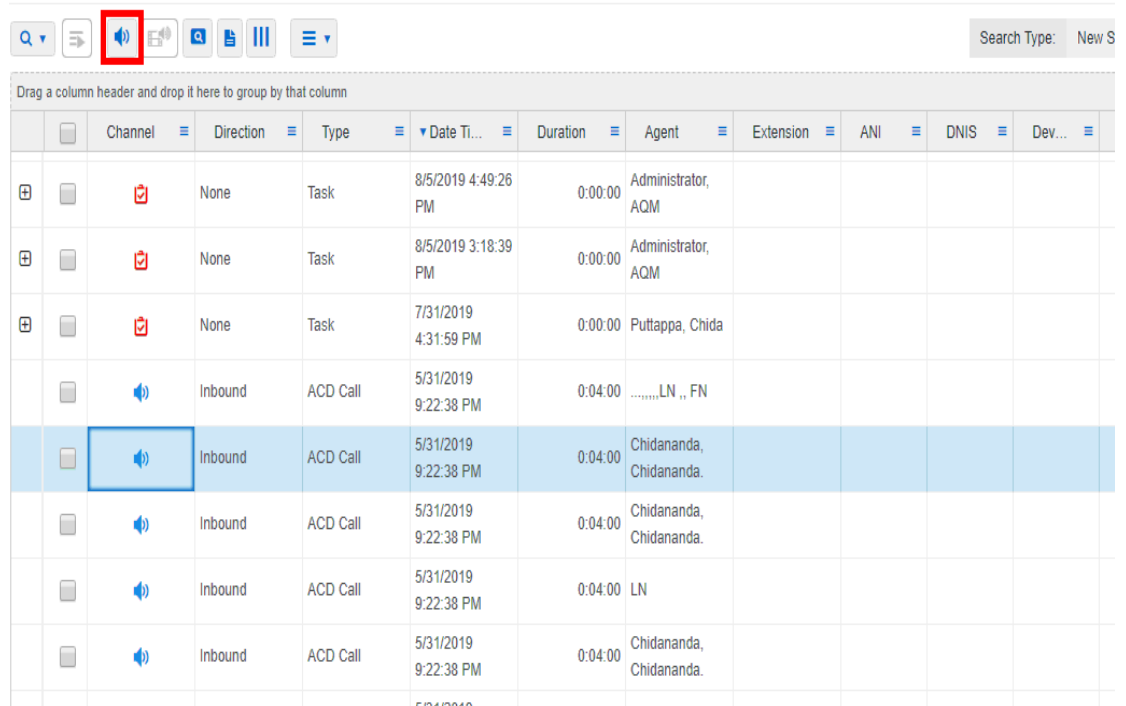
- Depending on the type of interaction that you want to view, select the following option.
 - [Quick View of Audio Interaction](#) in the Media Player

4.3.2 Quick View of Audio Interaction

If the user wants to listen to the recording 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.

SEARCH RESULTS: ALL



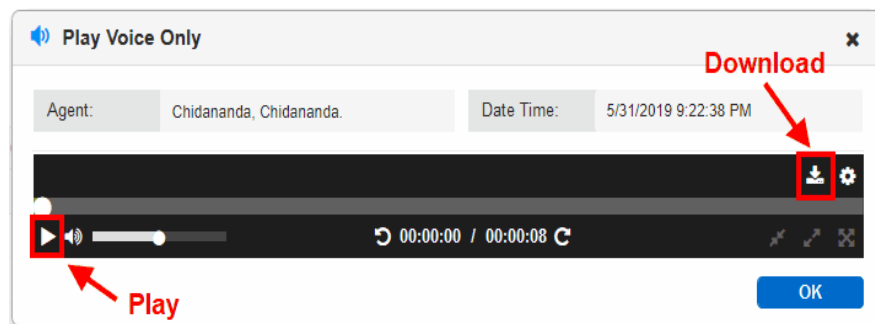
Drag a column header and drop it here to group by that column

	Channel	Direction	Type	Date Ti...	Duration	Agent	Extension	ANI	DNIS	Dev...
			None	Task	8/5/2019 4:49:26 PM	0:00:00	Administrator, AQM			
			None	Task	8/5/2019 3:18:39 PM	0:00:00	Administrator, AQM			
			None	Task	7/31/2019 4:31:59 PM	0:00:00	Puttappa, Chida			
			Inbound	ACD Call	5/31/2019 9:22:38 PM	0:04:00LN, FN			
			Inbound	ACD Call	5/31/2019 9:22:38 PM	0:04:00	Chidananda, Chidananda.			
			Inbound	ACD Call	5/31/2019 9:22:38 PM	0:04:00	Chidananda, Chidananda.			
			Inbound	ACD Call	5/31/2019 9:22:38 PM	0:04:00	LN			
			Inbound	ACD Call	5/31/2019 9:22:38 PM	0:04:00	Chidananda, Chidananda.			

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

2. Click on **Play** button to listen the audio or 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

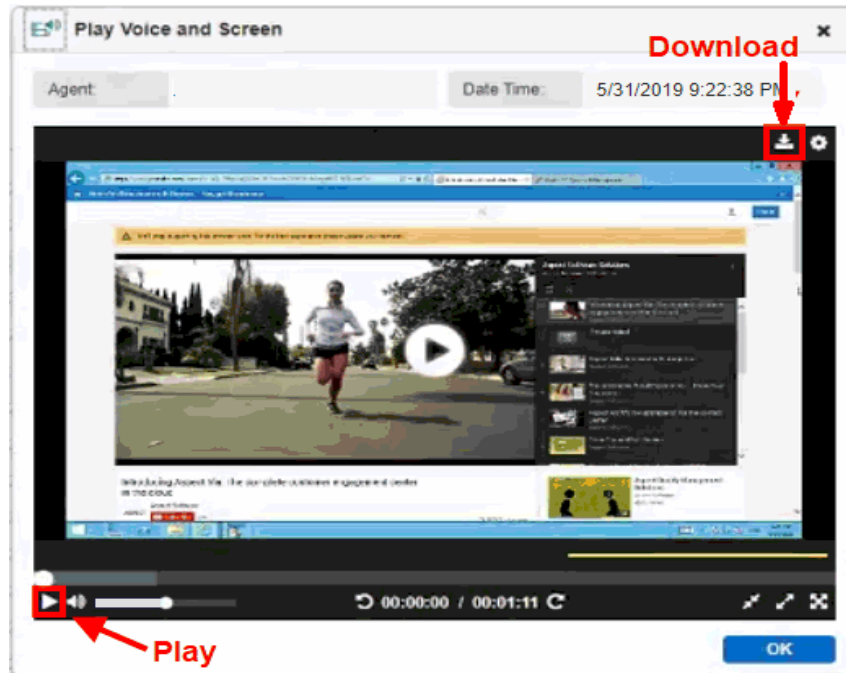


3. Click on **OK** button to close the dialog.

4.3.3 Quick View of Voice and Screen Interaction

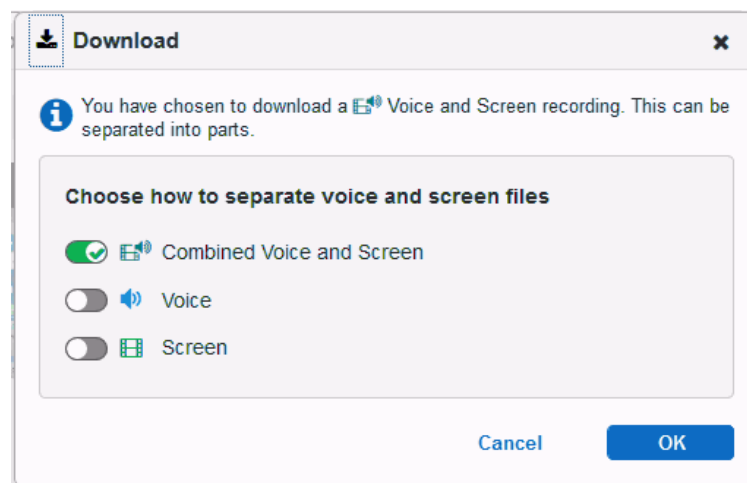
If the user wants to listen to the recording or download the recording, follow the steps below to listen a voice and screen interaction or download the audio interaction.

- 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.



- Click on **Play** button to view/listen and view the interaction
- 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.

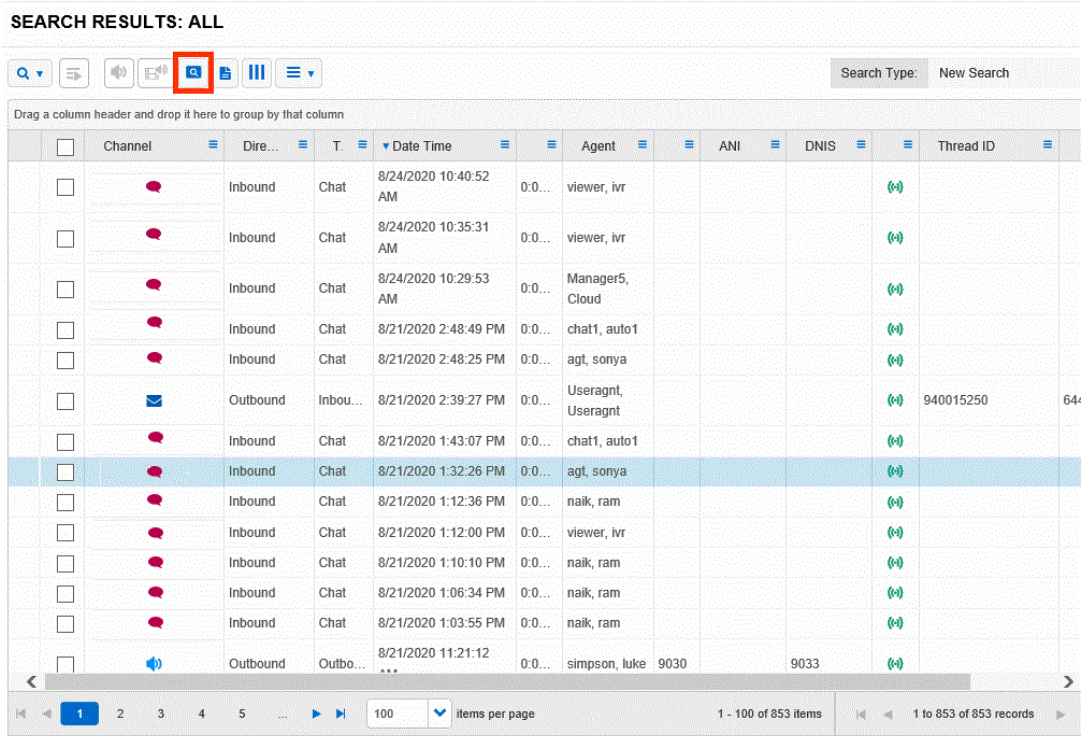
5. Click on **OK** button to complete the download.

4.3.3.1 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.

SEARCH RESULTS: ALL



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

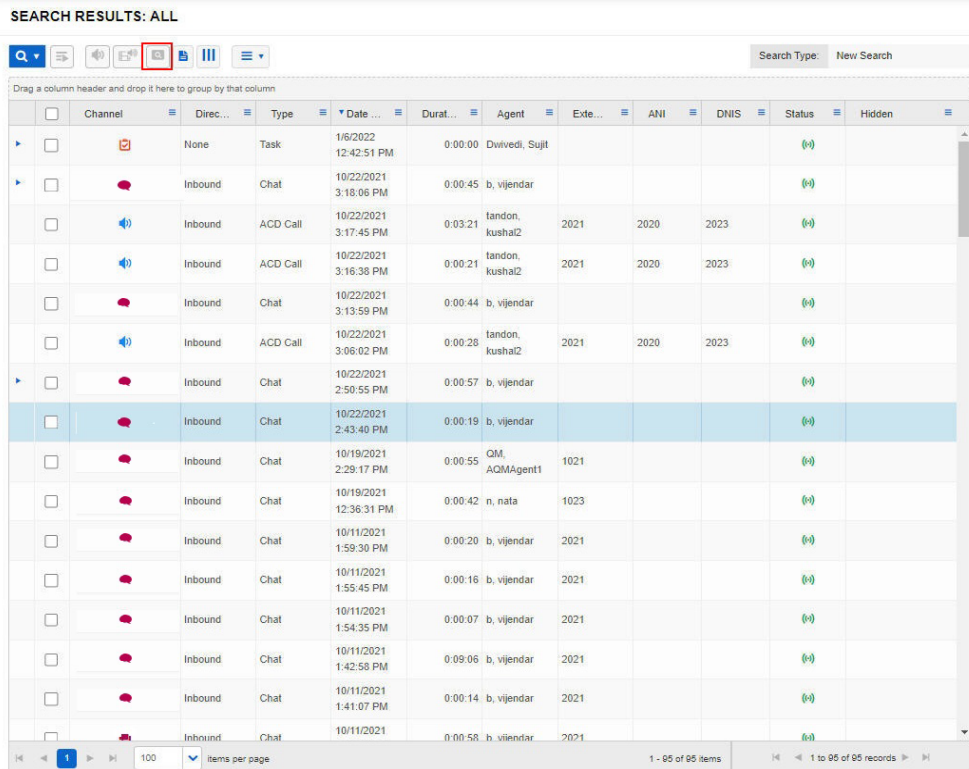
<input type="checkbox"/>	Channel	Dire...	T	Date Time	Agent	ANI	DNIS	Thread ID
<input type="checkbox"/>		Inbound	Chat	8/24/2020 10:40:52 AM	viewer,ivr			
<input type="checkbox"/>		Inbound	Chat	8/24/2020 10:35:31 AM	viewer,ivr			
<input type="checkbox"/>		Inbound	Chat	8/24/2020 10:29:53 AM	Manager5, Cloud			
<input type="checkbox"/>		Inbound	Chat	8/21/2020 2:48:49 PM	chat1, auto1			
<input type="checkbox"/>		Inbound	Chat	8/21/2020 2:48:25 PM	agt, sonya			
<input type="checkbox"/>		Outbound	Inbou...	8/21/2020 2:39:27 PM	Useragnt, Useragnt			940015250
<input type="checkbox"/>		Inbound	Chat	8/21/2020 1:43:07 PM	chat1, auto1			
<input type="checkbox"/>		Inbound	Chat	8/21/2020 1:32:26 PM	agt, sonya			
<input type="checkbox"/>		Inbound	Chat	8/21/2020 1:12:36 PM	naik, ram			
<input type="checkbox"/>		Inbound	Chat	8/21/2020 1:12:00 PM	viewer,ivr			
<input type="checkbox"/>		Inbound	Chat	8/21/2020 1:10:10 PM	naik, ram			
<input type="checkbox"/>		Inbound	Chat	8/21/2020 1:06:34 PM	naik, ram			
<input type="checkbox"/>		Inbound	Chat	8/21/2020 1:03:55 PM	naik, ram			
<input type="checkbox"/>		Outbound	Outbo...	8/21/2020 11:21:12	simpson, luke	9030	9033	

1 - 100 of 853 items | 1 to 853 of 853 records

Note: 1. After selecting the chat interaction, only the **View Transcript** button will be enabled.

2. The **View Transcript** button will be disabled, as shown below, if the selected chat interaction mediafilestatus is marked as deleted.

SEARCH RESULTS: ALL

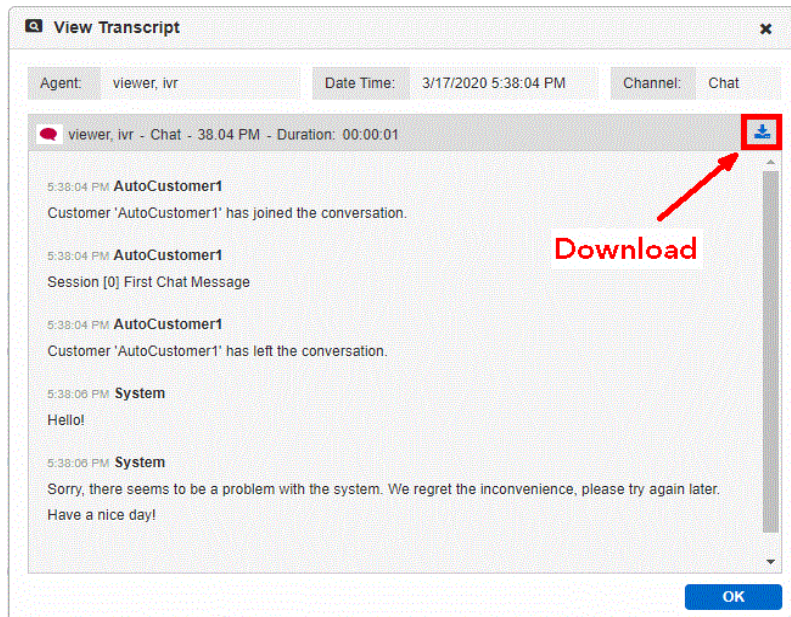


Drag a column header and drop it here to group by that column

<input type="checkbox"/>	Channel	Direc...	Type	* Date ...	Duraf...	Agent	Ext...	ANI	DNIS	Status	Hidden
<input type="checkbox"/>		None	Task	1/6/2022 12:42:51 PM	0:00:00	Dwivedi, Sujit					
<input type="checkbox"/>		Inbound	Chat	10/22/2021 3:18:06 PM	0:00:45	b, vijendar					
<input type="checkbox"/>		Inbound	ACD Call	10/22/2021 3:17:45 PM	0:03:21	tandon, kushal2	2021	2020	2023		
<input type="checkbox"/>		Inbound	ACD Call	10/22/2021 3:16:38 PM	0:00:21	tandon, kushal2	2021	2020	2023		
<input type="checkbox"/>		Inbound	Chat	10/22/2021 3:13:59 PM	0:00:44	b, vijendar					
<input type="checkbox"/>		Inbound	ACD Call	10/22/2021 3:06:02 PM	0:00:28	tandon, kushal2	2021	2020	2023		
<input type="checkbox"/>		Inbound	Chat	10/22/2021 2:50:55 PM	0:00:57	b, vijendar					
<input type="checkbox"/>		Inbound	Chat	10/22/2021 2:43:40 PM	0:00:19	b, vijendar					
<input type="checkbox"/>		Inbound	Chat	10/19/2021 2:29:17 PM	0:00:55	QM, AQMAgent1	1021				
<input type="checkbox"/>		Inbound	Chat	10/19/2021 12:36:31 PM	0:00:42	n, nata	1023				
<input type="checkbox"/>		Inbound	Chat	10/11/2021 1:59:30 PM	0:00:20	b, vijendar	2021				
<input type="checkbox"/>		Inbound	Chat	10/11/2021 1:55:45 PM	0:00:16	b, vijendar	2021				
<input type="checkbox"/>		Inbound	Chat	10/11/2021 1:54:35 PM	0:00:07	b, vijendar	2021				
<input type="checkbox"/>		Inbound	Chat	10/11/2021 1:42:58 PM	0:09:06	b, vijendar	2021				
<input type="checkbox"/>		Inbound	Chat	10/11/2021 1:41:07 PM	0:00:14	b, vijendar	2021				
<input type="checkbox"/>		Inbound	Chat	10/11/2021	0:00:58	b, vijendar	2021				

1 - 95 of 95 items | 1 to 95 of 95 records

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.

4.3.4 View Interaction Details

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.

SEARCH RESULTS: ALL

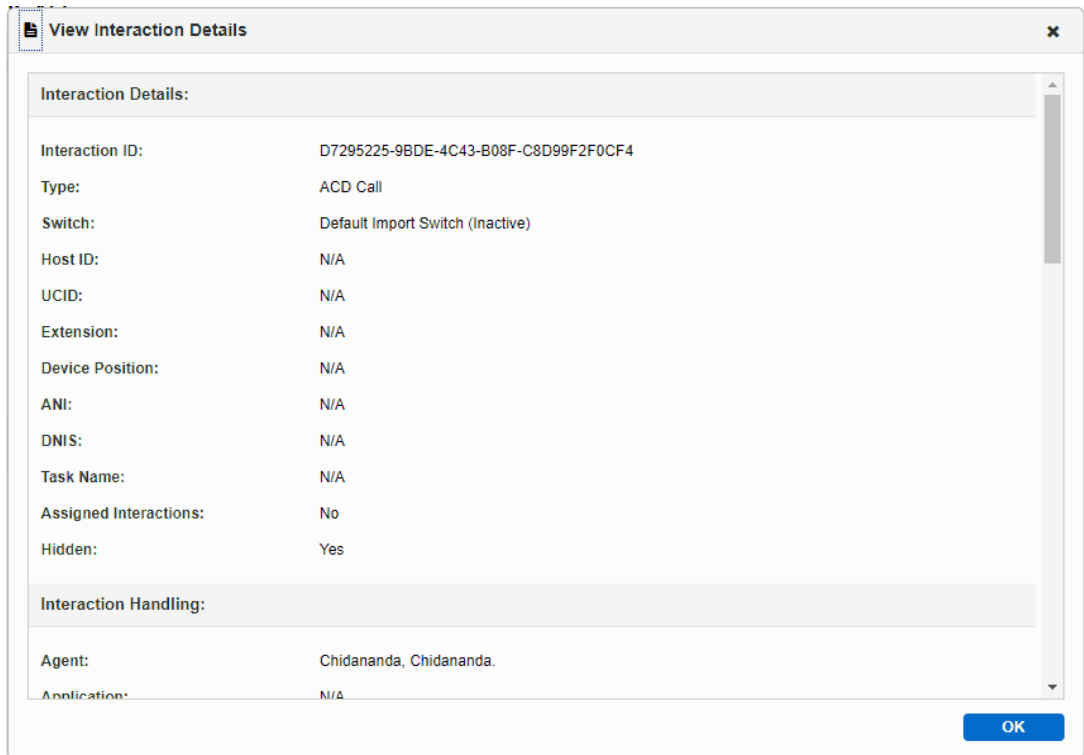
Search Type: New Search

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

<input type="checkbox"/>	Channel	Direction	Type	Date Time	Duration	Agent	Extension	ANI
<input type="checkbox"/>		Inbound	Inbound Direct Call	7/11/2022 3:13:41 PM	0:00:07	Godmp3, Bhagyamp3	12321	123
<input type="checkbox"/>		Inbound	Inbound Direct Call	3/5/2018 1:04:12 AM	0:01:21	Dwivedy, Abhay	916302822579	PLBK2100
<input type="checkbox"/>		Inbound	ACD Call	3/4/2018 11:50:33 PM	0:00:08	Godhuggi, Bhagyashree	916302822824	68887
<input type="checkbox"/>		Inbound	ACD Call	3/4/2018 11:44:20 PM	0:00:12	Godhuggi, Bhagyashree	916302822824	68887
<input checked="" type="checkbox"/>		Inbound	ACD Call	3/4/2018 11:39:18 PM	0:00:29	Godhuggi, Bhagyashree	916302822824	68887
<input type="checkbox"/>		Inbound	ACD Call	3/2/2018 2:00:05 AM	0:00:21	Dwivedy, Abhay	916302822824	68887
<input type="checkbox"/>		Inbound	Inbound Direct Call	11/16/2016 3:28:25 AM	0:00:14	agent30, agent30	1009	Unknown
<input type="checkbox"/>		Inbound	Inbound Direct Call	11/16/2016 3:24:56 AM	0:03:22	agent30, agent30	1009	Unknown
<input type="checkbox"/>		Inbound	Inbound Direct Call	11/16/2016 3:21:51 AM	0:00:56	agent30, agent30	1009	1004
<input type="checkbox"/>		Inbound	Inbound Direct Call	9/23/2016 12:14:11 AM	0:00:15	SCCP 1009, Cisco 7931	1009	2804
<input type="checkbox"/>		Outbound	Outbound Direct Call	9/23/2016 12:11:34 AM	0:00:19	SCCP 1004, Cisco 7931	1004	1004
<input type="checkbox"/>		Inbound	Inbound Direct Call	9/23/2016 12:10:59 AM	0:01:13	SCCP 1004, Cisco 7931	1004	2804
<input type="checkbox"/>		Outbound	Outbound Direct Call	9/23/2016 12:06:15 AM	0:00:26	SCCP 1009, Cisco 7931	1009	1009
<input type="checkbox"/>		Inbound	Inbound Direct Call	9/23/2016 12:05:34 AM	0:01:30	SCCP 1009, Cisco 7931	1009	2804
<input type="checkbox"/>		Outbound	Outbound Direct Call	9/23/2016 12:03:47 AM	0:00:18	SCCP 1004, Cisco 7931	1004	1004
<input type="checkbox"/>		Outbound	Outbound Direct Call	9/23/2016 12:03:16 AM	0:01:08	SCCP 1004, Cisco 7931	1004	1004
<input type="checkbox"/>		Outbound	Outbound Direct Call	9/22/2016 11:51:51 PM	0:00:22	SCCP 1004, Cisco 7931	1004	1004
<input type="checkbox"/>		Inbound	Inbound Direct Call	9/22/2016 11:51:18 PM	0:01:18	SCCP 1004, Cisco 7931	1004	1004
<input type="checkbox"/>		Outbound	Outbound Direct Call	9/22/2016 11:49:00 PM	0:00:10	SCCP 1004, Cisco 7931	1004	1004

1 - 100 of 594 Items 1 to 594 of 594 records


- 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.

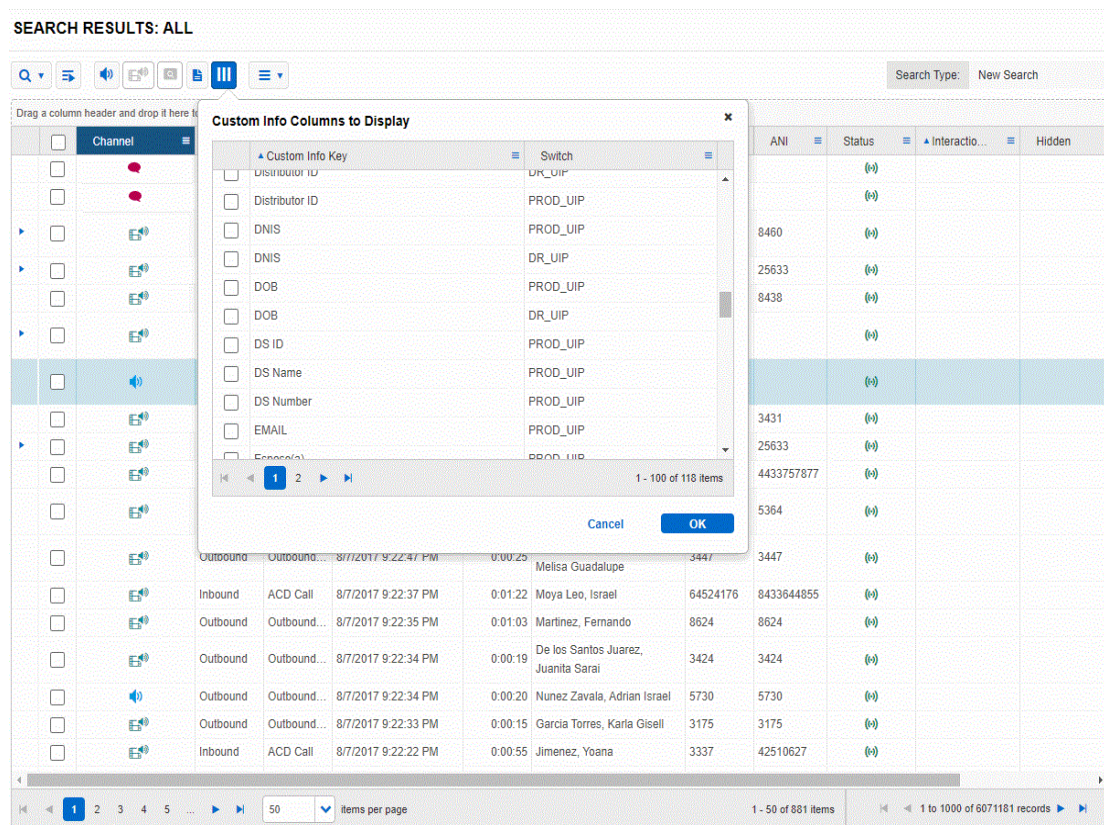


- Click **OK** button to close the View Interaction Details window.

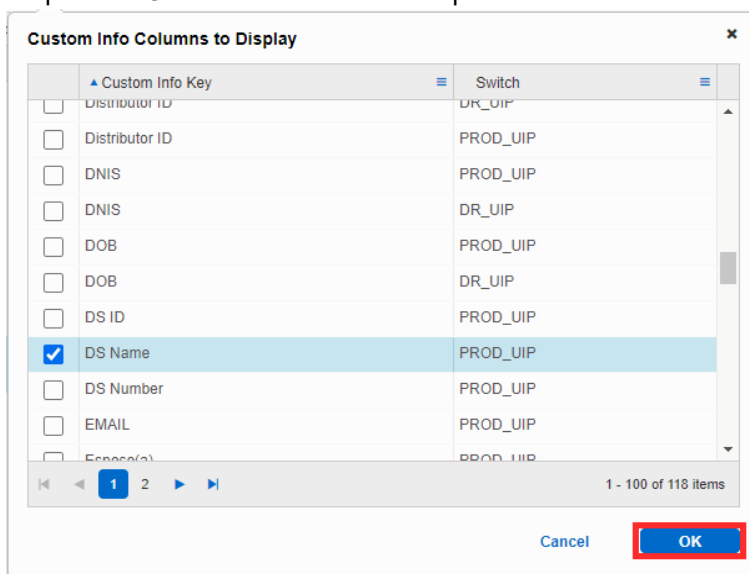
4.3.5 Custom Info Column to Display

Follow the steps below to view one Custom Info column or multiple Custom Info columns in the Search Results grid.

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.
Example: Disposition Code is taken as an example.



Note: Select multiple check boxes 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.

SEARCH RESULTS: ALL

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

<input type="checkbox"/>	Channel	Date Time	Agent	ANI	Status	Interactio...	Hidden	DS ID
<input type="checkbox"/>		8/4/2017 8:32:09 PM	Mata Barajas, Benigno	3412				
<input type="checkbox"/>		8/4/2017 8:19:36 PM	Burgueño, Christopher	3401				
<input type="checkbox"/>		8/4/2017 6:20:29 AM	Gonzalez Mendez, Karla Estefania	5166885062				
<input type="checkbox"/>		7/29/2017 11:09:45 PM	Morales Herrera, Ana	2144584397				
<input type="checkbox"/>		7/18/2017 3:07:35 AM	Cruz, Melvin	7575508598				
<input type="checkbox"/>		6/16/2017 4:33:52 AM	Wells, Sherry	8065703590				
<input type="checkbox"/>		5/17/2017 5:10:08 AM	Lopez Jacquez, Luis Miguel	9792159666				
<input type="checkbox"/>		5/3/2017 4:28:50 AM	Ramirez, Raul	6317721856				
<input type="checkbox"/>		4/29/2017 10:14:13 PM	SOLIS JIMENEZ, MARIA ISABEL	64524134				
<input type="checkbox"/>		3/31/2017 10:03:49 PM	Martinez Lopez, Luis Enrique	8065350875				
<input type="checkbox"/>		2/19/2017 2:24:04 AM	Tamayo Carbajal, Cristina Lizette	7143662600				

1 100 items per page 1 - 11 of 11 items 1 to 11 of 11 records

4.3.6 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.

4.3.6.1 Show or Hide Interaction

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

4.3.6.1.1 Hide Interaction

The user wants to hide an interaction from others, if 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.

SEARCH RESULTS: ALL

Search Type: New Search

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

<input type="checkbox"/>	Channel	Direction	Type	Date Time	Duration	Agent	Extension	ANI
<input type="checkbox"/>	Inbound	Inbound	Inbound Direct Call	7/11/2022 3:13:41 PM	0:00:07	Godimp3, Bhagyamp3	12321	123
<input checked="" type="checkbox"/>	Inbound	Inbound	Inbound Direct Call	3/5/2018 1:04:12 AM	0:01:21	Dwivedy, Abhay	916302822579	PLBK2100
<input type="checkbox"/>	Inbound	Inbound	ACD Call	3/4/2018 11:50:33 PM	0:00:08	Godihuggi, Bhagyashree	916302822824	68687
<input type="checkbox"/>	Inbound	Inbound	ACD Call	3/4/2018 11:44:20 PM	0:00:12	Godihuggi, Bhagyashree	916302822824	68687
<input type="checkbox"/>	Inbound	Inbound	ACD Call	3/4/2018 11:39:18 PM	0:00:29	Godihuggi, Bhagyashree	916302822824	68687
<input type="checkbox"/>	Inbound	Inbound	ACD Call	3/2/2018 2:00:05 AM	0:00:21	Dwivedy, Abhay	916302822824	68687
<input type="checkbox"/>	Inbound	Inbound	Inbound Direct Call	11/16/2016 3:28:25 AM	0:00:14	agent30, agent30	1009	Unknown
<input type="checkbox"/>	Inbound	Inbound	Inbound Direct Call	11/16/2016 3:24:56 AM	0:03:22	agent30, agent30	1009	Unknown
<input type="checkbox"/>	Inbound	Inbound	Inbound Direct Call	11/16/2016 3:21:51 AM	0:00:56	agent30, agent30	1009	1004
<input type="checkbox"/>	Inbound	Inbound	Inbound Direct Call	9/23/2016 12:14:11 AM	0:00:15	SCCP 1009, Cisco 7931	1009	2804
<input type="checkbox"/>	Outbound	Outbound	Outbound Direct Call	9/23/2016 12:11:34 AM	0:00:19	SCCP 1004, Cisco 7931	1004	1004
<input type="checkbox"/>	Inbound	Inbound	Inbound Direct Call	9/23/2016 12:10:59 AM	0:01:13	SCCP 1004, Cisco 7931	1004	2804
<input type="checkbox"/>	Outbound	Outbound	Outbound Direct Call	9/23/2016 12:06:15 AM	0:00:26	SCCP 1009, Cisco 7931	1009	1009
<input type="checkbox"/>	Inbound	Inbound	Inbound Direct Call	9/23/2016 12:05:34 AM	0:01:30	SCCP 1009, Cisco 7931	1009	2804
<input type="checkbox"/>	Outbound	Outbound	Outbound Direct Call	9/23/2016 12:03:47 AM	0:00:18	SCCP 1004, Cisco 7931	1004	1004
<input type="checkbox"/>	Outbound	Outbound	Outbound Direct Call	9/23/2016 12:03:16 AM	0:01:08	SCCP 1004, Cisco 7931	1004	1004
<input type="checkbox"/>	Outbound	Outbound	Outbound Direct Call	9/22/2016 11:51:51 PM	0:00:22	SCCP 1004, Cisco 7931	1004	1004
<input type="checkbox"/>	Inbound	Inbound	Inbound Direct Call	9/22/2016 11:51:16 PM	0:01:18	SCCP 1004, Cisco 7931	1004	
<input type="checkbox"/>	Outbound	Outbound	Outbound Direct Call	9/22/2016 11:49:00 PM	0:00:10	SCCP 1004, Cisco 7931	1004	1004

1 - 100 of 594 items 1 to 594 of 594 records

Note: Select multiple check boxes to hide multiple interactions.

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

SEARCH RESULTS: ALL

Hide Interactions

Show Interactions

Assign Interactions

Export Media

Collapse All

Save as my default view

Delete

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

SEARCH RESULTS: ALL

Search Type: New Search

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

	Channel	Direction	Type	Date Time	Hidden	Duration	Agent	Extension
<input type="checkbox"/>		Inbound	ACD Call	7/11/2022 3:13:41 PM		0:00:07	Godimp3	
<input type="checkbox"/>		Inbound	ACD Call	7/11/2022 3:13:41 PM		0:00:07	Godimp3	
<input type="checkbox"/>		Inbound	ACD Call	7/11/2022 3:13:41 PM		0:00:07	Godimp3	
<input type="checkbox"/>		Inbound	ACD Call	7/11/2022 3:13:41 PM		0:00:07	Godimp3	
<input type="checkbox"/>		Inbound	ACD Call	7/11/2022 3:13:41 PM		0:00:07	Godimp3	
<input type="checkbox"/>		Inbound	Inbound Direct Call	7/11/2022 3:13:41 PM		0:00:07	Godimp3, Bhagyamp3	12321
<input type="checkbox"/>		Outbound	Outbound Dialer Call	7/11/2022 3:13:41 PM		0:00:07	Godimp3, Bhagyamp3	
<input type="checkbox"/>		Inbound	Inbound Direct Call	7/11/2022 3:13:41 PM		0:00:07	Godimp3, Bhagyamp3	12321
<input type="checkbox"/>		Inbound	Inbound Direct Call	7/11/2022 3:13:41 PM		0:00:07	Godimp3, Bhagyamp3	12321
<input type="checkbox"/>		Inbound	Inbound Direct Call	7/11/2022 3:13:41 PM		0:00:07	Godimp3, Bhagyamp3	12321
<input type="checkbox"/>		Inbound	Inbound Direct Call	7/11/2022 3:13:41 PM		0:00:07	Godimp3, Bhagyamp3	12321
<input type="checkbox"/>		Inbound	Inbound Direct Call	7/11/2022 3:13:41 PM		0:00:07	Godimp3, Bhagyamp3	12321
<input checked="" type="checkbox"/>		Inbound	Inbound Direct Call	3/5/2018 1:04:12 AM	<input checked="" type="checkbox"/>	0:01:21	Dwivedy, Abhay	916302822579
<input checked="" type="checkbox"/>		Inbound	ACD Call	3/4/2018 11:50:33 PM		0:00:08	Godhuggi, Bhagyashree	916302822824
<input checked="" type="checkbox"/>		Inbound	ACD Call	3/4/2018 11:44:20 PM		0:00:12	Godhuggi, Bhagyashree	916302822824

100 Items per page | 1 - 100 of 594 items | 1 to 594 of 594 records

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.

4.3.6.1.2 Show Interaction

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

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

SEARCH RESULTS: ALL

Q ➔ 🔊 🗑️ 📄 ☰ ☰

Search Type: New Search

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

<input type="checkbox"/>	Channel	Direction	Type	Date Time	Hidden	Duration	Agent	Extension
<input type="checkbox"/>	🔊	Inbound	ACD Call	7/11/2022 3:13:41 PM		0:00:07	Godimp3	
<input type="checkbox"/>	🔊	Inbound	ACD Call	7/11/2022 3:13:41 PM		0:00:07	Godimp3	
<input type="checkbox"/>	🔊	Inbound	ACD Call	7/11/2022 3:13:41 PM		0:00:07	Godimp3	
<input type="checkbox"/>	🔊	Inbound	ACD Call	7/11/2022 3:13:41 PM		0:00:07	Godimp3	
<input type="checkbox"/>	🔊	Inbound	ACD Call	7/11/2022 3:13:41 PM		0:00:07	Godimp3	
<input type="checkbox"/>	🔊	Inbound	Inbound Direct Call	7/11/2022 3:13:41 PM		0:00:07	Godimp3, Bhagyamp3	12321
<input type="checkbox"/>	🔊	Outbound	Outbound Dialer Call	7/11/2022 3:13:41 PM		0:00:07	Godimp3, Bhagyamp3	
<input type="checkbox"/>	🔊	Inbound	Inbound Direct Call	7/11/2022 3:13:41 PM		0:00:07	Godimp3, Bhagyamp3	12321
<input type="checkbox"/>	🔊	Inbound	Inbound Direct Call	7/11/2022 3:13:41 PM		0:00:07	Godimp3, Bhagyamp3	12321
<input type="checkbox"/>	🔊	Inbound	Inbound Direct Call	7/11/2022 3:13:41 PM		0:00:07	Godimp3, Bhagyamp3	12321
<input type="checkbox"/>	🔊	Inbound	Inbound Direct Call	7/11/2022 3:13:41 PM		0:00:07	Godimp3, Bhagyamp3	12321
<input type="checkbox"/>	🔊	Inbound	Inbound Direct Call	7/11/2022 3:13:41 PM		0:00:07	Godimp3, Bhagyamp3	12321
<input checked="" type="checkbox"/>	🔊	Inbound	Inbound Direct Call	3/5/2018 1:04:12 AM	<input checked="" type="checkbox"/>	0:01:21	Dwivedy, Abhay	916302822579
<input type="checkbox"/>	🔊	Inbound	ACD Call	3/4/2018 11:50:33 PM		0:00:08	Godihuggi, Bhagyashree	916302822824
<input type="checkbox"/>	🔊	Inbound	ACD Call	3/4/2018 11:44:20 PM		0:00:12	Godihuggi, Bhagyashree	916302822824

1 2 3 4 5 ... ▶ ▶

100 items per page

1 - 100 of 594 items

1 to 594 of 594 records

Note:

- The interaction is marked hidden under the **Hidden** column
- Select multiple check boxes to “show” multiple hidden interactions.

2. Click on the button and select **Show Interactions**.

SEARCH RESULTS: ALL

Q ➔ 🔊 🗑️ 📄 ☰ ☰

Drag a column head

<input type="checkbox"/>	Ch
<input type="checkbox"/>	
<input type="checkbox"/>	
<input checked="" type="checkbox"/>	

Hide Interactions

Show Interactions

Assign Interactions

Export Media

Collapse All

Save as my default view

Delete

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

SEARCH RESULTS: ALL

Search Type: New Search

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

	Channel	Direction	Type	Date Time	Hidden	Duration	Agent	Extension
<input type="checkbox"/>		Inbound	ACD Call	7/11/2022 3:13:41 PM		0:00:07	Godimp3	
<input type="checkbox"/>		Inbound	ACD Call	7/11/2022 3:13:41 PM		0:00:07	Godimp3	
<input type="checkbox"/>		Inbound	ACD Call	7/11/2022 3:13:41 PM		0:00:07	Godimp3	
<input type="checkbox"/>		Inbound	ACD Call	7/11/2022 3:13:41 PM		0:00:07	Godimp3	
<input type="checkbox"/>		Inbound	ACD Call	7/11/2022 3:13:41 PM		0:00:07	Godimp3	
<input type="checkbox"/>		Inbound	Inbound Direct Call	7/11/2022 3:13:41 PM		0:00:07	Godimp3, Bhagyamp3	12321
<input type="checkbox"/>		Outbound	Outbound Dialer Call	7/11/2022 3:13:41 PM		0:00:07	Godimp3, Bhagyamp3	
<input type="checkbox"/>		Inbound	Inbound Direct Call	7/11/2022 3:13:41 PM		0:00:07	Godimp3, Bhagyamp3	12321
<input type="checkbox"/>		Inbound	Inbound Direct Call	7/11/2022 3:13:41 PM		0:00:07	Godimp3, Bhagyamp3	12321
<input type="checkbox"/>		Inbound	Inbound Direct Call	7/11/2022 3:13:41 PM		0:00:07	Godimp3, Bhagyamp3	12321
<input type="checkbox"/>		Inbound	Inbound Direct Call	7/11/2022 3:13:41 PM		0:00:07	Godimp3, Bhagyamp3	12321
<input type="checkbox"/>		Inbound	Inbound Direct Call	7/11/2022 3:13:41 PM		0:00:07	Godimp3, Bhagyamp3	12321
<input type="checkbox"/>		Inbound	Inbound Direct Call	7/11/2022 3:13:41 PM		0:00:07	Godimp3, Bhagyamp3	12321
<input checked="" type="checkbox"/>		Inbound	Inbound Direct Call	3/5/2018 1:04:12 AM		0:01:21	Dwivedy, Abhay	916302822579
<input type="checkbox"/>		Inbound	ACD Call	3/4/2018 11:50:33 PM		0:00:08	Godihuggi, Bhagyashree	916302822824
<input type="checkbox"/>		Inbound	ACD Call	3/4/2018 11:44:20 PM		0:00:12	Godihuggi, Bhagyashree	916302822824

1 - 100 of 594 items | 1 to 594 of 594 records

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.

4.3.7 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.

SEARCH RESULTS: ALL

The screenshot shows a search results page with a table of results. The table has columns for Channel, Direction, Type, Date Time, Duration, Agent, Extension, ANI, Status, and Hidden. Below the main table, there are nested grids for quality scores and agent details. The quality score grid has columns for Quality Score (%), Point Score, Pass/Fail, Status, Template Name, Created By, and Created Date Time. The agent details grid has columns for Quality Score (%), Point Score, Pass/Fail, Status, Template Name, Created By, and Created Date Time. The interface includes a search bar, a search type dropdown, and a 'Collapse All' button in the top right corner.

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

SEARCH RESULTS: ALL

This screenshot shows the same search results page as above, but with the 'Collapse All' button in the top right corner highlighted with a red box. The button is labeled 'Collapse All' and is part of a menu that also includes options like 'Hide Interactions', 'Show Interactions', 'Assign Interactions', 'Export Media', 'Save as my default view', and 'Delete'.

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

SEARCH RESULTS: ALL

Search Type: New Search

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

	Channel	Dir...	Type	Date Time	Du...	Agent	Ex...	ANI	Status	Interactio...	Hidden
<input type="checkbox"/>		Inbound	Chat	8/20/2020 12:17:49 PM	0:02:47	1, 1			(+)		
<input type="checkbox"/>		Inbound	Chat	8/20/2020 12:17:49 PM	0:02:47	1, 1			(+)		
<input checked="" type="checkbox"/>		Outbound	Outbound...	8/7/2017 9:24:13 PM	0:00:22	Cuellar Ocegueda, Luis Enrique	8460	8460	(+)		
<input checked="" type="checkbox"/>		Outbound	Outbound...	8/7/2017 9:24:07 PM	0:00:07	Del Real, Vanessa	25633	25633	(+)		
<input type="checkbox"/>		Outbound	Outbound...	8/7/2017 9:23:58 PM	0:00:19	Gomez Carcoba, Paola Natali	8438	8438	(+)		
<input checked="" type="checkbox"/>		Inbound	ACD Call	8/7/2017 9:23:52 PM	0:00:21	Perez Ramirez, Sara Vanessa	4145		(+)		
<input type="checkbox"/>		Inbound	ACD Call	8/7/2017 9:23:31 PM	0:00:05	Hernandez Espinosa, Carlos Alberto	3157		(+)		
<input type="checkbox"/>		Outbound	Outbound...	8/7/2017 9:23:19 PM	0:00:12	Ortega Ortega, Diana	3431	3431	(+)		
<input checked="" type="checkbox"/>		Outbound	Outbound...	8/7/2017 9:23:01 PM	0:00:07	Del Real, Vanessa	25633	25633	(+)		
<input type="checkbox"/>		Inbound	ACD Call	8/7/2017 9:23:00 PM	0:00:55	Portillo, Cristian	22772	4433757877	(+)		
<input type="checkbox"/>		Outbound	Outbound...	8/7/2017 9:22:58 PM	0:00:15	Lasso Torres, Evelyn del Carmen	5364	5364	(+)		
<input type="checkbox"/>		Outbound	Outbound...	8/7/2017 9:22:47 PM	0:00:25	Sotomayor Castaneda, Melisa Guadalupe	3447	3447	(+)		
<input type="checkbox"/>		Inbound	ACD Call	8/7/2017 9:22:37 PM	0:01:22	Moya Leo, Israel	64524176	8433644855	(+)		
<input type="checkbox"/>		Outbound	Outbound...	8/7/2017 9:22:35 PM	0:01:03	Martinez, Fernando	8624	8624	(+)		
<input type="checkbox"/>		Outbound	Outbound...	8/7/2017 9:22:34 PM	0:00:19	De los Santos Juarez, Juanita Sarai	3424	3424	(+)		
<input type="checkbox"/>		Outbound	Outbound...	8/7/2017 9:22:34 PM	0:00:20	Nunez Zavala, Adrian Israel	5730	5730	(+)		
<input type="checkbox"/>		Outbound	Outbound...	8/7/2017 9:22:33 PM	0:00:15	Garcia Torres, Karla Gisell	3175	3175	(+)		
<input type="checkbox"/>		Inbound	ACD Call	8/7/2017 9:22:22 PM	0:00:55	Jimenez, Yoana	3337	42510627	(+)		

1 2 3 4 5 ... 50 items per page 1 - 50 of 881 items 1 to 1000 of 6071181 records

4.3.8 Delete Interactions

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

Note: By default, the administrator has access to delete one or multiple interactions.

- To delete multiple interactions, click on the **check boxes** for the interactions which need to delete, as shown below.

SEARCH RESULTS: ALL

Search Type: New Search

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

<input type="checkbox"/>	Channel	Dir...	Type	Date Time	Du...	Agent	Ex...	ANI	Status	Int
<input type="checkbox"/>			Inbound	Chat	8/20/2020 12:17:49 PM	0:02:47	1, 1		(+)	
<input type="checkbox"/>			Inbound	Chat	8/20/2020 12:17:49 PM	0:02:47	1, 1		(+)	
<input type="checkbox"/>			Outbound	Outbound...	8/7/2017 9:24:13 PM	0:00:22	Cuellar Ocegueda, Luis Enrique	8460	8460	(+)
<input checked="" type="checkbox"/>			Outbound	Outbound...	8/7/2017 9:24:07 PM	0:00:07	Del Real, Vanessa	25633	25633	(+)
<input checked="" type="checkbox"/>			Outbound	Outbound...	8/7/2017 9:23:58 PM	0:00:19	Gomez Carcoba, Paola Natali	8438	8438	(+)
<input checked="" type="checkbox"/>			Inbound	ACD Call	8/7/2017 9:23:52 PM	0:00:21	Perez Ramirez, Sara Vanessa	4145		(+)
<input checked="" type="checkbox"/>			Inbound	ACD Call	8/7/2017 9:23:31 PM	0:00:05	Hernandez Espinosa, Carlos Alberto	3157		(+)
<input checked="" type="checkbox"/>			Outbound	Outbound...	8/7/2017 9:23:19 PM	0:00:12	Ortega Ortega, Diana	3431	3431	(+)
<input type="checkbox"/>			Outbound	Outbound...	8/7/2017 9:23:01 PM	0:00:07	Del Real, Vanessa	25633	25633	(+)
<input type="checkbox"/>			Inbound	ACD Call	8/7/2017 9:23:00 PM	0:00:55	Portillo, Cristian	22772	4433757877	(+)
<input type="checkbox"/>			Outbound	Outbound...	8/7/2017 9:22:58 PM	0:00:15	Lasso Torres, Evelyn del Carmen	5364	5364	(+)
<input type="checkbox"/>			Outbound	Outbound...	8/7/2017 9:22:47 PM	0:00:25	Sotomayor Castaneda, Melisa Guadalupe	3447	3447	(+)
<input type="checkbox"/>			Inbound	ACD Call	8/7/2017 9:22:37 PM	0:01:22	Moya Leo, Israel	64524176	8433644855	(+)
<input type="checkbox"/>			Outbound	Outbound...	8/7/2017 9:22:35 PM	0:01:03	Martinez, Fernando	8624	8624	(+)

1 - 50 of 881 items | 1 to 1000 of 6071181 records

- Click on **☰** button and select **Delete** as shown below.

SEARCH RESULTS: ALL

Hide Interactions

Show Interactions

Assign Interactions

Export Media

Collapse All

Save as my default view


Delete

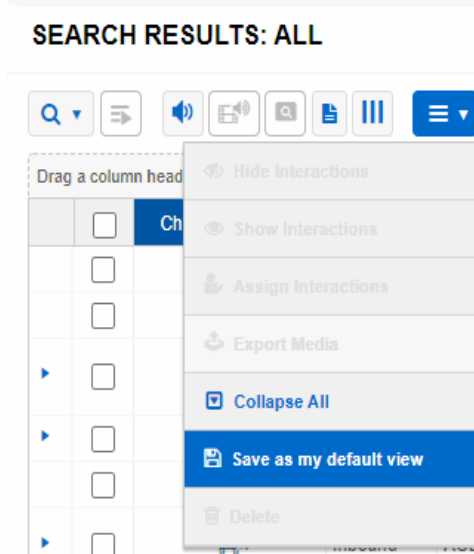
<input type="checkbox"/>	Ch	pe	Date Time	Du...	Agent
<input type="checkbox"/>			8/20/2020 12:17:49 PM	0:02:47	1, 1
<input type="checkbox"/>			8/20/2020 12:17:49 PM	0:02:47	1, 1
<input type="checkbox"/>		ound...	8/7/2017 9:24:13 PM	0:00:22	Cuellar Ocegueda, Luis Enrique
<input checked="" type="checkbox"/>		ound...	8/7/2017 9:24:07 PM	0:00:07	Del Real, Vanessa
<input checked="" type="checkbox"/>		ound...	8/7/2017 9:23:58 PM	0:00:19	Gomez Carcoba, Paola Natali
<input checked="" type="checkbox"/>		ound... ACD Call	8/7/2017 9:23:52 PM	0:00:21	Perez Ramirez, Sara Vanessa
<input checked="" type="checkbox"/>		Inbound ACD Call	8/7/2017 9:23:31 PM	0:00:05	Hernandez Espinosa, Carlos Alberto
<input checked="" type="checkbox"/>		Outbound	8/7/2017 9:23:19 PM	0:00:12	Ortega Ortega, Diana

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

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

4.3.9 Save as Default View

In earlier version of Alvaria Quality, when user customizes the grid to sorting, adding filters, grouping, these will be stored in the browser cache and if the user uses a different machine to login to Workforce Engagement Management, they will not see the customized grid. If they have customized the grid and they want to save that as a default grid view, then click on  button and select **Save as my default view** to save the customization in the database. When the user uses a different machine to login to Workforce Engagement Management, they will be able to see the same grid layout what they saved earlier. If you save, the system will save all the custom information columns selected.



4.3.10 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 Search Evaluations pane, not in the Search Results pane.

To add a column to the search results, see [Add or Remove Column Names on page 4-155](#).

Column Name	Description
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.


Column Name	Description
Extension	The extension of the agent who handled the interaction.
Coaching	If coaching is required for the evaluation, then check mark is shown on the column. Otherwise, the column is blank.
Quality Score	The evaluation score in percentage.
Point Score	The evaluation score in "Total Points earned/Total Points Possible". Eg: 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.
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 Chat 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.
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.
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.
Agent Group	The Agent Group which is stored in the database.

Column Name	Description
Initial Agent Group	Specify the initial Agent Group to which the system announced the interaction.
Skill Group	The name of a Skill Group which is stored in the database.
Initial Skill Group	Specify the initial Skill Group to which the system announced the interaction.
Protected	Displays if the Protected flag is marked in any one of the interactions of the interaction.
Device Position	The unique ID for the device or phone.
Status	The status of the interaction such as Complete or Draft.
Audio Port	The audio port of the interaction which is stored in the database.
Audio Port Description	The audio port is similar to the given input.
Recording Group	The recording group which is stored in the database.
Imported	If the interaction is imported then Yes is mentioned on the column.
Universal Call ID	The ID which is stored in the database.
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	<p>Search text box.</p> <ul style="list-style-type: none"> 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.
Terminal Number	The terminal number of the agent who accepted the interaction.
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 check mark is shown on the column. Otherwise, the column is blank.
Screen Recording Expected	If screen recording is expected, then the check mark is shown on the column. Otherwise, the column is blank.
Audio Recording Started Late	If audio recording is started late than the actual call start, then check mark 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 check mark 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.
Assigned Interactions	Recordings assigned to you by a peer.

Column Name	Description
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.
Hidden	This column indicates this interaction is reserved for Hide/Show Interactions, if the user has Hide/Show Interactions right for his/her profile.
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.
Channel	The medium used to complete an interaction, such as Voice Only, Screen Only, Voice and Screen, Chat, Task, or Unknown.
Transcript File Name	There is a Chat Transcript file. The Transcript File Name will be mentioned in a specific way for Chat. Example: <ul style="list-style-type: none"> • Chat - chat/2020/09/02/09/ab48a17e-7015-4571-9e6a-7d6597cae5e3.json
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 <ul style="list-style-type: none"> • 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 <ul style="list-style-type: none"> • 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).
Precision Queue	System announced interaction for specialized routing. Note: This column displays the value to find the interactions based on the Precision Queue that was used for routing the call to the agent in Cisco UCCE. The Precision Queue column is hidden by default, this can be included into the grid, if required.
Email Subject	The subject of the email interaction.
Thread ID	The identification number for the email thread.
Message ID	The identification number for the email thread.

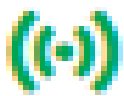


4.3.10.1 Media


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

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

4.3.10.2 Status





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



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		<p>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.</p> <p>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.</p> <p>Note: This is for future release.</p>

4.3.10.3 Channels

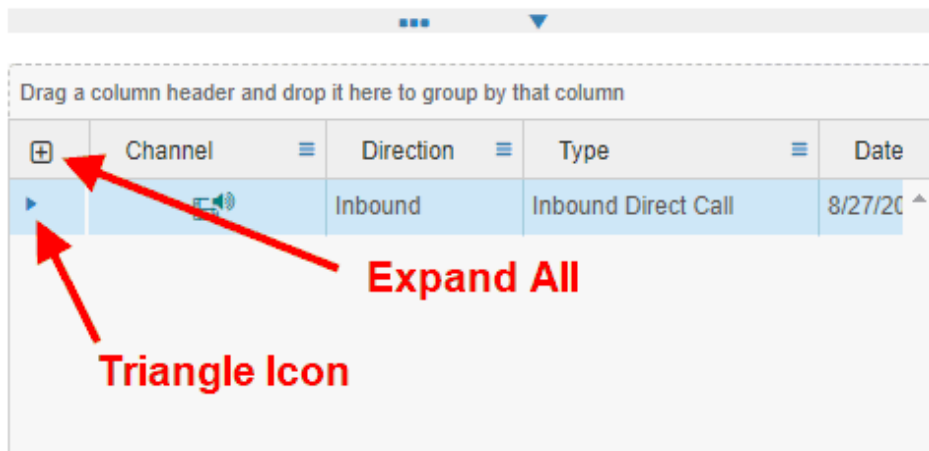
The following table describes the Channel icons in the search results.

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
Chat		Interactions that have the chat 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.

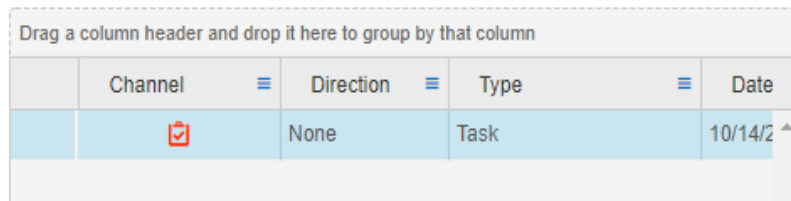
4.3.11 Related Interactions

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.



Note:

- If there is no related interaction for all the interactions then **Expand All** button will be hidden.
- If there is no related interaction for all of the interactions in the playlist then **Triangle** will be hidden.



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

Drag a column header and drop it here to group by that column				
Channel	Direction	Type	Date Time	
	Inbound	Inbound Direct Call	8/27/2019 9:06:52 PM	
Drag a column header and drop it here to group by that column				
Channel	Direction	Type	Date Time	
	Outbound	Outbound Direct Call	8/27/2019 9:06:52 PM	

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

4.4 Interaction Results Tabs

The interaction pane contains information about the current, selected interaction. The tab available is the [Details Tab](#).

4.4.1 Details Tab

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

The screenshot shows a web interface with a top navigation bar containing tabs: 'Details' (selected), 'Actions', 'Evaluation', 'Annotations', and 'Attachments'. Below the tabs is a scrollable area with two sections:

Interaction Details:

Interaction ID:	8CAA881A-43B6-42D5-AC93-1A1015661FE6
Type:	ACD Call
Switch:	Default Import Switch (Inactive)
Host ID:	N/A
UCID:	N/A
Extension:	N/A
Device Position:	N/A
ANI:	N/A
DNIS:	N/A
Task Name:	N/A
Assigned Interactions:	No
Hidden:	No

Interaction Handling:

Agent:	''
Application:	N/A
Agent Group:	Inbound
Initial Agent Group:	Inbound
Skill Group:	N/A
Initial Skill Group:	N/A

The Details tab provides the following information.

- [Interaction Details](#)
- [Interaction Handling](#)
- [Interaction Statistics](#)
- [Archiving Information](#)

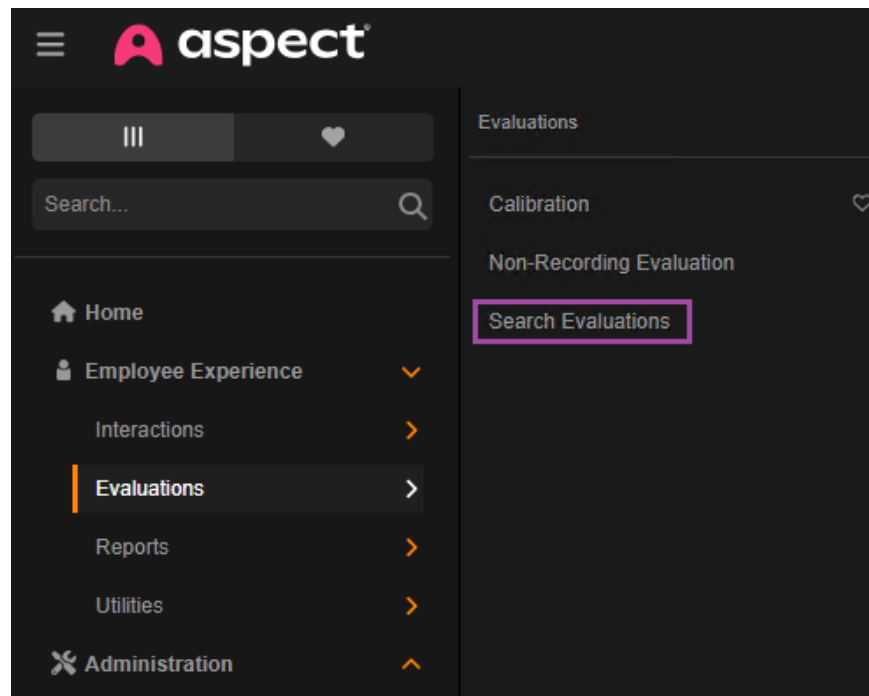
4.4.1.1 Interaction Details

Criteria	Description
ANI	The caller ID.
Assigned Interactions	Recordings shared with you.
DNIS	The Direct Inbound Dialer (called number indicator).
Device Position	Unique ID for a device.
Direction	Inbound call or outbound call or none.
Extension	The agent's extension number.
Protected	Displays if the Protected flag is marked in any one of the interactions of the interaction.
Switch	The switch on which the agent or agent group resides.
Task Name	Non-recording evaluation

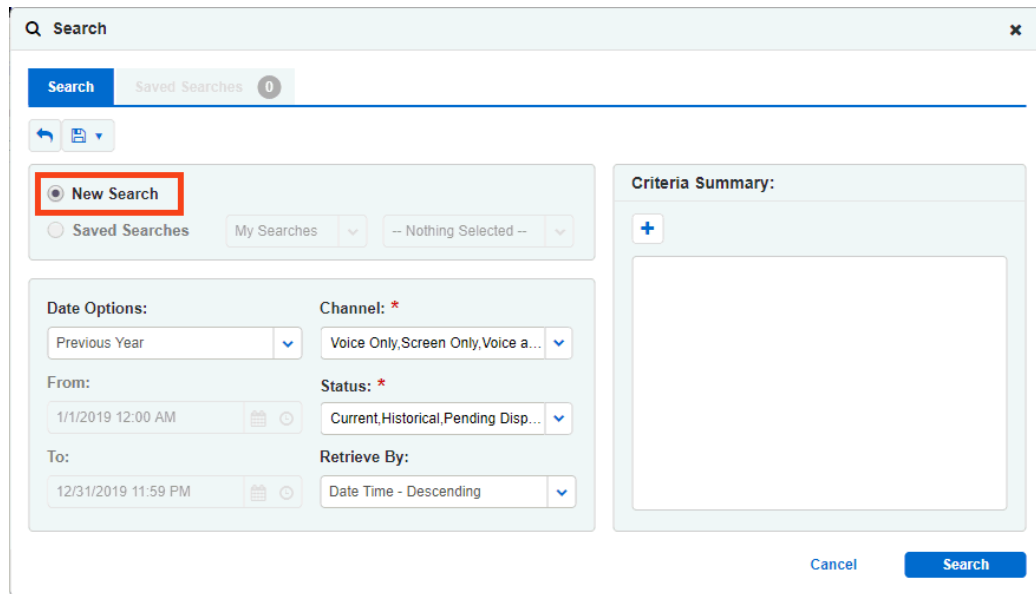
4.4.1.2 Search the Interaction

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

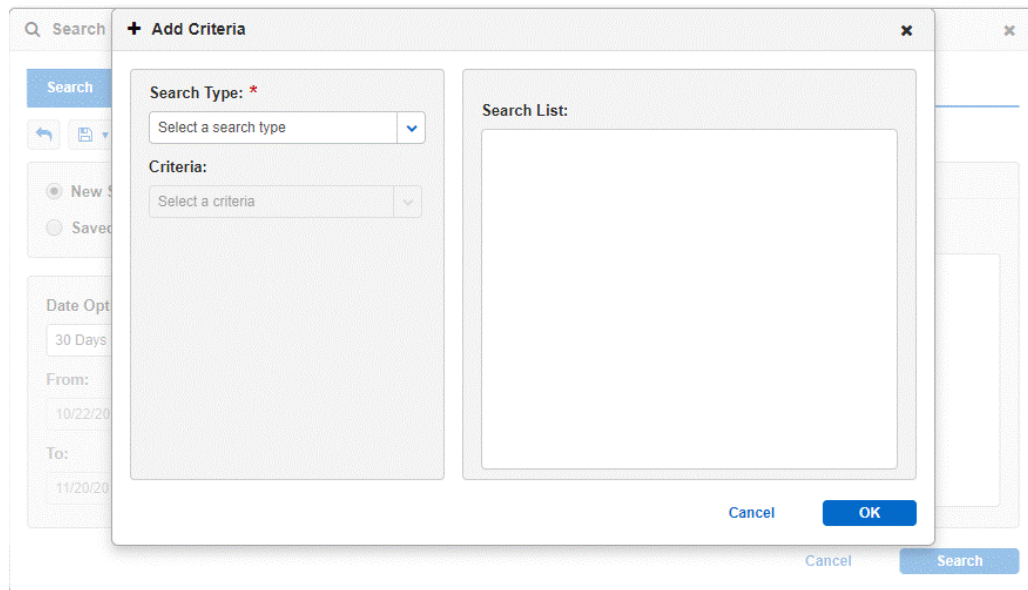
1. Login to the system.
2. Go to **Navigation menu > Employee Experience>** click on **Search Evaluations** under **Evaluation**. The Search window appears.



3. Click on **New Search** as shown below.



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

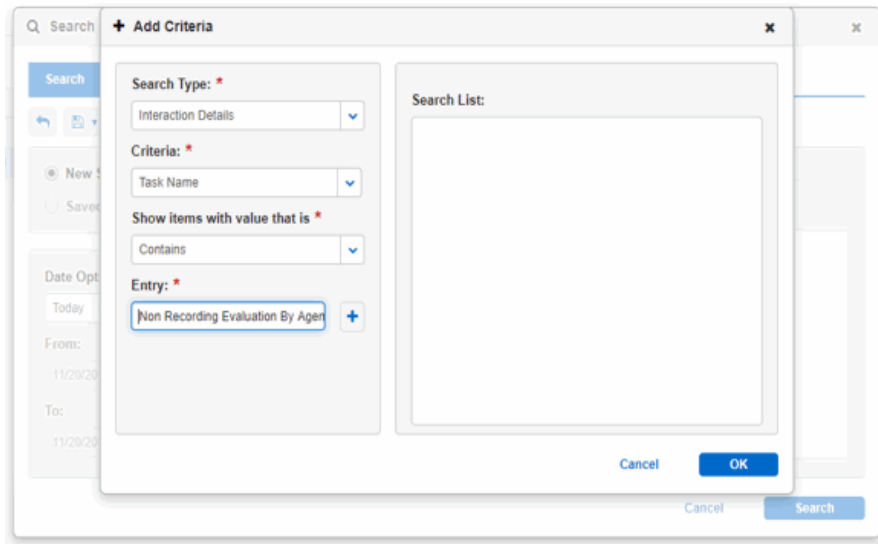


5. Click on the **Search Type** drop-down list and select **Interaction Details**.

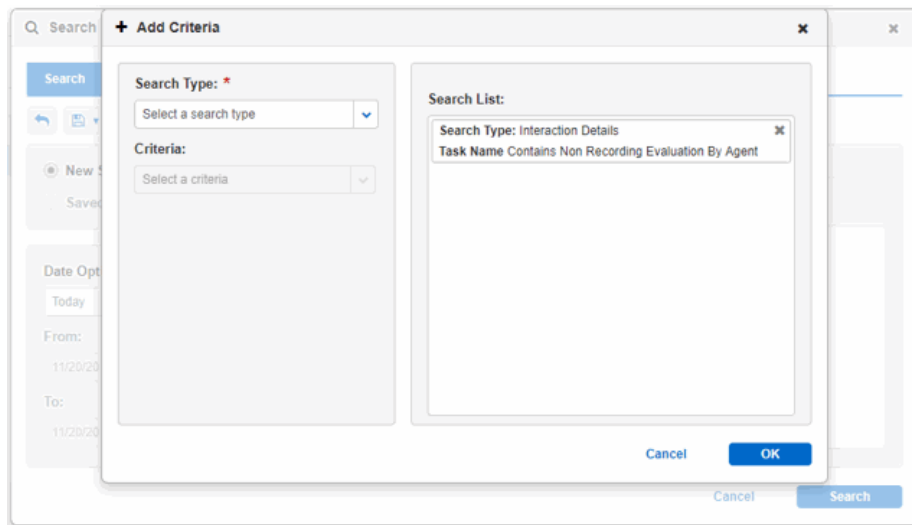
6. Select the **Criteria as Task Name**.

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 **Search** to view the search in Search Evaluations window as shown below.

SEARCH RESULTS: EVALUATIONS

Search Type: New Search

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

Channel	Direction	Date Time	Duration	Agent	Extension	Analytics	Coaching	Score	To Review	Status	Task
	None	11/27/2019 3:36:10 PM	0:00:00	Agent9, QA9				45			Non Recording Evaluation for Agent9

4.4.1.3 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).
Agent Group	The agent is associated with the Agent Group.
Application	Search text box. <ul style="list-style-type: none"> 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 Agent Group	Specify the Initial Agent Group to which the system announced the interaction. Initial Agent Group is the Agent Group to which the system initially announced the interaction. It may not necessarily be the Agent Group from which the agent took the interaction.
Initial Skill Group	Specify the initial Skill Group to which the system announced the interaction.
Precision Queue	This criteria is used to find the interactions based on the Precision Queue that was used for routing the call to the agent in Cisco UCCE. You can search without entering any filter value. A table displays a list of all active precision queue with their associated switch. You can also search by typing the partial or the complete Precision Queue name.
Skill Group	A group of agent groups called as Skill Group.
Team	The agent is a member of the team.

4.4.1.4 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.

4.4.1.5 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.

4.4.2 Evaluation Tab

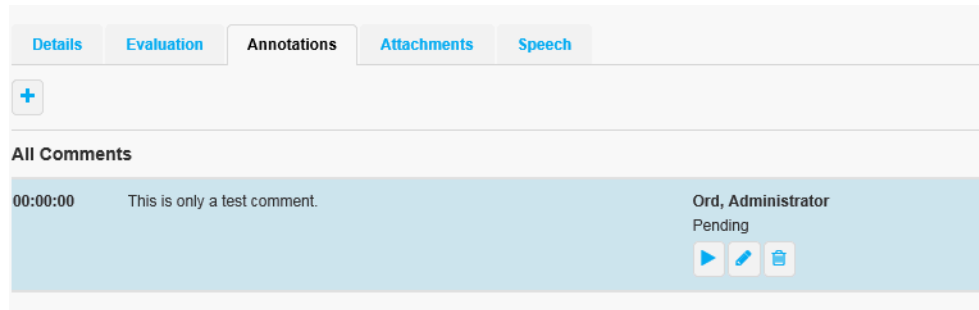
The Evaluation tab provides a snapshot of the evaluation for that interaction.

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.

4.4.3 Annotations Tab

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

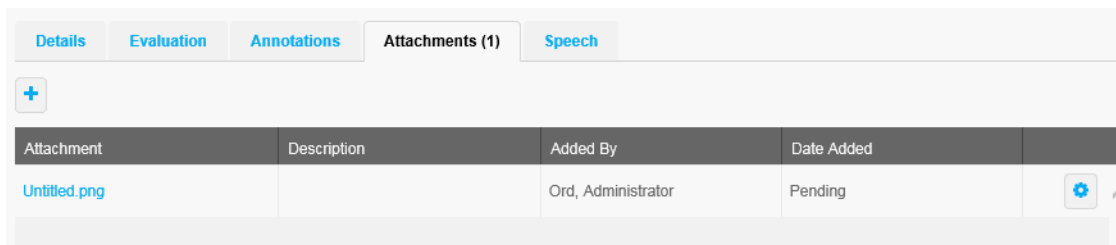


Note: If the loaded interaction does not have any accessible evaluation, the Annotations tab is inactive. It is also inactive if the loaded interaction type is a Task.

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

4.4.4 Attachments Tab

If there are 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.

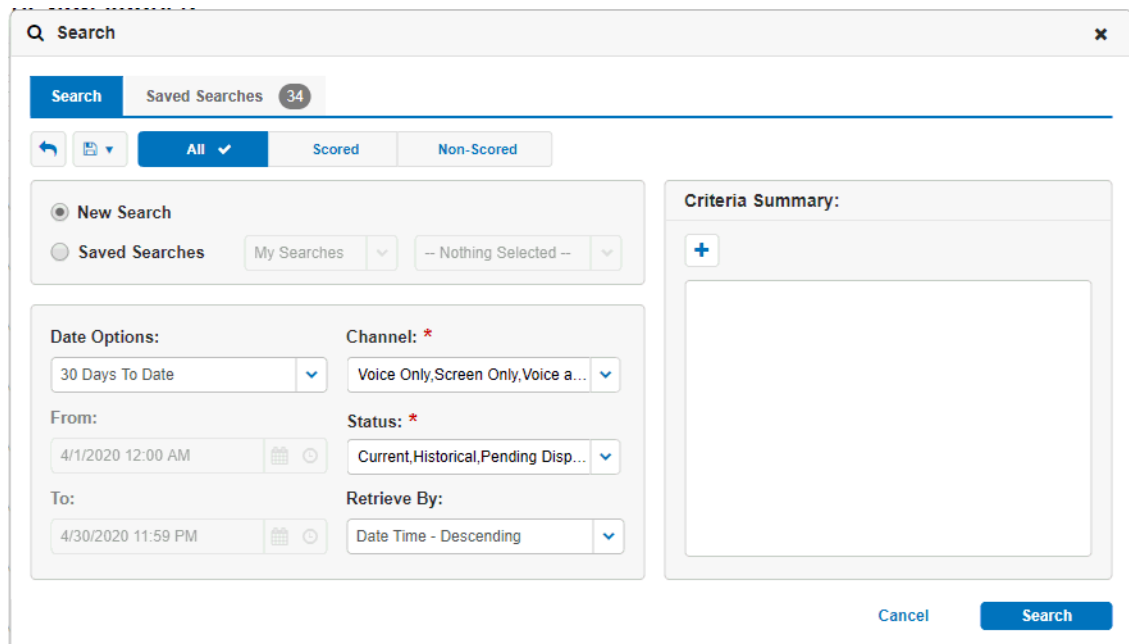
Columns	Description
Attachment	The file name of the attachment.
Description	A description of the attachment.
Added By	The name of the person who added the attachment to the interaction.
Date Added	The date and time that the person added the attachment to the interaction. The format of the date and time is based on the browser locale.

Columns	Description
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.

4.5 Saving Searches

You can save searches and access saved searches on both the Interaction Search and the Search Evaluations windows. However, the saved searches are unique to each screen; therefore, for example, if you created a search and saved it in Search Evaluation 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 4-120](#).

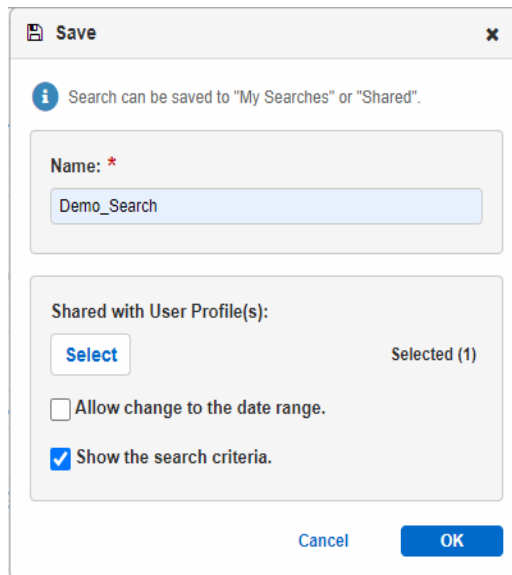
You can only access the **Saved Searches** tab, or the Saved Searches option on the Search tab, when you have one or more saved searches. The tab title contains a number that indicates the number of saved searches available.

Note: When you save a search with a selected view such as **All**, **Scored** or **Non-Scored** and want to share or edit the Saved Search, the system will display the Saved Search based on the selected view.

The Save window appears as shown below.

1. 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.
2. To share the saved search with user profiles, click on **Select** button and select the User Profile such as Agent or Mentor.

- Click on **Show the search criteria** check box to enable the button groups such as All, Scored and Non-Scored for the selected User Profile.

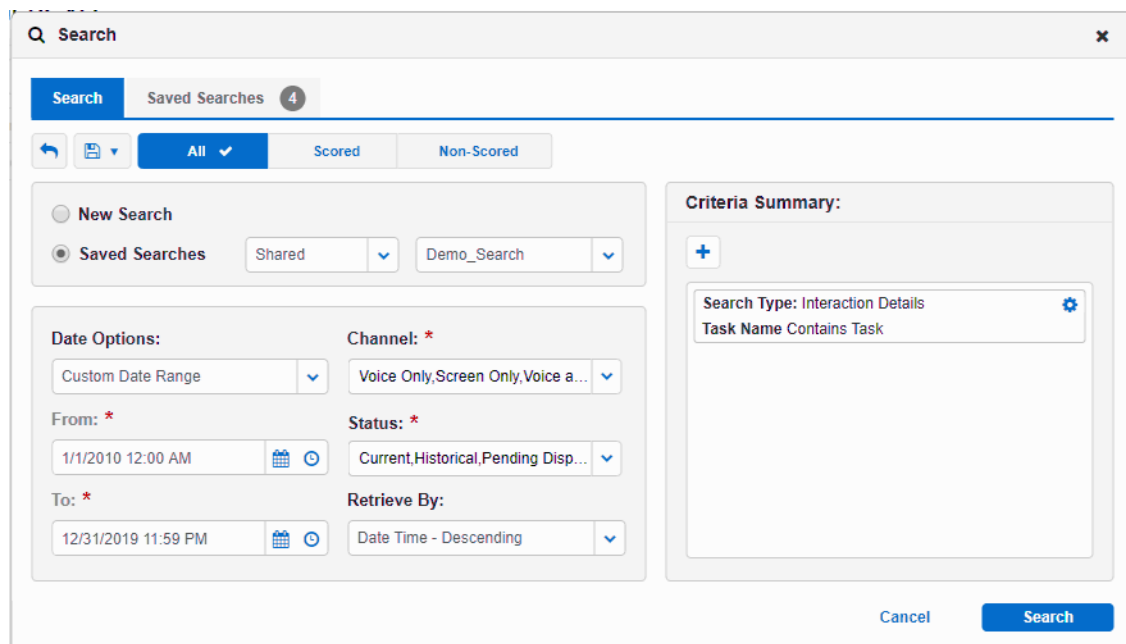


Example: When the administrator will share this saved search, button groups will be enabled for the users (assignee) associated with selected User Profile. Hence, when the assignee will go to the shared saved search, the button groups will be enabled.

Note: If the Show the search criteria check box is **unchecked**, the button groups will be **disabled** for the selected User Profile. Hence, when the assignee will go to the shared saved search, the button groups will be disabled.

- 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.



4.5.1 Saved Search Types

Saved searches are defined as:

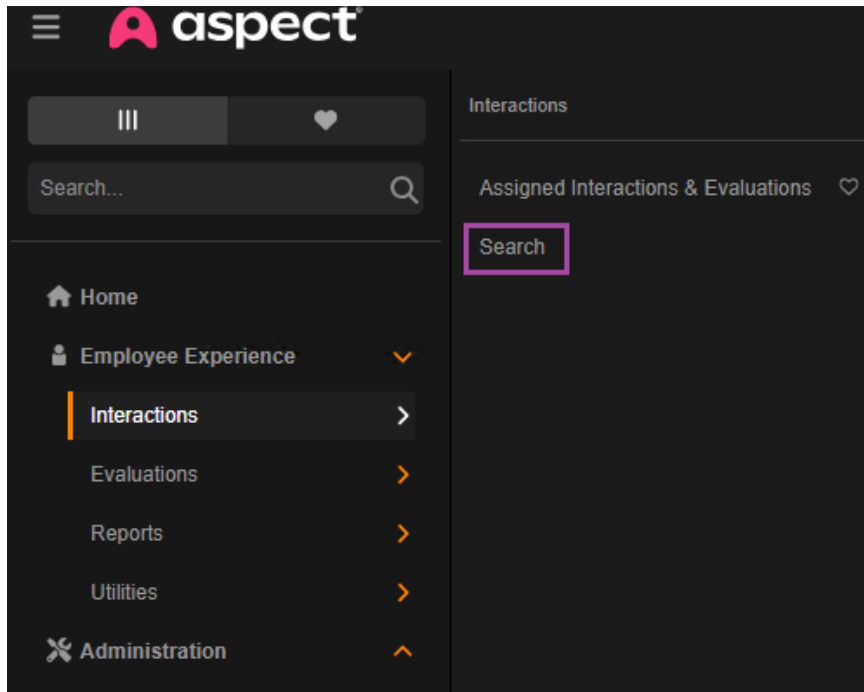
Saved Search Type	Definition
My Searches	When I create a search and save it without sharing with others then the search will appear in the My Searches category. While saving the search if I have customized the grid like sorting, adding filters, grouping, resizing the column width, adding/removing columns etc and whenever I open this search, I will be able to see the same grid layout as when I saved this search last time.
Shared	Searches created by the user which have been shared with one or more user profiles.
Shared with me	<ul style="list-style-type: none"> • 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. • When the Assigner of the search, customizes the Search Results grid like sorting, adding filters, grouping, resizing the column width, adding/removing columns etc, then saves the search and shares it with me. When I (assignee) open the search, I (assignee) will be able to see exactly how the Assigner had customized the grid. If assignee likes the grid layout he can also save the grid layout as his default grid layout.

4.5.2 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.

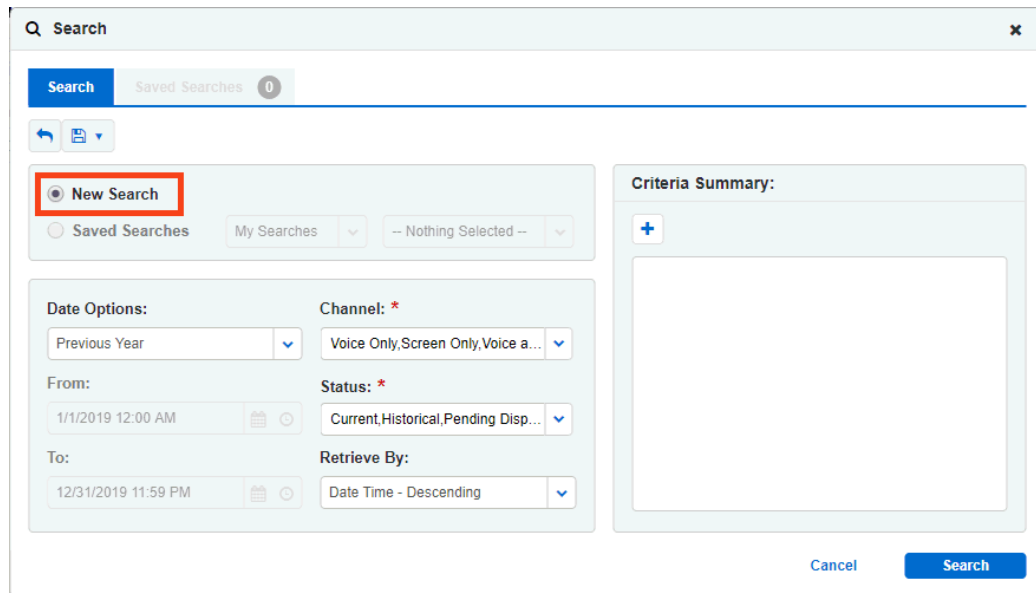
1. Login to the system.

- 2. Go to **Navigation menu > Quality >** click on **Search** under Interaction.



The Search window appears.

- 3. Click on **New Search** as shown below.



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

The screenshot shows a 'Search' window with a search bar and a 'Saved Searches' tab with 6 items. Below the search bar are filters for 'All', 'Scored', and 'Non-Scored'. There are two main sections: 'New Search' and 'Saved Searches'. The 'Date Options' section is highlighted with a red box and contains the following fields:

- Date Options:** A dropdown menu set to 'Custom Date Range'.
- From:** A date field set to '1/1/2010 12:00 AM' with a calendar icon.
- To:** A date field set to '12/31/2019 11:59 PM' with a calendar icon.

 Other fields include 'Channel' (set to 'Voice Only, Screen Only, Voice a...'), 'Status' (set to 'Current, Historical, Pending Disp...'), and 'Retrieve By' (set to 'Date Time - Descending'). A 'Criteria Summary' panel on the right has a '+' button. At the bottom are 'Cancel' and 'Search' buttons.

- Click on **Add** button under Criteria Summary. The Add Criteria window appears as shown below.

The 'Add Criteria' dialog box has a title bar with a '+' icon and a close button. It contains two main sections:

- Search Type:** A dropdown menu with the text 'Select a search type'.
- Criteria:** A dropdown menu with the text 'Select a criteria'.
- Search List:** A large empty rectangular area for listing search criteria.

 At the bottom right are 'Cancel' and 'OK' buttons.

- 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 4-130](#).
- Select the **Criteria** as **Task Name**.
- Select the **Show items with value that is** as **Contains**.

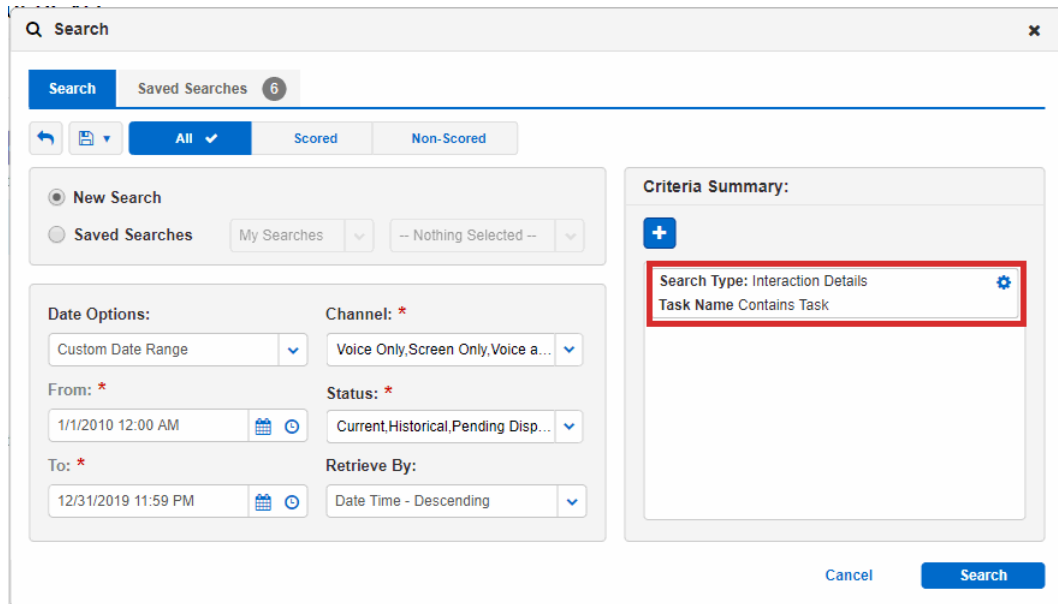
9. Click on the **Entry** field and type **Task**. Refer the window as shown below.

The screenshot shows a dialog box titled '+ Add Criteria'. On the left side, there are four sections: 'Search Type: *' with a dropdown menu showing 'Interaction Details'; 'Criteria: *' with a dropdown menu showing 'Task Name'; 'Show items with value that is *' with a dropdown menu showing 'Contains'; and 'Entry: *' with a text input field containing 'Task' and a '+' button to its right. On the right side, there is a large empty rectangular area labeled 'Search List:'. At the bottom right of the dialog, there are 'Cancel' and 'OK' buttons.

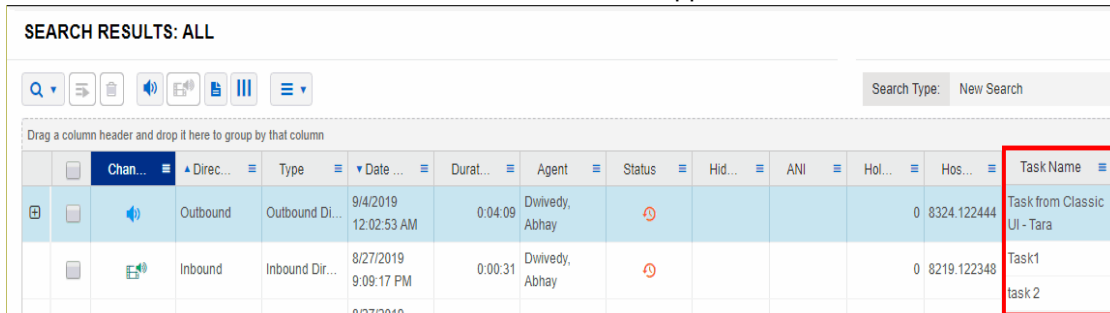
10. Click on **Add** button which is available next to the Entry field. The following window appears as shown below.

The screenshot shows the same dialog box after clicking the '+' button next to the 'Entry' field. The 'Search Type' dropdown now shows 'Select a search type'. The 'Criteria' dropdown shows 'Select a criteria'. The 'Search List' area now contains a single entry: 'Search Type: Interaction Details' followed by 'Task Name Contains Task'. At the bottom right, there are 'Cancel' and 'OK' buttons.

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.

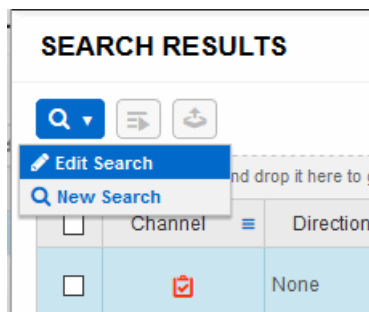


12. Click on **Search** button. The Search results window appears as shown below.



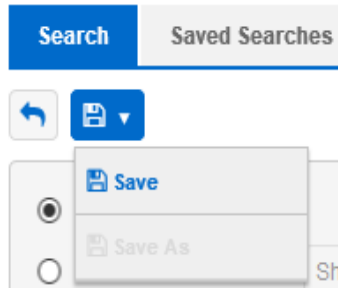
Note: The **Task Name** column is added to the grid as highlighted on the above screenshot.

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.

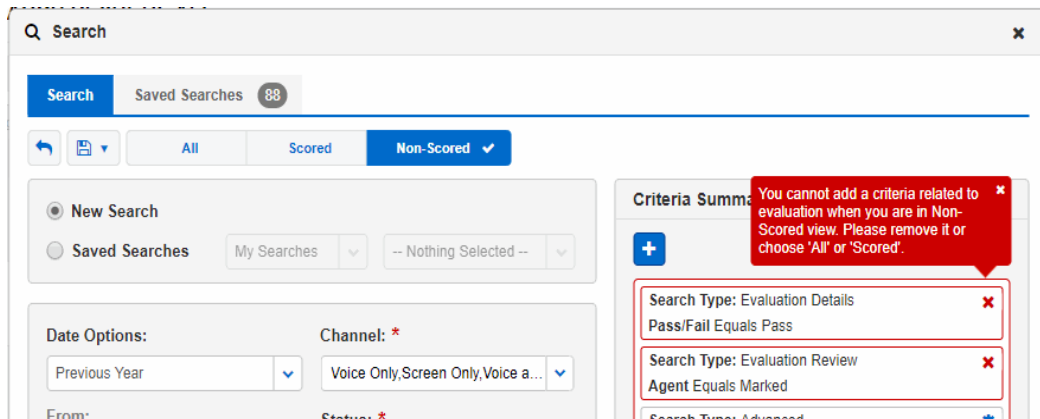
14. From the Save menu, click **Save**.



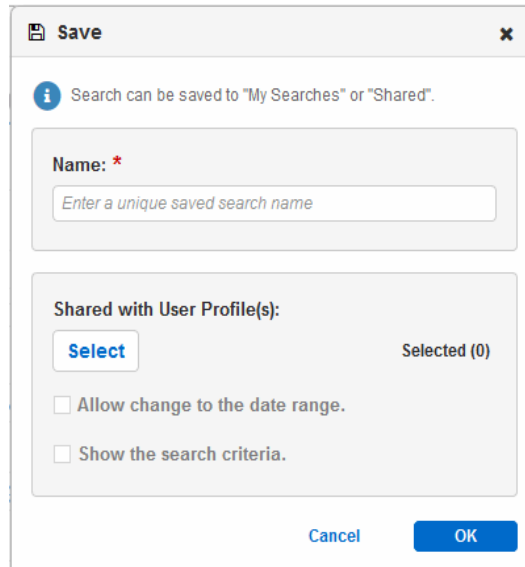
The Save menu has the following options:

Save Options	Description
Save	<ul style="list-style-type: none"> 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.
<p>Note: Neither Save menu options are available if the active saved search is a <i>Shared with me</i> saved search, because as a Shared-with-me user, you do not have ownership of that saved search.</p>	

Note: Evaluation Details and Evaluation Review are available if the user has selected **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 Save or Save As, a **validation message** will be displayed under the Criteria Summary section as shown below.



The Save window appears as shown below.



15. In the **Name** text box, type a name for the search. Example: 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 Profiles section of the window.

16. Click on **Show the search criteria** check box to enable the button groups such as All, Scored and Non-Scored for the selected User Profile.

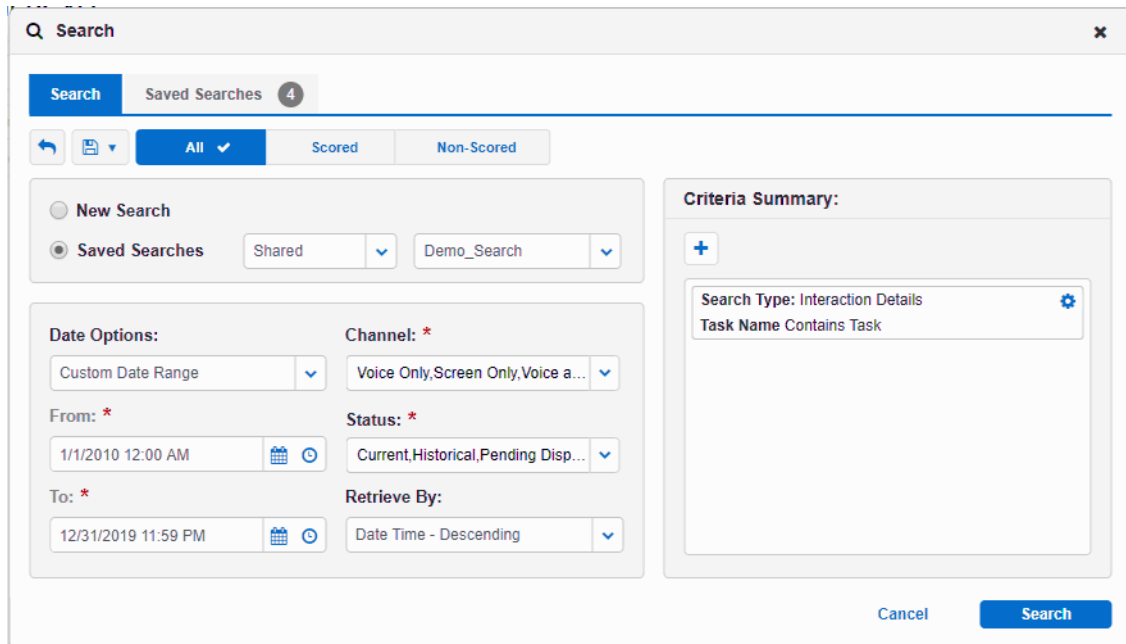
Ex: When the administrator will share this saved search, button groups will be enabled for the users associated with selected User Profile. Hence, when the assignee will go to the shared saved search, the button groups will be enabled.

Note: If the Show the search criteria check box is **unchecked**, the button groups will be **disabled** for the selected User Profile.

Ex: When the administrator will share this saved search, button groups will be disabled for the users associated with selected User Profiles. Hence, when the assignee will go to the shared saved search, the button groups will be disabled.

17. Click **OK**. The Save window closes and the Search window is active.

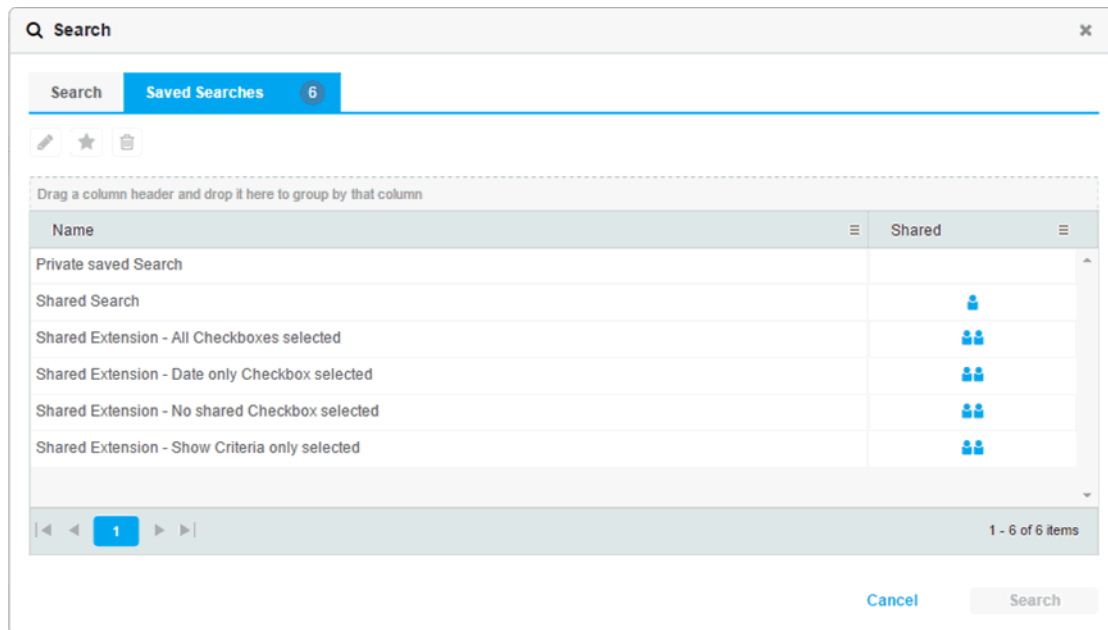
When you save a Private search, the Saved Searches option in the Search tab is selected along with the My Searches drop-down list box. The newly added saved search becomes the selected saved search drop down item.



4.5.3 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.



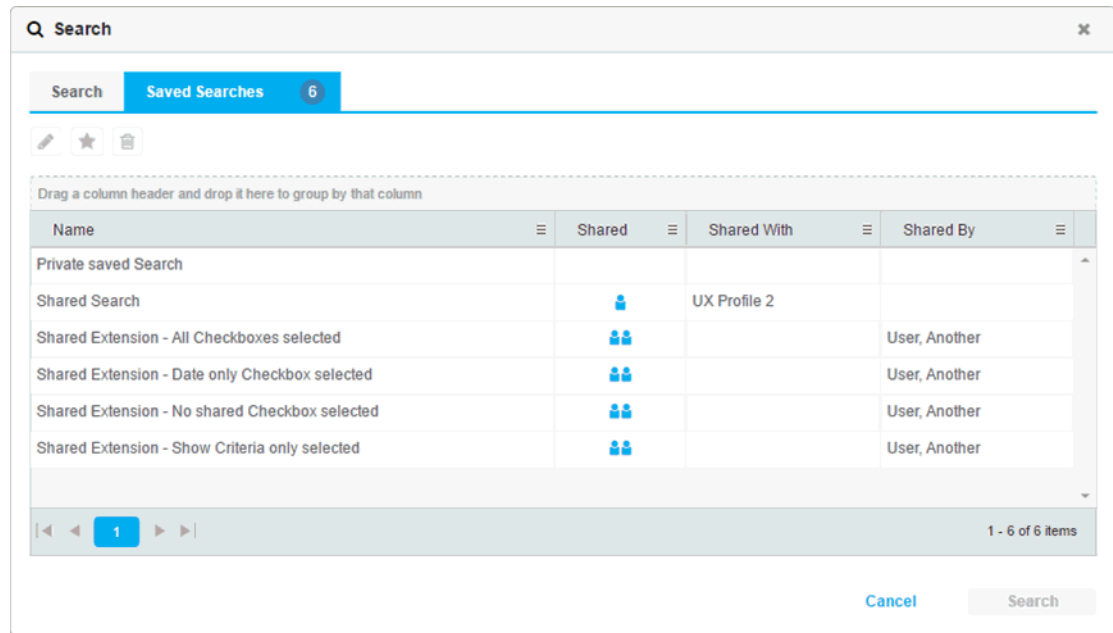
Note: The Saved Search tab is active only if you have access to one or more saved searches.

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 triple-bar icon next to the column title by which you want to filter or group the data.



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

OR

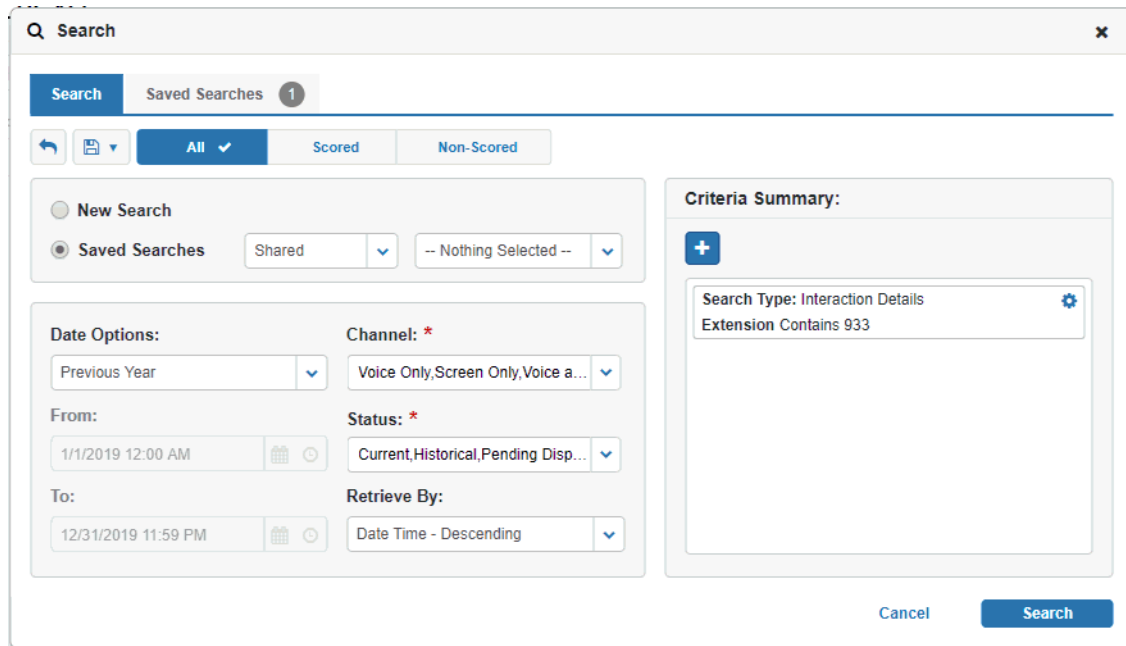
To edit, delete, or run a saved search, or to make a saved search a default search, see [Administer a Saved Search on page 4-211](#).

Note:

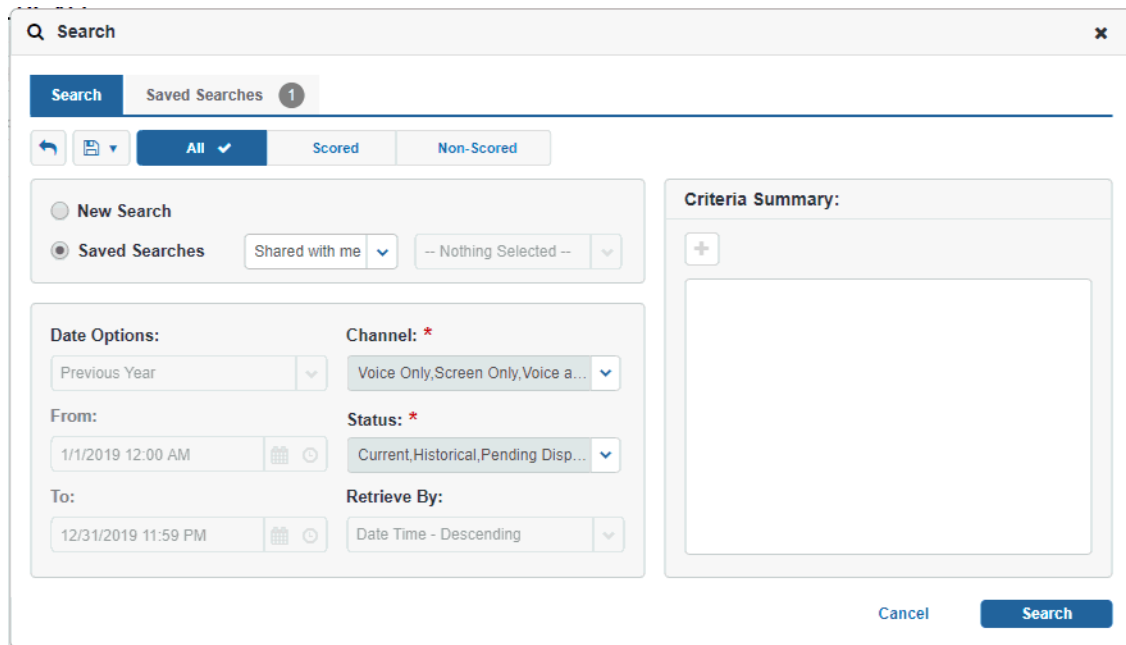
- When you save a search with a selected view such as **All**, **Scored** or **Non-Scored** and want to share or edit the Saved Search, the system will display the Saved Search based on the selected view.
- You can also toggle the view in the Search dialog, regardless of you or someone has created and shared with you.
- For more information on a saved search that an owner shared with you, see [View a Shared-with-me Search](#).

4.5.3.1 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.

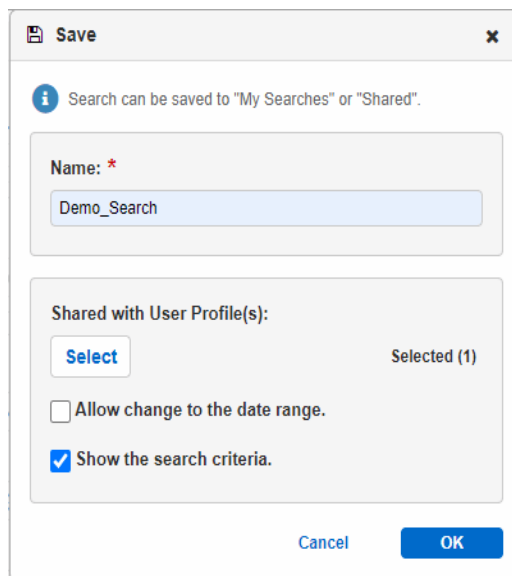


The following screen shot is an example of a search shared by its owner, who selected a user to view the saved search criteria, but did not give the user permission to modify the date range options.



Note:

- When you save a search with a selected view such as **All**, **Scored** or **Non-Scored** and want to share or edit the Saved Search, the system will display the Saved Search based on the selected view.
- You can also toggle the view in the Search dialog, regardless of you or someone has created and shared with you.
- When a saved search was created in Search Evaluation (known as Scored Interaction), then all the saved search will appear on the Search page with the **All** view selected by default.
- If **Show the search criteria** check box is checked while saving the search (refer the below screenshot) then the button groups such as All, Scored and Non-Scored will be enabled. Hence, when the assignee will go to the shared saved search, the button groups will be enabled.



- If the Show the search criteria check box is **unchecked** while saving the search, the button groups will be **disabled**. Hence, when the assignee will go to the shared saved search, the button groups will be disabled.




4.5.4 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.

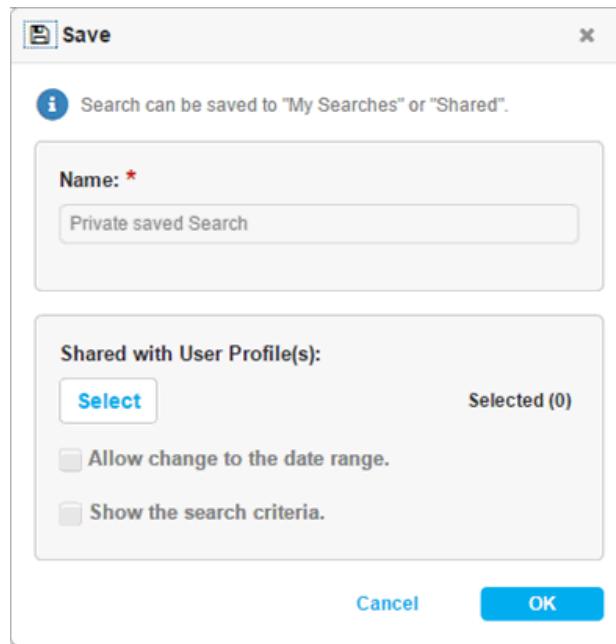
1. From the Search window, select the **Saved Searches** tab. The list of saved searches displays in the table.
2. From the list of saved searches, select a saved search that you own and want to modify. The Search window opens with the data for that saved search.

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	<p>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.</p> <p>Note: A star icon in the Name column indicates the current assigned default saved search.</p> <p>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.</p> <p>You can have only one default Interaction search and one default Search Evaluations. 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.</p>
	Delete	<p>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.</p> <p>Note: Deleting a shared search removes the search from any previously-associated user profiles.</p>

- Adjust the search criteria as needed (for more information on the criteria, see [Performing a Search](#)).

- 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.



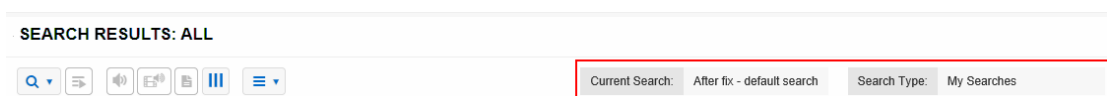
- Click **OK**. The saved search is updated with the modifications.
- To run the search query after changing it, on the Saved Searches tab, from the list, select the saved search and click **Search**.

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.

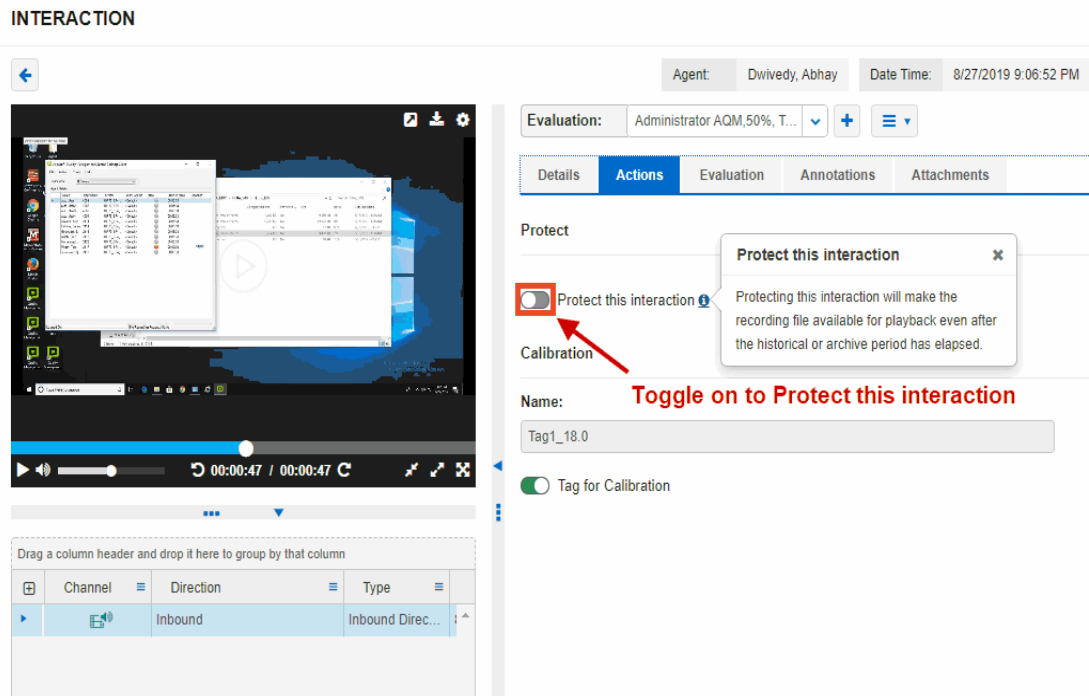
The Current Search name and Search Type display above the Search Results table.



4.6 Protecting Interactions

Protecting an interaction means that you keep the interaction available for playback after the historical or archive processes run. For example, you may want to protect an interaction, that has recorded a challenging customer call that you want to play back at a later time for training

purposes. You can protect an interaction in Workforce Engagement Management by flagging the interaction.



4.6.1 Who Can Protect an Interaction?

- An Administrator user.
- A user who has permission to the interaction, but does not have the right to unprotect the interaction, can view the protect flag details created by other users.
- If the user does not have permission to the interaction, the Protect section for the interaction does not display to that user.
- If the user is an Administrator and the user has permission to the interaction, the **Protect this interaction** option is enabled, and the user can toggle the option to the On state to protect an interaction.

Note: In this case, if the user does not have permission to the interaction, the **Protect this interaction** option is inactive.

4.6.2 Protect an Interaction

To protect an interaction, perform the following steps.

1. Perform a search (see [Performing a Search on page 4-120](#)) for the interaction that you want to protect.

2. [Create a Playlist](#). The Media Player opens with the interaction that you want to protect in the Interaction window.

INTERACTION

Agent: Godihuggi, Bhagyashree Date Time: 1/25/2019 2:10:57 AM

Evaluation: None

Details **Actions** Evaluation Annotations Attachments

No actions available.

Protect

Protect this interaction ⓘ

Calibration

Name: *

Tag for Calibration

3. Select the **Protect this interaction** option. When selected, the option is green.

INTERACTION

Agent: Godihuggi, Bhagyashree Date Time: 1/25/2019 2:10:57 AM

Evaluation: None

Details **Actions** Evaluation Annotations Attachments

No actions available.

Protect

Protect this interaction ⓘ

Calibration

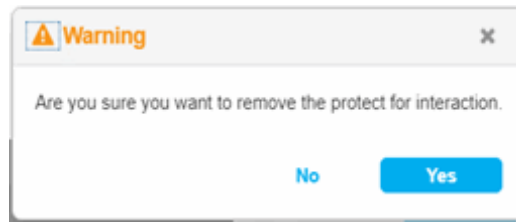
Name: *

Tag for Calibration

4.6.3 Unprotect an Interaction

Only an Administrator or the interaction owner who protected the interaction can unprotect an interaction. If you want to unprotect an interaction, perform the following steps.

1. Perform a search (see [Performing a Search on page 4-120](#)) for the interaction that you want to unprotect.
2. [Create a Playlist](#). The Media Player opens with the interaction that you want to unprotect in the Interaction window.
3. Select the **Protect this interaction** option. A warning message displays.



4. Clicks **Yes**. The system unprotects the interaction, and the option displays the Off state.

4.7 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 Search Evaluations 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 Search Evaluations 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).

4.7.1 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 Workforce Engagement Management as an Administrator.
- 2. Search for an interaction (see [Performing a Search on page 4-120](#)).
- 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.

SEARCH RESULTS: ALL

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

<input checked="" type="checkbox"/>	Channel	Direction	Type	Date Time	Duration	Agent	Extension
<input checked="" type="checkbox"/>		Inbound	Chat	10/30/2023 3:20:45 PM	0:09:45	tandon, cloud_kushalmgr1	
<input checked="" type="checkbox"/>		Outbound	Manual Outbound Email	10/21/2023 3:43:23 PM	0:00:00	Manager, Aguilar	
<input checked="" type="checkbox"/>		Outbound	Outbound Direct Call	4/5/2023 6:22:02 AM	0:00:40	Agent10, UCCE	6005
<input checked="" type="checkbox"/>		Inbound	Inbound Direct Call	3/4/2023 2:13:16 PM	0:01:10	User1, Agent	401

100 items per page

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

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

SEARCH RESULTS: ALL

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

<input checked="" type="checkbox"/>	Channel	Direction	Type	Date Time	Duration	Agent	Extension
<input checked="" type="checkbox"/>		Inbound	Chat	10/30/2023 3:20:45 PM	0:09:45	tandon, cloud_kushalmgr1	
<input checked="" type="checkbox"/>		Outbound	Manual Outbound Email	10/21/2023 3:43:23 PM	0:00:00	Manager, Aguilar	
<input checked="" type="checkbox"/>		Outbound	Outbound Direct Call	4/5/2023 6:22:02 AM	0:00:40	Agent10, UCCE	6005
<input checked="" type="checkbox"/>		Inbound	Inbound Direct Call	3/4/2023 2:13:16 PM	0:01:10	User1, Agent	401

100 items per page

Dropdown menu options:

- Hide Interactions
- Show Interactions
- Assign Interactions
- Export Media**
- Collapse All
- Save as my default view
- Delete

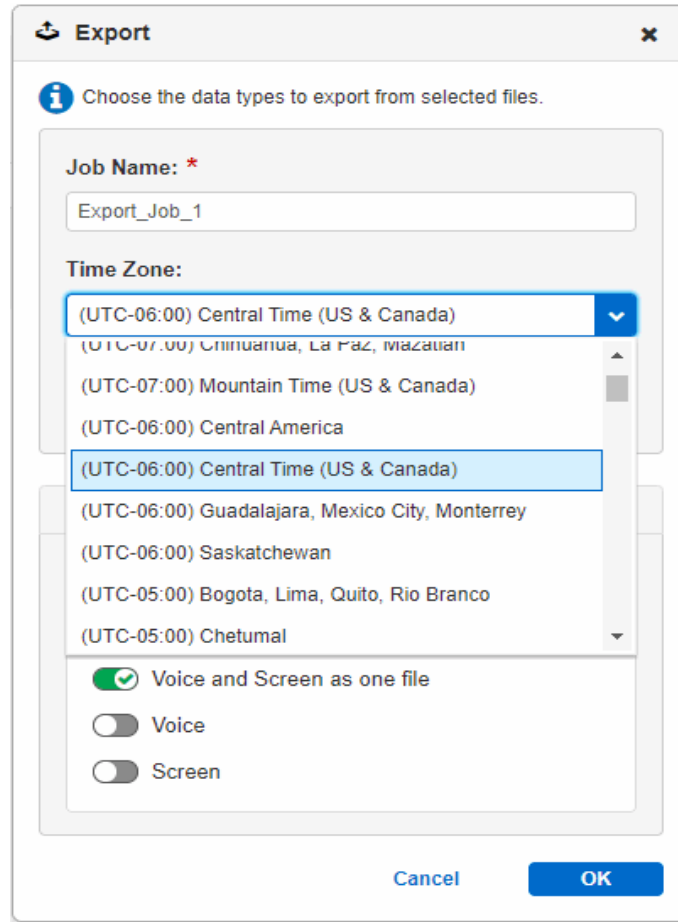
The Export window opens.

Note: In this example procedure, Voice and Screen (combined) interactions is selected in the Search Results table.

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

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

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



- If you want to export the metadata for the selected interactions, select the **Metadata** option.
OR
If you do not want to export the metadata for the selected interactions, do not select the **Metadata** option.
- If you want to export the media for the selected interactions, 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.

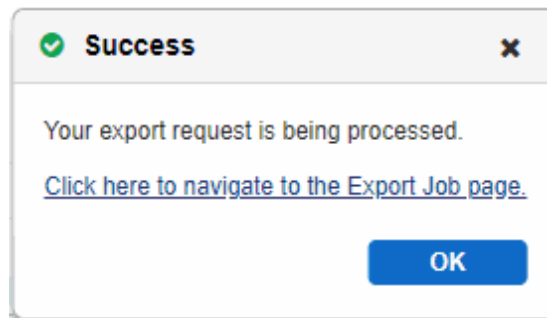
Option	Description
Voice and Screen Combined Interactions	If the interaction you want to export contains a media file with both Voice and Screen recorded together, then you can select one of the following options. <ul style="list-style-type: none"> • Voice and Screen as one file - select this option 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.
Non Voice Channels	Select this option to export Chat and Email interactions. Email Attachment - Select the option for exporting Email attachments.

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 Time Zone details.

EXPORT JOBS

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

Job Name	DateTime Requested	Voice and Screen	Non Voice and Screen	Metadata	Evaluations	Requested By	Time Zone	Status
Chat Export job	11/9/2020 7:26:46 AM					Administrator , AQM	(UTC-05:00) Eastern Time (US & Canada)	Done
Job28	11/3/2020 4:55:05 PM					Administrator , AQM	(UTC-06:00) Central Time (US & Canada)	Done
DemoJobforTimeZoneInExcel	11/3/2020 3:29:13 PM					Administrator , AQM	(UTC-06:00) Central Time (US & Canada)	Done with failures
Job27	11/3/2020 12:01:07 AM					Administrator , AQM	(UTC+05:30) Chennai, Kolkata, Mumbai, New Delhi	Done
Job26	11/2/2020 11:34:43 PM					Administrator , AQM	(UTC-08:00) Pacific Time (US & Canada)	Done
Job25	11/2/2020 10:13:09 PM					Administrator , AQM	(UTC-08:00) Pacific Time (US & Canada)	Done
Job23	11/2/2020 9:34:30 PM					Administrator , AQM	(UTC-06:00) Central Time (US & Canada)	Done
Job22	11/2/2020 9:14:29 PM					Administrator , AQM	(UTC-06:00) Central Time (US & Canada)	Done
Job22	11/2/2020 9:04:09 PM					Administrator , AQM	(UTC-08:00) Pacific Time (US & Canada)	Done
Job22	11/2/2020 8:47:43 PM					Administrator , AQM	(UTC) Coordinated Universal Time	Pending
Job21	11/2/2020 7:22:09 PM					Administrator , AQM	(UTC-08:00) Pacific Time (US & Canada)	Done
Job20	11/2/2020 6:22:50 PM					Administrator , AQM	(UTC+05:30) Chennai, Kolkata, Mumbai, New Delhi	Done

1 - 18 of 18 items

EXPORT JOBS

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

Job Name	DateTime Requested	Voice and Screen	Non Voice	Metadata	Evaluations	Requested By	Time Zone	Status
Export media job	11/2/2023 12:23:53 PM					Administrator , AQM	(UTC) Coordinated Universal Time	Done

1

4.7.2 Export a Job for Search Evaluations

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

To create an export job for Search Evaluations, perform the following steps.

1. Log in to Workforce Engagement Management as an Administrator.
2. Search for an evaluation (see [Performing a Search on page 4-120](#)).
3. Select an interaction (or interactions) by clicking the check boxes next to the interactions 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.

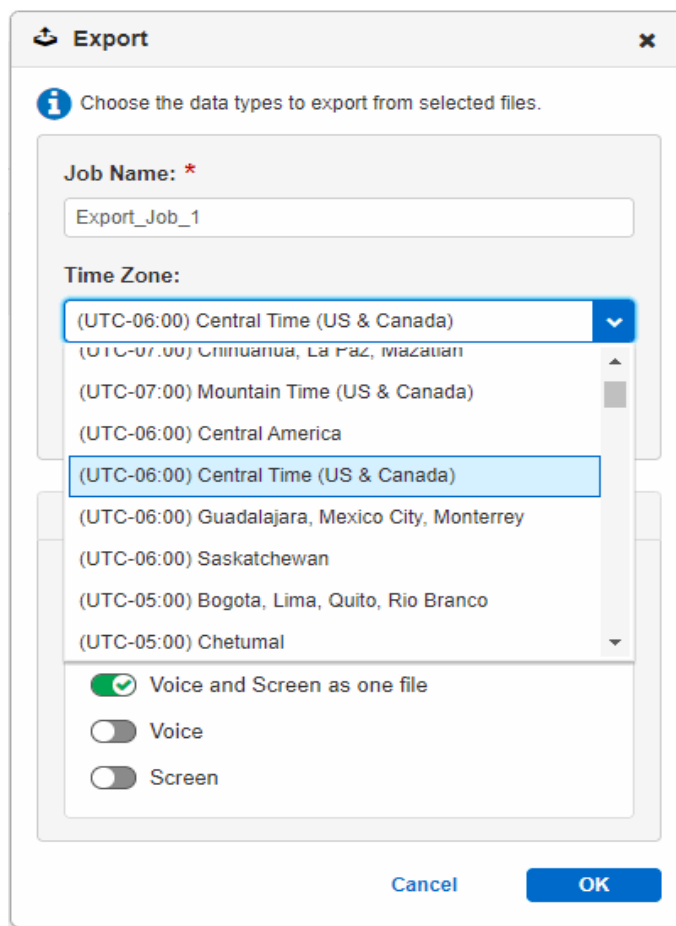
- Click on **Export Media**  from the list.

The Export window opens.

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

Note: The fields marked (*) are mandatory fields.

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



- If you want to export metadata, select the **Metadata** option.
- If you want to export the evaluations for the selected interaction(s), select the **Evaluations** option.
- 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	<p>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.</p> <ul style="list-style-type: none"> 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.

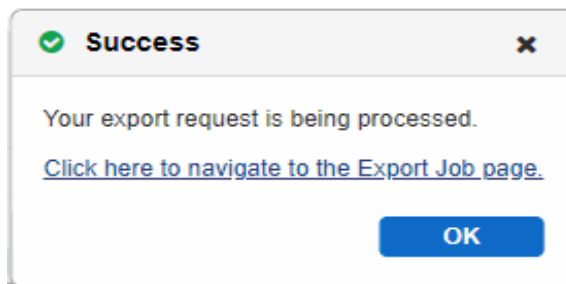
Option	Description
Non Voice Channels	Select this option to export Chat and Email interactions. Email Attachment - Select the option for exporting Email attachments.

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**. The Export Jobs window opens.

EXPORT JOBS

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

Job Name	Date Time Requested	Voice and Screen	Non Voice and Screen	Metadata	Evaluations	Requested By	Time Zone	Status
Chat Export job	11/9/2020 7:26:46 AM					Administrator , AQM	(UTC-05:00) Eastern Time (US & Canada)	Done
Job28	11/3/2020 4:55:05 PM					Administrator , AQM	(UTC-06:00) Central Time (US & Canada)	Done
DemoJobforTimeZoneInExcel	11/3/2020 3:29:13 PM					Administrator , AQM	(UTC-06:00) Central Time (US & Canada)	Done with failures
Job27	11/3/2020 12:01:07 AM					Administrator , AQM	(UTC+05:30) Chennai, Kolkata, Mumbai, New Delhi	Done
Job26	11/2/2020 11:34:43 PM					Administrator , AQM	(UTC-08:00) Pacific Time (US & Canada)	Done
Job25	11/2/2020 10:13:09 PM					Administrator , AQM	(UTC-08:00) Pacific Time (US & Canada)	Done
Job23	11/2/2020 9:34:30 PM					Administrator , AQM	(UTC-06:00) Central Time (US & Canada)	Done
Job22	11/2/2020 9:14:29 PM					Administrator , AQM	(UTC-06:00) Central Time (US & Canada)	Done
Job22	11/2/2020 9:04:09 PM					Administrator , AQM	(UTC-08:00) Pacific Time (US & Canada)	Done
Job22	11/2/2020 8:47:43 PM					Administrator , AQM	(UTC) Coordinated Universal Time	Pending
Job21	11/2/2020 7:22:09 PM					Administrator , AQM	(UTC-08:00) Pacific Time (US & Canada)	Done
Job20	11/2/2020 6:22:50 PM					Administrator , AQM	(UTC+05:30) Chennai, Kolkata, Mumbai, New Delhi	Done

1 - 18 of 18 items

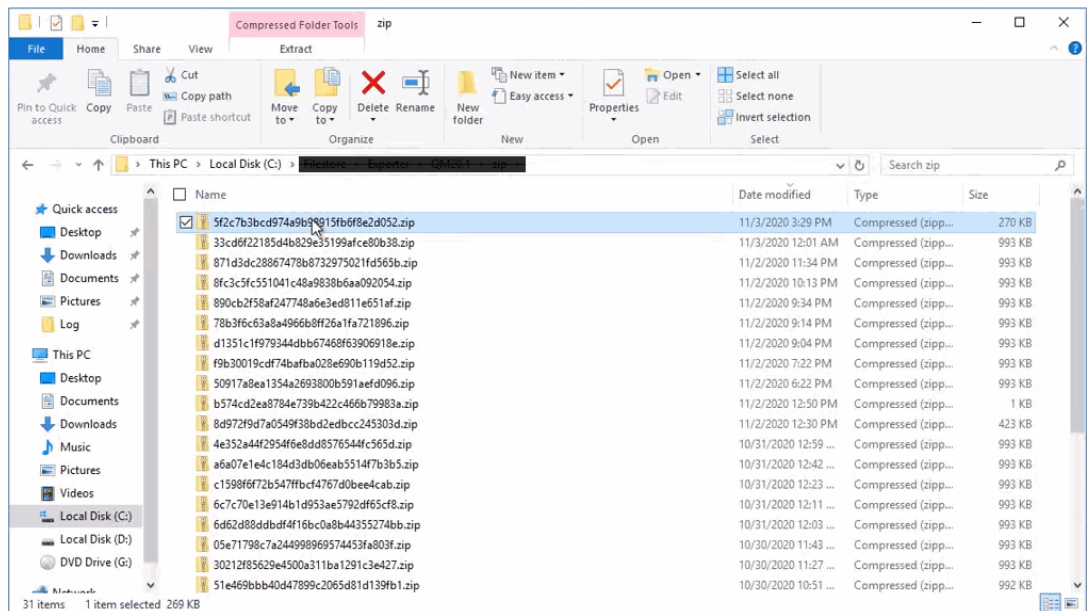
EXPORT JOBS

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

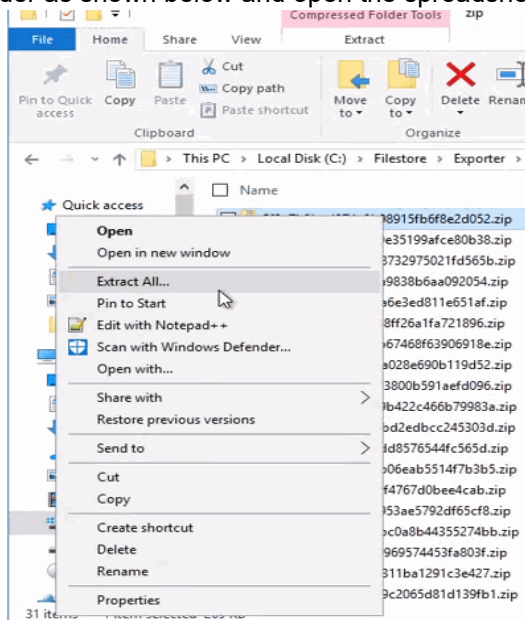
Job Name	Date Time Requested	Voice and Screen	Non Voice	Metadata	Evaluations	Requested By	Time Zone
Export media job	11/2/2023 12:23:53 PM					Administrator , AQM	(UTC) Coordinated Universa

1

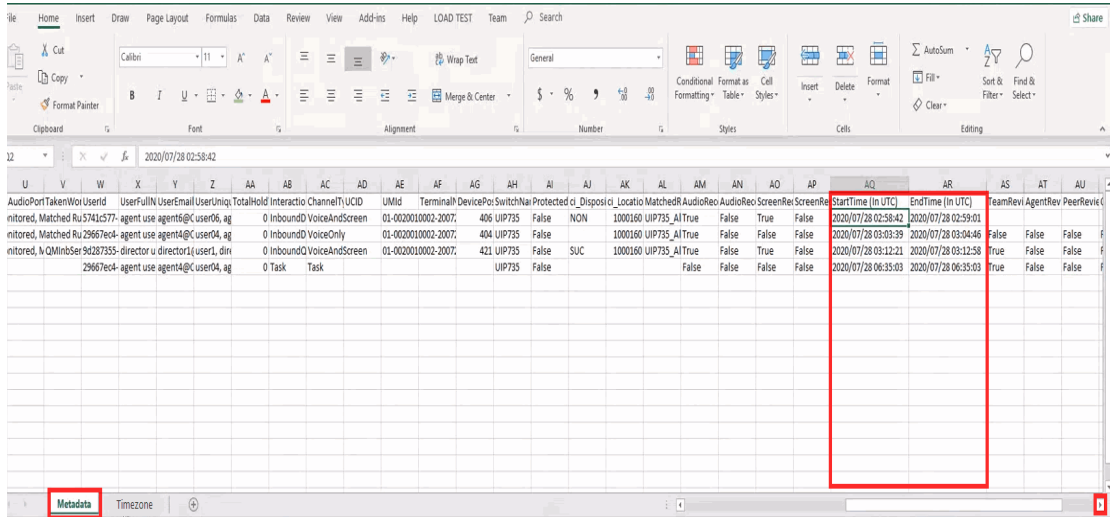
12. Go to your local folder where the export job is saved and select the folder as shown below.



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

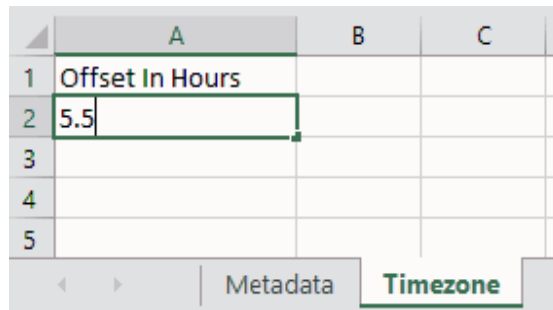


14. On the Metadata tab, the **Start Time** and **End Time** columns reflect the time according to the selected time zone, and scroll right to find the **Start Time (In UTC)** and **End Time (In UTC)** column of the export job as shown below.



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.

A	B	C	D	E	F	G	H	I	J	K	L
Recording AudioFile	ScreenFile	Combinec	ChatTrans	SMSTrans	EmailTran	Ani	Applicatic	Dnis	StartTime	EndTime	
ebb74c40-4eb4-4d75-8956-65e1	20200728025842-5741c577a43c4c4cae0348						406		405	2020/07/27 20:58:42	2020/07/27 20:59:01
e534600e-20200728030339-29667ec49a154ae68ff6deb66f0fee22-e534600							405		404	2020/07/27 21:03:39	2020/07/27 21:04:46
b239d544-1a74-4580-a0fb-104fi	20200728031221-9d28735535a94b9eb257e46d12e85c	QMInbour							40002	2020/07/27 21:12:21	2020/07/27 21:12:58
716b7d3c-ea82-4fe3-8749-f68508bb8445										2020/07/28 00:35:03	2020/07/28 00:35:03

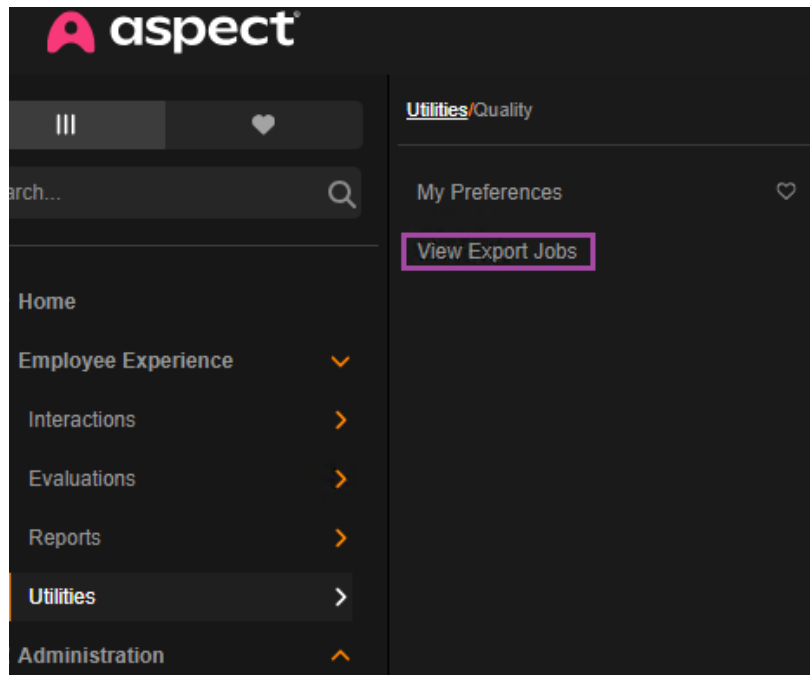
Before

A	B	C	D	E	F	G	H	I	J	K	L
Recording AudioFile	ScreenFile	Combinec	ChatTrans	SMSTrans	EmailTran	Ani	Applicatic	Dnis	StartTime	EndTime	
ebb74c40-4eb4-4d75-8956-65e1	20200728025842-5741c577a43c4c4cae0348						406		405	2020/07/28 08:28:42	2020/07/28 08:29:01
e534600e-20200728030339-29667ec49a154ae68ff6deb66f0fee22-e534600							405		404	2020/07/28 08:33:39	2020/07/28 08:34:46
b239d544-1a74-4580-a0fb-104fi	20200728031221-9d28735535a94b9eb257e46d12e85c	QMInbour							40002	2020/07/28 08:42:21	2020/07/28 08:42:58
716b7d3c-ea82-4fe3-8749-f68508bb8445										2020/07/28 12:05:03	2020/07/28 12:05:03

After

4.8 View Export Jobs

You can access the **View Export Jobs** by login to Workforce Engagement Management, and select Quality. Now, click the menu. Select **Employee Experience > Utilities > View Export Jobs**.



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	Non Voice and Screen	Metadata	Evaluations	Requested By	Time Zone	Status
Chat Export.job	11/9/2020 7:26:46 AM			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Administrator, AQM	(UTC-05:00) Eastern Time (US & Canada)	Done
Job28	11/3/2020 4:55:05 PM			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Administrator, AQM	(UTC-06:00) Central Time (US & Canada)	Done
DemoJobforTimeZoneInExcel	11/3/2020 3:29:13 PM			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Administrator, AQM	(UTC-06:00) Central Time (US & Canada)	Done with failures
Job27	11/3/2020 12:01:07 AM			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Administrator, AQM	(UTC+05:30) Chennai, Kolkata, Mumbai, New Delhi	Done
Job26	11/2/2020 11:34:43 PM			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Administrator, AQM	(UTC-08:00) Pacific Time (US & Canada)	Done
Job25	11/2/2020 10:13:09 PM			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Administrator, AQM	(UTC-08:00) Pacific Time (US & Canada)	Done
Job23	11/2/2020 9:34:30 PM			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Administrator, AQM	(UTC-06:00) Central Time (US & Canada)	Done
Job22	11/2/2020 9:14:29 PM			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Administrator, AQM	(UTC-06:00) Central Time (US & Canada)	Done
Job22	11/2/2020 9:04:09 PM			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Administrator, AQM	(UTC-08:00) Pacific Time (US & Canada)	Done
Job22	11/2/2020 8:47:43 PM			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Administrator, AQM	(UTC) Coordinated Universal Time	Pending
Job21	11/2/2020 7:22:09 PM			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Administrator, AQM	(UTC-08:00) Pacific Time (US & Canada)	Done
Job20	11/2/2020 6:22:50 PM			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Administrator, AQM	(UTC+05:30) Chennai, Kolkata, Mumbai, New Delhi	Done





1 - 18 of 18 items

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	The Voice and Screen icons are enabled when the respective interaction is selected
Non Voice	The Email and Chat icons are enabled when the respective interaction is selected.
Metadata	A check mark icon to indicate that Export metadata was selected when saving the export job.
Evaluation	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 Search Evaluations 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 four possible states. Refer to the next table for further information.

The following table describes the export job states.

Status	Description
	<p>Pending. The export job has been received and is currently being processed.</p>
	<p>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.</p>
	<p>Done. The export process has completed successfully. The export job is available for download.</p>
	<p>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.</p> <p>The export job is available for download and contains the successfully exported items.</p> <p>Note: This state is not applicable to table items in the View Job Details window.</p>

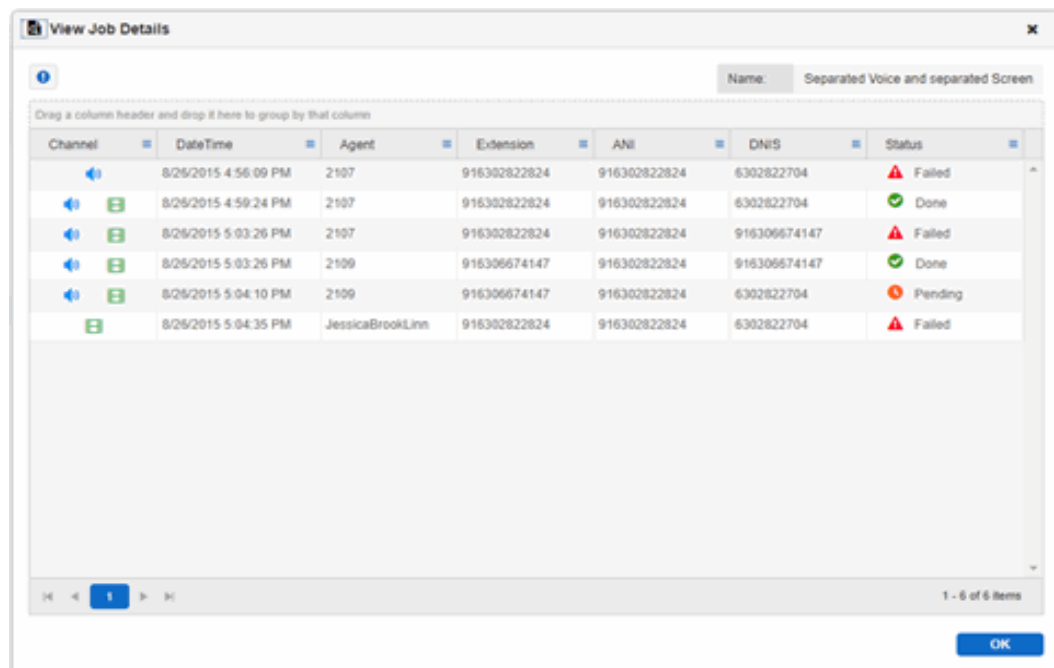
The export job grid supports single row selection. With each selected row, where applicable, you can execute the following actions.

Status	Description
	<p>Refresh. When you select this action, the export grid is refreshed to reflect the latest export job items.</p> <p>This action is always enabled.</p>

Status	Description
	<p>View Details. When you select this action, a window opens with a detailed view of each interaction in the selected export job.</p> <p>This action is always enabled.</p>
	<p>Download. When you select this action, the selected export job downloads as a single compressed (Zip) file.</p> <p>This action is only available to export jobs with a status of Done and Done with Failures.</p>
	<p>Delete. When you select this action, you can confirm if you want to delete the selected export job.</p> <p>This action is always enabled.</p>

4.8.1 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.

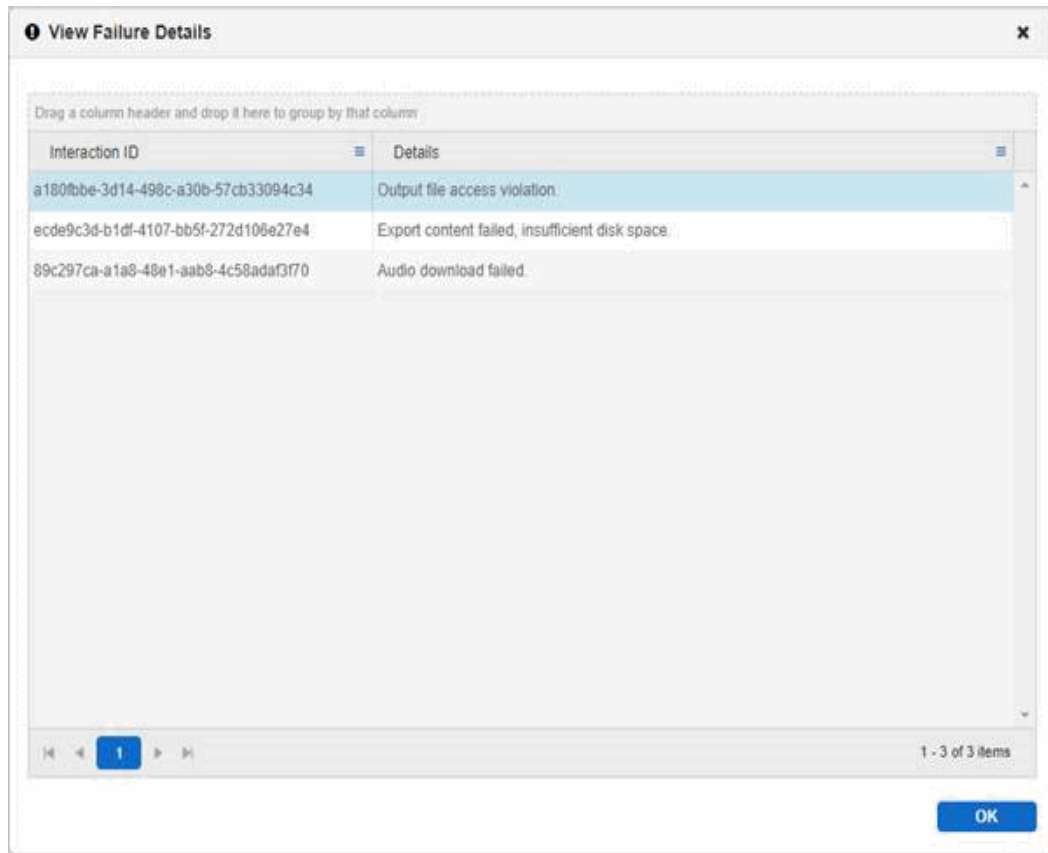
Columns	Description
Channel	The channel associated with the interaction. This is represented by the corresponding channel icon used in the (Scored) Interaction search screen. If the interaction channel is a Voice and Screen channel, up to 3 icons may be displayed in this column. This would represent 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 Dialed 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.
ScorecardID (hidden column)	The unique identifier of the Search Evaluation.
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 4-228 . Note: The Done with Failures state is not applicable to the View Job Details window.

4.8.2 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.

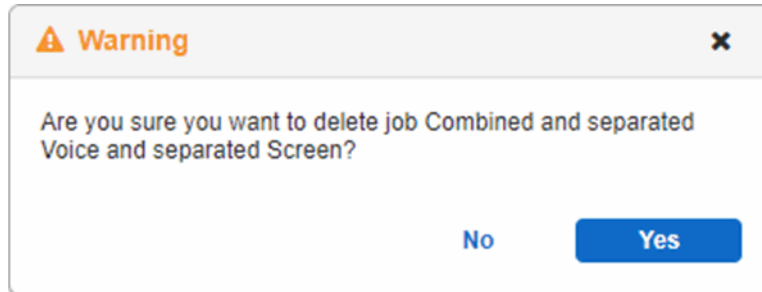


The View Failure Details window outlines the error associated with each export detail row. The following table describes the columns in the View Failure Details window.

Column	Description
Interaction ID	The unique identifier of the interaction. If this is a scored interaction, the same Interaction ID may exist across other rows to indicate related Search Evaluations.
Details	This column outlines the export error that occurred against the interaction.

4.8.3 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.

4.8.4 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.

4.8.5 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.

AUDIT ACTIVITY DETAIL

Date Range: 12/13/2017-1/12/2018 Team: No Team

Activity Date	Action	Entity Type	Entity Description	Comment
12/18/2017 4:50:56 PM	Deleted	Export Job	Job test 1	Job test 1
12/18/2017 5:03:42 PM	Created	Export Job	Test 2	Test 2
12/18/2017 5:04:04 PM	Deleted	Export Job	Test 2	Test 2
12/18/2017 5:10:11 PM	Created	Export Job	test3	test3

4.9 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 Search Evaluations 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 Search Evaluations window. In the Search Evaluations table, select the evaluations that you want to delete and click **Delete**.

4.9.1 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 Search Evaluations window.
2. On the Dashboard, click **Quality**.
3. Under Aspect Quality Evaluation, click on **Search Evaluations**. After selecting the required criteria from [Select a Date Option](#), [Select a Channel](#), [Select a Status](#) and [Select Criteria](#) fields, the Search Evaluations window opens.

SEARCH RESULTS: EVALUATIONS

Search Type: New Search

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

	Cha...	Type	Date...	Dura...	Agent	Ext...	Anal...	Coa...	Score	To R...	Status
<input type="checkbox"/>	<input checked="" type="checkbox"/>		3:19:36 AM	0:00:00	Baker				50%		(=)
<input type="checkbox"/>	<input checked="" type="checkbox"/>		10/10/2019 3:19:36 AM	0:00:00	Andrew, Baker				100%	Agent	(=)
<input type="checkbox"/>	<input checked="" type="checkbox"/>		10/10/2019 3:19:19 AM	0:00:00	Andrew, Baker				100%		(=)
<input type="checkbox"/>	<input checked="" type="checkbox"/>		9/30/2019 4:37:07 PM	0:00:00	Pissay, Tara				N/A		(=)
<input type="checkbox"/>	<input checked="" type="checkbox"/>		9/30/2019 4:36:48 PM	0:00:00	Pissay, Tara				N/A		(=)
<input type="checkbox"/>	<input checked="" type="checkbox"/>		9/27/2019 2:01:26 AM	0:00:00	auto, User1				N/A		(=)
<input type="checkbox"/>	<input checked="" type="checkbox"/>		9/20/2019 5:51:30 PM	0:00:00	Dwivedy, Abhay				1		(=)
<input type="checkbox"/>	<input checked="" type="checkbox"/>		8/27/2019 9:06:52 PM	0:00:47	Dwivedy, Abhay	2579			50%		(=)
<input type="checkbox"/>	<input checked="" type="checkbox"/>		8/27/2019 9:06:52 PM	0:00:47	Pissay, Tara	2578			3		(=)
<input type="checkbox"/>	<input checked="" type="checkbox"/>		8/27/2019 8:11:23 PM	0:01:20	Pissay, Tara	2578			50%		(=)
<input type="checkbox"/>	<input checked="" type="checkbox"/>		8/27/2019 8:11:23 PM	0:01:20	Dwivedy, Abhay	2579			Draft		(=)

1 - 15 of 15 items

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.

SEARCH RESULTS: EVALUATIONS

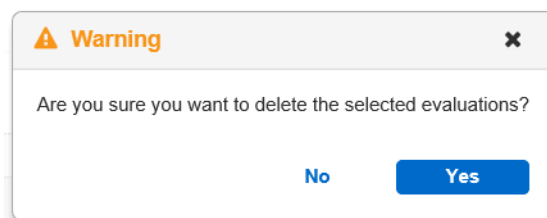
<input type="checkbox"/>	Cha...	Type	Date...	Dura...	Agent	Ext...	Anal...	Coa...	Score	To R...	Status
<input type="checkbox"/>			3:19:36 AM	0:00:00	Baker				50%		(=)
<input type="checkbox"/>			10/10/2019 3:19:36 AM	0:00:00	Andrew, Baker				100%	Agent	(=)
<input type="checkbox"/>			10/10/2019 3:19:19 AM	0:00:00	Andrew, Baker				100%		(=)
<input type="checkbox"/>			9/30/2019 4:37:07 PM	0:00:00	Pissay, Tara				N/A		(=)
<input type="checkbox"/>			9/30/2019 4:36:48 PM	0:00:00	Pissay, Tara				N/A		(=)
<input type="checkbox"/>			9/27/2019 2:01:26 AM	0:00:00	auto, User1				N/A		(=)
<input type="checkbox"/>			9/20/2019 5:51:30 PM	0:00:00	Dwivedy, Abhay				1		(=)
<input type="checkbox"/>			8/27/2019 9:06:52 PM	0:00:47	Dwivedy, Abhay	2579			50%		(=)
<input checked="" type="checkbox"/>			8/27/2019 9:06:52 PM	0:00:47	Pissay, Tara	2578			3		(=)
<input type="checkbox"/>			8/27/2019 8:11:23 PM	0:01:20	Pissay, Tara	2578			50%		(=)
<input type="checkbox"/>			8/27/2019 8:11:23 PM	0:01:20	Dwivedy, Abhay	2579			Draft		(=)

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

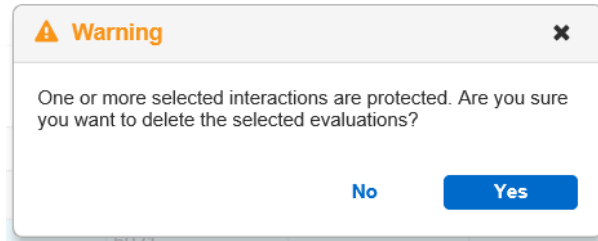
7. Click **Delete**. A warning message opens.

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.

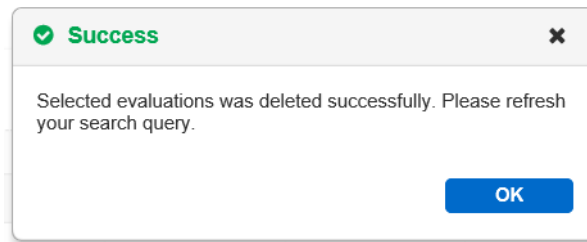


8. To delete the evaluations, click **Yes**.

Note:

- If the selected interaction has only one evaluation and you delete it, the interaction is no longer displayed in the Search Evaluations 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 Search Evaluations 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.

4.10 My Preferences

My Preferences window allows you to show inactive details of User, Agent Group, Evaluation Template, Application and Team in Report definition and search criteria based on the preference of the logged-in user. The window also shows details of Playback In Stereo, which means audio should be played back in stereo when it is set to Yes.

Below is the table for all the Preferences:

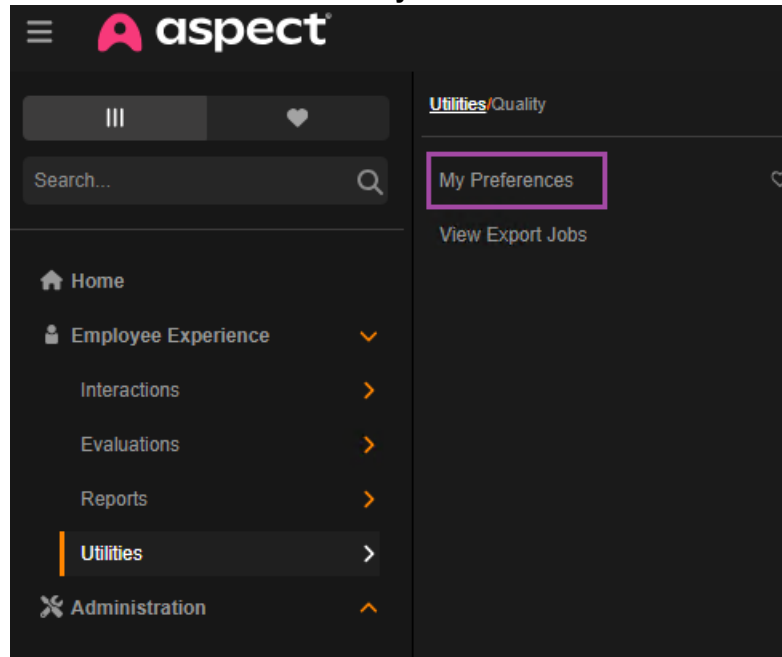
Name of the Preferences	Description
Display Inactive Users in Search Criteria	By default, inactive Users will not be displayed in Search Criteria and if you wish to view them, you have to turn on the preference.
Display Inactive Teams in Search Criteria	By default, inactive Teams will not be displayed in Search Criteria and if you wish to view them, you have to turn on the preference.
Display Inactive Evaluation Templates in Search Criteria	By default, inactive Evaluation Templates will not be displayed in Search Criteria and if you wish to view them, you have to turn on the preference.
Display Inactive Applications in Search Criteria	By default, inactive Applications will not be displayed in Search Criteria and if you wish to view them, you have to turn on the preference.
Display Inactive Agent Groups in Search Criteria	By default, inactive Agent Groups will not be displayed in Search Criteria and if you wish to view them, you have to turn on the preference.
Display Inactive Users in Reports	By default, inactive Users will not be displayed in Reports and if you wish to view them, you have to turn on the preference.
Display Inactive Teams in Reports	By default, inactive Teams will not be displayed in Reports and if you wish to view them, you have to turn on the preference.
Display Inactive Evaluation Templates in Reports	By default, inactive Evaluation Templates will not be displayed in Reports and if you wish to view them, you have to turn on the preference.
Display Inactive Applications in Reports	By default, inactive Applications will not be displayed in Reports and if you wish to view them, you have to turn on the preference.
Display Inactive Agent Groups in Reports	By default, inactive Agent Groups will not be displayed in Reports and if you wish to view them, you have to turn on the preference.
Playback In Stereo	By default, playback of Audio recording or Audio with Screen recordings will be played back in Stereo (if it is recorded as Stereo, else will be played back as Mono), which is depicted by a check-mark in the value column. If you wish to play back in Mono, then you can edit the preference and select "No" from the Edit Preference to playback as Mono (the value column will be blank).

Note: When you turn on the preference, the settings apply only to you and not across the system.

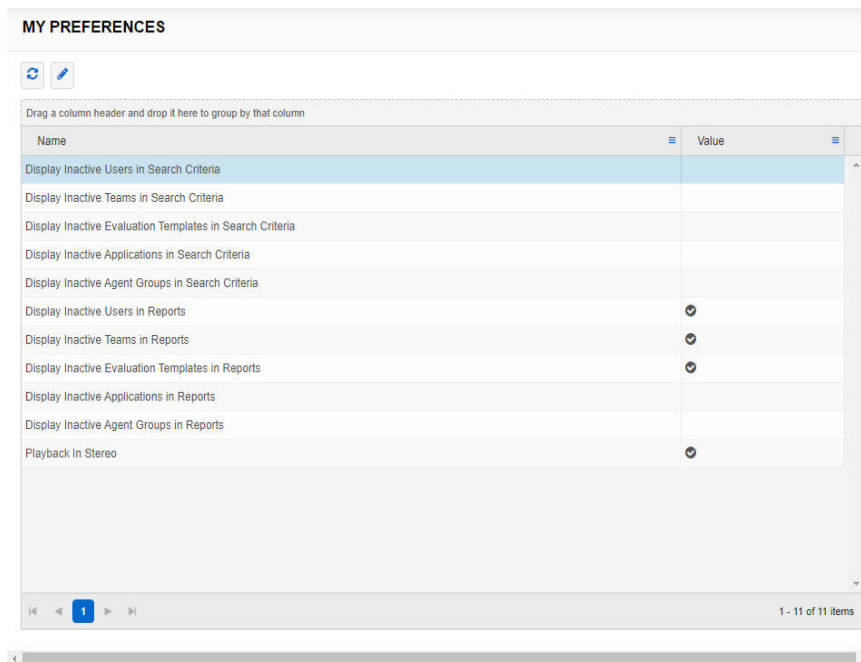
Follow the steps below to go to My Preferences window.

1. Login to Workforce Engagement Management.

2. Go to **Main Menu** and click on **Utilities - My Preferences**.




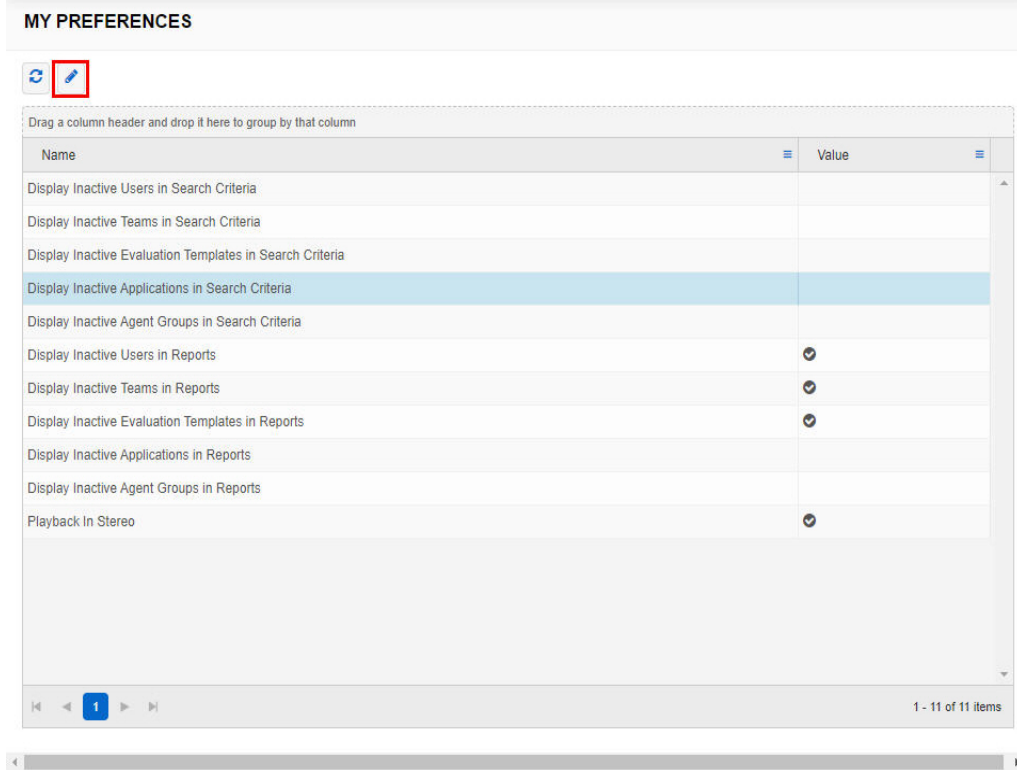
3. The **MY PREFERENCES** window appears.



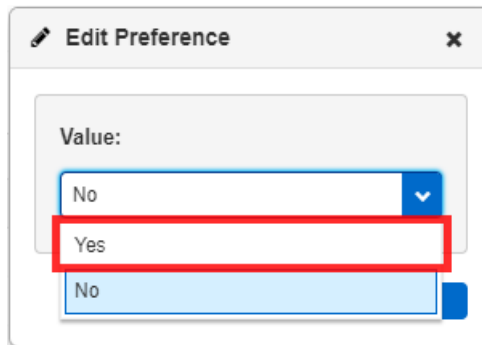
4.10.1 Edit My Preferences

When you want to edit the value of My Preferences, follow the steps below.

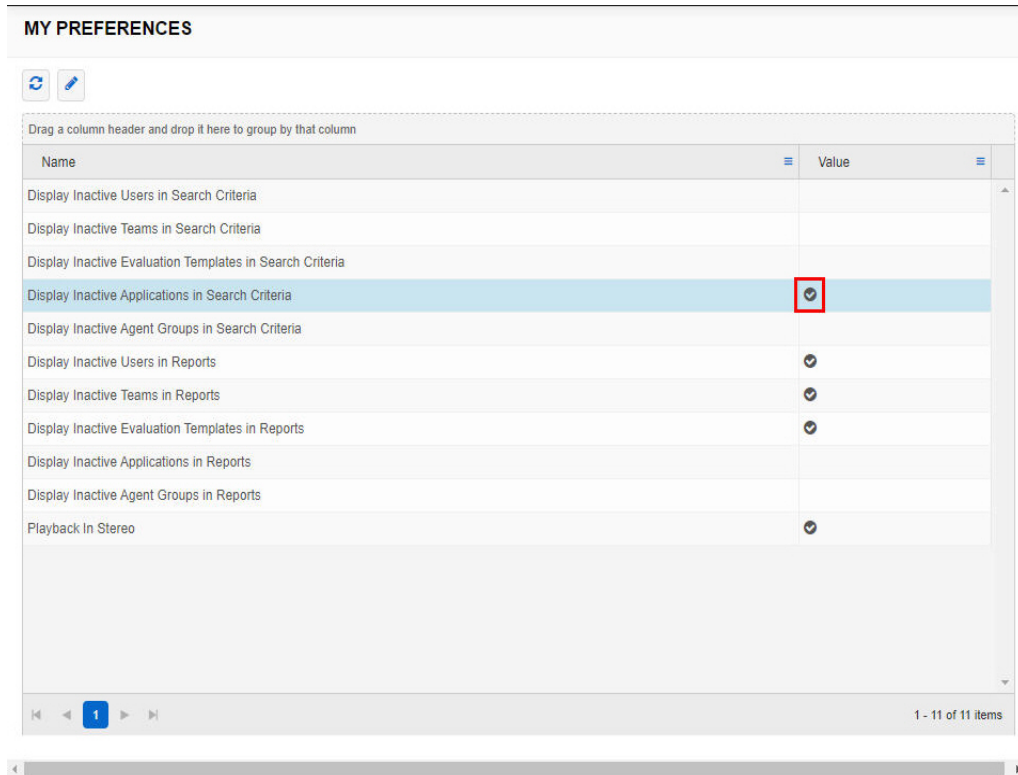
1. Select the preference row and click on the **Edit**  button.



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



- Click on the **Save** button 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.

5. Assigning Interactions

From Search Results page, a user who has the “Assign Interaction” right can assign one or more interactions to other users and specify an expiry date. So that the user to whom the interactions were assigned, now will be able to see/score the interaction. For example, when one of the agents in a mentor’s team, who has handled the call very well and if the mentor wants to share the interaction with other mentors, about how the agent has done. The mentor can use this feature to assign interaction to other mentors. Also, when a mentor goes on vacation and if the mentor wants other mentors to score his/her team's interactions then he/she can share the selected interactions with other users as well. Refer [Performing a Search](#) for the list of interactions and follow the steps below to assign an interaction.

1. Select the interaction which you want to assign.
2. Click on **Interaction Menu > Assign interactions** as shown below.

SEARCH RESULTS: ALL

Channel	Date Time	Duration	Extension	ANI	DNIS	Status
	2019 4:52:01 PM	0:00:00				(v)
	2019 4:51:13 PM	0:00:23	1024	1025	2579	(v)
<input checked="" type="checkbox"/>	2019 4:50:14 PM	0:00:26	1025	1025	2579	(v)
	2019 4:49:28 PM	0:01:44	1025	1024	1025	(v)
	2019 4:49:28 PM	0:01:44	1024	1024	1025	(v)
	2019 4:48:22 PM	0:00:00				(v)
	2019 4:45:47 PM	0:00:46	1025	1024	1025	(v)
	9/6/2019 4:45:47 PM	0:00:46	1024	1024	1025	(v)
	9/6/2019 4:40:27 PM	0:05:20	1024	1024	1025	(v)
	9/6/2019 4:40:27 PM	0:05:20	1025	1024	1025	(v)
	9/6/2019 4:39:47 PM	0:00:09	1025	1024	1025	(v)
	9/6/2019 4:39:47 PM	0:00:09	1024	1024	1025	(v)

3. The **Assign Interactions** window appears as shown below.

Assign Interactions

Users: *
Select Selected (0)

Name: *
[Text Input]

View Until: *
3/13/2020 2:03 PM [Calendar Icon]

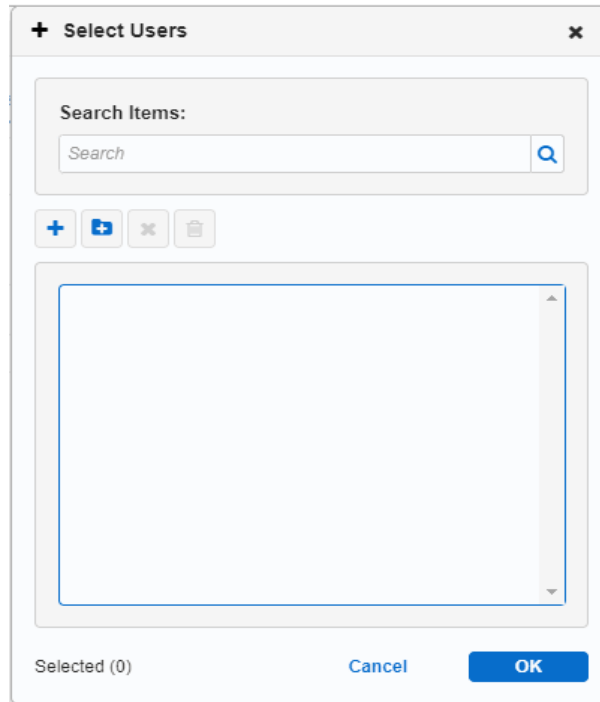
Notify User

Message:
Hi,
I have shared interactions with you. Please search using 'My assigned recordings' in the search page to listen to those interactions.
Thanks,





Cancel OK

Note: The fields marked (*) are mandatory fields.

- Click on the **Select** button to choose the user whom you want to assign the interaction. The **Select Users** window appears as shown below.



The buttons on the Select Users window are described in the following table.

Button	Name	Description
	Search	Click to search for the matched user and to open the Users table. Note: Only active users are displayed.
	Add	Click to open the Users table, where you can add users to the list. Note: Only active users are displayed.
	Clear Selected	Remove the selected users from the list.
	Clear All	Remove all users from the list.

5. Click on **Add** button and select the user from the list as shown below.

User Nam	First Nam	Last Name	Switch Name	Role
#	&	\$	None	Agent
@bhagya	Bhagya 1	Godihuggi1	UIP73_SP3_RCTIPS	Agent
1004	Cisco 7931	SCCP 1004	Cisco UCM (Inactive)	Agent
1007	Cisco 7941	SEP001F9E253...	Cisco UCM (Inactive)	Agent
1008	Cisco 7931	SCCP 1008	Cisco UCM (Inactive)	Mentor
1009	Cisco 7931	SCCP 1009	Cisco UCM (Inactive)	Agent
1016	Cisco 7940	1016	Cisco UCM (Inactive)	Agent
1017	Cisco 7940	1017	Cisco UCM (Inactive)	Agent
1022	Cisco 7941	SIP 1022	Cisco UCM (Inactive)	Agent
1024	Cisco 7960	1024	Cisco UCM (Inactive)	Agent
1025	Cisco IP Communicator	Surya 1025	Cisco UCM (Inactive)	Agent
1026	Cisco 7941	SIP 1026	Cisco UCM (Inactive)	Agent
EM Device Profile				

1 - 100 of 2046 items

OK

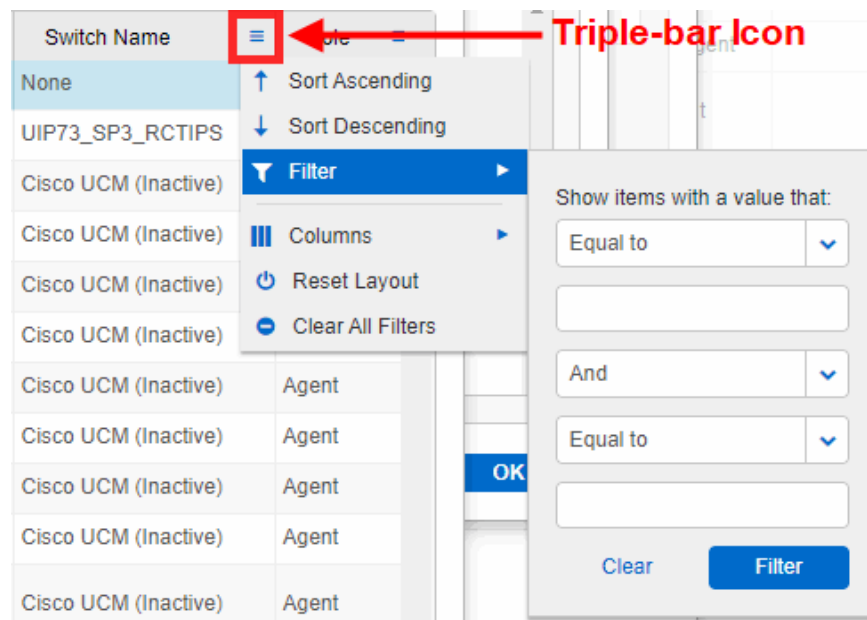
Note:

- To select multiple users, click Ctrl and the left click on the mouse on the user rows from the list.

- From the triple-bar icon which is next to the column name, the user can narrow or filter the columns by changing the criteria of a particular column. The column details are given in the below table.

Column Name	Description
User Name	Displays user name of the user
First Name	Displays first name of the user
Last Name	Displays last name of the user
Switch Name	<ul style="list-style-type: none"> Switch name to which the user is associated. If the Switch is not active, then "(Inactive)" will be displayed with the Switch Name If the user is not associated with any switch, then "None" will be displayed
Role	Displays Role of the user from the below list <ul style="list-style-type: none"> None Agent Mentor Administrator
Status	Displays the status of the user
Email Address	<ul style="list-style-type: none"> Displays Email address of the user If email address does not exist, then blank will be displayed
User Profile	<ul style="list-style-type: none"> Displays Profile name for which the user is associated.

For example, if the user wants to change the criteria for the Switch Name column, the **Filter** drop-down list displays as shown below.



- Click **OK** button. The User list table closes, the Select Users window is active, and the user(s) you selected displays in the lower half of the window.

- Click **OK**. The Select Users window closes and the Assign Interactions window is active as shown below.

- Type name (which will be used as a reference to understand what is the purpose of the assignment, so that it will be helpful if user wants to modify when the user has multiple assignments) on the **Name** field and select the date from the **View Until** field as shown below. By selecting the date and time, the user is able to view or listen the assigned interaction until the selected date and time.

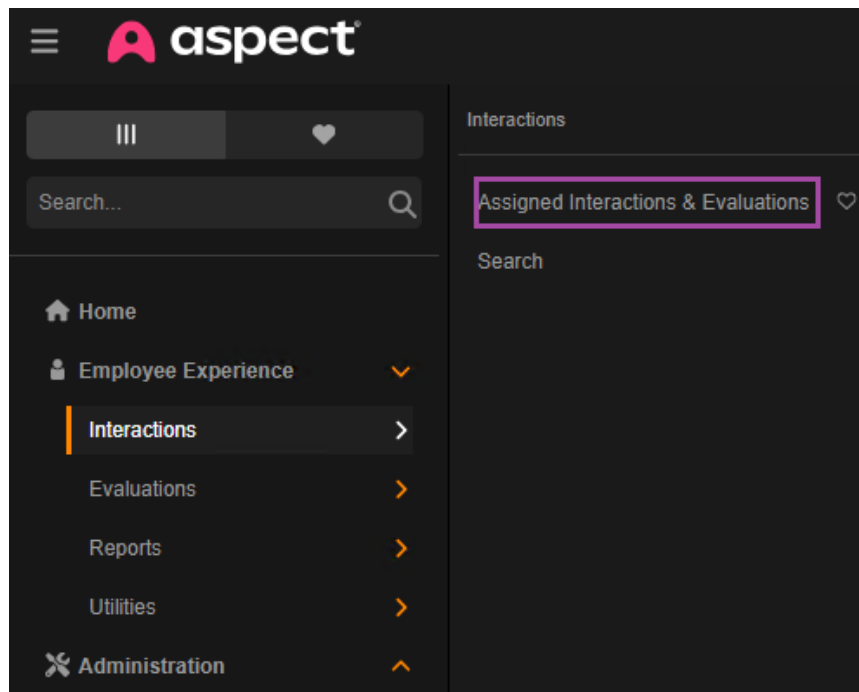
- Toggle-on the **Notify User** button as shown below and type any custom information which user wants to share with the assigning users and if user don't want customized message then user can leave the default message as mentioned in the screen for the selected user(s).

10. Click on **OK** button to assign the interaction for the selected user. The assigned user will receive the information which you have written on the Message field through an email.

5.1 Manage Assigned Interactions and Evaluations

Once an interaction is assigned to the user (Refer to [Assigning Interactions](#)). The user who assigned the interaction and whom the interactions are assigned will be able to view the details about the interaction, in the Assigned Interactions and Evaluations window. To view the Assigned Interactions and Evaluations window, follow the steps below.




1. Login to Workforce Engagement Management.
2. Go to Main Menu and click on **Employee Experience > Interactions > Assigned Interactions & Evaluations** as shown below.



3. The **Assigned Interactions and Evaluations** window appears as shown below.

ASSIGNED INTERACTIONS AND EVALUATIONS




Interactions Assigned By Me | Interactions Assigned To Me | Evaluations Shared With Me

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

Name	Assigned On	Expires On	Assigned By	Status
Demo_1	3/12/2020 2:06:50 AM	3/13/2020 2:03:08 PM	Administrator, AQM	Active
Assigned by mentor	3/11/2020 12:03:10 AM	3/12/2020 12:03:10 AM	Dwivedy, Abhay	Expired
New assign recording	3/10/2020 1:47:35 AM	3/11/2020 1:47:35 AM	Administrator, AQM	Expired
Karthi	3/10/2020 1:28:52 AM	3/11/2020 1:28:52 AM	Administrator, AQM	Expired
assign to mentor1	3/10/2020 1:05:38 AM	3/11/2020 1:05:38 AM	Administrator, AQM	Expired
Assign to agent	3/10/2020 1:02:17 AM	3/11/2020 1:02:17 AM	Administrator, AQM	Expired
assign to mentor	3/10/2020 1:02:05 AM	3/11/2020 1:02:05 AM	Administrator, AQM	Expired
assign to mentor and agent	3/10/2020 1:01:33 AM	3/11/2020 1:01:33 AM	Administrator, AQM	Expired
444	3/2/2020 5:09:06 AM	3/2/2020 5:09:08 AM	Administrator, AQM	Expired
777	3/2/2020 5:06:34 AM	3/3/2020 5:06:34 AM	Administrator, AQM	Expired
555	3/2/2020 5:04:26 AM	3/2/2020 6:05:26 AM	Administrator, AQM	Expired
777	3/2/2020 5:04:09 AM	3/3/2020 5:04:09 AM	Administrator, AQM	Expired
6	2/1/2020 12:50:03 AM	2/2/2020 12:50:03 AM	Administrator, AQM	Expired
5	2/1/2020 12:49:13 AM	2/2/2020 12:49:13 AM	Administrator, AQM	Expired
7	4/24/2020 2:44:40 PM	2/1/2020 12:49:13 AM	Administrator, AQM	Expired

The buttons on the **Interactions Assigned By Me** tab are described in the following table.

Button	Name	Description
	Refresh	Refreshes the grid with latest changes. Instead of user click on the browser refresh button, user can click on this which will refresh only the grid data and not the page
	Edit	Opens the Assigned Interaction for user to edit.
	Delete	To Delete an Assigned Interaction.

The available columns under the **Interactions Assigned By Me** tab are given below.

- **Name** - The name of the assignment which the user entered while creating the assignment
- **Assigned On** - The date when the interaction is assigned to the users
- **Expires On** - The assignment is going to expire on the date and time mentioned in the column. The user is able to view the interaction until that date and time
- **Assigned By** - The user who assigned the interaction. This column is available **only** to the **Administrator**.
- **Status** - The status of the evaluation such as Draft or Complete.

5.1.1 View Interactions Assigned To Me

Click on **Interactions Assigned To Me** tab to view the interactions which are assigned to you as shown below.

ASSIGNED INTERACTIONS AND EVALUATIONS				
Interactions Assigned By Me		Interactions Assigned To Me		Evaluations Shared With Me
		Drag a column header and drop it here to group by that column		
Name	Assigned On	Expires On	Status	
Assign to Bhagya	6/5/2020 5:33:34 PM	7/7/2020 5:40:19 PM	Active	
Assign to Bhagya	3/19/2020 11:44:47 AM	4/10/2020 11:45:44 AM	Expired	
assign to Chida- from AQMAAdmin	3/16/2020 2:42:52 PM	3/17/2020 2:43:53 PM	Expired	
sadas	3/11/2020 3:43:30 PM	3/12/2020 3:44:23 PM	Expired	

The buttons on the Interactions Assigned To Me tab are described in the following table.

Button	Name	Description
	Refresh	Refreshes the grid with latest changes. Instead of user click on the browser refresh button, user can click on this which will refresh only the grid data and not the page
	Create Playlist	Select one or more interactions as a group, to listen to recordings. Refer the Step 2 of Create a Playlist section.

The available columns under the Interactions Assigned To Me tab are given below.

- **Name** - The name of the assignment which the user entered while creating the assignment
- **Assigned On** - The date when the interaction is assigned to the users
- **Expires On** - The assignment is going to expire on the date and time mentioned in the column. The user is able to view the interaction until that date and time
- **Assigned By** - The user who assigned the interaction. This column is available **only** to the **Administrator**.
- **Status** - The status of the assignment either **Active** or **Expired**.

To view the details of interactions that are assigned as part of the assignment such as Channel, Direction, Type, Date Time, and so on, click on the **Expand** button. The expanded view is shown below.



ASSIGNED INTERACTIONS AND EVALUATIONS										
Interactions Assigned By Me			Interactions Assigned To Me			Evaluations Shared With Me				
		Drag a column header and drop it here to group by that column								
Name	Assigned On	Expires On	Status							
Assign to Bhagya	6/5/2020 5:33:34 PM	7/7/2020 5:40:19 PM	Active							
Drag a column header and drop it here to group by that column										
Channel	Direction	Type	Date Time	Duration	Agent	Extension	ANI			
<input type="checkbox"/>		Inbound	ACD Call	5/19/2016 3:35:44 PM	0:00:52	Godihuggl, Bhagyashree	6861132	6861131		
<input type="checkbox"/>		Outbound	Outbound Direct Call	5/4/2016 4:37:58 PM	0:00:17	User1, Ux	916302822720	91630282		
1 - 2 of 2 items										
Assign to Bhagya	3/19/2020 11:44:47 AM	4/10/2020 11:45:44 AM	Expired							

5.1.2 View Evaluations Shared With Me

Go to **Evaluations Shared With Me** to view the evaluations which are shared with you as shown below.

ASSIGNED INTERACTIONS AND EVALUATIONS



Interactions Assigned By Me Interactions Assigned To Me **Evaluations Shared With Me**

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

	Quality Score (%)	Point Score	Pass/Fail	Status	Template Name	Created By	
<input type="checkbox"/>	100%	10/10	Pass	Complete	150919	Administrator AQM	3/18
<input type="checkbox"/>	105%	105/100	Pass	Complete	General Performance	Puttappa Chida	3/18
<input type="checkbox"/>	Draft	Draft	Draft	Draft	General Performance	Administrator AQM	3/18

The buttons on the Evaluations Shared With Me tab are described in the following table.

Button	Name	Description
	Refresh	Refreshes the grid with latest changes. Instead of user click on the browser refresh button, user can click on this which will refresh only the grid data and not the page
	Create Playlist	Select one or more interactions as a group, to listen to recordings. Refer the Step 2 of Create a Playlist section.

Note: Evaluations which are shared with you only through the "Share with specific users" will display here.

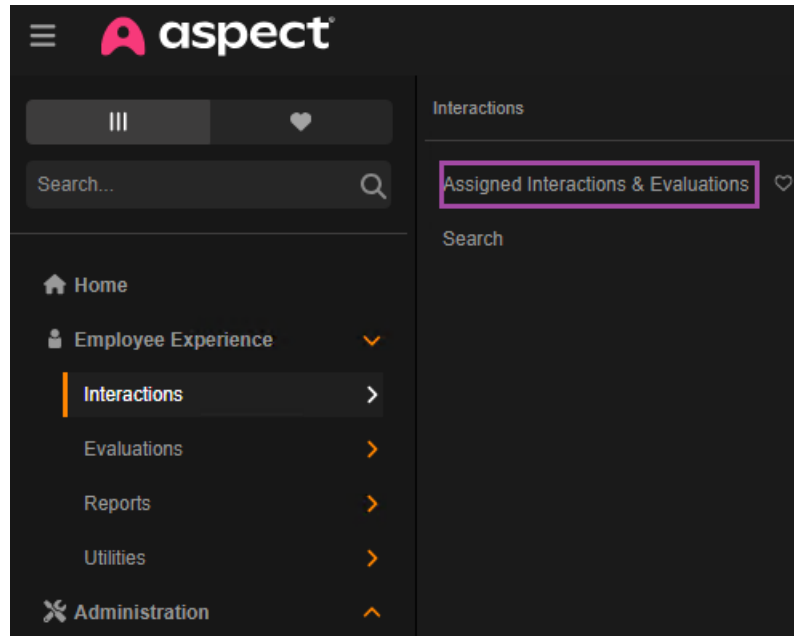
The available columns under the Evaluations Shared With Me tab are given below.

- **Quality Score** - The evaluation score in percentage
- **Point Score** - The evaluation score in "Total Points earned/Total Points Possible"
- **Pass/Fail** - The evaluation score in Pass/Fail format.
- **Status** - The status of the evaluation such as Draft or Complete.
- **Template Name** - Name of the evaluation template.
- **Created By** - The creator of the evaluation template.
- **Created Date Time** - The date and time when the evaluation template was created.
- **To Review** - The reviewer (such as Agent, Team, Peer) who is assigned to review the evaluation.
- **Reviewed By Recorded Agent** - The review status of the evaluation which is assigned to the recorded agent, a check mark will be mentioned in this column.
- **Do Not Show In Report** - When the evaluation is used for training purpose, a check mark will be mentioned in this column.
- **Coaching** - When coaching is required for the evaluation, a check mark will be mentioned in this column.

5.2 Edit an Assigned Interactions and Evaluations

Use the edit feature to change an assigned interaction assignment and save the assigned interaction assignment.

1. Login to Workforce Engagement Management.
2. Go to Main Menu and click on **Employee Experience > Interactions > Assigned Interactions & Evaluations** as shown below.



3. Select an assigned interaction assignment which you want to edit and click on the **Edit** button under the **Interactions Assigned By Me** tab as shown below.

ASSIGNED INTERACTIONS AND EVALUATIONS

Interactions Assigned By Me | Interactions Assigned To Me | Evaluations Shared With Me

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

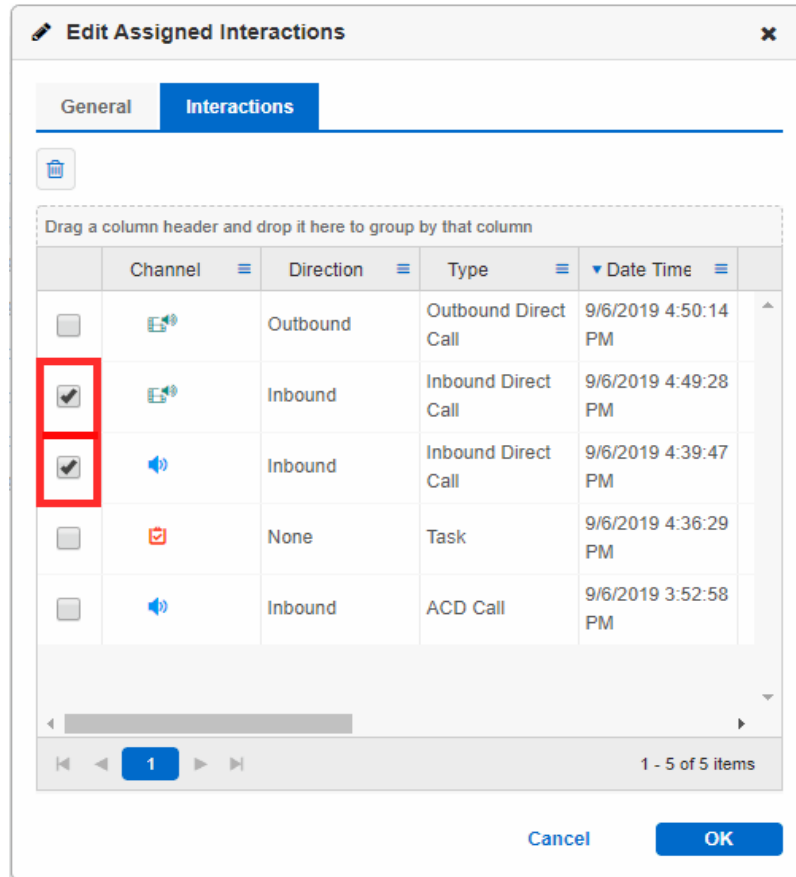
Name	Assigned On	Expires On	Assigned By	Status
Demo_1	4/1/2020 2:30:50 PM	4/7/2020 2:33:06 PM	Administrator, AQM	Active
Dhruva	3/23/2020 4:19:14 PM	3/24/2020 4:20:50 PM	Administrator, AQM	Expired
Demo Assignment - Mentor	3/20/2020 6:59:29 PM	3/21/2020 7:01:01 PM	Supervisor1, Cisco	Expired
Check Delete behavior	3/3/2020 2:49:17 PM	3/4/2020 2:49:17 PM	Administrator, AQM	Expired
AS	3/2/2020 5:55:53 PM	3/3/2020 5:55:53 PM	Administrator, AQM	Expired
Assign within 24 hrs	3/2/2020 5:33:10 PM	3/2/2020 6:33:10 PM	Administrator, AQM	Expired
To A24	2/19/2020 5:59:38 PM	2/20/2020 5:59:38 PM	Administrator, AQM	Expired

4. The **Edit Assigned Interactions** dialog appears as shown below.

The Edit Assigned Interactions dialog contains two tabs **General** and **Interactions**.

- **General** tab - From General tab, the administrator will be able to add or remove users, edit the name of the selected Assigned Interactions assignment, “View Until” date and time, “Notify User” will send notification to the selected users through an email. Refer to step 3 to 10 of [Assigning Interactions](#) section.
- **Interactions** tab - From Interactions tab, the administrator or owner of the assigned interaction will be able to delete interactions which are already assigned to the assigned user. If administrator or owner of the assigned interaction deletes interactions from the Interactions tab, the selected users (in General tab) will not be able to view those deleted interactions. Follow the steps from Step 5 to 7, to delete one or multiple interactions from the Interactions tab.

- Click on the **check boxes** of the interactions which administrator or owner of the assigned interaction wants to delete for the selected users, as shown below.



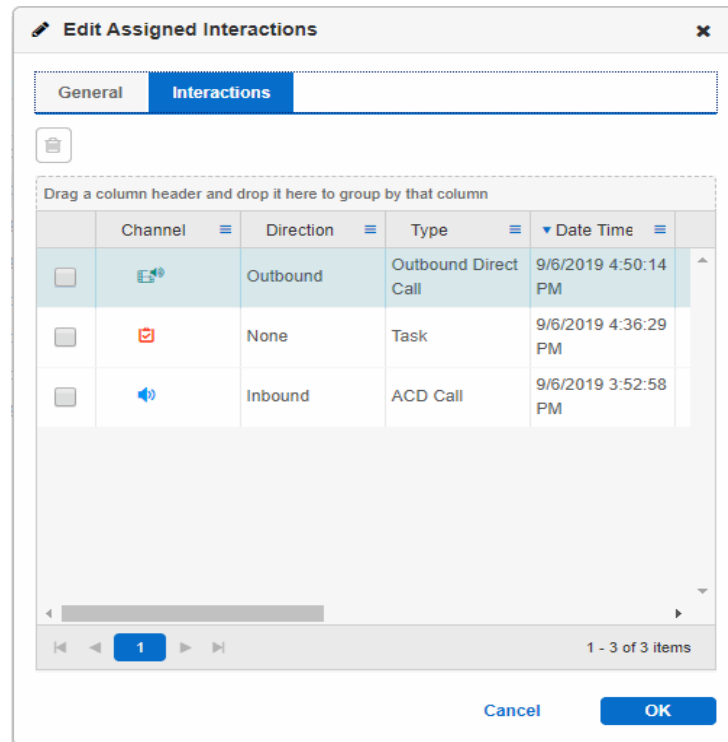
Note:

- Total 100 interactions will be displayed on each page.
- The Interactions tab contains the following columns.

Column Name	Description
Channel	The medium used to complete an interaction, such as Voice Only, Screen Only, Voice and Screen, Chat, Task, or Unknown.
Direction	The direction of the interaction, which can be None, Inbound, or Outbound.
Type	Type of the interaction, such as Outbound Direct Call, Inbound Direct Call, Task, ACD Call.
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.
ANI	If available from the switch, the caller ID or ANI.

Column Name	Description
DNIS	If available from the switch, the DNIS or DID (called number indicator).
Status	The status of the interaction such as Current.

6. Click on the **Delete** button to delete the selected interactions and Interaction tab is shown below.



7. Click **OK** button on the Edit Assigned Interaction dialog. System will save the edited Assigned Interactions and display in the grid.

Note: User cannot add interactions to an existing assignment and if the user wants to do that the user has to create a new assignment.

5.3 Delete an Assigned Interaction




The user who created or administrator will be able to delete an assigned interaction which is listed on the Assigned Interactions window. Refer [Manage Assigned Interactions and Evaluations](#) to view the Assigned Interactions window. Follow the steps below to delete an assigned interaction.

1. Select the assigned interaction which administrator or owner of the assigned interaction wants to delete.

2. Click on the **Delete** button as shown below.

ASSIGNED INTERACTIONS AND EVALUATIONS

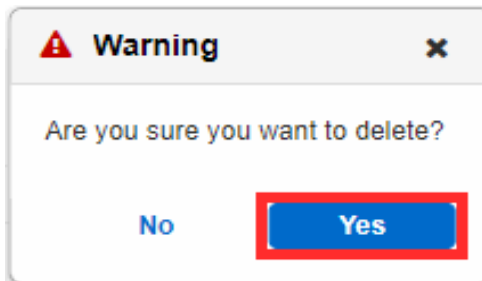
Interactions Assigned By Me | Interactions Assigned To Me | Evaluations Shared With Me

   ← **Delete Button**

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

Name	Assigned On	Expires On	Assigned By	Status
Demo_1	3/15/2020 10:42:13 PM	3/17/2020 11:57:10 AM	Administrator, AQM	Active
New assign recording	3/10/2020 1:47:35 AM	3/11/2020 1:47:35 AM	Administrator, AQM	Expired
Karathi	3/10/2020 1:28:52 AM	3/11/2020 1:28:52 AM	Administrator, AQM	Expired
assign to mentor1	3/10/2020 1:05:38 AM	3/11/2020 1:05:38 AM	Administrator, AQM	Expired
Assign to agent	3/10/2020 1:02:17 AM	3/11/2020 1:02:17 AM	Administrator, AQM	Expired
assign to mentor	3/10/2020 1:02:05 AM	3/11/2020 1:02:05 AM	Administrator, AQM	Expired




3. Select **Yes** to delete the assigned interaction from the grid.



4. The refreshed Assigned Interactions window appears as shown below.

ASSIGNED INTERACTIONS AND EVALUATIONS

Interactions Assigned By Me | Interactions Assigned To Me | Evaluations Shared With Me

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

Name	Assigned On	Expires On	Assigned By	Status
New assign recording	3/10/2020 1:47:35 AM	3/11/2020 1:47:35 AM	Administrator, AQM	Expired
Karathi	3/10/2020 1:28:52 AM	3/11/2020 1:28:52 AM	Administrator, AQM	Expired
assign to mentor1	3/10/2020 1:05:38 AM	3/11/2020 1:05:38 AM	Administrator, AQM	Expired
Assign to agent	3/10/2020 1:02:17 AM	3/11/2020 1:02:17 AM	Administrator, AQM	Expired
assign to mentor	3/10/2020 1:02:05 AM	3/11/2020 1:02:05 AM	Administrator, AQM	Expired
444	3/2/2020 5:09:06 AM	3/2/2020 5:09:08 AM	Administrator, AQM	Expired
777	3/2/2020 5:06:34 AM	3/3/2020 5:06:34 AM	Administrator, AQM	Expired
555	3/2/2020 5:04:26 AM	3/2/2020 6:05:26 AM	Administrator, AQM	Expired
777	3/2/2020 5:04:09 AM	3/3/2020 5:04:09 AM	Administrator, AQM	Expired

6. 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.

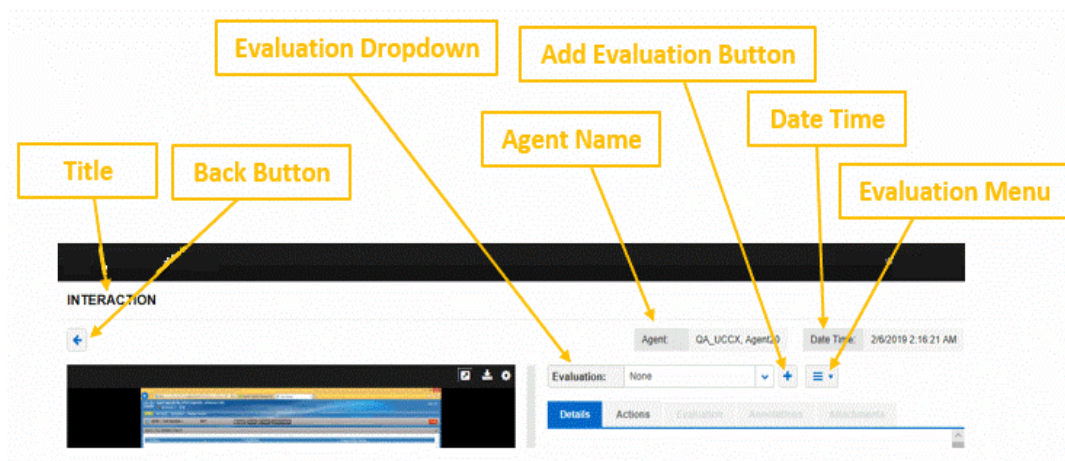
From the Aspect Quality component, you can be reviewing an interaction (an evaluation or a recording), and without logging off Aspect Quality to launch Aspect Performance, you can create a contextual link to Performance and assign coaching directly from Quality.

6.1 Assign Coaching

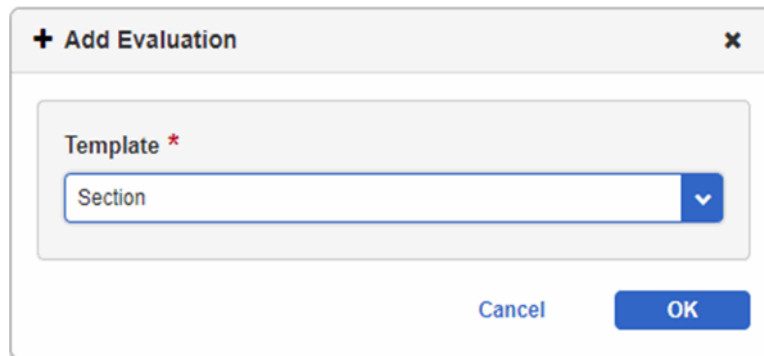
To assign coaching to a new evaluation, perform the following steps.

Note: To assign coaching to an existing evaluation, see [Assign Coaching to an Existing Evaluation on page 6-260](#).

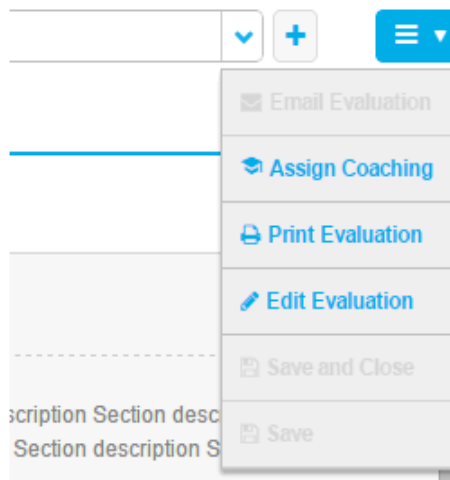
1. Search for an interaction. (See the [Chapter 4, Search for an Interaction.](#))
2. Open the interaction by double-clicking it. The Interaction window opens.
3. In the right pane, click **Add Evaluation**.



The Add Evaluation window opens.



4. From the drop-down list box, select a **Template**.
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 Aspect Performance system configured for Workforce Engagement Management.
- Have a Aspect Quality Evaluation license and an Performance Coaching license.
- Be logged into Quality as a user who is also configured in Aspect Performance.
- Have the Quality agent of the interaction for whom you are creating the coaching mapped to Aspect Performance
- Be logged into Quality as a user who is authorized to access coaching assignments in Aspect Performance
- Be logged into Quality as a user who is authorized to create a coaching assignment in Aspect Performance

The Create Coaching Assignment window opens.

Name	Type	Duration
Calls Coaching	1 to 1	01:00:00
Coaching Action	1 to 1	01:00:00
Ruc.56982	1 to 1	01:00:00

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 *Alvaria 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 *Alvaria Performance Supervisor Guide*.

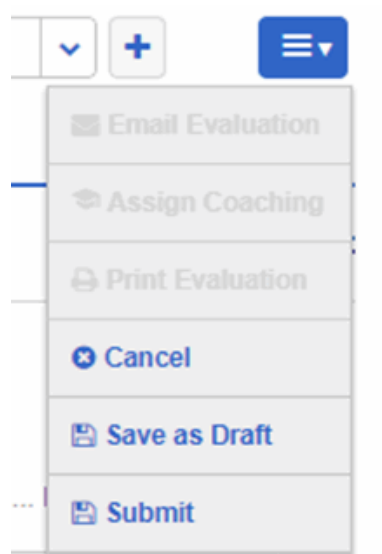
13. In the Comment text box, you can type any other information that you think might be helpful to the agent.
14. Click **Save**. The Create Coaching Assignment window closes and the Interaction window is active.

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

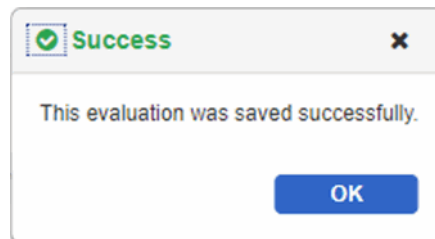
16. To save the coaching assignment, select **Save as Draft**.

OR

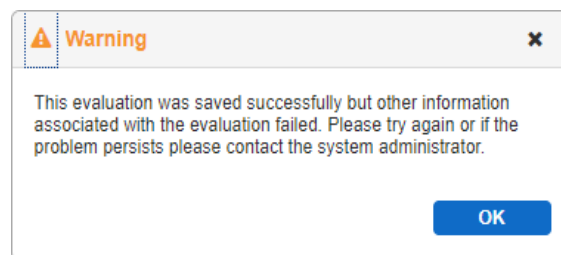
If you have finished assigning the coaching, select **Submit**. This also saves the coaching assignment.



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.



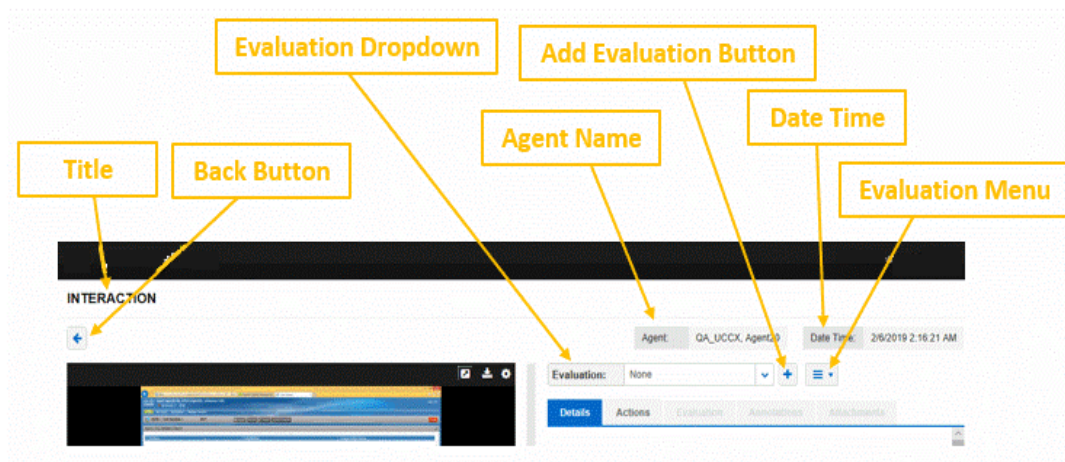
17. On the Success window, click **OK**.

6.1.1 Assign Coaching to an Existing Evaluation

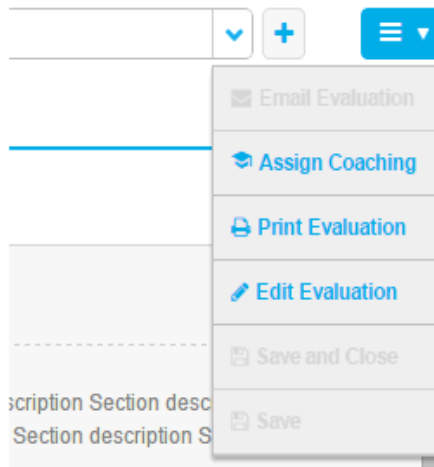
To assign coaching to an existing evaluation, perform the following steps.

1. Search for an interaction. (See the [Chapter 4, Search 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 Aspect Performance system configured for Workforce Engagement Management.
- Have a Aspect Quality Evaluation license and an Performance Coaching license.
- Be logged into Quality as a user who is also configured in Aspect Performance.
- Have the Quality agent of the interaction for whom you are creating the coaching mapped to Aspect Performance
- Be logged into Quality as a user who is authorized to access coaching assignments in Aspect Performance
- Be logged into Quality as a user who is authorized to create a coaching assignment in Aspect Performance

The Create Coaching Assignment window opens.

Agents: *

Wuryandani, Gantiah

KPI Filter:

No Filter

Action: *

Name	Type	Duration
Calls Coaching	1 to 1	01:00:00
Coaching Action	1 to 1	01:00:00
Rua.56982	1 to 1	01:00:00

Due Date: *

1/21/2016

Reference Link:

Affected KPIs:

Agent Outbound Contacts Average Handle Time

Comment:

Cancel Save

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

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

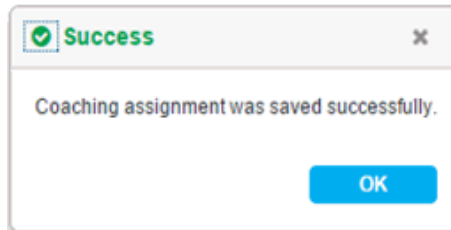
Note: For more information about KPIs, see the *Alvaria Performance System Administrator Guide*.

- 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.
- In the **Due Date** field, using the Calendar, select the date by which you want the agent to complete the action.
- 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 *Alvaria Performance Supervisor Guide*.

- 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**.

6.1.2 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.

COACHING ASSIGNMENTS

Filter Type: None

Agent	Team	Action	Type	Created Date	Due Date	Duration	Comments	Status
Agent 3, Agent 3	Group 2	Master Coaching Action Task	1 to 1	2/18/2019 12:21:17 PM	3/1/2019	01:00:00	0	Approved
Agent 4, Agent 4	Group 2	Coaching Task	1 to 1	2/19/2019 12:09:09 PM	3/1/2019	10:00:00	0	Approved
Agent 1, Agent 1	Group 1	RD Coaching Task	1 to 1	2/19/2019 1:57:38 PM	3/1/2019	5:00:00:00	1	Approved

RD Coaching Task	Comments
<p>http://www.google.com</p> <p>Description</p> <p>Reference Link</p> <p>Aspect</p> <p>Points</p> <p>125</p> <p>Additional information</p> <ul style="list-style-type: none"> • Trigger: Manual • Coaching Action reason: 2/19/2019 1:54:14 PM • Currently assigned 	<p>You - 2/19/2019</p> <p>commented</p>

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

6.2 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 Aspect Quality.

Similarly, from the Performance component, it is possible to launch the associated Aspect 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 Aspect Quality version 18.1 or later.

To view coaching, you must

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

6.2.1 View Coaching on the Search Results Window

1. Perform a search (see [Performing a Search on page 4-120](#)).
2. On the **SEARCH RESULTS: ALL/SCORED** window, select the interaction which has evaluations associated with the coaching assignment. By default, the first evaluation is selected in the nested grid. User can select the specific evaluation in the nested grid to view the specific coaching assignment.

SEARCH RESULTS: ALL

Search Type: New Search

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

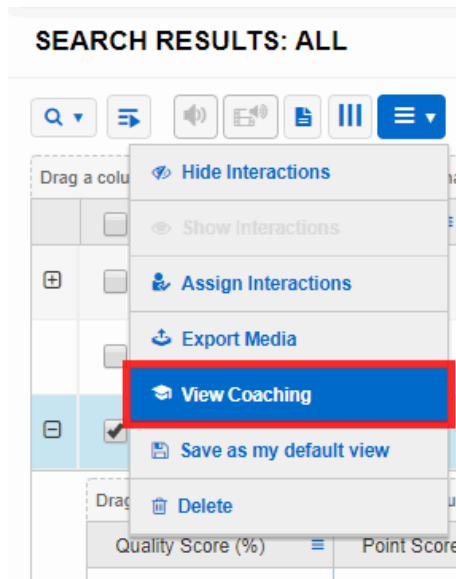
	Channel	Dir...	Type	Dat...	Dur...	Agent	Ext...	ANI	DNIS	Status	Hidden
<input type="checkbox"/>			None	Task	7/12/2022 12:30:31 PM	0:00:00	Crawford, Brandy			(+)	
<input type="checkbox"/>			None	Task	7/12/2022 12:16:17 PM	0:00:00	Cowley, Randy			(+)	
<input type="checkbox"/>			None	Task	6/7/2022 1:45:04 PM	0:00:00	Cowley, Randy			(+)	
<input type="checkbox"/>			None	Task	6/7/2022 1:43:36 PM	0:00:00	Cowley, Randy			(+)	
<input type="checkbox"/>			None	Task	6/7/2022 1:42:45 PM	0:00:00	Cowley, Randy			(+)	
<input checked="" type="checkbox"/>			None	Task	4/25/2022 6:57:03 PM	0:00:00	Crawford, Brandy			(+)	

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

Created Date Time	To Review	Assigned Evaluation	Reviewed By Recorded Agent	Do Not Show In Report	Coaching
8/16/2022 3:20:43 PM	Agent, Team, Peer				<input type="checkbox"/>
4/25/2022 1:27:35 PM					<input checked="" type="checkbox"/>

Note: View Coaching is based on the row selection of the nested grid on the Search Results page and not check box selection based.

3. click on the  button and select **View Coaching** to view the assigned coaching.

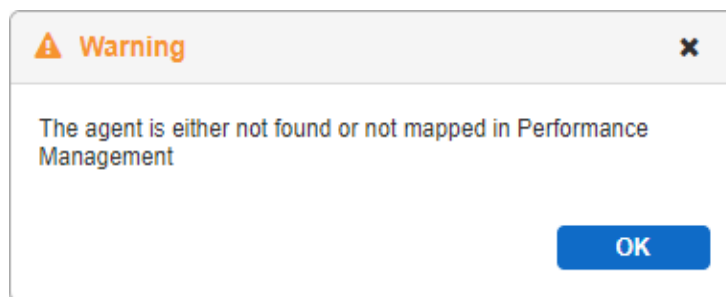


Note: If the View Coaching option is disabled, then

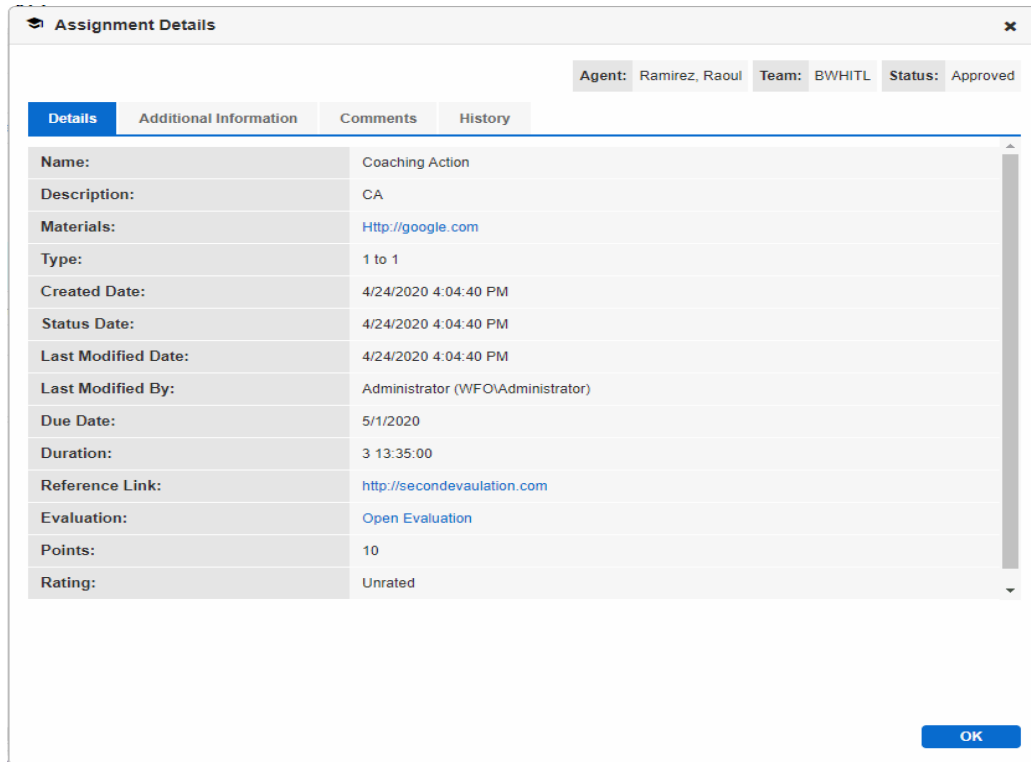
- You do not have access to Aspect Performance, OR
- There is no coaching assigned to that interaction or selected evaluation, OR
- The coaching assignment was created prior to version 18.

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

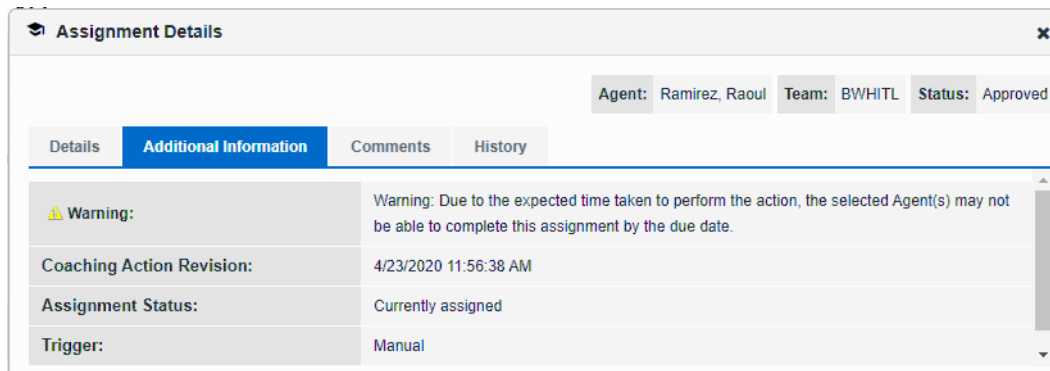
- The Quality agent of the interaction is not mapped to Aspect Performance
- The logged in Quality user is not authorized to view the coaching assignment in Aspect Performance



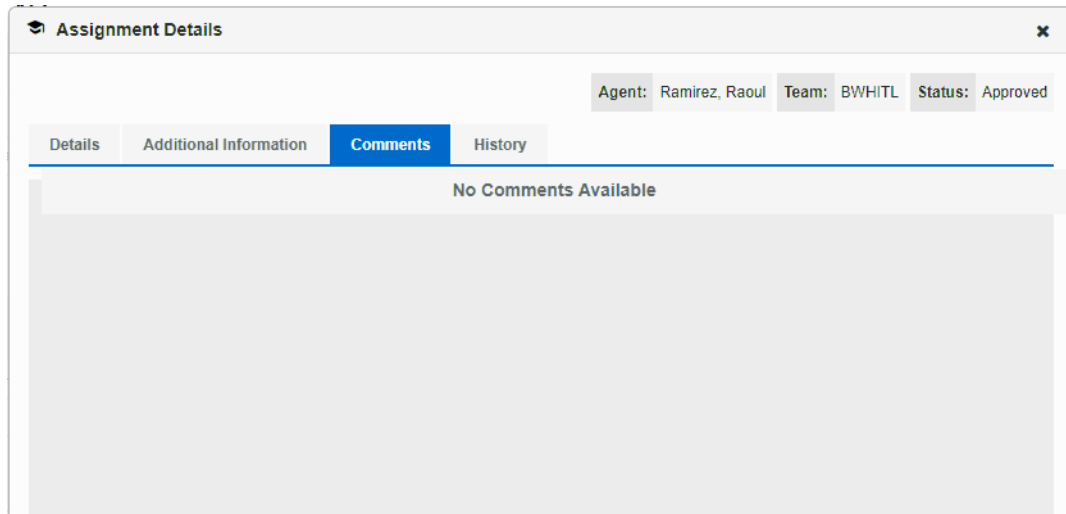
The Assignment Details window opens with the Details tab active. View coaching assignment will open the assigned coaching in read-only mode and not allow to perform any coaching actions.



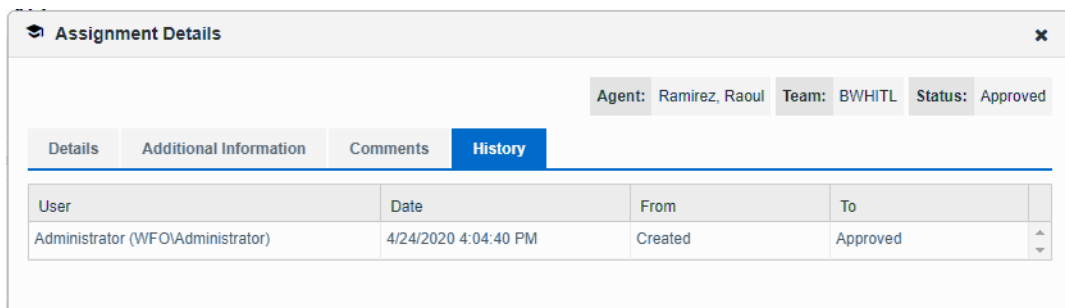
4. To view the Coaching Action and the Trigger, select the **Additional Information** tab.



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



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



- Click **OK** to close the Assignment Details dialog.

6.2.2 View Coaching on the Search Evaluations Window

- Search for a scored interaction. (See the [Chapter 4, Search for an Interaction.](#))
- On the Search Evaluations window, select an interaction that has a coaching assigned to it.

3. Click **View Coaching**.

SCORED INTERACTIONS

View Coaching - Opens a simulated dialog.

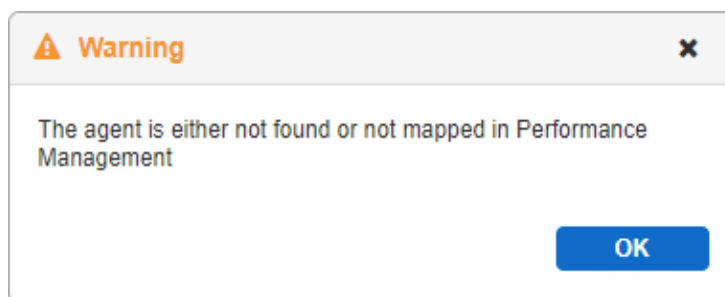
Channel	Direction	Date Time	Duration	Agent	Extension	Analytics	Coaching	Score
	None	3/13/2018 1:27 PM	0:00:00	Administrator, AQM				N/A
	Outbound	7/18/2017 1:11 AM	0:00:00	Administrator, AQM				Fail
	Outbound	7/18/2017 1:11 AM	0:00:00	Administrator, AQM				N/A
	ES ⁹	Outbound	6/2/2017 7:05 AM	0:00:44	user10, agent	3010		N/A
	ES ⁹	Outbound	6/2/2017 7:05 AM	0:00:44	user10, agent	3010		Draft
<input checked="" type="checkbox"/>	ES ⁹	Outbound	6/2/2017 7:05 AM	0:00:44	user10, agent	3010		N/A
	ES ⁹	Outbound	6/2/2017 7:05 AM	0:00:44	user10, agent	3010		100%
	ES ⁹	Outbound	6/2/2017 7:05 AM	0:00:44	user10, agent	3010		N/A
	ES ⁹	Outbound	6/2/2017 7:05 AM	0:00:44	user10, agent	3010		N/A
	ES ⁹	Outbound	6/2/2017 7:05 AM	0:00:44	user10, agent	3010		0

Note: If the View Coaching option is inactive, then

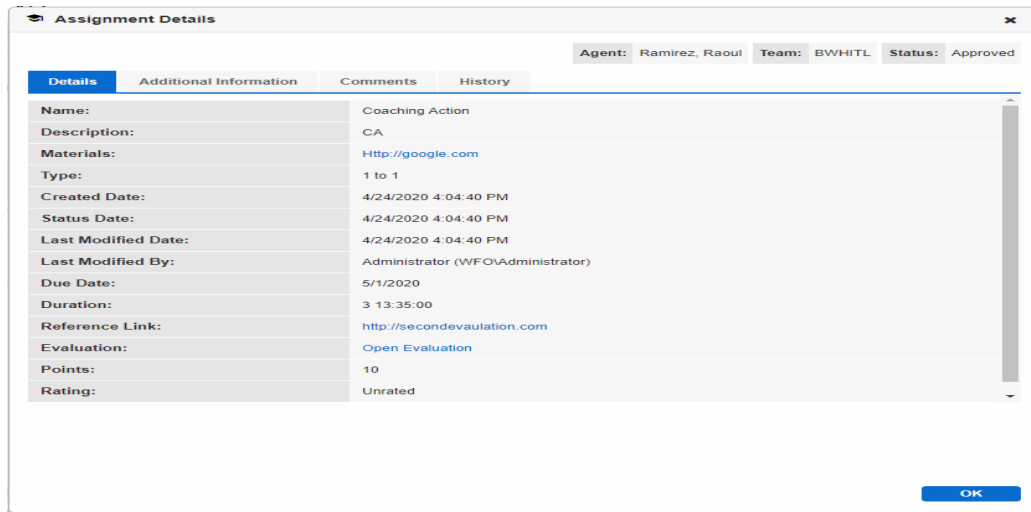
- You do not have access to Aspect Performance, OR
- There is no coaching assigned to that interaction, OR
- The coaching assignment was created prior to version 18.

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

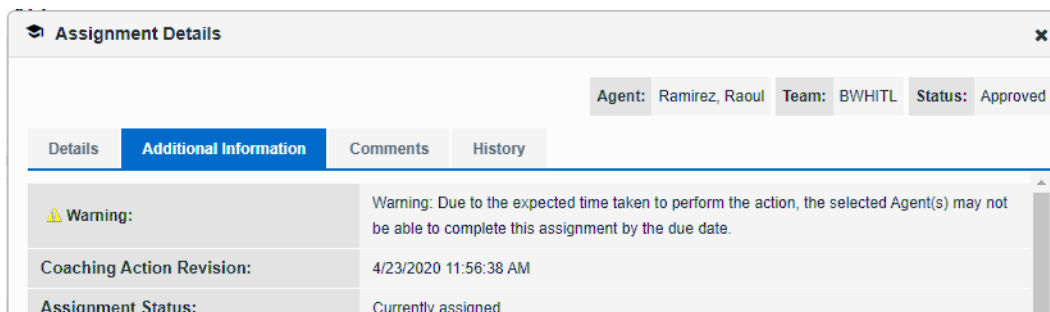
- The Quality agent of the interaction is not mapped to Aspect Performance
- The logged in Quality user is not authorized to view the coaching assignment in Aspect Performance



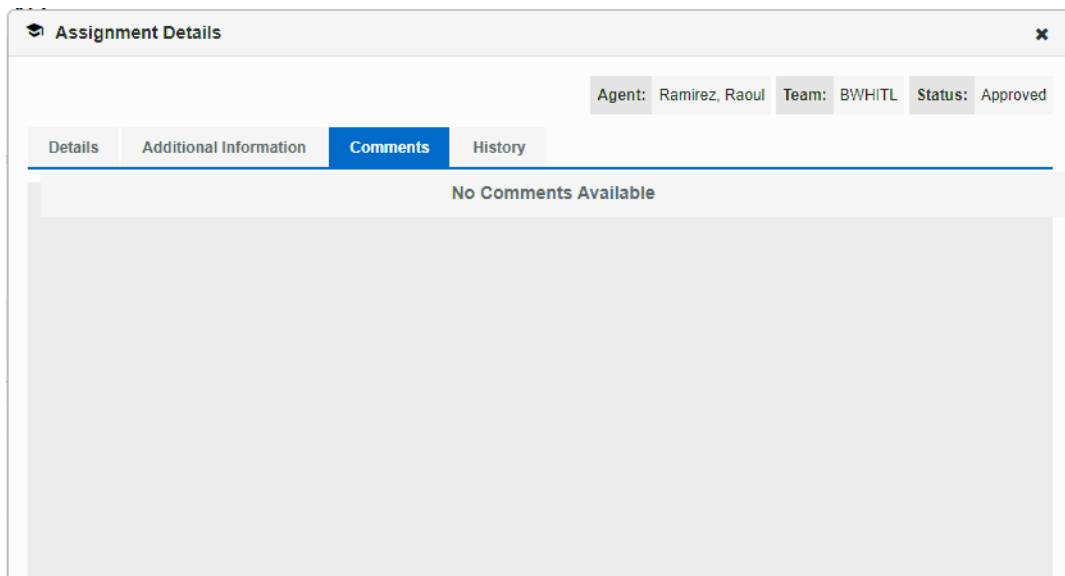
The Assignment Details window opens with the Details tab active.



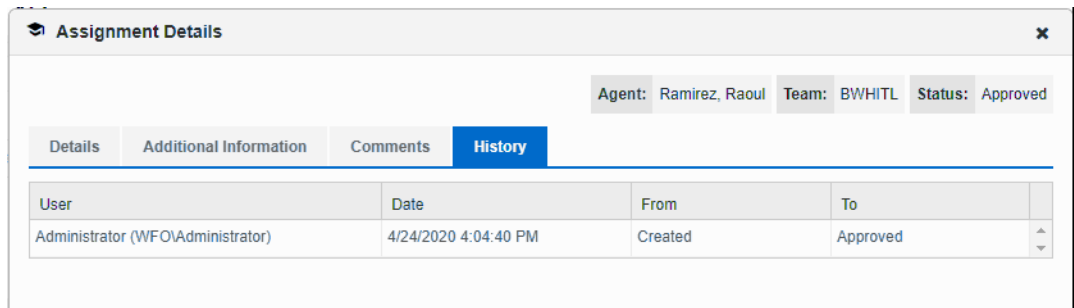
- To view the Coaching Action and the Trigger, select the **Additional Information** tab.



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



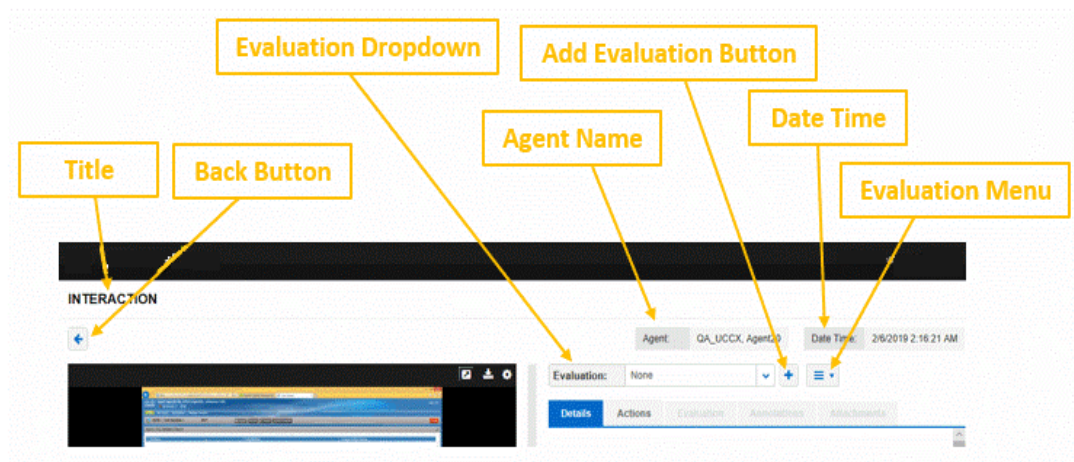
- To view the chronological history of the coaching assignment, select the **History** tab.



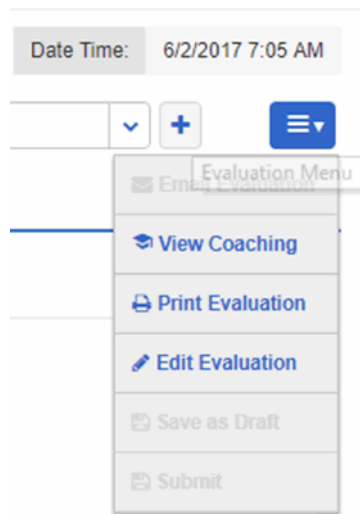
- When finished viewing the coaching assignment, close the Assignment Details window by clicking **OK**.

6.2.3 View Coaching on the Evaluation or Interaction Windows

- Search for an interaction. (See the [Chapter 4, Search for an Interaction](#).)
- Open the interaction that has coaching assigned by double-clicking it. The Interaction window opens.
- In the right pane, select the **Evaluation** menu.



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

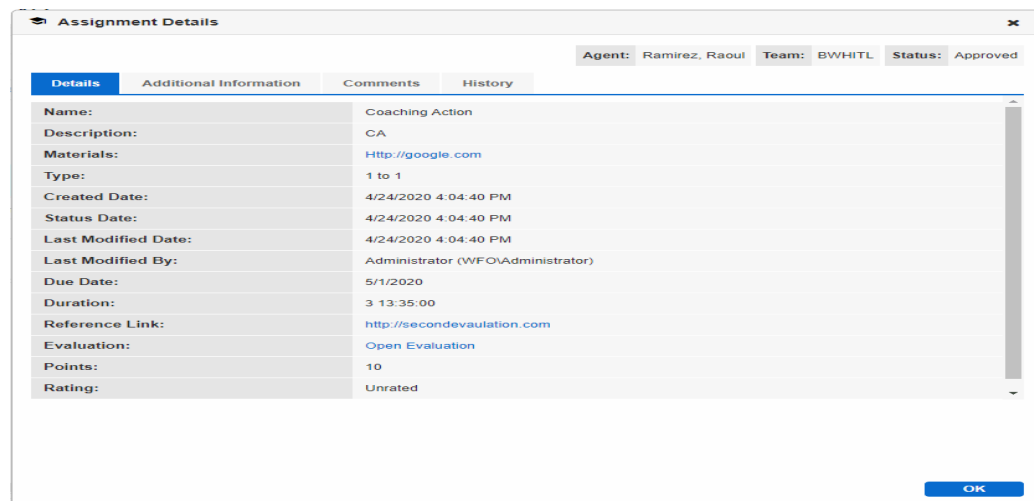


Note: If the View Coaching option is not available, then you do not have permission to view coaching.

If the View Coaching option is inactive, then

- The logged in Quality user does not have access to Aspect 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 Aspect Performance, OR
- The logged in Quality user is not authorized to view the coaching assignment in Aspect Performance

The Assignment Details window opens with the Details tab active.



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

Assignment Details

Agent: Ramirez, Raoul Team: BWHITL Status: Approved

Details Additional Information Comments History

Warning:	Warning: Due to the expected time taken to perform the action, the selected Agent(s) may not be able to complete this assignment by the due date.
Coaching Action Revision:	4/23/2020 11:56:38 AM
Assignment Status:	Currently assigned

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

Assignment Details

Agent: Ramirez, Raoul Team: BWHITL Status: Approved

Details Additional Information Comments History

No Comments Available

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

Assignment Details

Agent: Ramirez, Raoul Team: BWHITL Status: Approved

Details Additional Information Comments History

User	Date	From	To
Administrator (WFO\Administrator)	4/24/2020 4:04:40 PM	Created	Approved

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

7. Evaluations

This section describes about:

- [Calibration](#)
- [Non-Recording Evaluations](#)
- [Email an Evaluation](#)
- [Delete an Evaluation](#)

7.1 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 uses the same process as quality scoring (for more information about quality scoring, see [Chapter 10, Aspect Quality Evaluation](#)).

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.

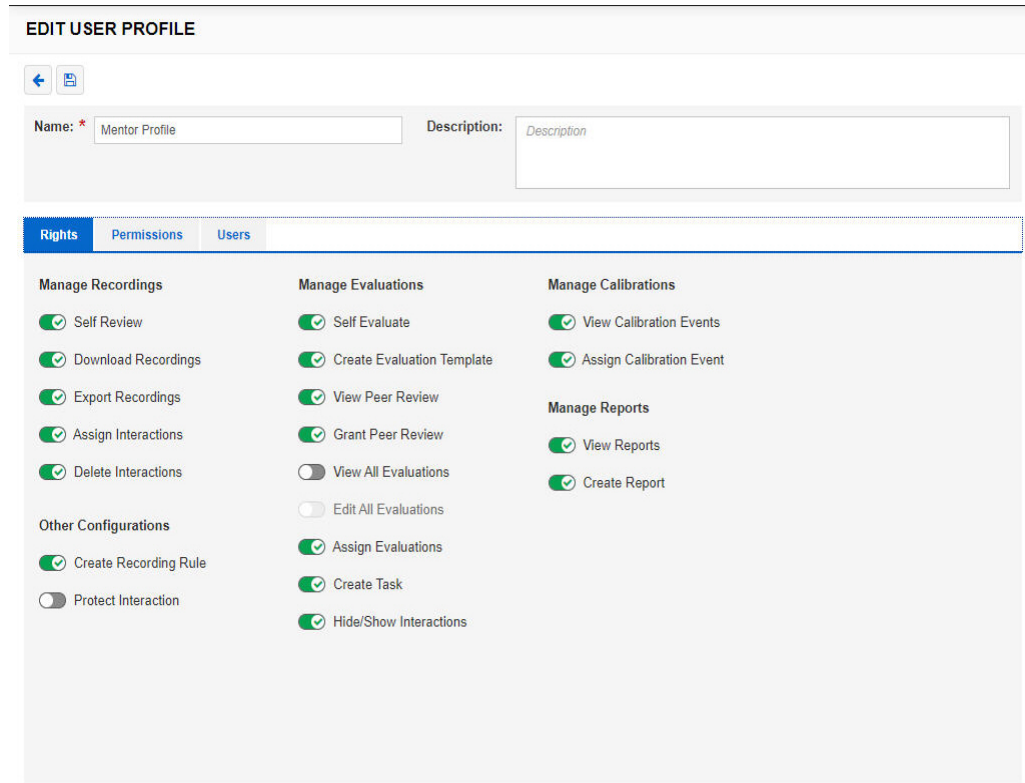
1. In Aspect Quality, create or modify user profiles with the Assign Calibration Event and/or the View Calibration Event rights (see [Best Practices for Calibration User Profiles](#)).
2. In Aspect Via Workforce Engagement Management, [Tag an Interaction for Calibration](#).
3. [Create a Calibration Event](#).
4. [Calibrate a Calibration Event](#).
5. [View Calibration Event Results](#).

7.1.1 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.



7.1.2 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 Quality, this means you must be logged in as an Administrator, Mentor and Agent to tag an interaction.

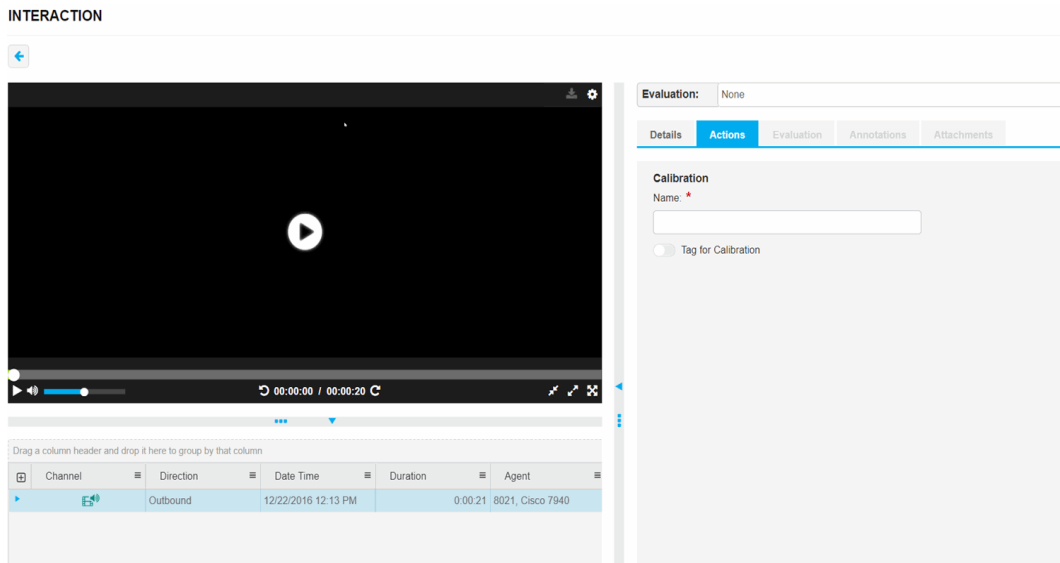
Note: If you have only the View Calibration Event right, then you can see a tag created by other users, but you cannot edit or remove a tag.

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.

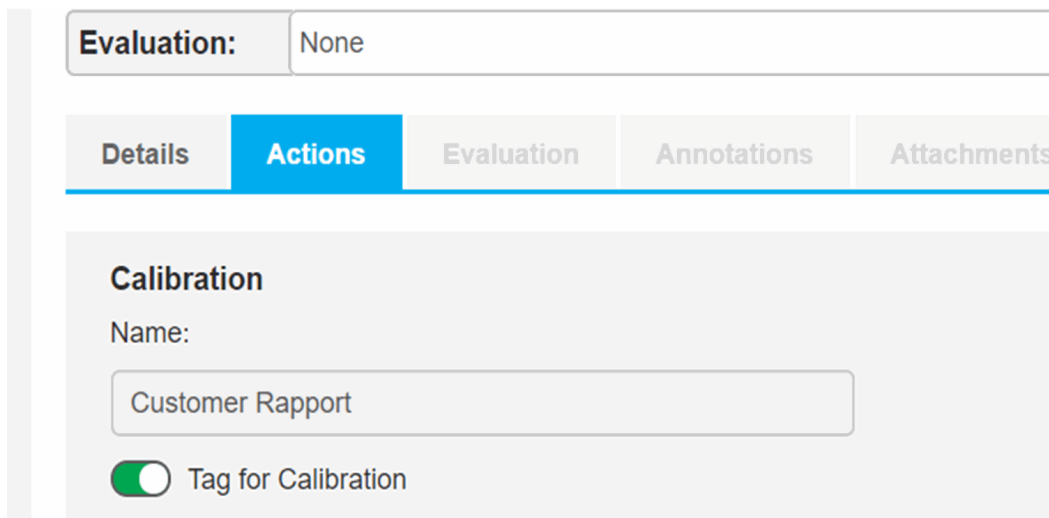
To tag an interaction for calibration, perform the following steps.

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 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.

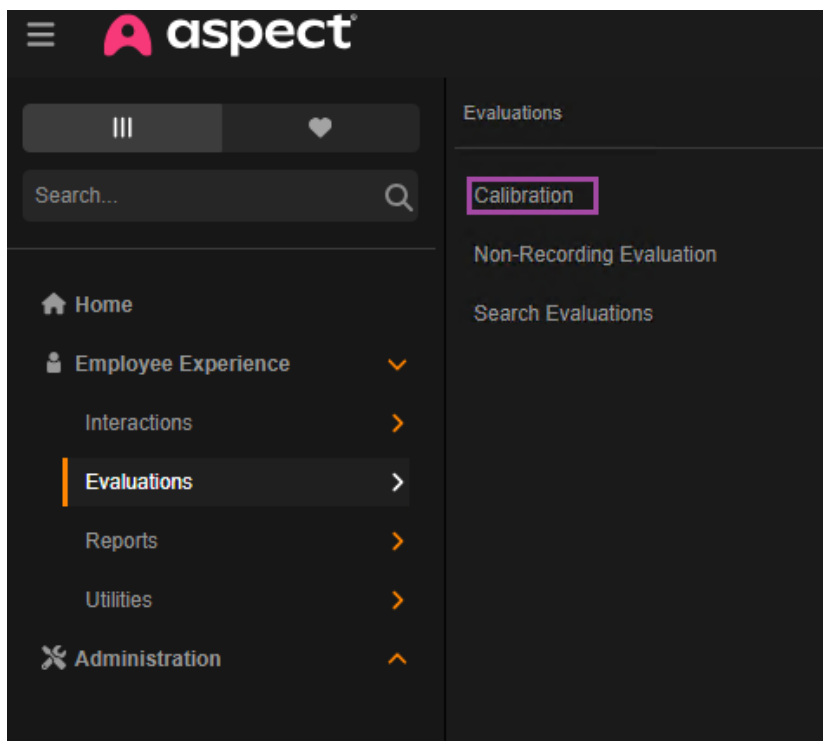
If a user has tagged an interaction on which you want to create a different tag,

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.

7.1.3 Create a Calibration Event

If you are a user who has the View Calibration Event right in your user profile, and you have the Aspect Quality Evaluation license, then in the Quality dashboard you see the Calibration link.

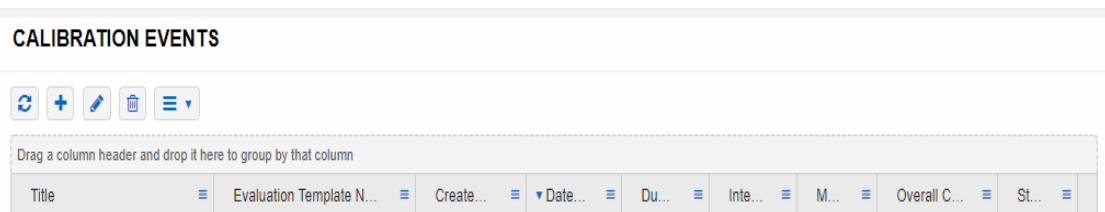


Note: If you are a participant with View Calibration Event right, you can view the calibration events assigned to you.

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.

CREATE CALIBRATION EVENT

Title: *

Evaluation Template: *

Please select an evaluation template.

Due Date: *

Select Participants:

Select

Show results on completion ⓘ

Notify Participants

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

	Name	Channel	Direction	Type	
<input type="checkbox"/>	zcsdfs	📞	None	Task	11/
<input type="checkbox"/>	cal_taskName	📞	None	Task	11/
<input type="checkbox"/>	task	📞	None	Task	11/
<input type="checkbox"/>	Tag for task	📞	None	Task	11/
<input type="checkbox"/>	chida_tag	🔊	Inbound	Inbound Direct Call	5/
<input type="checkbox"/>	dsdfsdfsdfsdf	🔊	Inbound	ACD Call	5/
<input type="checkbox"/>	q2wew	🔊	Inbound	ACD Call	5/
<input type="checkbox"/>	\$\$%^&***1234 <<<>>>>>?!"~:;{} []\	📞	None	Task	8/
<input type="checkbox"/>	qwertyuiop asdfg hjkl zxcv bnm qwertyuiop asdfg	🔊	Inbound	Inbound Direct Call	5/
<input type="checkbox"/>	1234567890123456789012345678...	🔊	Inbound	ACD Call	5/
<input type="checkbox"/>	cal_jull11th2019	🔊	Inbound	ACD Call	5/
<input type="checkbox"/>	non rec- draft- by agent	📞	None	Task	3/
<input type="checkbox"/>	non recording by mentor	📞	None	Task	3/
<input type="checkbox"/>	admin tagged	📞	None	Task	3/
<input type="checkbox"/>	Mentor tagged	🔊	Inbound	ACD Call	3/
<input type="checkbox"/>	Agent tagged	🔊	Inbound	ACD Call	3/

1 - 16 of 16 items

Note: To return to the Calibration Events window, click **Back**.



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

- 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.
- From the **Evaluation Template** drop-down list box, select the template to assign to the event.

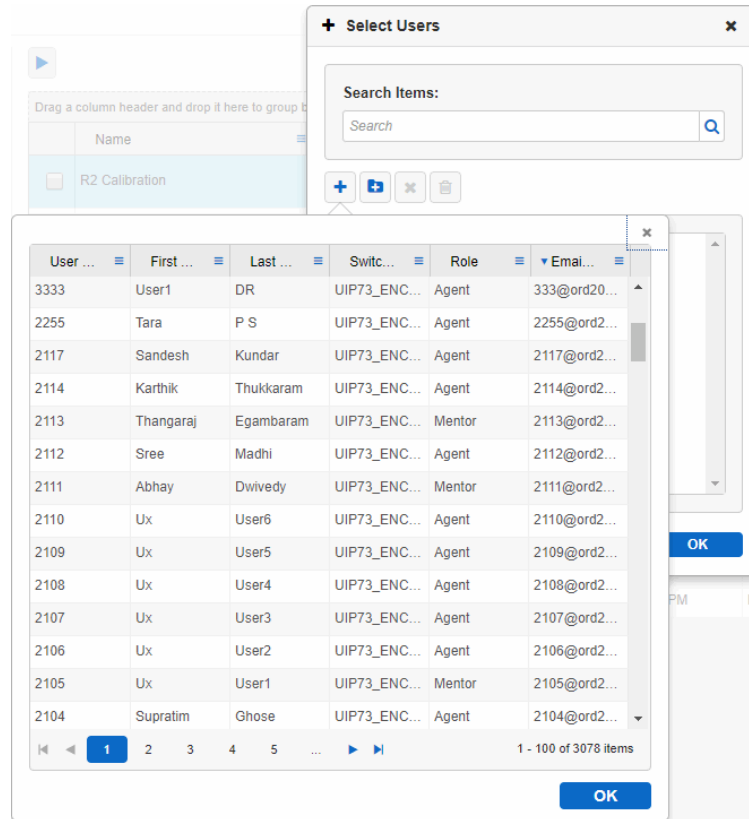
Note:

- Only the Evaluation Templates to which you (the logged-in user) have permission, will be displayed in the drop-down list box.
- Evaluation Templates created in Workforce Engagement Management will be displayed in the drop-down list box.
- Evaluation Templates saved as Draft will not be displayed in the drop-down list box.

- 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** check box is checked.
 - Note:** The participants will not be able to see the results until all the participants complete the calibration.
11. If you want all calibration event participants to receive e-mail 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).
Direction	The direction of the interaction (for example, Inbound or Outbound)
Date Time	The date and time of the interaction.
Type	Type of the interaction, such as Outbound Direct Call, Inbound Direct Call, Task, ACD Call.
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.
Universal Media ID	A unique Aspect Via ID that references a customer interaction, regardless of channel type.

Column Name	Description
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.
Total Hold Time	The total duration of the Hold time in the interaction. For example, there are two Holds and each Hold had a duration of 10 seconds, then the Total Hold Time is 20 seconds.

Note: If you want to play back the media interaction or read the Chat 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.

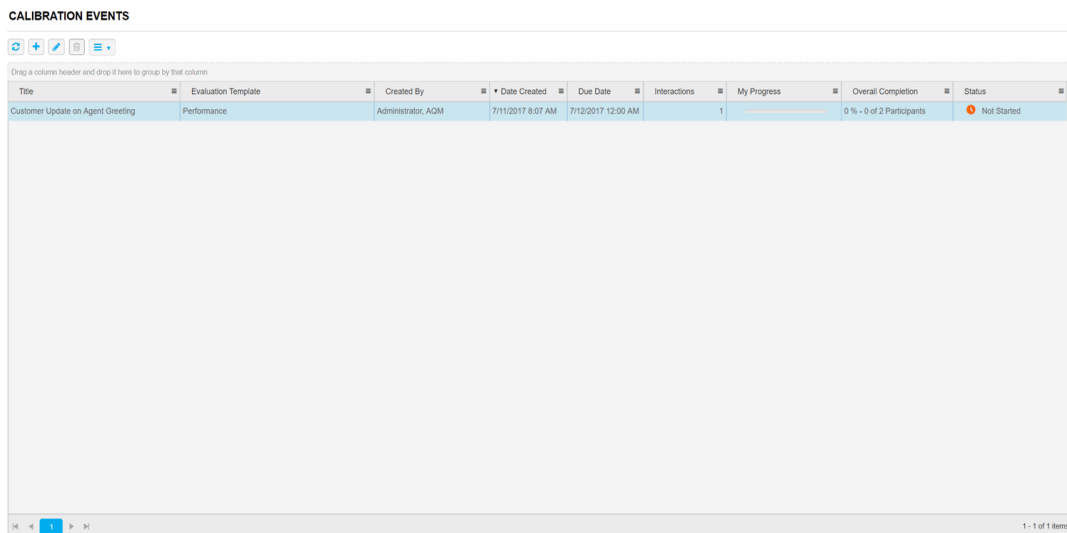
The Media Player launches. You can only play back one interaction at a time. When you are finished playing back the interaction, click **OK**. The Media Player closes and the Create Calibration Event window is active.

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.

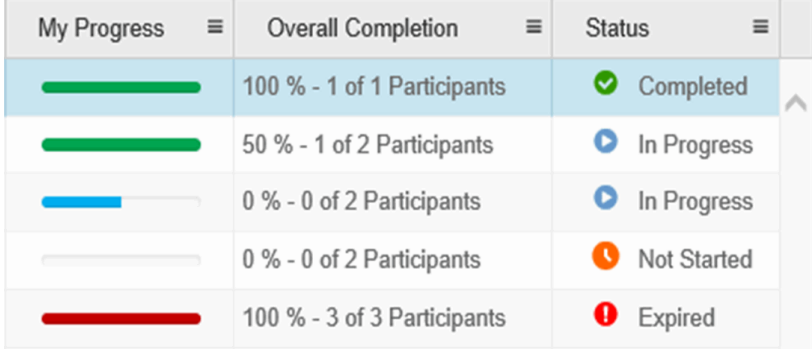


Note: By default, the Calibration Events table is sorted by Date Created in descending order.

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.

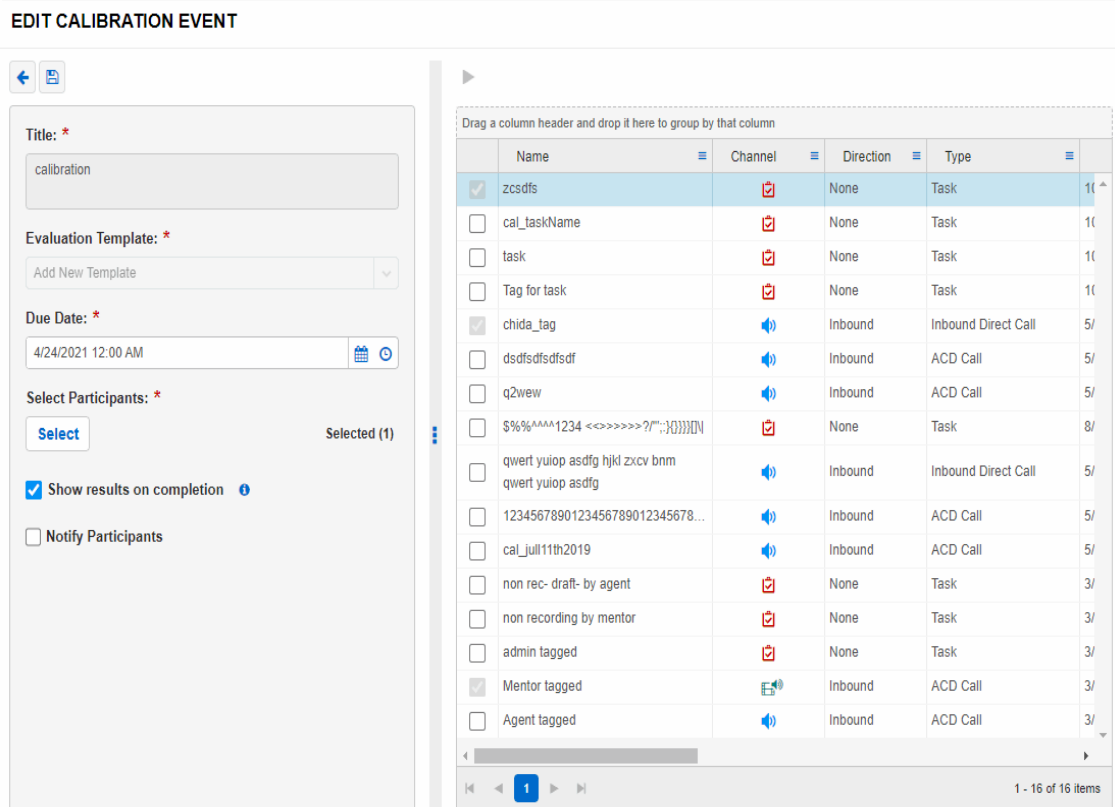
Column Name	Description
My Progress	<p>Displays the progress made by the participant when evaluating the interaction associated with the calibration event.</p> <ul style="list-style-type: none"> If the progress is less than 100%, the progress bar is blue. If the progress is 100%, the progress bar is green. If the calibration event has expired, the progress bar is red.  <p>Note: If you hover your mouse over the My Progress column, the tool tip displays the Overall Completion percentage.</p>
Overall Completion	<p>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%.</p>
Status	<p>Indicates the status of the calibration event with icons. The following list describes the values for this column.</p> <ul style="list-style-type: none"> 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.

7.1.3.1 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 Aspect Quality Evaluation, click **Calibration**. The Calibration Events window opens.
3. Select the calibration even 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 uncheck the check box, the participants will be able to view the results before all the participants complete the calibration.
- Notify Participants

5. Click **Save**.

7.1.3.2 Delete a Calibration Event

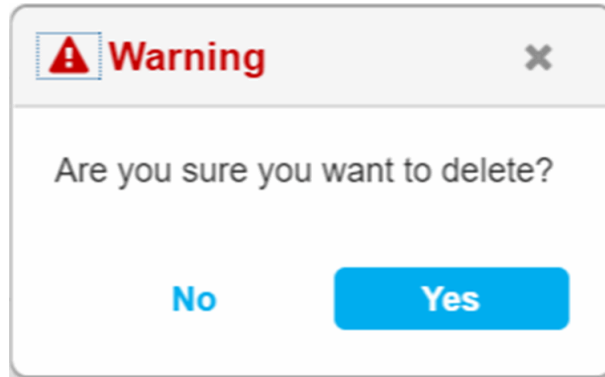
Only an Administrator or the owner of the calibration event can delete the calibration event. You can only delete calibration events that have expired.

To delete a calibration event, perform the following steps.

1. On the Dashboard, click **Quality**.
2. Under Aspect Quality 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.

7.1.3.3 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 **Employee Experience > Evaluations > 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**.

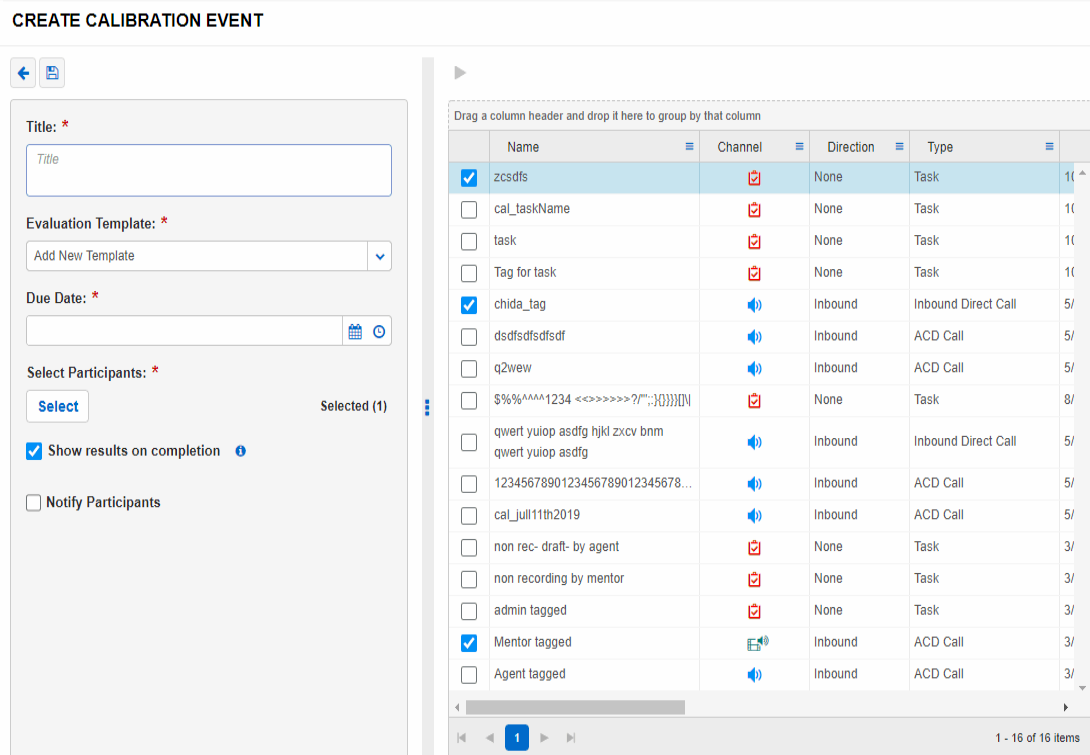
CALIBRATION EVENTS

🔄 + ✎ 🗑️ ☰

Drag **Duplicate** it here to group by that column

TR	Calibrate	Evaluation Template Name	Created By	▼ Date ...	Due ...	Inter...	My ...	Overall Co...	Sta...
calic	View Results	Add New Template	Administrator, AQM	4/22/2021 5:32:10 PM	4/24/2021 12:00:00 AM	3	<div style="width: 100%;"></div>	100 % - 1 of 1 Participants	Expired
		Create Calibration After Create Task functionality	Administrator, AQM	10/15/2019 6:20:44 PM	5/30/2021 12:00:00 AM	11	<div style="width: 100%;"></div>	0 % - 0 of 3 Participants	In Progress
hkk		list with no weight	Administrator, AQM	9/24/2019 7:19:00 PM	9/28/2019 12:00:00 AM	12	<div style="width: 100%;"></div>	0 % - 0 of 1 Participants	Expired

The Create Calibration Event window opens.



- In the **Title** text box, type a name for the copied calibration event.
- The copied Evaluation Template displays, but you can select a different template from the drop-down list box.

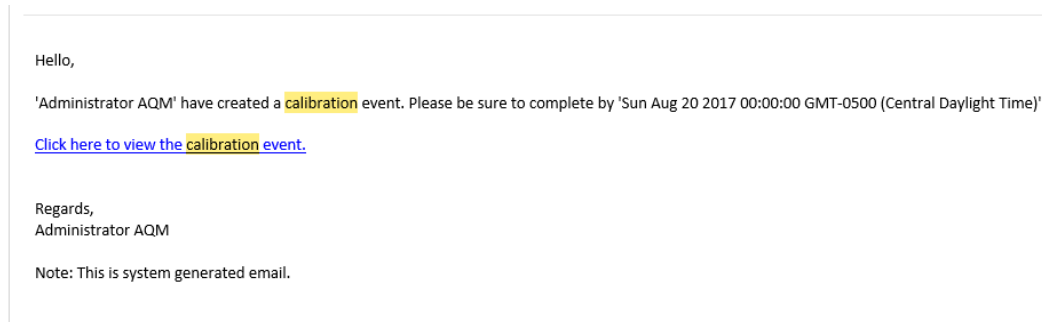
Note: If you change the Evaluation Template, and the selected participants in the copied calibration event do not have permission to the template that you selected, the Selected number changes.
- In the **Due Date** text box, click the **Calendar** icon and select a date that is 24 hours greater than the current date and time of the client machine.
- If you want to change the participants on the calibration event, click **Select** and add or remove the participants as appropriate.
- Check or uncheck the **Show results on completion** check box as per the requirement.
- 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.
- After making the necessary changes, click **Save**. The new calibration event displays in the Calibration Events list.

7.1.4 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.



Note: If the creator of the calibration event or any of the participants selected to score the interaction does not have an e-mail address configured, then a message displays, asking you to configure that e-mail address. However, e-mail is not sent only if the creator does not have an e-mail address configured in their Aspect Quality user account.

As an e-mail recipient, click the link in the e-mail, 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](#).

7.1.5 Calibrate a Calibration Event

Once a user has created a calibration event, the following steps must occur.

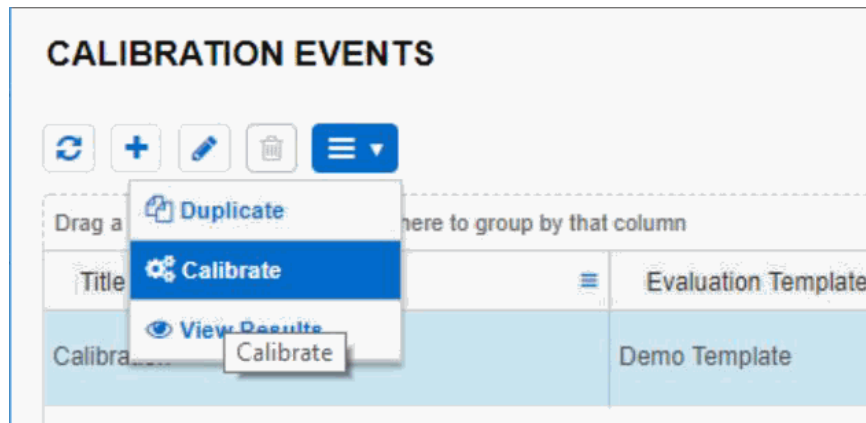
- The selected participants receive an e-mail with a link to the calibration event (see [Calibration Event Email](#)).
- The participants score the interactions. To score interactions that are tagged for calibration, see [Score a Calibration Event](#).
- Finally, the creator of the calibration event views the progress of the interaction scores and when the calibration event is complete, the creator can interpret the results.

7.1.5.1 Score a Calibration Event

You may have received an e-mail asking you to score a calibration event (see [Calibration Event Email](#)). If so, click the link in the e-mail and the Calibration Events window opens.

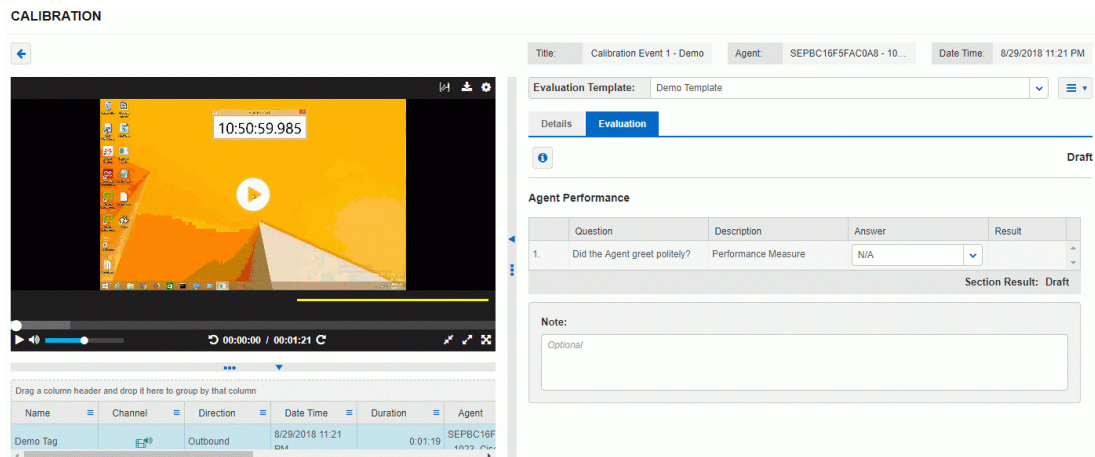
1. On the Calibration Events window, from the list of calibration events, select row of the calibration event that you want to score.

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, 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.

- Listen to and/or watch the recording and using that information, in the Evaluation tab, respond to the questions in the Answer column.

Evaluation Template: Demo Template ⌵ ⌵

Details **Evaluation**

i Draft

Agent Performance

	Question	Description	Answer	Result
1.	Did the Agent greet politely?	Performance Measure	N/A ⌵	⌵

Section Result: Draft

Note:

Optional

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.

Information ✕

Evaluation Template: Template 1

Created By: Administrator AQM

Created On: 9/12/2018 1:34 AM

Last Modified On: 9/19/2018 12:58 AM

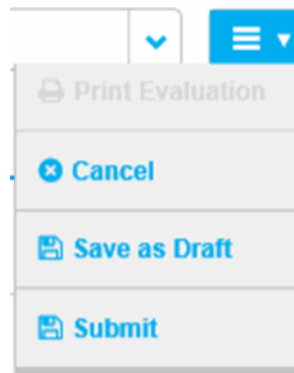
The following table describes the details in the Information box.

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.
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.

Field/Column Name	Description
Last Modified On	<p>The date and time when the calibration evaluation was last modified.</p> <p>Note:</p> <ul style="list-style-type: none"> 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.

- 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.
- 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.

7.1.5.2 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.

Title	Evaluation Template Name	Created By	Date Created	Due Date	Interactions	My Progress	Overall Completion	Status
Assigned to Mentor	2 Sections Failure - Point	Administrator, AQM	2/20/2019 12:41:51 AM	2/27/2019 12:00:00 AM	1	<div style="width: 0%; background-color: blue;"></div>	0 % - 0 of 1 Participants	Not Started
SS	2 Sections Failure - Point	Dwivedy, Abhay	12/14/2018 5:42:13 AM	12/19/2018 12:00:00 AM	1	<div style="width: 100%; background-color: green;"></div>	100 % - 1 of 1 Participants	Expired
Event - Created By	Template 1	Administrator, AQM	8/22/2018 11:38:21 PM	8/30/2018 12:00:00 AM	1	<div style="width: 50%; background-color: blue;"></div>	50 % - 1 of 2 Participants	Expired
Event 3	Template 1	Administrator, AQM	7/30/2018 12:26:50 AM	8/6/2019 12:00:00 AM	2	<div style="width: 0%; background-color: blue;"></div>	0 % - 0 of 2 Participants	In Progress
Assign 2 interaction for a user - admin	Template 1	Administrator, AQM	7/15/2018 10:54:47 PM	11/29/2018 12:00:00 AM	6	<div style="width: 0%; background-color: blue;"></div>	0 % - 0 of 3 Participants	Expired
2 Interactions and 2 users	Template 1	Dwivedy, Abhay	7/12/2018 11:03:15 PM	10/24/2019 12:00:00 AM	4	<div style="width: 0%; background-color: blue;"></div>	0 % - 0 of 2 Participants	In Progress

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.

My Progress	Overall Completion	Status
<div style="width: 100%; background-color: green;"></div>	100 % - 1 of 1 Participants	Completed
<div style="width: 50%; background-color: blue;"></div>	50 % - 1 of 2 Participants	In Progress
<div style="width: 0%; background-color: blue;"></div>	0 % - 0 of 2 Participants	In Progress
<div style="width: 0%; background-color: blue;"></div>	0 % - 0 of 2 Participants	Not Started
<div style="width: 100%; background-color: red;"></div>	100 % - 3 of 3 Participants	Expired

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 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.

7.1.6 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**.

CALIBRATION EVENTS

Event ID	Evaluation Template Name	Created By	Date Created	Due Date	Interactions	My Progress	Overall Completion	Status
Review	Event created in 21.1 (Score)	Administrator, AGM	12/21/2020 4:42:16 PM	1/28/2021 12:00:00 AM	2	<div style="width: 100%;"></div>	0% - 0 of 3 Participants	In Progress
123	Auto Template 10/10/2020 10:24:39 PM	Drivedy	12/4/2020 12:01:04 PM	12/8/2020 12:00:00 AM	1	<div style="width: 0%;"></div>	0% - 0 of 1 Participants	Expired
Different pages	Auto Template 10/10/2020 10:19:55 PM	Drivedy	12/30/2020 4:53:57 PM	12/8/2020 12:00:00 AM	2	<div style="width: 0%;"></div>	0% - 0 of 1 Participants	Expired
DC	Dependent Question	Administrator, AGM	10/20/2020 3:42:58 PM	10/22/2020 10:30:00 AM	1	<div style="width: 0%;"></div>	0% - 0 of 1 Participants	Expired
Auto Event 10/16/2020	DisplayScoreWithSection_Question_Overall_PassOrFail	Administrator, AGM	10/16/2020 10:37:40 AM	1/21/2021 10:31:00 AM	1	<div style="width: 100%;"></div>	100% - 5 of 5 Participants	Completed
Auto Event 10/15/2020	DisplayScoreWithSection_Question_Overall_PassOrFail	Administrator, AGM	10/15/2020 7:48:30 PM	10/17/2020 7:59:00 PM	1	<div style="width: 0%;"></div>	0% - 0 of 1 Participants	Expired
Auto Event 10/15/2020	DisplayScoreWithSection_Question_Overall_PassOrFail	Administrator, AGM	10/15/2020 7:32:13 PM	10/17/2020 7:42:00 PM	1	<div style="width: 0%;"></div>	0% - 0 of 1 Participants	Expired
Auto Event 10/15/2020	DisplayScoreWithSection_Question_Overall_PassOrFail	Administrator, AGM	10/15/2020 3:06:16 PM	10/17/2020 2:52:00 PM	1	<div style="width: 0%;"></div>	0% - 0 of 1 Participants	Expired
Auto Event 10/15/2020	DisplayScoreWithSection_Question_Overall_PassOrFail	Administrator, AGM	10/15/2020 2:49:16 PM	10/17/2020 2:52:00 PM	1	<div style="width: 0%;"></div>	0% - 0 of 1 Participants	Expired
Auto Event 10/15/2020	DisplayScoreWithSection_Question_Overall_PassOrFail	Administrator, AGM	10/15/2020 2:32:10 PM	10/17/2020 2:38:00 PM	1	<div style="width: 0%;"></div>	0% - 0 of 1 Participants	Expired

The Calibration Results window opens with the Summary tab active.

CALIBRATION RESULTS

Calibration Event:	Reviewer table test in 21.0 - event created in 21.1 (Score)	Number Of Participants:	3	Number of Interactions:	2
Evaluation Template:	All types of questions and dependent questions	Overall Average Score:	83%	Overall Standard Deviation:	19.09

Summary | By Question

Interaction	Channel	Calibration Participants			Average Score	# of Evaluations Completed	Standard Deviation
		Terry Adams	Thomas Aagaard	AGM Administrator			
AutoTag1 10/15/2020 9:12:45 AM		N/A	N/A	N/A	0	N/A	
AutoTag1 10/15/2020 9:29:24 AM		67%	N/A	94%	2	19.09	

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.

CALIBRATION RESULTS

Calibration Event:	Reviewer table test in 21.0 - event created in 21.1 (Score)	Number Of Participants:	3	Number of Interactions:	2
Evaluation Template:	All types of questions and dependent questions	Overall Average Score:	83%	Overall Standard Deviation:	19.09

Summary **By Question**

Section	Average Score	Standard Deviation	
Section 1: "S1"	100%	12.02	
Question	Number Of Responses	Average Score	Standard Deviation
Question 1: "Q1"	2	50%	70.71
Option	Number Of Responses	Response %	
Yes	1	50%	
No	1	50%	
N/A	0	0%	
Question 2: "Q2"	2	100%	0
Option	Number Of Responses	Response %	
Pass	2	100%	
Fail	0	0%	
Question 3: "Q3"	2	50%	70.71
Option	Number Of Responses	Response %	
True	1	50%	
False	1	50%	
N/A	0	0%	
Section 2: "S2"	0%	53.74	
Question	Number Of Responses	Average Score	Standard Deviation
Question 1: "Q1"	2	50%	0

4. To view the dependent questions and the reviewer, click on the drill-down.

Example:

a. Here, Q1 has a dependent question and it has Yes/No option, so click on the drill-down button as shown below.

Summary **By Question**

Section	Question	Number Of
Section 1: "S1"	Question 1: "Q1"	2
Option	Yes	
	No	
	N/A	

The options related to the question appears and click on the drill-down button to view the reviewer as shown below.

Section	Average Score
Section 1: "S1"	100%
Question	Number Of Responses
Question 1: "Q1"	2
Option	Number Of Response
Yes	1
Dependent Question	Number Of Responses
If "Yes": Question1A: "DQ1"	1
Option	Number Of Res
1	0
2	0
3	1
Reviewed By	
Administrator, AQM	
4	0
N/A	0

- b. The Q2 does not have any dependent question, so click on the drill-down button to view the reviewer details as shown below.

Section	Ave
4	N/A
No	N/A
Question 2: "Q2"	2
Option	
Pass	
Reviewed By	
Adams, Terry	
Administrator, AQM	
Fail	

- c. For any free form questions, the reviewer responds to the question and the response will be shown on the grid as shown below.

Question 3: "Q3"	1
Response	
123	
Reviewed By	
Administrator, AQM	

Note: When multiple reviewers are provided any responses, then the responses will be shown in multiple rows.

7.1.6.1 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.
Overall Average Score	<p>The average score of all the participants for all the interactions scored. The formula used is</p> <p>[Total Point Score of each User/Total Max Possible Score of each User]*100</p> <p>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%.</p>
Overall Standard Deviation	<p>The formula used to calculate the overall standard deviation is:</p> $\sigma = \sqrt{\frac{1}{N} \sum_{i=1}^N (x_i - \mu)^2}$ <p>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).</p>

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, 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.

Column Name	Description
Average Score	<p>The average of evaluated score by user for the respective interaction. All scores display in percentage.</p> <p>Note: If the template scoring type is Total Points or Pass/Fail, then scores convert to percentage, and display here.</p> <p>The interactions overall score displays here.</p> <p>For example, User1's score is 100 and Interaction2 as 100; User2's score is 0, then the average score is $[(100+0)/(100+100)]*100 = 50\%$.</p>
# of Evaluations Completed	<p>The number of evaluations scored and completed for the respective interaction.</p> <p>Note: If the scored evaluation is in Draft mode, it does not count as a completed evaluation.</p>
Standard Deviation	<p>The standard deviation formula is</p> $\sigma = \sqrt{\frac{1}{N} \sum_{i=1}^N (x_i - \mu)^2}$ <p>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).</p>

7.1.6.1.1 *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**.

7.1.6.2 Calibration Events By Question

Click the **By Question** tab.

CALIBRATION RESULTS

Calibration Event:	Calibration Event 3	Evaluation Template:	Simple Template	Number of Interactions:	2
Number Of Participants:	5	Overall Average Score:	50%	Overall Standard Deviation:	70.71

Summary | **By Question**

Section	Average Score	Standard Deviation
Section 1: "Section 1"	50%	70.71

Question	Number Of Responses	Average Score	Standard Deviation
Question 1: "Pass or Fail"	2	50%	70.71

Option	Number Of Responses	Response %
Pass	1	50%
Fail	1	50%

The following table describes the main header columns on the By Question tab.

Column Name	Description
Section	The name of the section.
Average Score	<p>The average of the section. All scores display in percentage.</p> <p>Note: If the template scoring type is Total Points or Pass/Fail, then scores convert to percentage, and display here.</p> <p>$[\text{Total Point Score of Section} / \text{Total Max Possible Score of Section}] * 100$</p> <p>For example, User1's score for Section1 is 100 and Section2 is 0, then the average score is $[(100+0)/(100+100)] * 100 = 50\%$.</p>
Standard Deviation	<p>The standard deviation formula is</p> $\sigma = \sqrt{\frac{1}{N} \sum_{i=1}^N (x_i - \mu)^2}$ <p>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).</p>

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 $[\text{Total Point Score of each User} / \text{Total Max Possible Score of each User}] * 100$ For example, User1's score for Question1 is 100 and Question2 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 $[\text{Number of Responses for that option} / \text{Total number of responses for that question}] * 100$

If an option contains dependent questions, then another table displays under the Option sub-section. 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 $[\text{Total Point Score of Question for each User} / \text{Total Max Possible Score of Question for each User}] * 100$ For example, User1's score for Question1 is 100 and Question2 is 0, then the average score is $[(100+0)/(100+100)] * 100 = 50\%$.

Column Name	Description
Standard Deviation	<p>The standard deviation formula is</p> $\sigma = \sqrt{\frac{1}{N} \sum_{i=1}^N (x_i - \mu)^2}$ <p>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).</p>

7.1.6.3 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.

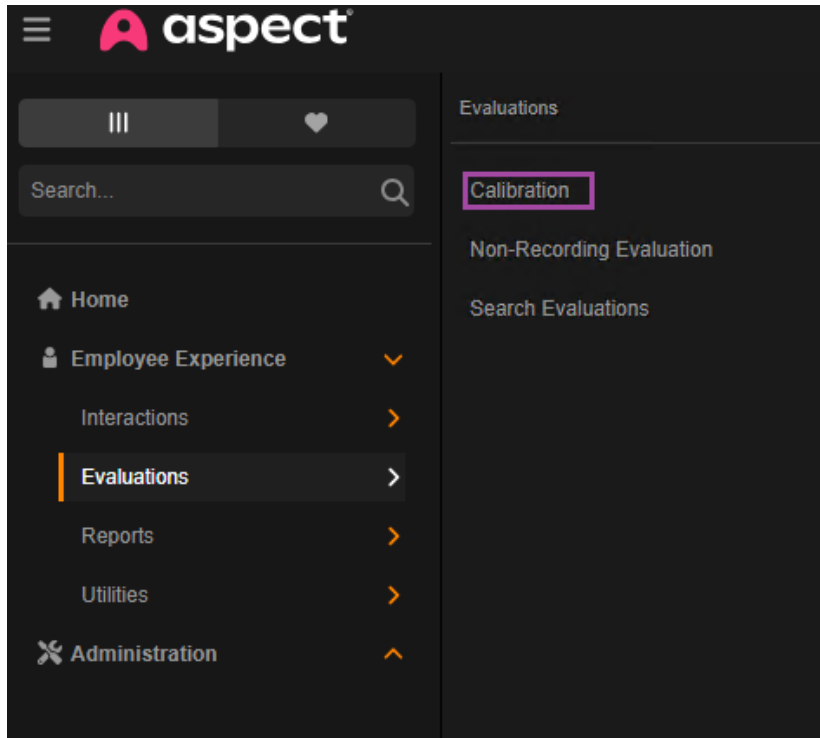
	A	B	C	D	E	F	G	H	I	J
1	Calibration Event: Calibration Event 3									
2	Evaluation Template: Simple Template									
3	Number of Interactions: 2									
4	Number Of Participants: 5									
5	Overall Average Score: 70.71									
6	Overall Standard Deviation: 50									
7										
8										
9										
10	Calibration Participants									
11	Interaction	Channel	AQM Administrator	Ux User3	Ux User6	Ux User1	Ux User2	Average Score	# of Evaluations Completed	Standard Deviation
12	Tag by admin 6	Voice Only	N/A	N/A	100%	N/A	N/A	100%	1	0
13	Tag by admin	Voice and Screen	N/A	N/A	0%	N/A	N/A	0%	1	0
14										
15										
16										
17										

7.1.7 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									
Title	Evaluation Template Name	Created By	Date Created	Due Date	Interactions	My Progress	Overall Completion	Status	
Assigned to Mentor	2 Sections Failure - Point	Administrator, AQM	2/20/2019 12:41:51 AM	2/27/2019 12:00:00 AM	1	<div style="width: 0%;"></div>	0% - 0 of 1 Participants	Not Started	
SS	2 Sections Failure - Point	Dwivedy, Abhay	12/14/2018 5:42:13 AM	12/19/2018 12:00:00 AM	1	<div style="width: 0%;"></div>	100% - 1 of 1 Participants	Expired	
Event - Created By	Template 1	Administrator, AQM	8/22/2018 11:38:21 PM	8/30/2018 12:00:00 AM	1	<div style="width: 50%;"></div>	50% - 1 of 2 Participants	Expired	
Event 3	Template 1	Administrator, AQM	7/30/2018 12:26:50 AM	8/6/2019 12:00:00 AM	2	<div style="width: 0%;"></div>	0% - 0 of 2 Participants	In Progress	
Assign 2 interaction for an user - admin	Template 1	Administrator, AQM	7/15/2018 10:54:47 PM	11/29/2018 12:00:00 AM	6	<div style="width: 0%;"></div>	0% - 0 of 3 Participants	Expired	
2 Interactions and 2 users	Template 1	Dwivedy, Abhay	7/12/2018 11:03:15 PM	10/24/2019 12:00:00 AM	4	<div style="width: 0%;"></div>	0% - 0 of 2 Participants	In Progress	

- In the list, select the calibration event that you want to delete. Select the delete button as highlighted in the below image.

CALIBRATION EVENTS

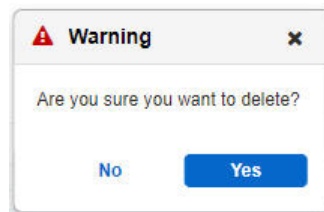






Drag a column header and drop it here to group by that column

Title	Evaluation Template Name	Created By	Date C...	Due ...	Inter...	My P...	Overall Completion	Status
Assign to Mentor and Agent	A_Test1	Administrator, AQM	8/10/2022 9:52:02 PM	8/12/2022 12:00:00 AM	1	<div style="width: 100%;"></div>	100% - 2 of 2 Participants	Expired
Admin created	All_in_one	Administrator, AQM	8/10/2022 9:48:05 PM	8/12/2022 12:00:00 AM	3	<div style="width: 0%;"></div>	0% - 0 of 2 Participants	Expired
Agent Created	FFT Template	Pissay, Tara	8/10/2022 5:33:11 PM	8/12/2022 12:00:00 AM	1	<div style="width: 100%;"></div>	100% - 2 of 2 Participants	Expired
Mentor and Agent	FFT Template	Administrator, AQM	7/25/2022 5:46:49 PM	7/27/2022 12:00:00 AM	1	<div style="width: 100%;"></div>	100% - 2 of 2 Participants	Expired
Assign to Mentor and Agent - Issue	All_in_one	Administrator, AQM	7/25/2022 4:53:42 PM	7/27/2022 12:00:00 AM	1	<div style="width: 100%;"></div>	100% - 2 of 2 Participants	Expired
Assign to Mentor and agent	A_Test1	Administrator, AQM	7/14/2022 6:16:53 PM	7/14/2022 12:00:00 AM	1	<div style="width: 50%;"></div>	50% - 1 of 2 Participants	Expired
Assign to Mentor and Agent	All questions EDR	Administrator, AQM	7/6/2022 2:40:39 PM	7/8/2022 12:00:00 AM	1	<div style="width: 100%;"></div>	100% - 2 of 2 Participants	Expired
DefaultChat Calibration for System Parameter	All_in_one	Administrator, AQM	4/17/2022 12:11:45 PM	4/17/2025 12:00:00 AM	3	<div style="width: 0%;"></div>	0% - 0 of 3 Participants	Not Started
Calibration for system parameter test	All_in_one	Administrator, AQM	4/16/2022 11:59:13 PM	4/16/2025 12:00:00 AM	3	<div style="width: 0%;"></div>	0% - 0 of 3 Participants	Not Started

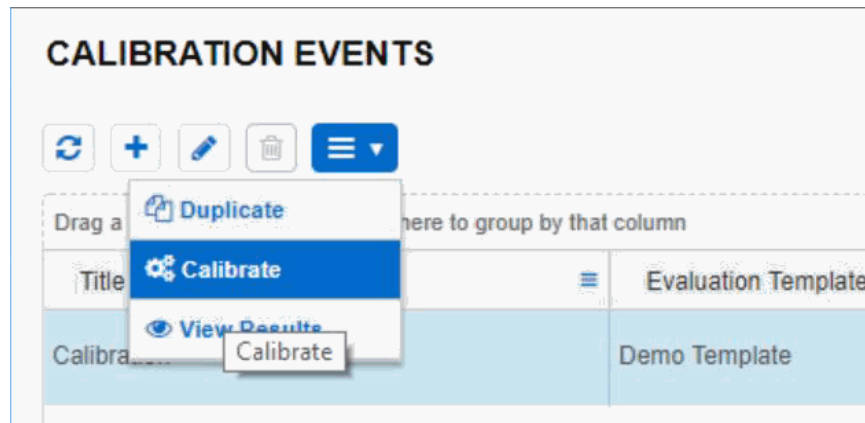
1 - 9 of 9 items

- The Warning Message appears to confirm the deletion.

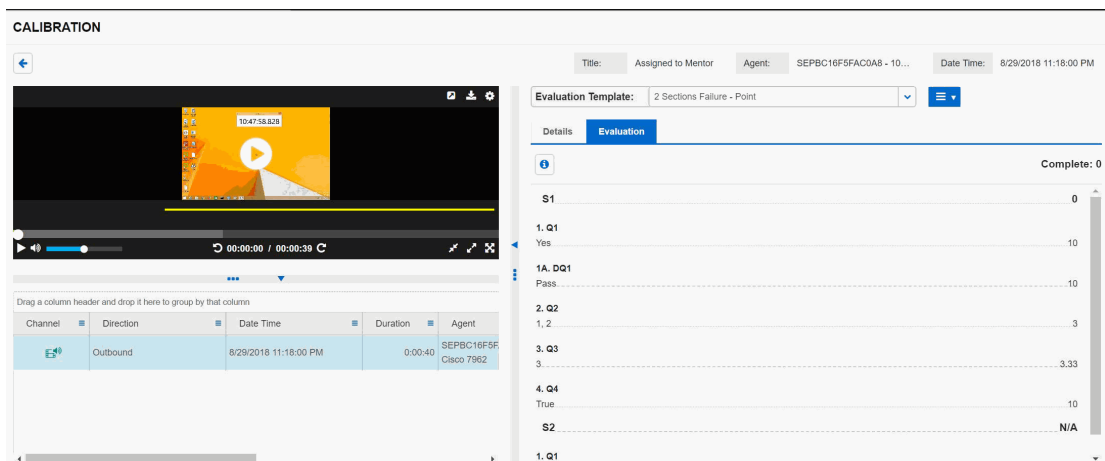


- Select Yes to delete the Calibration event.
- You can also delete the Calibration evaluation from the Calibration Menu, as given below.

a. From the Calibration menu, select the **Calibrate** option.



The Calibration window opens with the Evaluation tab active in the right pane.

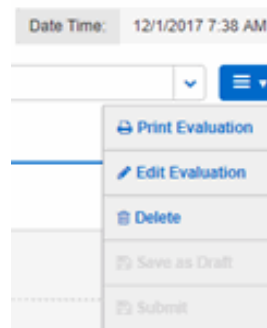


Note: You can only delete a calibration evaluation if the calibration event is not expired.

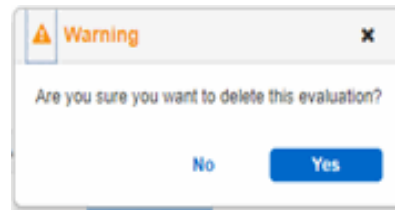
The Delete option is enabled once the user completes the calibration evaluation for the calibration event; otherwise the Delete option is disabled.

Clicking Delete only deletes the calibration evaluation for the logged-in user.

b. 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 (2) interactions, the user scored both interactions, the event is assigned for two (2) 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.

7.2 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 non-recording 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.

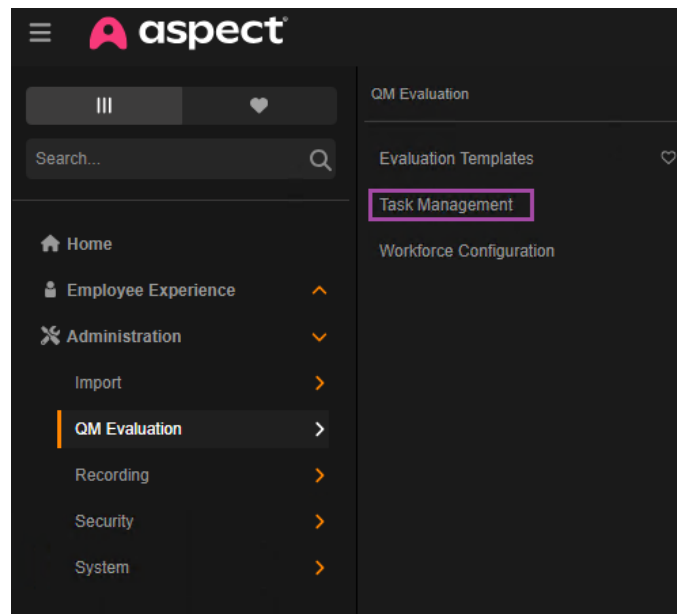
7.2.1 Task Management

This feature allows the user to define the custom information which is required to manage during the creation of Non Recording Evaluation (Task) in WEM.

Note: Either a Admin or Mentor who has the Task Management right turned on in their user profile, can manage the Task Management.

Follow the below mentioned steps to create task management.

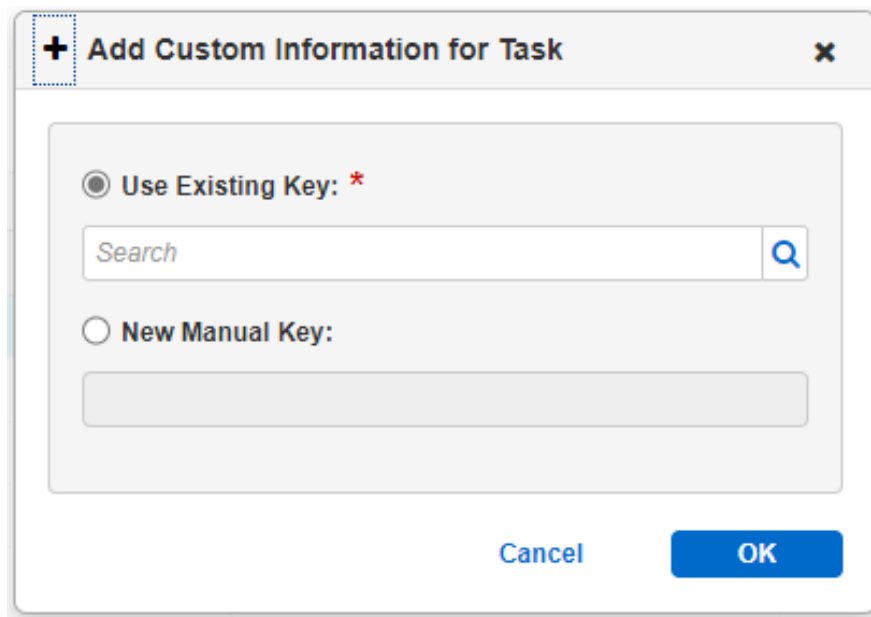
1. Login to WEM.
2. Navigate to main menu > Administrator > QM Evaluation > Task Management link



Toolbar Buttons

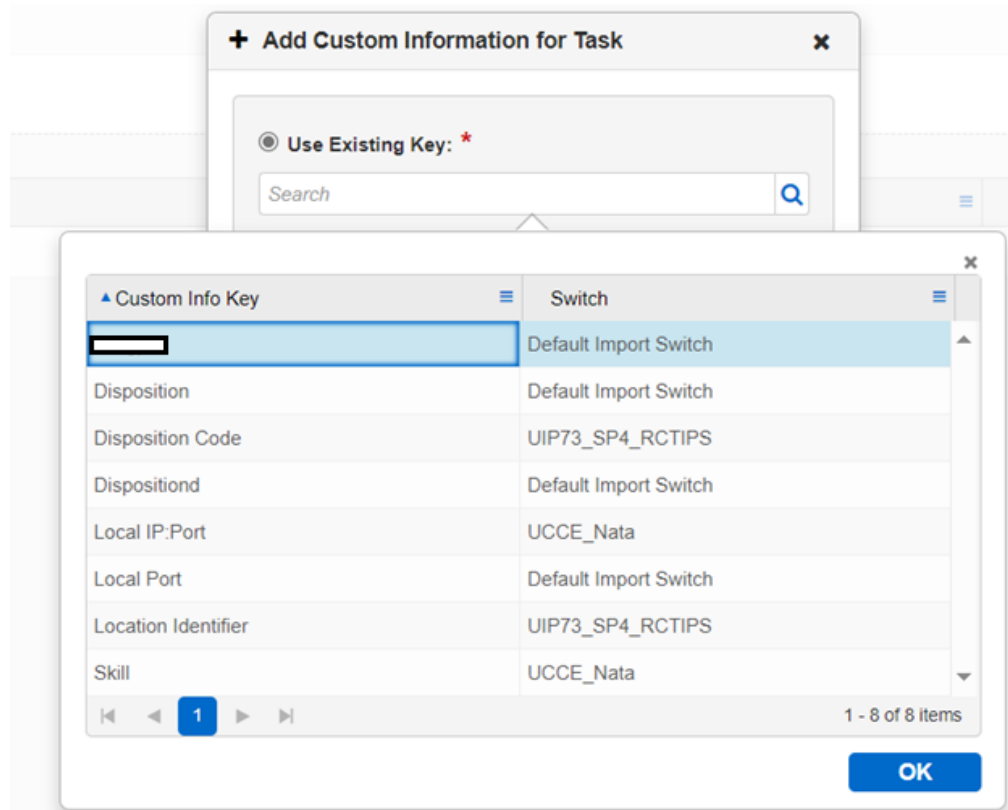
Button Name	Functionality
Refresh	Refreshes the task management grid with the latest data
Add	Allows to add new or existing custom information key to the task management
Edit	The Edit button will be enabled only for the newly added keys. For existing custom information keys, the edit button will be disabled
Activate	Activates the selected row
Deactivate	Deactivates the selected row

3. Click on “+” (Add) button to add existing or new custom information key to the task management.

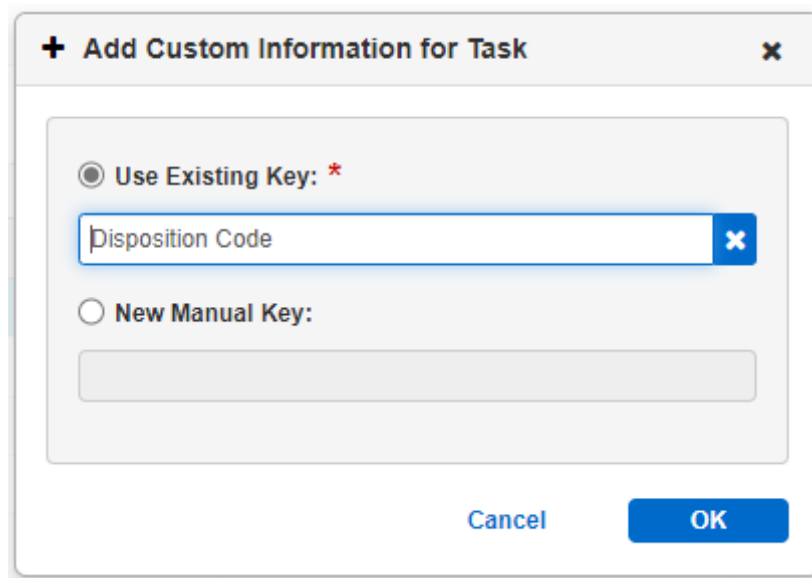


4. By default, “Use Existing Key” radio button will be selected. With this option the user can add the existing custom information key to the task management.
5. Click on the Search button to see all the active custom information existing in the system.

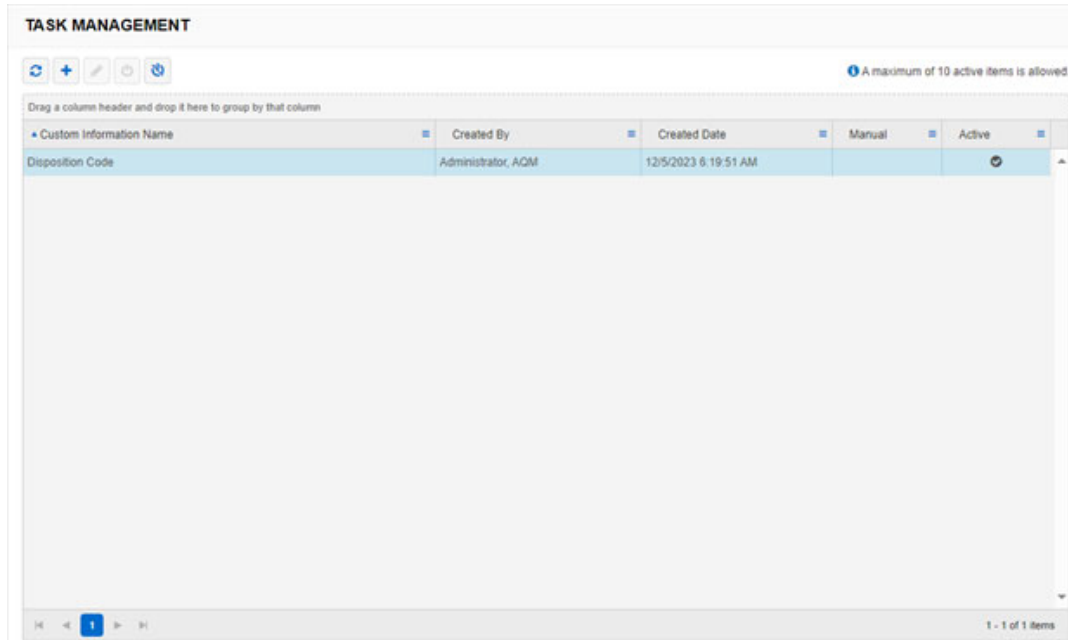
Note: Existing custom information can be searched by providing the starting text of the custom information in the search text box.



6. Select the custom information and click on OK button.

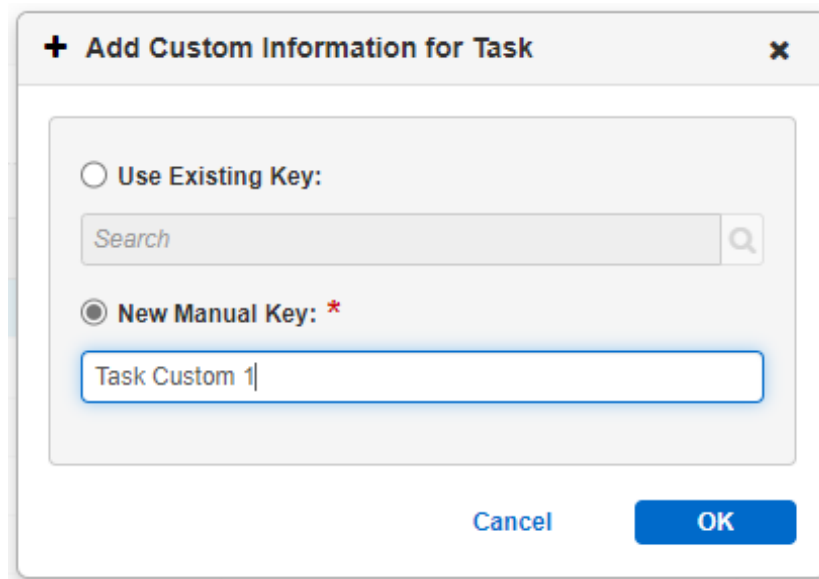


7. Click on the OK button.
8. The existing custom information key gets added to the task management as shown in the below screenshot.

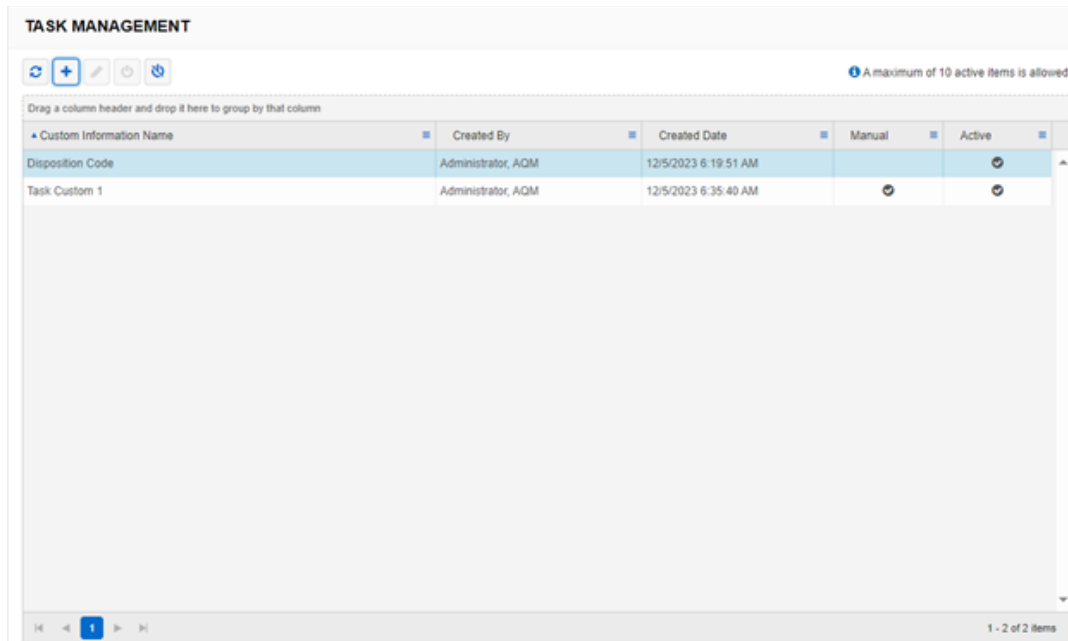


If you want to add a new custom information that does not exist in the system, follow the steps below.

1. Click the Add button.
2. Select “New Manual Key” radio button. Text box will be enabled.
3. Enter the custom information key name and click on OK button



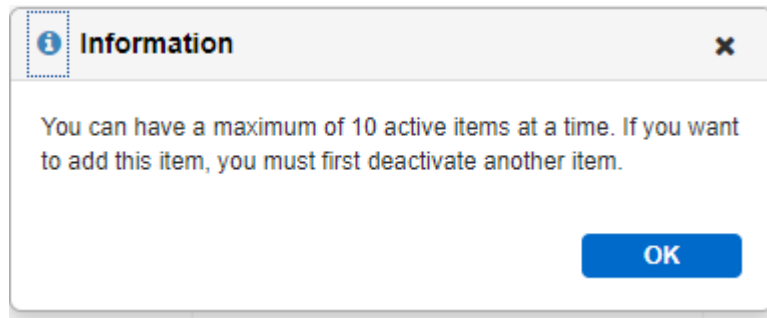
4. The new custom information key gets added to the task management.



Task Management grid will display as explained below;

Column Name	Description
Custom Information Name	Name of the custom information key
Created By	The user who added the task management
Created Date	The date and time when the Custom Information is associated for Task created
Manual	<ul style="list-style-type: none"> This column specifies if the custom information key is an existing one or it is added newly. <ul style="list-style-type: none"> Tick mark indicates newly added custom information key Blank value indicates it is an existing custom information key
Active	This column indicates if the task management is active or inactive

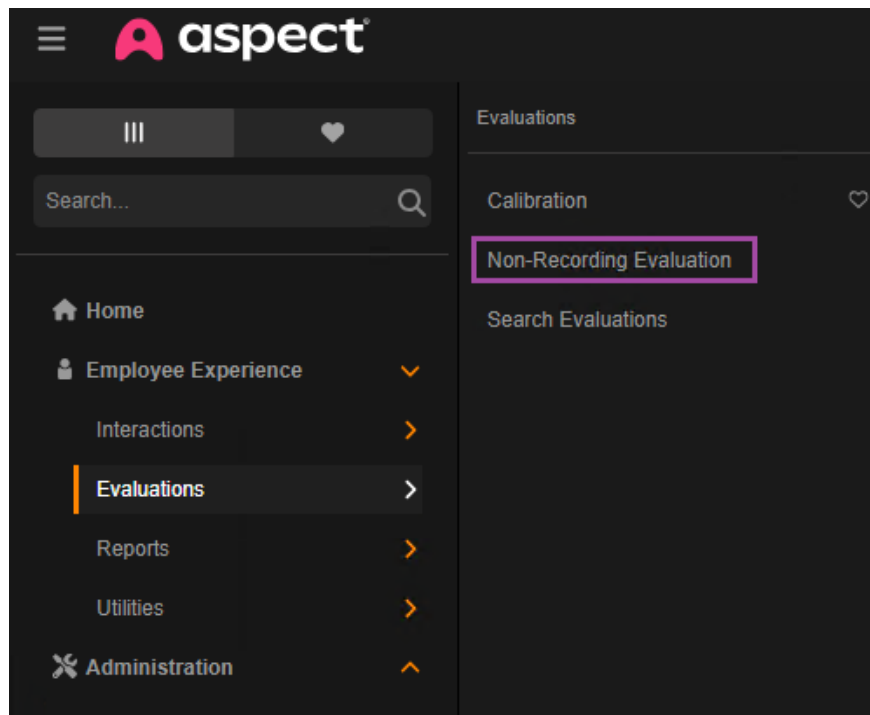
Note: Maximum of 10 active line items can be created using existing or new custom information keys. Clicking on Add button after adding 10 active task managements will show information message.



5. 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.
6. The user can Activate/Deactivate the line items by clicking on Activate/Deactivate buttons.

7.2.1.1 Create Non Recording Evaluation and associate custom information key

1. Click on main menu > Employee Experience > Evaluations > Non Recording evaluation link



2. Create Task dialog will be displayed with the active custom information keys added to the task management.

+ Create Task ✕

i Task Name field is optional. If an agent is not selected, this task will be associated with your user name.

Task Name:

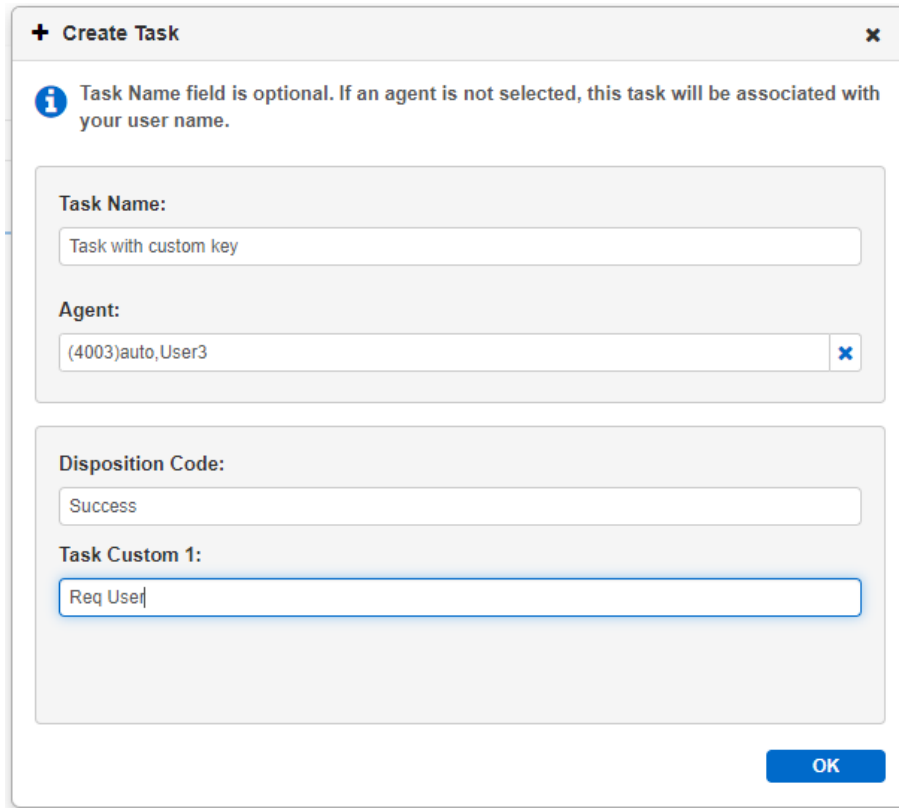
Agent:
 🔍

Disposition Code:

Task Custom 1:

3. Manager or Agent can create Non Recording Evaluation by entering the custom information value required for the custom information key to assign to an 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 on OK button.



+ Create Task ✕

i Task Name field is optional. If an agent is not selected, this task will be associated with your user name.

Task Name:

Agent:
 ✕

Disposition Code:

Task Custom 1:

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.

INTERACTION

✎

Evaluation: Administrator AQM, Pass 50%, Agent Review ▼ + ☰

Details | Actions | Evaluation | Associations | Attachments

Hidden: No

Interaction Handling:

Agent: auto, User3
 Application: N/A
 Agent Group: N/A
 Initial Agent Group: N/A
 Skill Group: N/A
 Initial Skill Group: N/A
 Teams: <Default>

Interaction Statistics:

Start Time: 12/5/2023 12:11:37 PM
 End Time: 12/5/2023 12:11:37 PM
 Duration: 00:00:00
 Matched Rules: N/A

Archiving Information:

Status: Current
 Protected: No

Custom Information:

Disposition Code: Success
 Task Custom 1: Req User

Note: User can search for the Non Recording evaluation (Task) by adding the custom information search criteria.

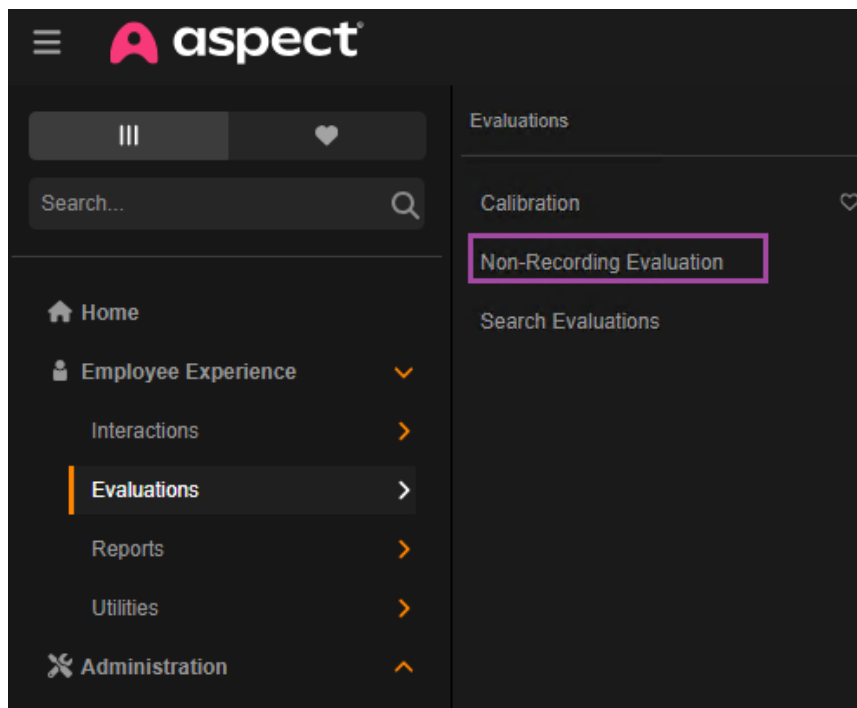
7.2.2 Create a Non-Recording Evaluation

This section describes how to create a non-recording evaluation in Workforce Engagement Management

1. Login to Workforce Engagement Management.
2. Click **Quality**.
3. Select **Employee Experience > Evaluations > Non-Recording Evaluation**.

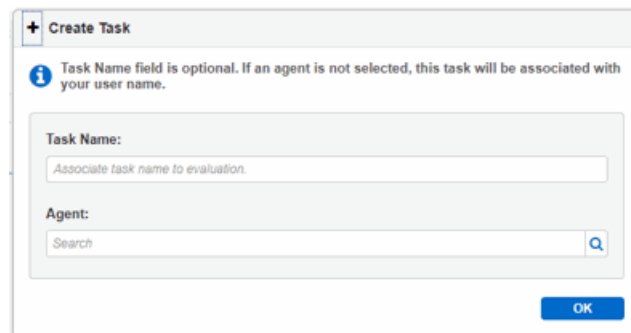
Note:

- 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. Refer to [Navigate Aspect Quality](#)

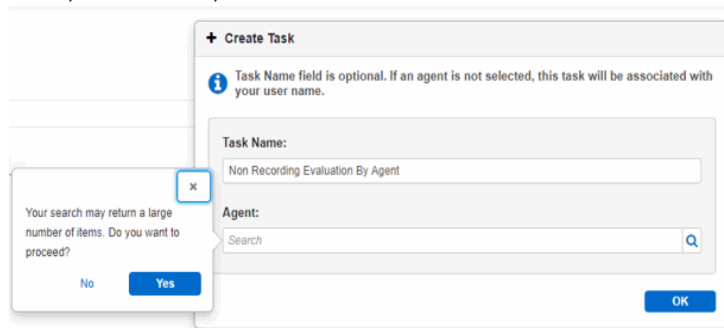


The Create Task dialog appears.

4. Enter the **Task Name**. The Task Name is an optional field.



- 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 considered as Agent.

- 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.

+ Create Task

i Task Name field is optional. If an agent is not selected, this task will be associated with your user name.

Task Name:

Agent:
 Q

User Name	First Name	Last Name	Switch Name	Role
2127	AutoCall	Agent3	UIP73_SP4_RCTIPS	Agent
BaseInAgent1	BaseInAgent1	base-l	UIP73_SP4_RCTIPS	Agent
2115	Sree	Madhi	UIP73_SP4_RCTIPS	Agent
BaseEmulOutAgent	BaseEmulOutAgent	base-l	UIP73_SP4_RCTIPS	Agent
4001	User1	auto	UIP73_SP4_RCTIPS	Agent
BaseEmulInAgent	BaseEmulInAgent	base-l	UIP73_SP4_RCTIPS	Agent
abaker	Baker	Andrew	Demo Switch (Inactive)	Agent
kgengaram	Karthikeyan	Gengaram	Demo Switch (Inactive)	Agent
4004	User4	auto	UIP73_SP4_RCTIPS	Agent
2119	Sandesh	Kundar	UIP73_SP4_RCTIPS	Agent
2126	AutoCall	Agent2	UIP73_SP4_RCTIPS	Agent
4002	User2	auto	UIP73_SP4_RCTIPS	Agent

1 - 26 of 26 items

OK

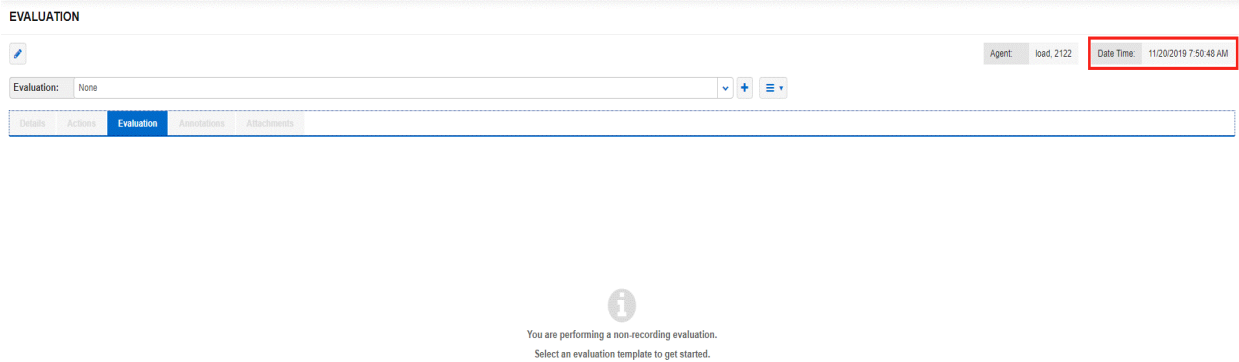
7. Select the user from the search grid as shown above.

Example:- 2127 is selected from the search grid, is taken agent.

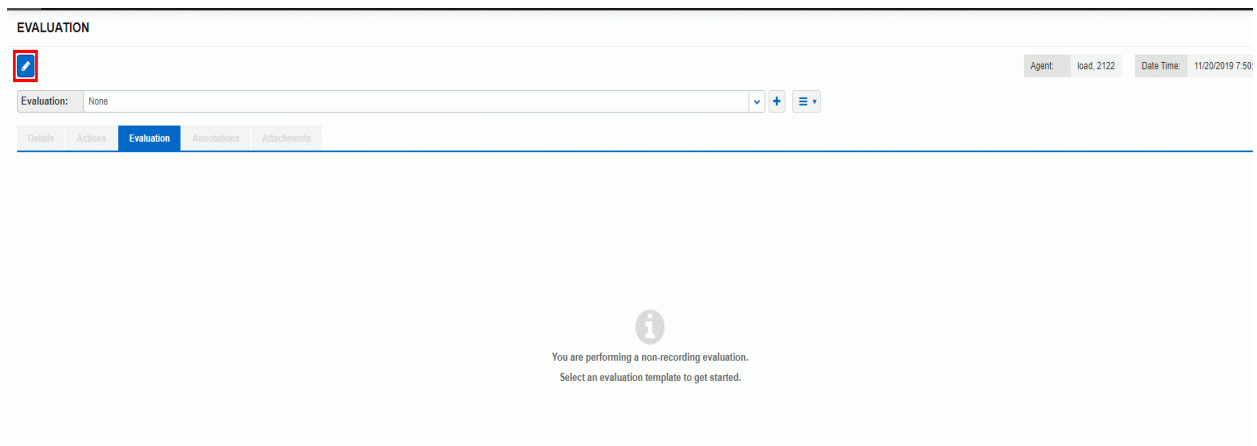
Note: If an user is assigned to an inactive switch, then switch name with **(Inactive)** suffix will be displayed.

8. Click on **OK** button. The **Evaluation** window appears and the **Start Time** is mentioned at the right-hand corner of the Evaluation window.

Note: First time when the task is clicked called **Start Time**.

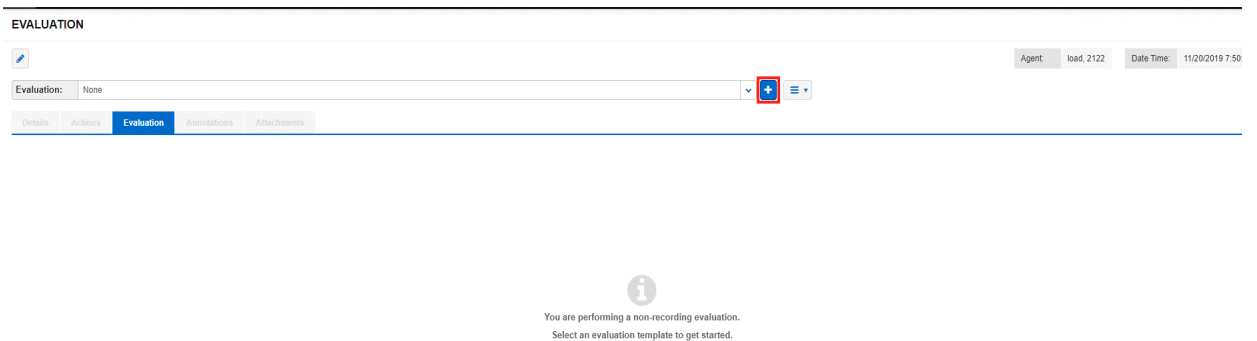


9. Click on **Edit** button to edit Task Name and Agent.

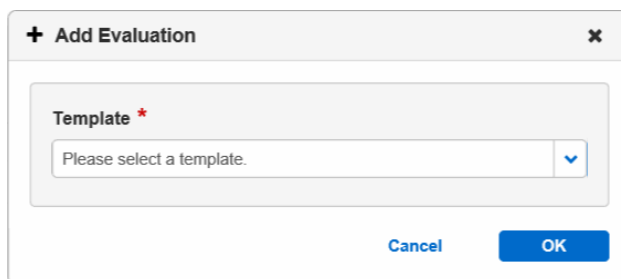


10. Edit the **Task Name** and **Agent** and click on **OK** button.

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: By default, the list of templates are sorted based on the Names in the ascending order.

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.

EVALUATION

Agent: load, 2122 Date Time: 11/20/2019 7:50:48 AM

Evaluation: Administrator AQM, Draft, Quality Trend Report

Details Actions **Evaluation** Annotations Attachments

Review: None

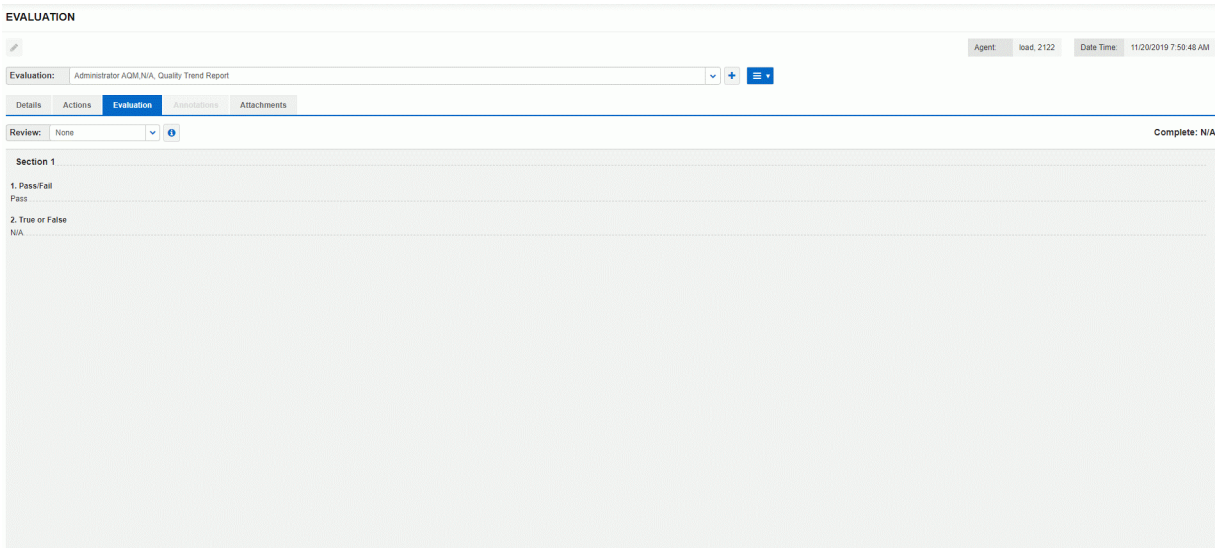
Information

Evaluation Template: Quality Trend Report
 Created By: Administrator AQM
 Created On: N/A

Description	Answer	Result
	N/A	
	N/A	

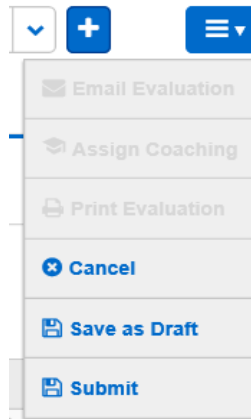
Note:
Optional

14. Select the options for the questions and **Submit** the evaluation.

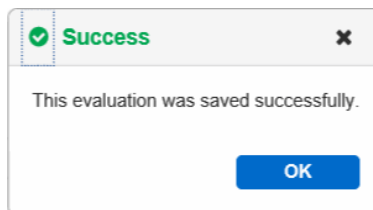


15. Save the evaluation as a draft, or submit it.

- 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.

The screenshot shows the 'EVALUATION' interface with the following details:

- Evaluation:** Administrator AGM,N/A, Quality Trend Report
- Agent:** load, 2122
- Date Time:** 11/20/2019 7:50:48 AM
- Interaction ID:** 34BA46F-DE63-459C-AC4A-AC8884E09ED6
- Type:** Task
- Switch:** UCCE116
- Task Name:** Non Recording Evaluation By Agent
- Interaction Handling:**
 - Agent:** load, 2122
 - Agent Group:** N/A
 - Initial Agent Group:** N/A
 - Teams:** UCCE_Load
- Interaction Statistics:**
 - Start Time:** 11/20/2019 7:50:48 AM
 - End Time:** 11/20/2019 7:50:48 AM
 - Duration:** 00:00:00
- Archiving Information:**
 - Status:** Current
 - Protected:** No

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.

7.2.3 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 *Alvaria 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 *Alvaria 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 [Search for an Interaction on page 4-120](#)).
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 screenshot shows the 'INTERACTION' view in the Aspect Workforce Engagement Management Quality Administrator. The interface includes a video player on the left, a table of interaction details, and a right-hand panel with an 'Email Evaluation' menu open.

Table: Interaction Details

Channel	Direction	Date Time
Ex	Outbound	1/29/2019 2:18:40 AM

Interaction Details:

- Interaction ID: 307D211D-D942-443C-
- Type: Outbound Direct Call
- Switch: UCCX
- Host ID: 17605139
- UCID: N/A
- Extension: 1020
- Device Position: 1020
- ANI: 1020
- DNIS: 2577

Interaction Handling:

- Agent: QA_UCCX, Agent20
- Agent Group: N/A
- Initial Agent Group: N/A

Right Panel: Evaluation Menu

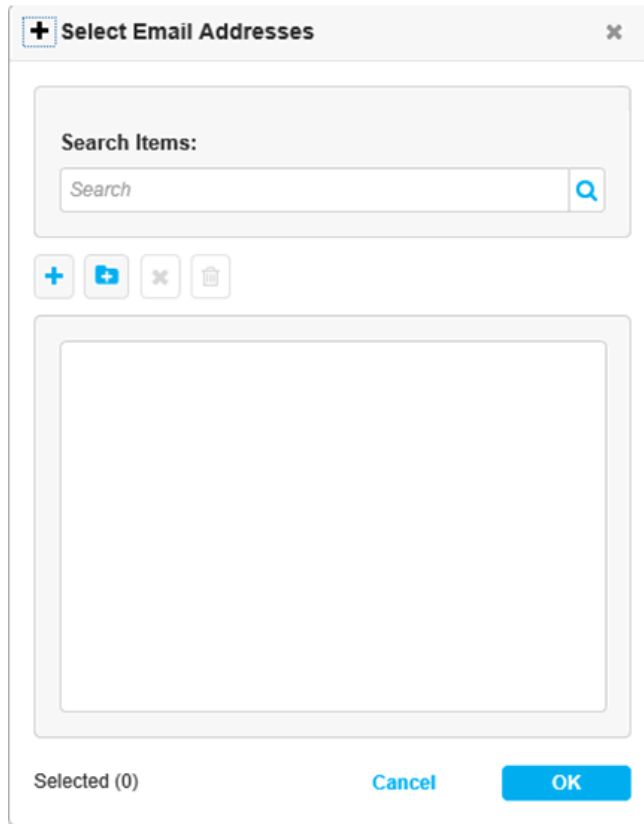
- Administrator AGM, N/A, Classic UI 1
- Agent: QA_UCCX, Agent20
- Date Time: 1/29/2019 2:18:40 AM
- Details | Actions | Evaluation | Annotations | **Email Evaluation**
- Assign Coaching
- Print Evaluation
- Edit Evaluation
- Cancel
- Delete
- Save as Draft
- Submit

The Email Evaluation window opens with the interaction's agent's email address in the To field.

The screenshot shows a window titled "Email Evaluation" with a close button (X) in the top right corner. The window contains the following fields and controls:

- To:** A text input field containing a redacted email address followed by "@Aspect.com".
- Cc:** A section containing a blue "Select" button, an unchecked checkbox labeled "Include All", and the text "Selected (0)".
- Subject:** An empty text input field.
- Message:** A large empty text area for composing the email body.
- Buttons:** A blue "Cancel" button and a blue "Send" button located at the bottom right of the window.

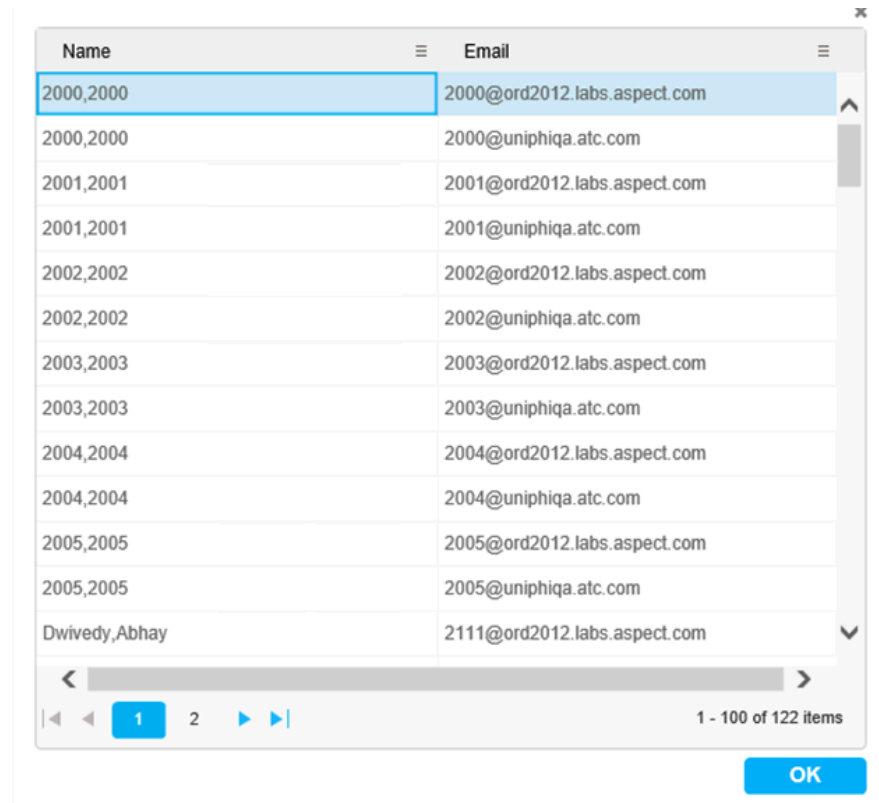
4. Click **Select**. The Select Email Addresses window opens.



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, e-mail Names and addresses display in the list box.

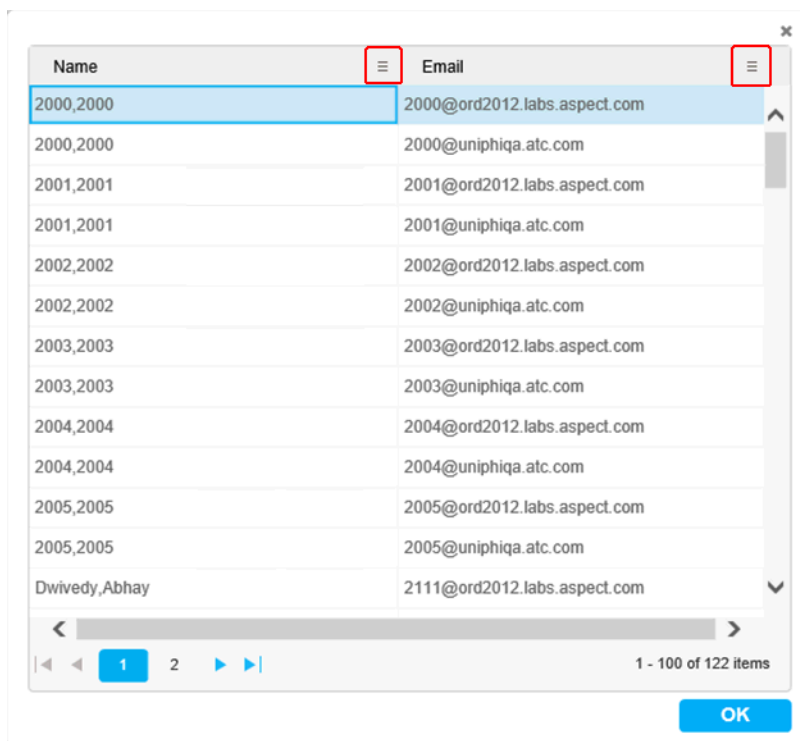


The table contains the following columns.

Column Name	Description
Name	Display the user's name in the format <i>Lastname, Firstname</i> .
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 triple bar 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.

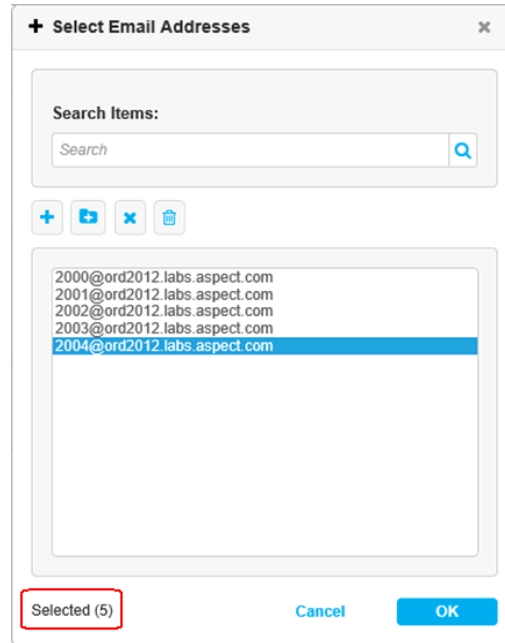
Note: Inactive user details do **not** display in the table.

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 e-mail addresses that you added to the detail list box. For example, in the

following screen shot, the user added five (5) e-mail addresses. Therefore, the label displays **Selected (5)**. This number persists in the Email Evaluation window.

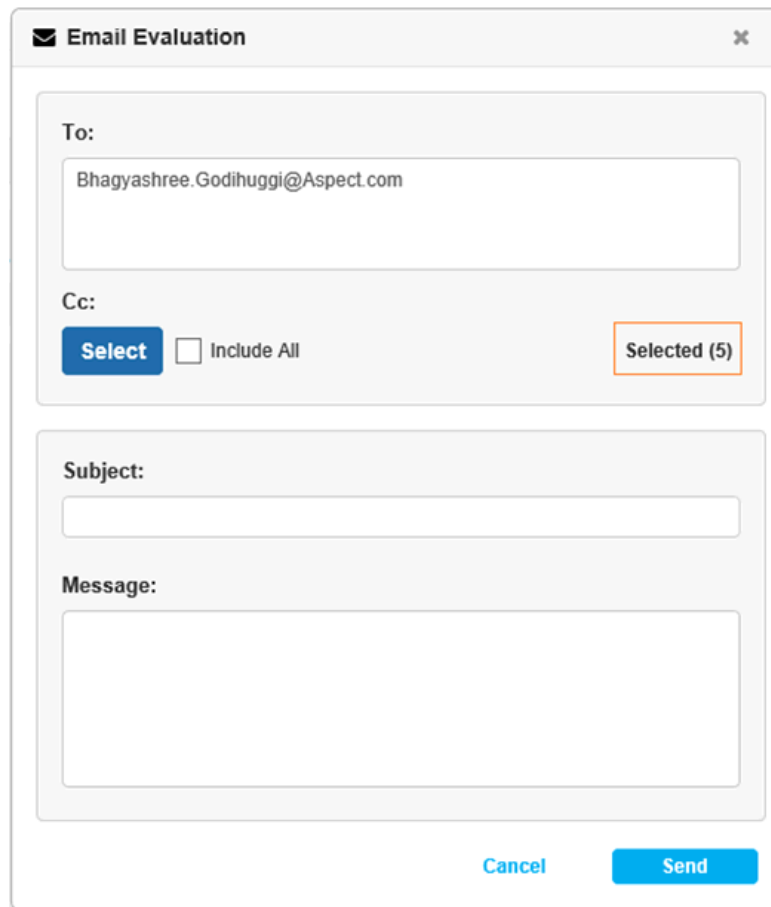


7. To add a user’s email address to the email, select the row and click **OK**.

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.



Email Evaluation [X]

To:
Bhagyashree.Godihuggi@Aspect.com

Cc:

 Include All

Subject:
[Empty text box]

Message:
[Empty text box]

Note: If you are entering the e-mail 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.

- To add all accessible e-mail IDs (“all emails” is a number of emails that your organization determines), select the **Include All** check box. The Selected field displays Selected (All).

The screenshot shows a dialog box titled "Email Evaluation". It has a close button (X) in the top right corner. The "To:" field contains the email address "B[redacted]@Aspect.com". Below the "To:" field is the "Cc:" section, which includes a "Select" button, a checked "Include All" checkbox, and a "Selected (All)" button that is highlighted with a red rectangular border. Below the "Cc:" section are two text input fields: "Subject:" and "Message:". At the bottom of the dialog box are two buttons: "Cancel" and "Send".

Note: Once you select the Include All check box, the Select button is inactive.

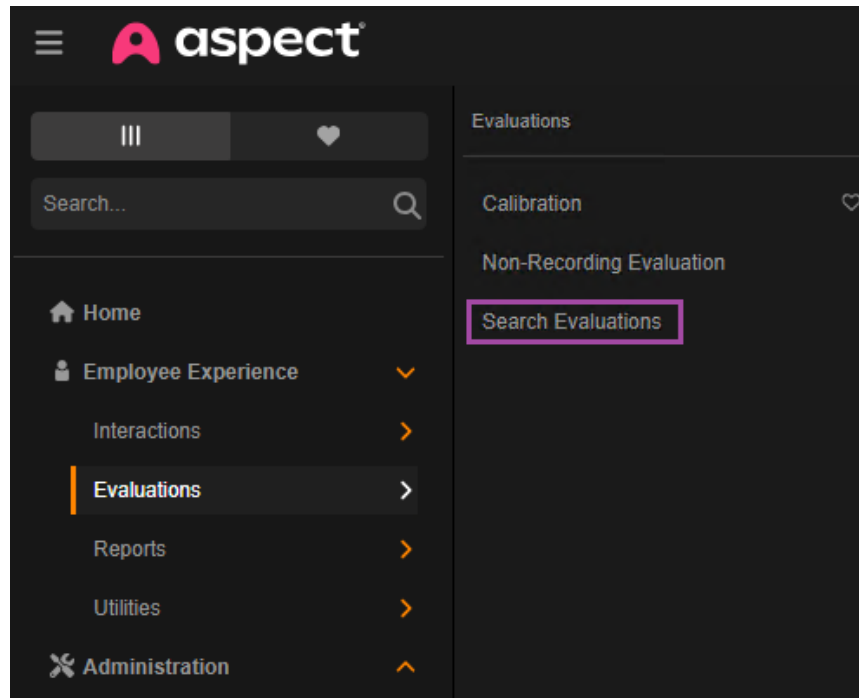
- Click **Send**. The system sends the e-mail to all the e-mail addresses that you added to the Cc list.

7.2.4 Delete an Evaluation

This section describes how to delete evaluation in Workforce Engagement Management.

- Log in to Workforce Engagement Management as an Administrator.
- On the Dashboard, click **Employee Experience**.

3. Under Evaluation, click the **Search Evaluations**.



Note: The Search Evaluations link is displayed only if the logged-in user has the Evaluation license.

After selecting the required criteria from [Select a Date Option](#), [Select a Channel](#), [Select a Status](#) and [Select Criteria](#) fields, the Search Evaluations window opens.

SEARCH RESULTS: EVALUATIONS

Search Type: New Search

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

	Cha...	Type	Date...	Dura...	Agent	Ext...	Anal...	Coa...	Score	To R...	Status
	📧		3:19:36 AM	0:00:00	Baker				50%		👍
	📧		10/10/2019 3:19:36 AM	0:00:00	Andrew, Baker				100%	Agent	👍
	📧		10/10/2019 3:19:19 AM	0:00:00	Andrew, Baker				100%		👍
	📧		9/30/2019 4:37:07 PM	0:00:00	Pissay, Tara				N/A		👍
	📧		9/30/2019 4:36:48 PM	0:00:00	Pissay, Tara				N/A		👍
	📧		9/27/2019 2:01:26 AM	0:00:00	auto, User1				N/A		👍
	📧		9/20/2019 5:51:30 PM	0:00:00	Dwivedy, Abhay				1		👍
	📧	👍	8/27/2019 9:06:52 PM	0:00:47	Dwivedy, Abhay	2579			50%		👍
	📧	👍	8/27/2019 9:06:52 PM	0:00:47	Pissay, Tara	2578			3		👍
	📧	🔊	8/27/2019 8:11:23 PM	0:01:20	Pissay, Tara	2578			50%		👍
	📧	🔊	8/27/2019 8:11:23 PM	0:01:20	Dwivedy, Abhay	2579			Draft		👍

1 - 15 of 15 items

4. Double-click on the evaluation that you want to delete. The evaluation opens.
5. In the right pane, select the **Evaluation** tab.

EVALUATION

Agent: Dwivedy, Abhay Date Time: 8/27/2019 9:06:52 PM

Evaluation: Administrator AQM,50%, Templa... + ≡

Details Actions **Evaluation** Annotations Attachments

Do not show in report Complete: 50%

S1	50%
1. Q1	
Yes	100%
2. Q2	
No	0%
S2	N/A
1. Q1	
N/A	N/A
2. Q2	
N/A	N/A

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

Channel	Direction	Type
Inbound	Inbound	Inbound

6. On the Evaluation tab, click the Evaluation menu.

la... v + ≡

- Email Evaluation
- Assign Coaching
- Print Evaluation
- Edit Evaluation
- Delete
- Save as Draft
- Submit

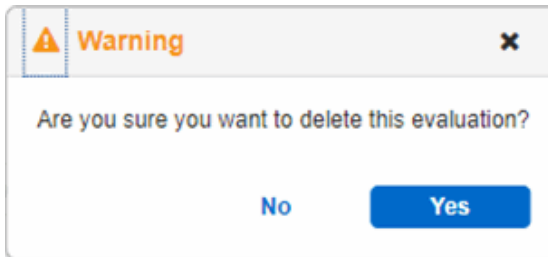
The Delete option on the Evaluation menu is enabled when the logged-in user is one of the following:

- 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.

8. 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 8-333](#)
- [Save a Report on page 8-334](#)
- [Edit a Report on page 8-375](#)
- [View a Report on page 8-380](#)

8.1 About Aspect 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 8-334](#)

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.

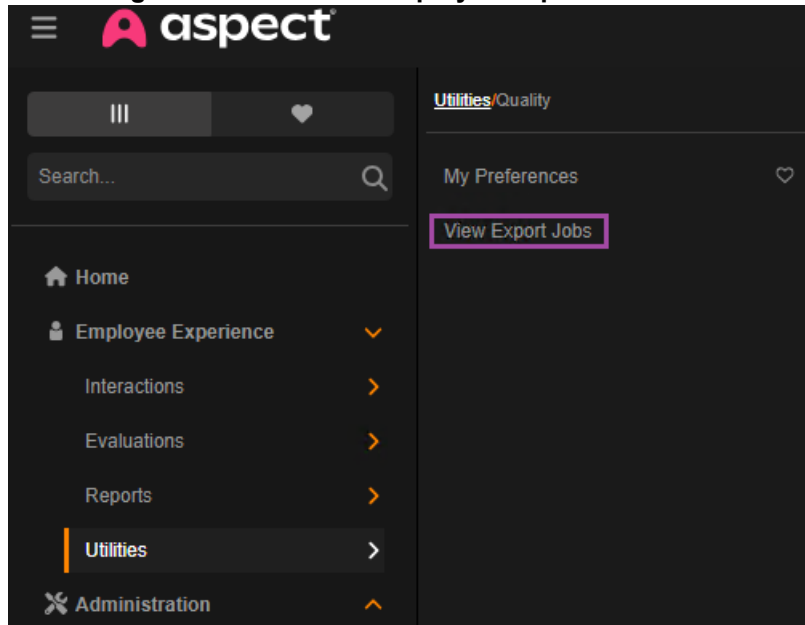
The Evaluation Detail report and the Quality Score Trend report only display data for interaction records. If the system Archiver process automatically deletes interaction data, or if a user manually deletes it, then the data is no longer available for reports. As you navigate through the Workforce Engagement 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.

8.2 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** and then click **Reports**.



3. 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 as per the scheduled time.
Example: The user wants to check daily report. So, if the user enable schedule and set 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.
4. The **Reports** window appears which consists 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.

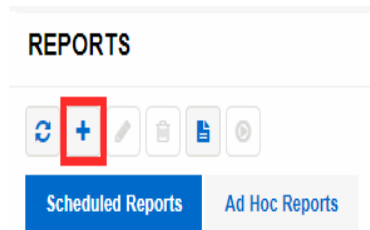
Column Name	Description
Name	The name of the report.
Description	The description of the report.
Report Type	The report type is mentioned in this column.
Created Date Time	The date and time when the report was created.
Created By	The creator of the report.

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 check mark will be shown on the column.

8.3 Save a Report

To saving a Report (regardless of 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.

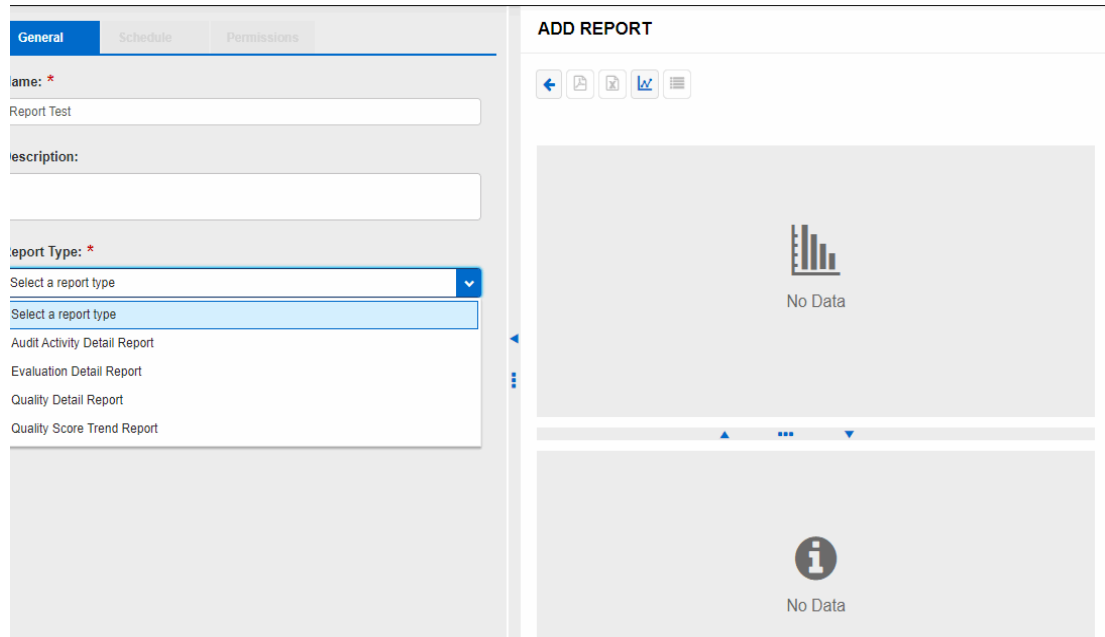


8.3.1 General Tab

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.

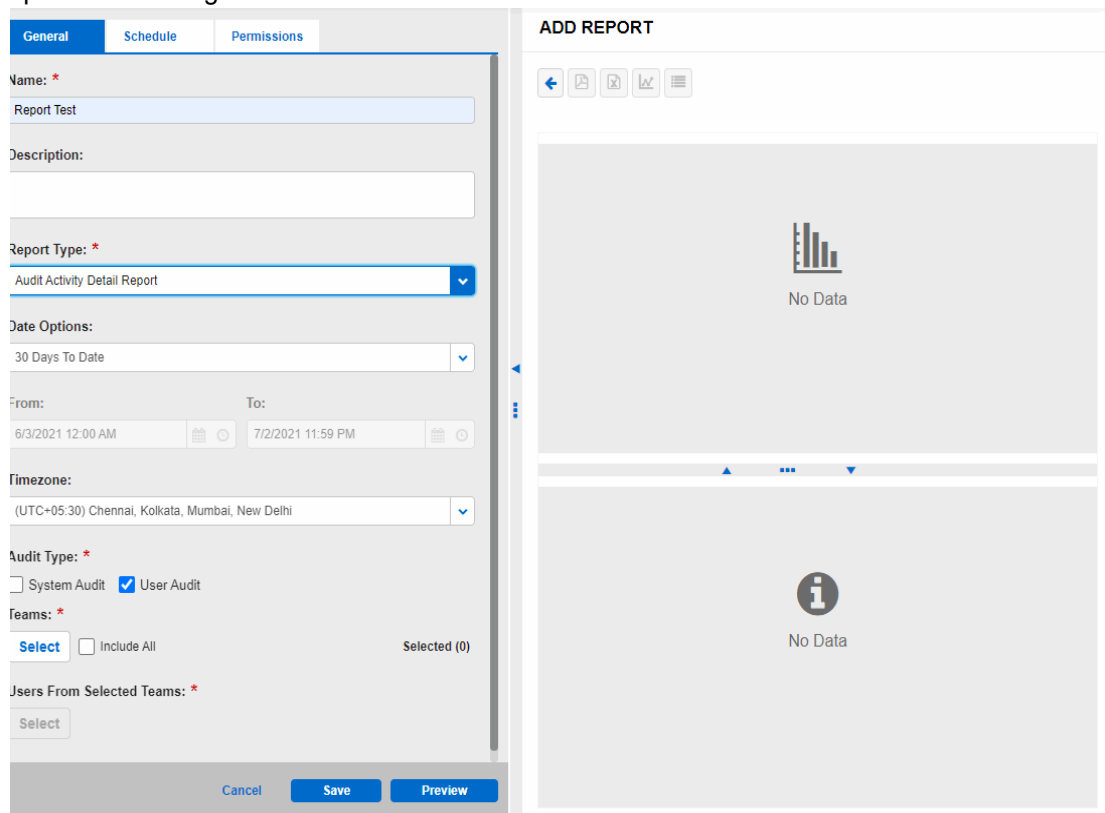
- Click on the drop-down list of the Report Type field. The listed Report Types are [Audit Activity Detail Report](#), [Evaluation Details Report](#), [Quality Detail Report](#) and [Quality Score Trend Report](#).

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




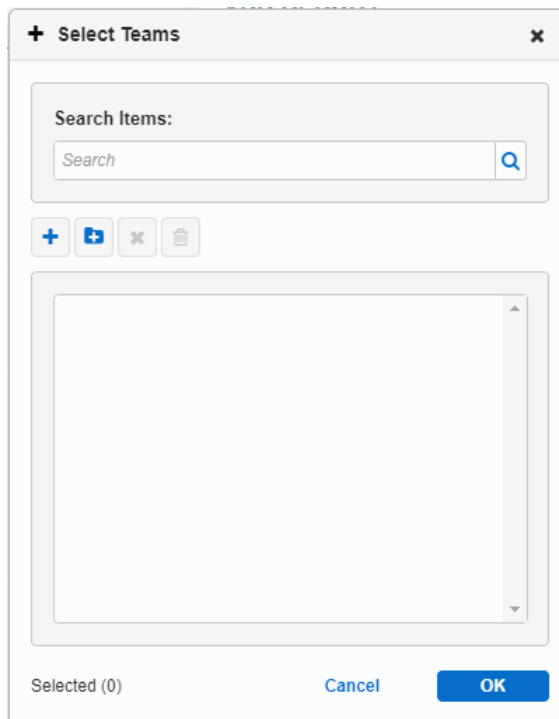
8.3.1.1 Audit Activity Detail Report

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 Time zone is selected based on your location. To change the Time zone, click on the drop-down and choose your required time zone.
4. Click on the **System Audit** or **User Audit** or **both** as per your requirement.
Note: If you select System Audit, the remaining fields such as Teams, 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** check box to include all the teams or else click on Select button to add specific teams.

- Click on the  icon in the Search Items field, and select Yes. A window opens with a list of available teams.




- 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
USLAX Nikki Rawnstley	DR_UIP	Active
MXGUA Karina Hernandez	DR_UIP	Active
MXGUA Adolfo Mendez SS	DR_UIP	Active
USLAX Stacy Heard	PROD_UIP	Active
MXGUA Giovanni Arellano	DR_UIP	Active
MXGUA Team Lead 1	DR_UIP	Active
MXGUA Carlos Alberto Garcia	PROD_UIP	Active
USLAX Edgar Munguia	DR_UIP	Active
USLAX C2B	DR_UIP	Active
MXGUA_Requal	DR_UIP	Active
USLAX Karinna Raquel Hernandez	DR_UIP	Active
USLAX Norma Edith Rubio Zamarripa	PROD_UIP	Active
MXGUA Abraham Armenta	PROD_UIP	Active

Note:

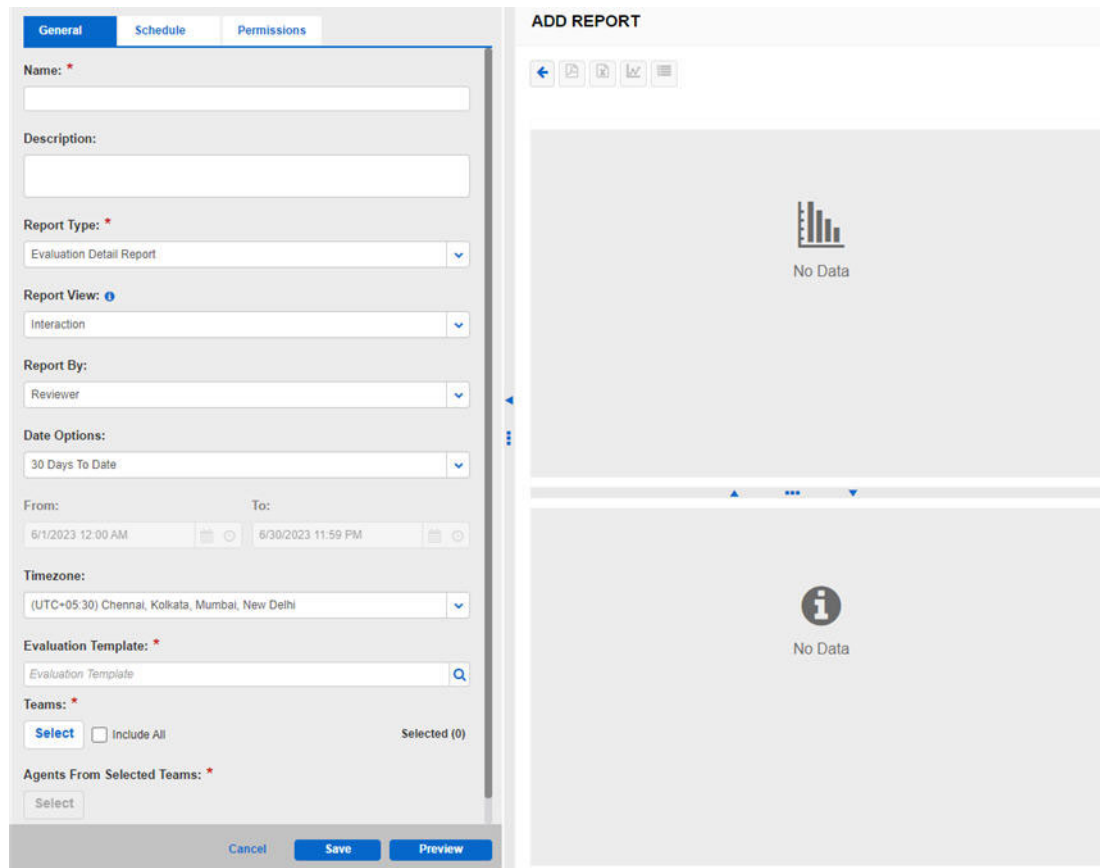
- To include all of the teams, click on **Include All** check box.

- 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 4-239](#), 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.
11. Select the user as per your requirement and click **OK**.

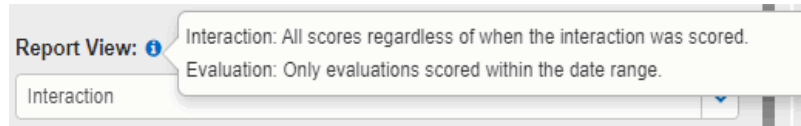
8.3.1.2 Evaluation Details Report

Select the **Evaluation Details 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, Point Earn, Points Possible and Success Rate. Under Report Type, when you select Evaluation Details Report, the below screen appears.

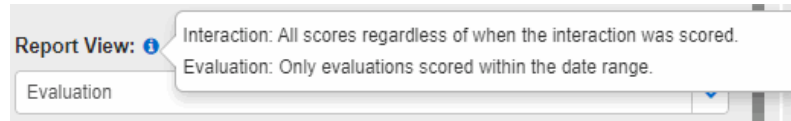


1. Click on the Report View drop-down and select Interaction or Evaluation.

Note: For more information, click on the Info button for Interaction as shown below.

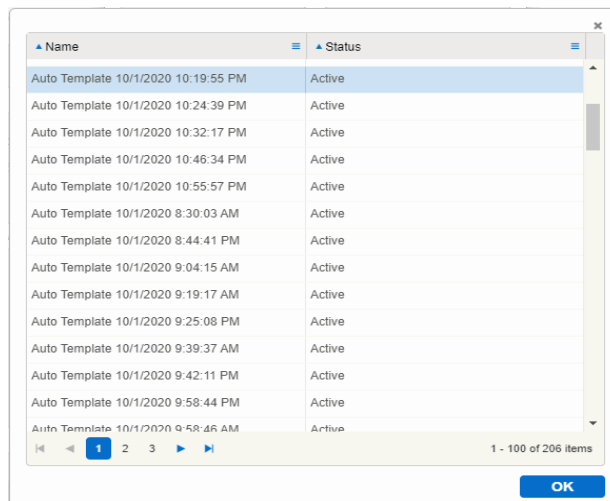


For more information, click on the Info button for Evaluation as shown below.



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, where as Reviewer option will display the scores grouped on the basis of reviewer. By default the system selects the Reviewer as an option. 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 or 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 Time zone is selected based on your location. To change the Time zone, click on the drop-down and choose your required time zone.
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.

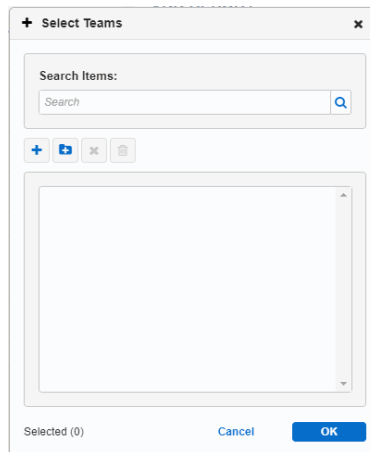


Active templates display in the list; see the Status column. Select the template as required.

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 4-239](#), if you would like to see the Inactive users along with the Active evaluation templates in the reports.
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. Active teams display in the list box, and the table is, by default, sorted in ascending alphabetical order.

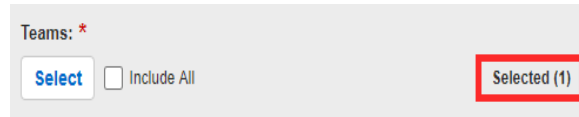
Name	Switch Name	Status
USLAX Nikki Rawnsley	DR_UIP	Active
MXGUA Karina Hernandez	DR_UIP	Active
MXGUA Adolfo Mendez SS	DR_UIP	Active
USLAX Stacy Heard	PROD_UIP	Active
MXGUA Giovanni Arellano	DR_UIP	Active
MXGUA Team Lead 1	DR_UIP	Active
MXGUA Carlos Alberto Garcia	PROD_UIP	Active
USLAX Edgar Munguia	DR_UIP	Active
USLAX C2B	DR_UIP	Active
MXGUA_Requal	DR_UIP	Active
USLAX Karinna Raquel Hernandez	DR_UIP	Active
USLAX Norma Edith Rubio Zamarripa	PROD_UIP	Active
MXGUA Abraham Armenta	PROD_UIP	Active

Note:

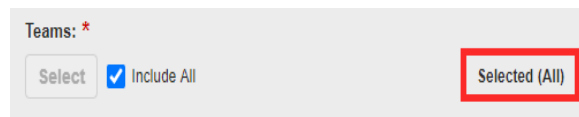
- If you are logged in as an Administrator, you can search for and select any of the teams.

- 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.
- By default, only Active Teams will be displayed. Refer to [Edit My Preferences on page 4-239](#), if you would like to see the Inactive teams along with the Active teams in the reports.

10. Click OK to return to the General tab. Under the Teams section, number of Team is mentioned, as shown below.

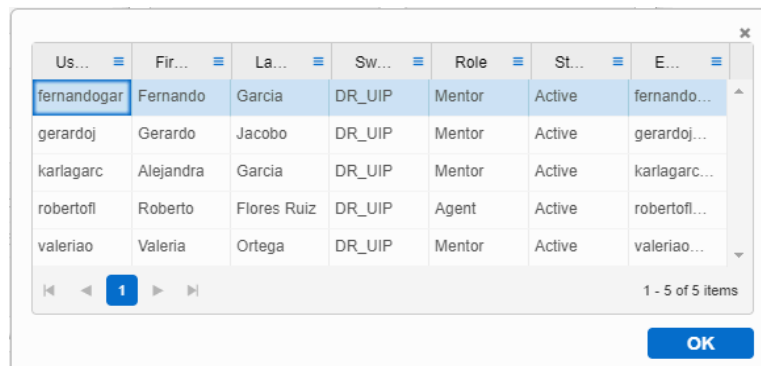


Note: If you have checked the Include All, then the Select button will be disabled and “All” will be mentioned as shown below.



11. The **Select** button, under the **Agents From Selected Teams**, is enabled. Click on the Select button, the Select Agent(s) window opens.

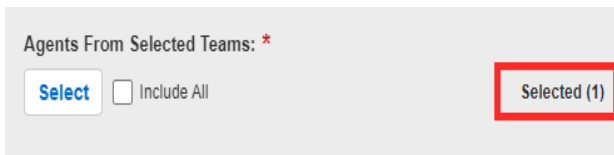
12. Search for an Agent in the Search Items text box by clicking Search and select Yes. A window opens with the list of available agents **for the selected team**.



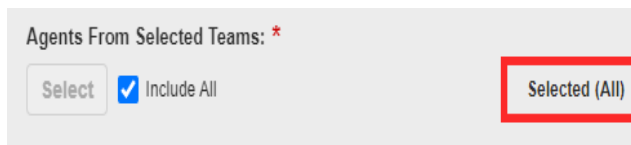
Note: By default, only Active users will be displayed. Refer to [Edit My Preferences on page 4-239](#), if you would like to see the Inactive users along with the Active users in the reports.

13. Select the Agent and click OK.

14. Click OK to return to the General tab. Under the Agent From Selected Teams section, number of Agent is mentioned, as shown below.



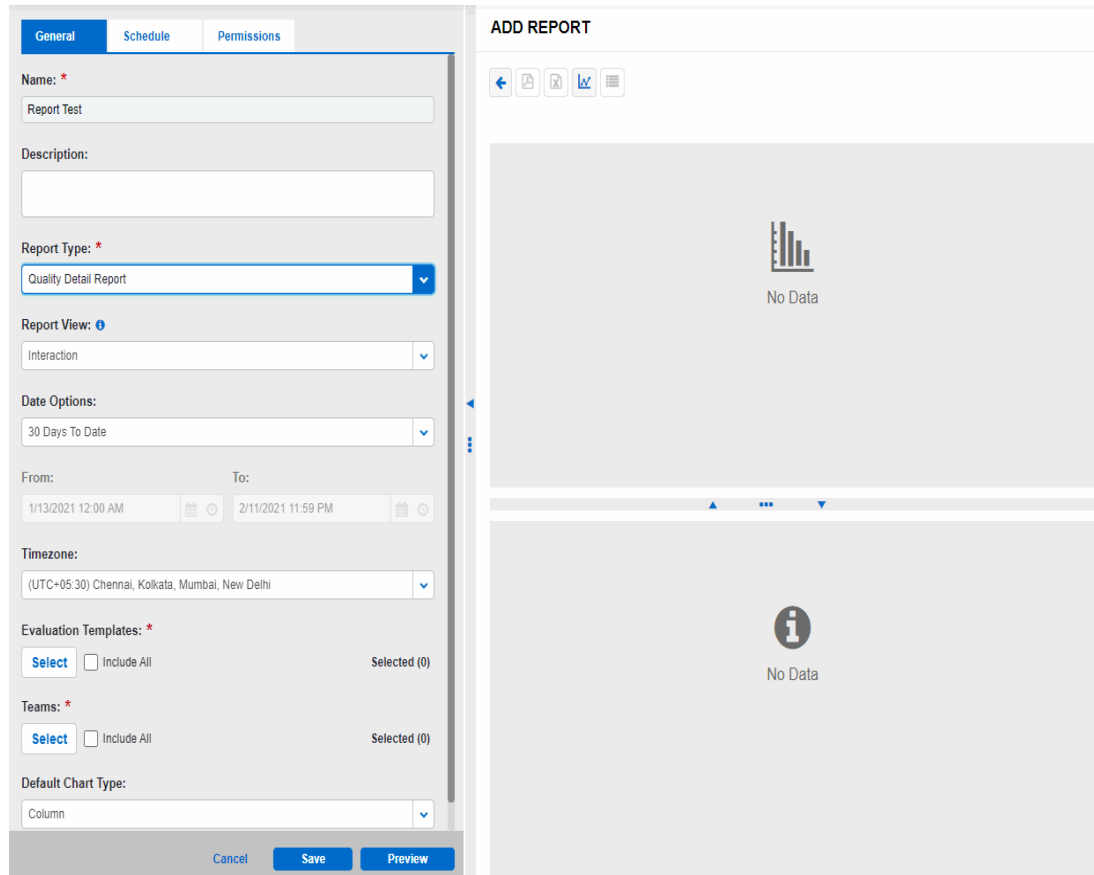
Note: If you have checked the Include All, then the Select button will be disabled and "All" will be mentioned as shown below.



8.3.1.3 Quality Detail Report

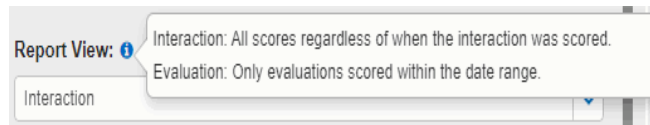
Select the **Quality Detail Report** to review the details of the quality score of agents in a team for interactions evaluated against the specified evaluation templates. This report provides the ability to display you the High Score/ Average Score/ Low Score and number of evaluations scores for each 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.

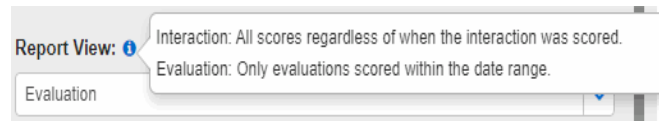


1. Click on the Report View drop-down and select Interaction or Evaluation.

Note: For more information, click on the Info button for Interaction as shown below.




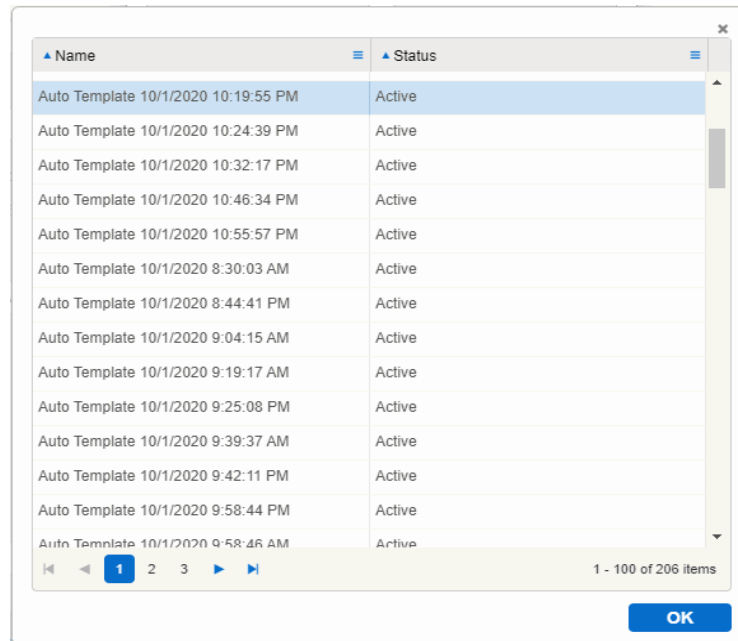
For more information, click on the Info button for Evaluation as shown below.



2. Select the Date Options from the drop-down list. To choose any date range based on your requirement or 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 Time zone is selected based on your location. To change the Time zone, click on the drop-down and choose your required time zone.
5. Under the Evaluation Template field, to 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 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.

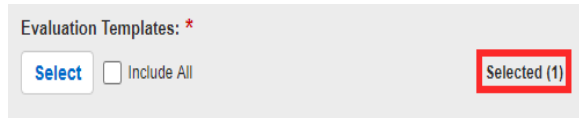
Note:

- If you are logged in as an Administrator, you have access to all templates.

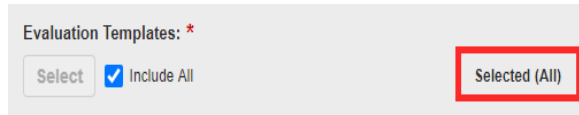
If you are logged in as a Mentor, you have access to templates based on how the evaluations assigned to you.
- By default, only Active evaluation templates will be displayed. Refer to [Edit My Preferences on page 4-239](#), if you would like to see the Inactive evaluation templates along with the Active evaluation templates in the reports.

7. Once you have selected the template, click OK. The templates window closes and the Select Evaluation Template window is active.

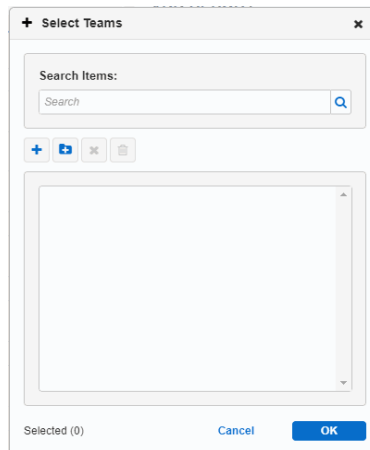
- 8. Click OK to return to the General tab. Under the Evaluation Templates section, number of template is mentioned, as shown below.



Note: If you have checked the Include All, then the Select button will be disabled and “All” will be mentioned 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
USLAX Nikki Rawnsley	DR_UIP	Active
MXGUA Karina Hernandez	DR_UIP	Active
MXGUA Adolfo Mendez SS	DR_UIP	Active
USLAX Stacy Heard	PROD_UIP	Active
MXGUA Giovanni Arellano	DR_UIP	Active
MXGUA Team Lead 1	DR_UIP	Active
MXGUA Carlos Alberto Garcia	PROD_UIP	Active
USLAX Edgar Munguia	DR_UIP	Active
USLAX C2B	DR_UIP	Active
MXGUA_Requal	DR_UIP	Active
USLAX Karinna Raquel Hernandez	DR_UIP	Active
USLAX Norma Edith Rubio Zamarripa	PROD_UIP	Active
MXGUA Abraham Armenta	PROD_UIP	Active

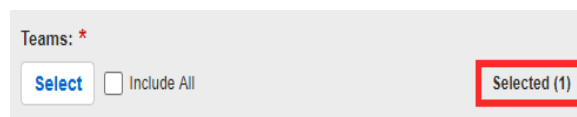
1 - 100 of 401 items

OK

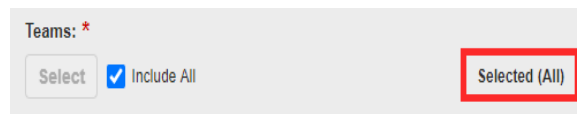
Note:

- 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.
- By default, only Active Teams will be displayed. Refer to [Edit My Preferences on page 4-239](#), if you would like to see the Inactive teams along with the Active teams in the reports.

11. Click OK to return to the General tab. Under the Teams section, number of Team is mentioned, as shown below.



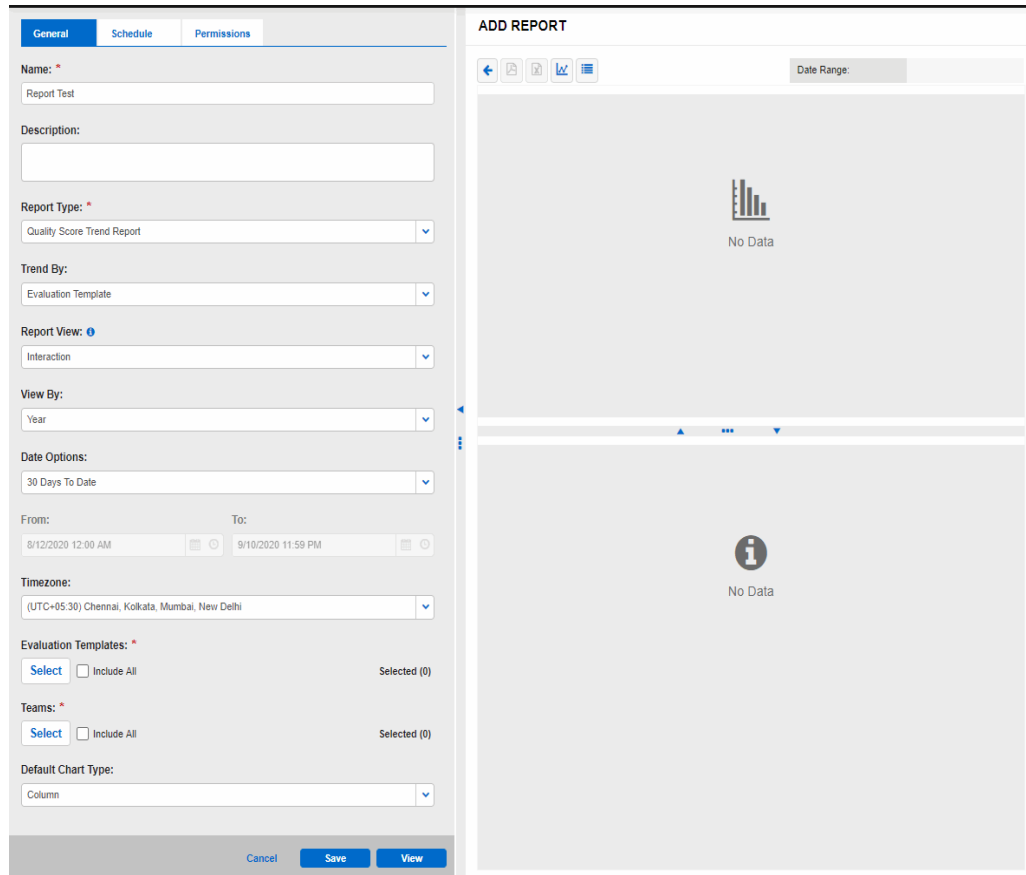
Note: If you have checked the Include All, then the Select button will be disabled and “All” will be mentioned as shown below.



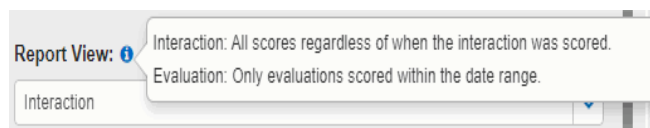
12. Under the Default Chart Type section field’s drop-down, select the chart type as your default chart type. It means whenever you will access this report, and the chart type will be shown based on the selection from the drop-down list.

8.3.1.4 Quality Score Trend Report

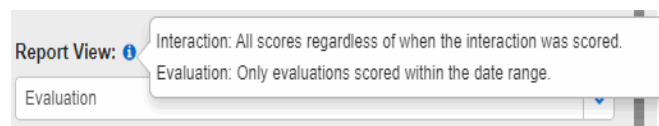
Select the **Quality Score Trend Report** to review the average quality score of agents in a team for interactions evaluated against the specified evaluation template. The report generates at a team level. Under Report Type, when you select Quality Score Trend Report, the below screen appears.



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 8-360](#).
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 or 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 Time zone is selected based on your location. To change the Time zone, click on the drop-down and choose your required time zone.
7. Under the Evaluation Template field, to 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.

Note: By default, only Active Evaluation Templates will be displayed. Refer to [Edit My Preferences on page 4-239](#), if you would like to see the Inactive Evaluation Templates along with the Active Evaluation Templates in the reports.
8. Click on the 🔍 icon in the Search Items field, and select Yes. A window opens with a list of available templates.

Name	Status
Auto Template 10/1/2020 10:19:55 PM	Active
Auto Template 10/1/2020 10:24:39 PM	Active
Auto Template 10/1/2020 10:32:17 PM	Active
Auto Template 10/1/2020 10:46:34 PM	Active
Auto Template 10/1/2020 10:55:57 PM	Active
Auto Template 10/1/2020 8:30:03 AM	Active
Auto Template 10/1/2020 8:44:41 PM	Active
Auto Template 10/1/2020 9:04:15 AM	Active
Auto Template 10/1/2020 9:19:17 AM	Active
Auto Template 10/1/2020 9:25:08 PM	Active
Auto Template 10/1/2020 9:39:37 AM	Active
Auto Template 10/1/2020 9:42:11 PM	Active
Auto Template 10/1/2020 9:58:44 PM	Active
Auto Template 10/1/2020 9:58:46 AM	Active

1 - 100 of 206 items

OK

Active templates display in the list; see the Status column.

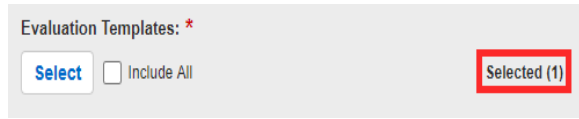
Note: If you are logged in as an Administrator, you have access to all templates.

If you are logged in as a Mentor, you have access to templates based on how the evaluations assigned to you:

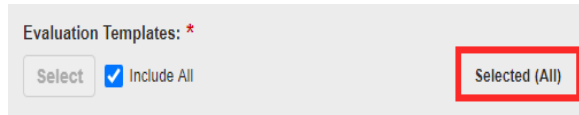
- Peer review
- Agent review
- Team review
- Evaluation Assigned
- Permission in User Profile

9. Once you have selected the template, click OK. The templates window closes and the Select Evaluation Template window is active.

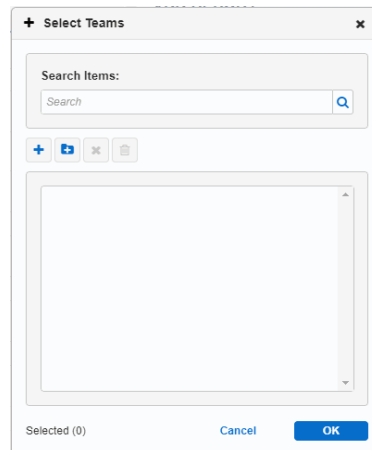
10. Click OK to return to the General tab. Under the Evaluation Templates section, number of template is mentioned, as shown below.



Note: If you have checked the Include All, then the Select button will be disabled and "All" will be mentioned 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.

Name	Switch Name	Status
USLAX Nikki Rawnsley	DR_UIP	Active
MXGUA Karina Hernandez	DR_UIP	Active
MXGUA Adolfo Mendez SS	DR_UIP	Active
USLAX Stacy Heard	PROD_UIP	Active
MXGUA Giovanni Arellano	DR_UIP	Active
MXGUA Team Lead 1	DR_UIP	Active
MXGUA Carlos Alberto Garcia	PROD_UIP	Active
USLAX Edgar Munguia	DR_UIP	Active
USLAX C2B	DR_UIP	Active
MXGUA_Requal	DR_UIP	Active
USLAX Karinna Raquel Hernandez	DR_UIP	Active
USLAX Norma Edith Rubio Zamarripa	PROD_UIP	Active
MXGUA Abraham Armenta	PROD_UIP	Active

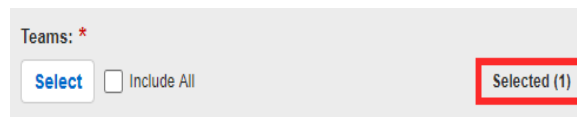
1 - 100 of 401 items

OK

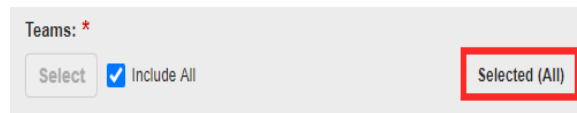
Note:

- 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 displayed. Refer to [Edit My Preferences on page 4-239](#), if you would like to see the Inactive teams along with the Active teams in the reports.

13. Click OK to return to the General tab. Under the Teams section, number of Team is mentioned, as shown below.



Note: If you have checked the Include All, then the Select button will be disabled and “All” will be mentioned 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 will access this report, and the chart type will be shown based on the selection from the drop-down list.

8.3.2 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.

The screenshot shows the 'Schedule' tab interface. At the top, there are three tabs: 'General', 'Schedule' (which is active), and 'Permissions'. Below the tabs, there is a green 'Enable' toggle switch that is turned on. Underneath, there is a 'Date Type:' field with a red asterisk, which is a dropdown menu currently showing 'One Time'. Below that is a 'Start Date and Time:' field, also with a red asterisk, containing the text '9/21/2020 7:00 AM'. To the right of this field are two small icons: a calendar icon and a clock icon.

- b. **Daily:** When you need to generate a report daily, then select this option.

- a. Go to Start Date and Time field, 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 turned on the toggle for End Date, then the Aspect Quality system will generate everyday.

Or,

If you want to generate a report daily till a period of time, then toggle-on the End

Date button. The End Date field will be enabled and select the date as shown below.

The screenshot shows the 'Schedule' configuration page with the following settings:

- Enable:** Checked (green checkmark)
- Date Type:** Daily
- Start Date and Time:** 9/21/2020 7:00 AM
- End Date:** 10/6/2020
- Rekurs Every:** 1 Days

Example: Based on the above screenshot, the system will start to generate the daily report from 21st September'20 at 7:00 AM till 21st September'20.

- c. On the Rekurs 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 6th 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.

The screenshot shows the 'Schedule' configuration page with the following settings:

- Enable:** Checked (green checkmark)
- Date Type:** Weekly
- Start Date and Time:** 9/21/2020 7:00 AM
- End Date:** 11/29/2020
- Rekurs Every:** 1 Weeks
- Days of Week:** (Empty dropdown menu)

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 mentioned. 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.

The screenshot shows a configuration window with the following fields:

- End Date:** A date picker set to 10/28/2020.
- Recurs Every:** A text input field containing the number "1" and a "Weeks" label.
- Days of Week:** A dropdown menu currently showing "Monday". Below it is a list of days with checkboxes:
 - Sunday
 - Monday (highlighted with a red box)
 - Tuesday
 - Wednesday
 - Thursday
 - Friday
 - Saturday

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.

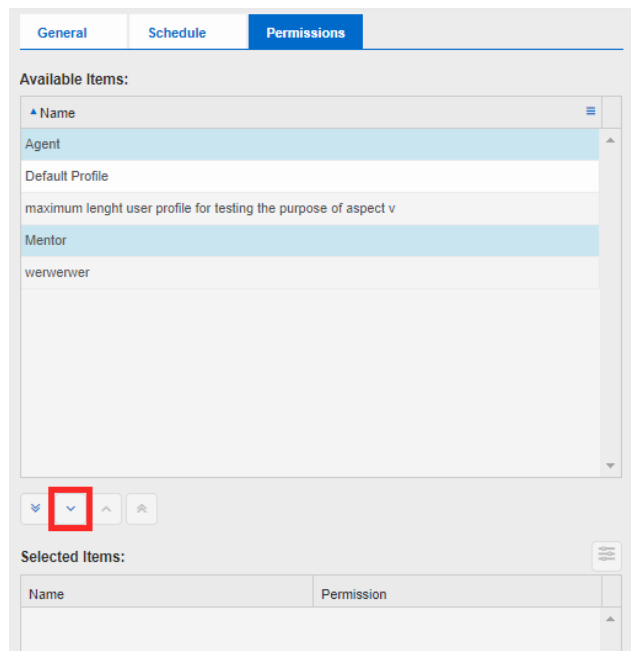
Example: If you type number 5, then the Aspect Quality system will retain the last five reports.

Note: The number must be 1 - 365. The Aspect Quality will not retain the reports if the number exceeds.



8.3.3 Permissions Tab



The Permissions tab helps you to share this report with all the users in the selected user profile(s).

1. To provide the permission, 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.

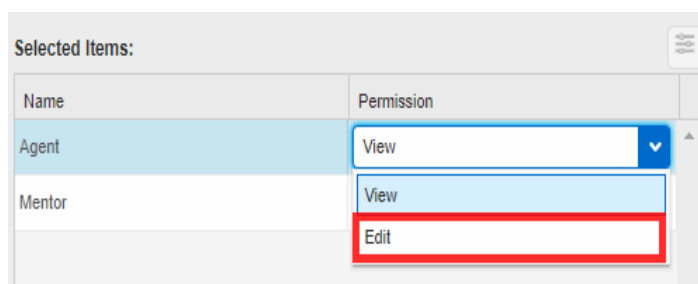


The usage of these buttons are given below.

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.

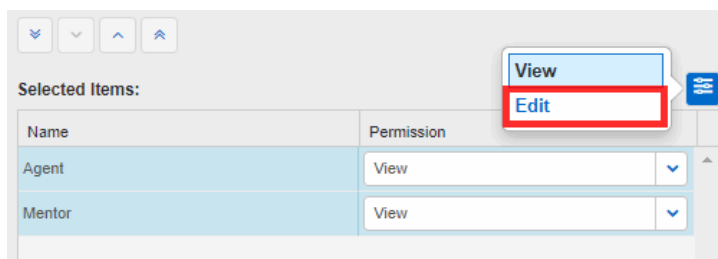
Button	Name	Description
	Remove items	Removes the selected user profiles from Selected Items section to Available Items.
	Remove all items	Removes all user profiles from Selected Items section to Available Items.

- To provide the edit permission for the report, select the user profile under the Selected Items section.
- Click on the Permission drop-down and select Edit as shown below.

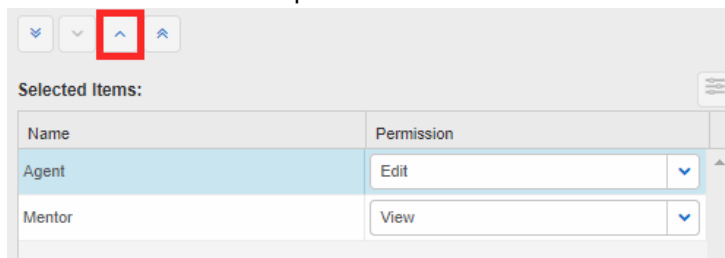


Note:

- 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 the Edit permission to the user profile, if you remove the user profile from the Selected Items section as shown below, the report will not shown to the users associated with the user profile.



- 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 what you have defined.

General | **Schedule** | **Permissions**

Available Items:

- Name
- Default Profile
- maximum lenght user profile for testing the purpose of aspect v
- No Rights profile for testing aggregate user
- wenverver

Selected Items:

Name	Permission
Agent	View
Mentor	View

ADD REPORT

Templates

Quality Score Trend Report

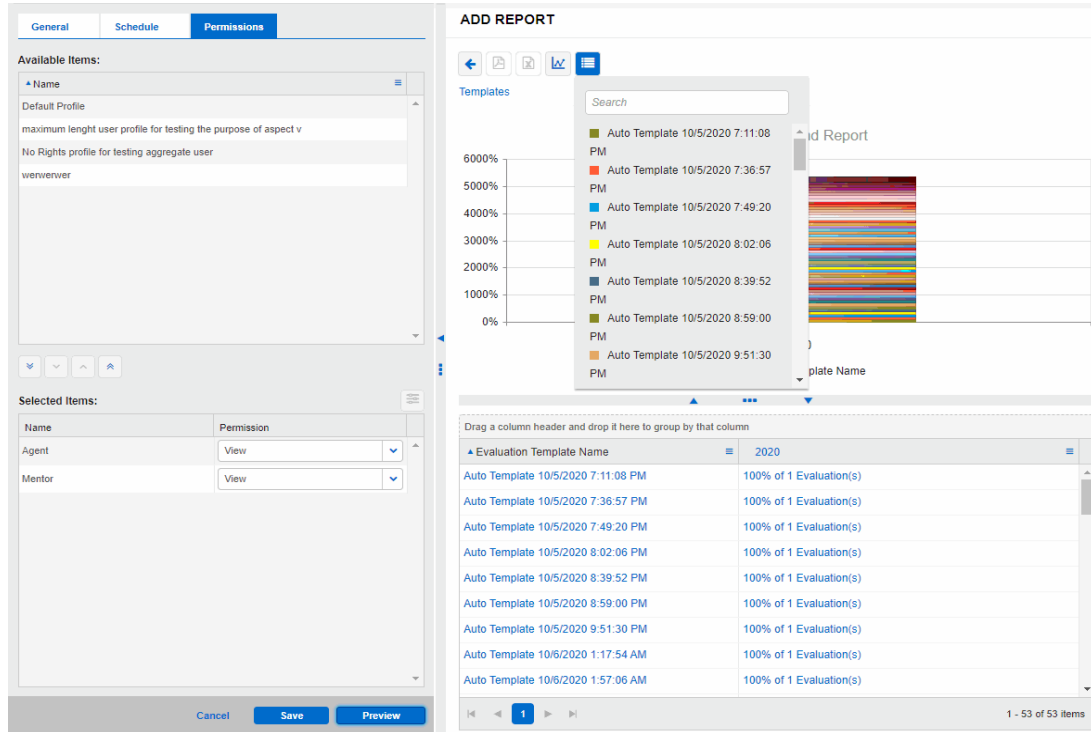
2020

Evaluation Template Name

Evaluation Template Name	2020
Auto Template 10/5/2020 7:11:08 PM	100% of 1 Evaluation(s)
Auto Template 10/5/2020 7:36:57 PM	100% of 1 Evaluation(s)
Auto Template 10/5/2020 7:49:20 PM	100% of 1 Evaluation(s)
Auto Template 10/5/2020 8:02:06 PM	100% of 1 Evaluation(s)
Auto Template 10/5/2020 8:39:52 PM	100% of 1 Evaluation(s)
Auto Template 10/5/2020 8:59:00 PM	100% of 1 Evaluation(s)
Auto Template 10/5/2020 9:51:30 PM	100% of 1 Evaluation(s)
Auto Template 10/6/2020 1:17:54 AM	100% of 1 Evaluation(s)
Auto Template 10/6/2020 1:57:06 AM	100% of 1 Evaluation(s)

1 - 53 of 53 items

- (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.

- Click on Save button to complete the process. The Reports window appears as shown below.

REPORTS

Scheduled Reports | Ad Hoc Reports

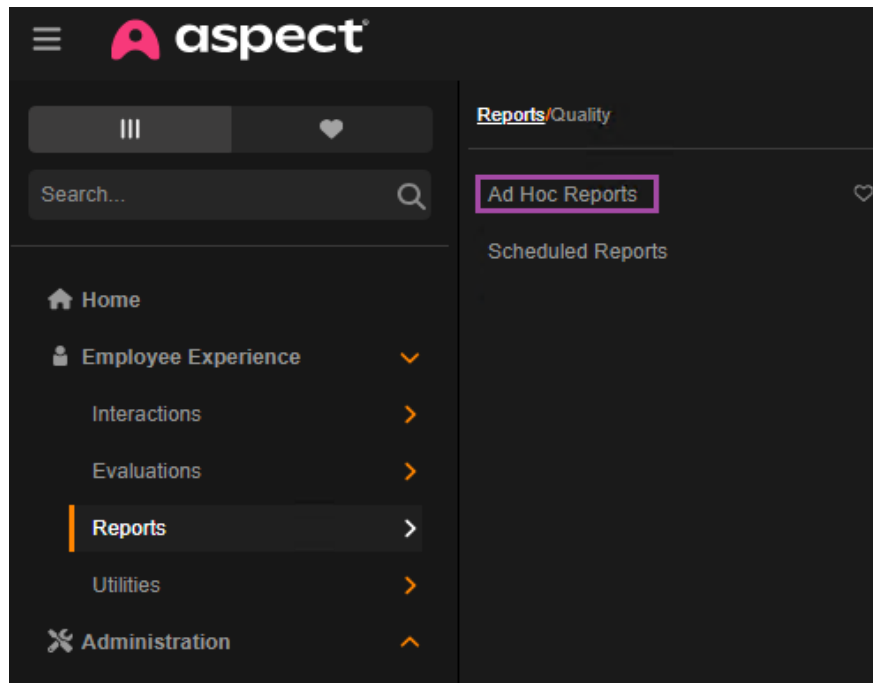
Name	Report Type	Created Date Time	Created By	Last Run Date	Last Run By	Schedule	Status
Report Test	Quality Score Trend Report	9/14/2020 1:50:52 PM	AQM, Administrator			Daily	New
Failed report testing	Quality Score Trend Report	9/14/2020 1:25:25 PM	AQM, Administrator	9/14/2020 1:25:30 PM	System	Daily	Failed
Aggregate User creating the Schedule report	Quality Score Trend Report	9/14/2020 1:23:08 PM	Jill, Deen			Weekly	New
monthly report 1 to 10 21 to last date	Quality Score Trend Report	9/10/2020 12:14:02 PM	AQM, Administrator	9/10/2020 12:14:09 PM	System	Monthly	Success
monthly even days- new one after upgarde	Quality Score Trend Report	9/10/2020 12:08:39 PM	AQM, Administrator	9/14/2020 12:00:10 AM	System	Monthly	Success

Note: As the Report is scheduled in the **Schedule Tab**, the report is saved under the Scheduled tab. If the **Enable** button is **not turned on** in the **Schedule Tab**, then the Report would be saved under the Ad Hoc Reports tab.

8.3.4 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, click **Employee Experience** and click **Reports**.
3. Click on Ad Hoc Reports.



4. The Reports window appears and the Ad Hoc Reports tab is selected as shown below.

REPORTS

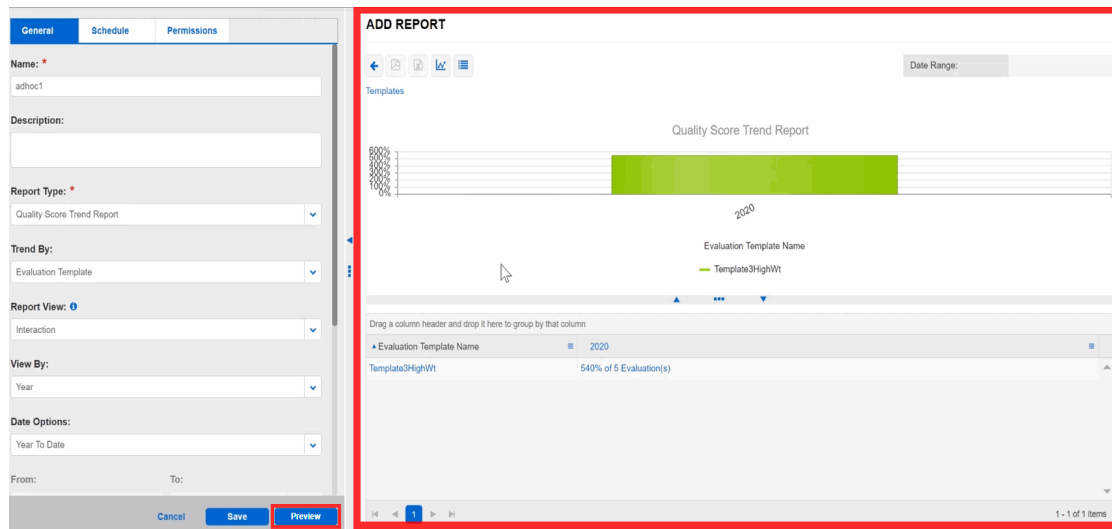
Scheduled Reports Ad Hoc Reports

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

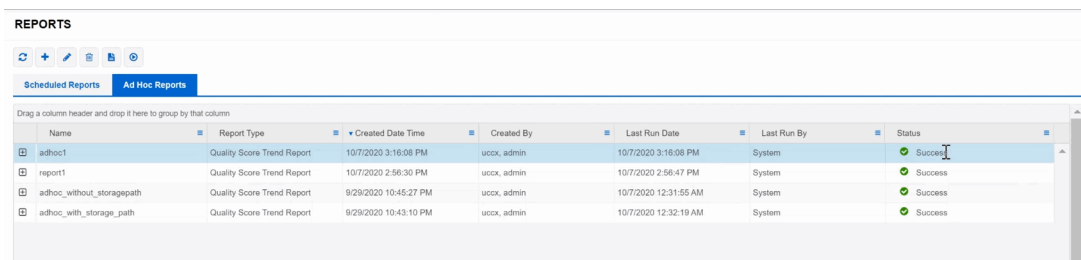
Name	Report Type	Created Date Time	Created By	Last Run Date	Last Run By	Status
report1	Quality Score Trend Report	10/7/2020 2:58:30 PM	uccx, admin	10/7/2020 2:58:47 PM	System	Success
adhoc_without_storagepath	Quality Score Trend Report	9/29/2020 10:45:27 PM	uccx, admin	10/7/2020 12:31:55 AM	System	Success
adhoc_with_storage_path	Quality Score Trend Report	9/29/2020 10:43:10 PM	uccx, admin	10/7/2020 12:32:19 AM	System	Success

5. Refer from step 1 to step 6 of the [Save a Report on page 8-334](#) section.

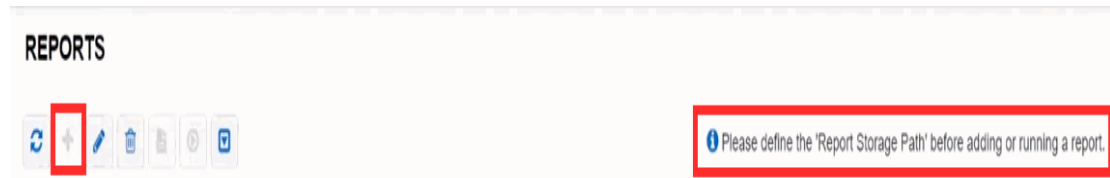
6. Click on Preview button to preview the report on right side of the window, as shown below.



7. Click on Save button 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.



8.3.4.1 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 8-361](#)
- [Trend By Team on page 8-363](#)
- [Trend By Agent on page 8-365](#)
- [Trend By Agent Group on page 8-367](#)

- [Trend By Application on page 8-371](#)

8.3.4.1.1 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.

The screenshot displays the 'ADD REPORT' configuration panel on the left and the resulting report on the right.

Configuration Panel (Left):

- Report Type:** Quality Score Trend Report
- Trend By:** Evaluation Template
- Report View:** Interaction
- View By:** Year
- Date Options:** 30 Days To Date
- From:** 10/1/2020 12:00 AM
- To:** 10/30/2020 11:59 PM
- Timezone:** (UTC+05:30) Chennai, Kolkata, Mumbai, New Delhi
- Evaluation Templates:** Include All (Selected (All))
- Teams:** Include All (Selected (All))
- Default Chart Type:** Column

Report (Right):

Quality Score Trend Report

The chart shows a horizontal bar for the year 2020, with the x-axis representing percentage from 0% to 8000%.

Table (Bottom Right):

Drag a column header and drop it here to group by that column		
▲ Evaluation Template Name	=	2020
Auto Template 10/1/2020 10:24:39 PM		100% of 1 Evaluation(s)
Auto Template 10/1/2020 10:32:17 PM		100% of 1 Evaluation(s)
Auto Template 10/1/2020 10:46:34 PM		100% of 1 Evaluation(s)
Auto Template 10/1/2020 10:55:57 PM		100% of 1 Evaluation(s)
Auto Template 10/1/2020 8:30:03 AM		100% of 1 Evaluation(s)
Auto Template 10/1/2020 8:44:41 PM		100% of 1 Evaluation(s)
Auto Template 10/1/2020 9:04:15 AM		100% of 1 Evaluation(s)
Auto Template 10/1/2020 9:19:17 AM		100% of 1 Evaluation(s)

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.

The screenshot shows the 'ADD REPORT' configuration window on the left and a data table on the right. The configuration window includes fields for Name, Description, Report Type (Quality Score Trend Report), Trend By (Evaluation Template), Report View (Interaction), View By (Year), Date Options (30 Days To Date), From/To dates, Timezone, and Evaluation Templates (Include All selected). The data table on the right is titled 'Quality Score Trend Report' and shows a bar chart for the year 2020. Below the chart is a table with columns for 'Evaluation Template Name' and 'Q4 2020'. The table lists several 'Auto Template' entries with a '100% of 1 Evaluation(s)' status.

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.

This screenshot shows the 'ADD REPORT' breadcrumb navigation path: **Templates / 2020 / Q4 / November / Week 04**. The path is highlighted with a red box.

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.

This screenshot shows the 'ADD REPORT' breadcrumb navigation path: **Templates / Auto Template 10/8/2020 8:56:13 PM / IS Access Only**. The path is highlighted with a red box.

8.3.4.1.2 Trend By Team

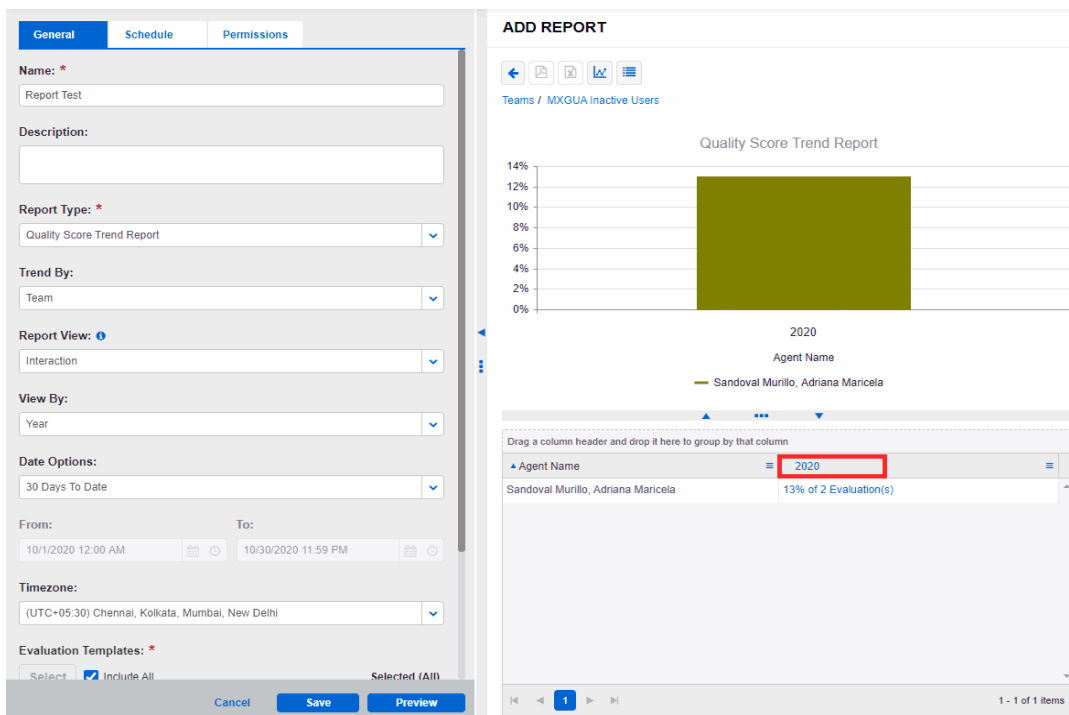
Select Team from the drop-down list of Trend By field and click on the Preview button, the report will show on the right side of the grid.

The screenshot shows the 'ADD REPORT' configuration interface. On the left, the 'General' tab is active, showing fields for Name, Description, Report Type (Quality Score Trend Report), Trend By (Team), Report View (Interaction), View By (Year), Date Options (30 Days To Date), From/To dates, Timezone, and Evaluation Templates. On the right, the 'Quality Score Trend Report' is displayed for the year 2020. The chart shows two categories: MXGUA Inactive Users (yellow) and USLAX Inactive Users (orange). Below the chart is a table with the following data:

Team Name	2020
MXGUA Inactive Users	13% of 2 Evaluation(s)
USLAX Inactive Users	101% of 89 Evaluation(s)

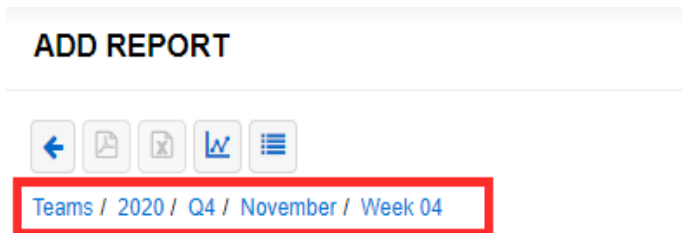
To drill down the report from Team to Agent for the Teams, click on the Team as shown above

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 **Quarter**, the folders will be shown below the buttons as shown below.



8.3.4.1.3 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.

The screenshot shows the 'ADD REPORT' configuration window. On the left, the 'General' tab is active. The 'Trend By' dropdown is set to 'Agent'. The 'Report View' is set to 'Interaction' and 'View By' is set to 'Year'. The 'Date Options' are set to '30 Days To Date' with a range from 10/1/2020 12:00 AM to 10/30/2020 11:59 PM. The 'Timezone' is set to '(UTC+05:30) Chennai, Kolkata, Mumbai, New Delhi'. The 'Evaluation Templates' section has 'Include All' checked. On the right, the 'Quality Score Trend Report' for 2020 is displayed. The chart shows two stacked bars: a yellow bar for 'GARCIA TORRES, LUISA GERALDINE' and an orange bar for 'Sandoval Murillo, Adriana Maricela'. Below the chart, a table shows the evaluation data for 2020:

Agent Name	2020
GARCIA TORRES, LUISA GERALDINE	101% of 89 Evaluation(s)
Sandoval Murillo, Adriana Maricela	13% of 2 Evaluation(s)

To drill down the report from Year to Quarter for the Team, click on the Year as shown above and the following window appears.

The screenshot shows the 'ADD REPORT' configuration window with 'View By' set to 'Year'. The 'Quality Score Trend Report' for Q4 2020 is displayed. The chart shows two stacked bars: a green bar for 'GARCIA TORRES, LUISA GERALDINE' and an orange bar for 'Sandoval Murillo, Adriana Maricela'. Below the chart, a table shows the evaluation data for Q4 2020:

Agent Name	Q4 2020
GARCIA TORRES, LUISA GERALDINE	101% of 89 Evaluation(s)
Sandoval Murillo, Adriana Maricela	13% of 2 Evaluation(s)

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 hierarchy will be shown below the buttons as shown below.

ADD REPORT



Agents / Adams, Terry(In 2020) / Adams, Terry(In Q4) / Adams, Terry(In Novem... / Adams, Terry(In Week 04)

- 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.

The screenshot shows the 'ADD REPORT' configuration panel on the left and a preview chart on the right. In the configuration panel, the 'View By' dropdown is set to 'Day' and the 'Date Options' dropdown is set to 'Previous 3 Months'. The preview chart is a column chart titled 'Quality Score Trend Report' showing data for various dates from 9/2/2020 to 11/24/2020. A legend below the chart identifies the data series: Adams, Terry (green), GARCIA TORRES, LUISA GERALDINE (orange), Sandoval Murillo, Adriana Maricela (blue), and Villagomez, Jose Carlos (yellow). A red box highlights the legend, and a red arrow points to it with the label 'Legends'.

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.

ADD REPORT



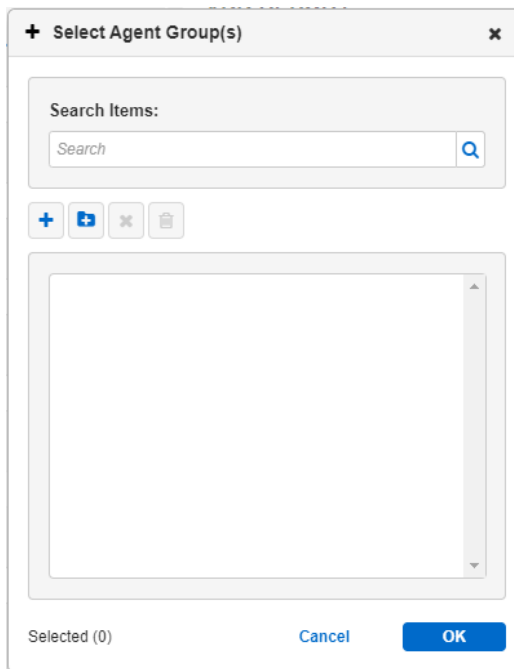
The screenshot shows the 'ADD REPORT' configuration panel with a 'Chart Type' dialog box open. The dialog box has 'Column' selected in the 'Chart Type' dropdown. Below the dropdown, there are two checkboxes: 'Stacked' (unchecked) and 'Hide embedded legend' (checked). A red box highlights the 'Hide embedded legend' checkbox. The background shows the same 'Quality Score Trend Report' chart as in the previous screenshot.

8.3.4.1.4 Trend By Agent Group

Select Agent Group from the drop-down list of Trend By field and the Agent Groups section is added on the left pane as shown below.

The screenshot displays the configuration interface for a report. On the left, the 'General' tab is active, showing various filters and options. The 'Trend By' field is set to 'Agent Group'. Below it, 'Report View' is 'Interaction', 'View By' is 'Year', and 'Date Options' is '30 Days To Date'. The date range is from '10/4/2020 12:00 AM' to '11/2/2020 11:59 PM' in the '(UTC+05:30) Chennai, Kolkata, Mumbai, New Delhi' timezone. Under 'Evaluation Templates', 'Include All' is checked, resulting in 'Selected (All)'. Similarly, 'Include All' is checked for 'Teams', also resulting in 'Selected (All)'. The 'Agent Groups' section, highlighted with a red box, shows 'Include All' is unchecked, resulting in 'Selected (0)'. The 'Default Chart Type' is set to 'Column'. At the bottom of the left pane are 'Cancel', 'Save', and 'Preview' buttons. The right pane, titled 'ADD REPORT', contains two chart areas, both displaying 'No Data' with a bar chart icon and an information icon.

- Under Agent Groups, click Select button. The Select Agent Group(s) window opens.



- Search for an Agent Group in the Search Items text box by clicking Search and select Yes. A window opens with the list of available agent groups. Active Agent Group 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 Agent Groups will be displayed. Refer to [Edit My Preferences on page 4-239](#), if you would like to see the Inactive Agent Groups along with the Active Agent Groups in the reports.

3. Select the Agent Group and click OK to return to the General tab. Under the Agent Group(s) section, number of Agent Group is mentioned, as shown below.

Agent Groups: *

Select Include All Selected (1)

Note: If you have checked the Include All, then the Select button will be disabled and "All" will be mentioned as shown below.

Agent Groups: *

Select Include All Selected (All)

4. Click on the Preview button, the report will show on the right side of the grid.

General | Schedule | Permissions

Trend By: Agent Group

Report View: Interaction

View By: Year

Date Options: Custom Date Range

From: 11/7/2016 12:00 AM To: 11/5/2020 11:59 PM

Timezone: (UTC+05:30) Chennai, Kolkata, Mumbai, New Delhi

Evaluation Templates: *
 Select Include All Selected (All)

Teams: *
 Select Include All Selected (All)

Agent Groups: *
 Select Include All Selected (All)

Default Chart Type: Column

Cancel Save Preview

ADD REPORT

Agent Groups

Quality Score Trend Report

Agent Group Name	2016	2017
ARGUA_SPN_DR	97% of 914 Evaluation(s)	97% of 914 Evaluation(s)
ARGUA_SPN_OB_1ST_ANNIVERSARY	70% of 1 Evaluation(s)	70% of 1 Evaluation(s)
ARGUA_SPN_OB_CONGRATS_1ST_CALL	100% of 3 Evaluation(s)	100% of 3 Evaluation(s)
ARGUA_SPN_OB_CONGRATS_3RD_CALL	80% of 1 Evaluation(s)	80% of 1 Evaluation(s)
ARGUA_SPN_OB_EVENTOS_1	95% of 3 Evaluation(s)	95% of 3 Evaluation(s)
ARGUA_SPN_OB_EVENTOS_2	0% of 1 Evaluation(s)	0% of 1 Evaluation(s)
ARGUA_SPN_OB_PROMOTION	98% of 109 Evaluation(s)	98% of 109 Evaluation(s)
ARGUA_SPN_OB_REGUAL_DL	99% of 12 Evaluation(s)	99% of 12 Evaluation(s)
ARGUA_SPN_OB_REGUAL_DL	99% of 12 Evaluation(s)	99% of 12 Evaluation(s)

1 - 100 of 273 items

- To drill down the report from Agent Groups to Team, click on the Agent Group as shown above and the following window appears.

The screenshot shows the 'ADD REPORT' interface. On the left, the configuration sidebar includes sections for 'Trend By', 'Report View', 'View By', 'Date Options', 'Timezone', 'Evaluation Templates', 'Teams', and 'Agent Groups'. The 'Agent Groups' section is expanded, showing 'Include All' checked. The main area displays a 'Quality Score Trend Report' chart with a Y-axis from 0% to 450% and X-axis for 2016 and 2017. Below the chart is a table with columns for 'Team Name', '2016', and '2017'. The 'Team Name' column is expanded to show a list of teams, with 'ARGUA Inactive Users' highlighted in red.

Team Name	2016	2017
ARGUA Inactive Users		97% of 176 Evaluation(s)
ARGUA Support		97% of 598 Evaluation(s)
MXGUA_QUALITY_AND_TRAINNING_MX		96% of 102 Evaluation(s)
UYGUA Support		99% of 38 Evaluation(s)

Note:

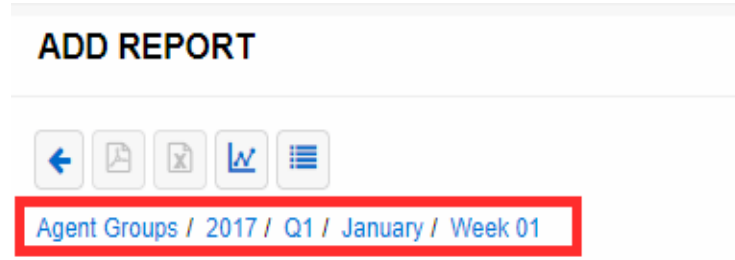
- Click on the Team, as shown above, to drill down the report to associated Agents as shown below.

This screenshot shows the same report configuration and visualization, but with the 'Agent Name' column expanded in the table below the chart. The 'Agent Name' column is expanded to show a list of agents, with 'Aranda, Miguel' highlighted in red.

Agent Name	2016	2017
Aranda, Miguel		98% of 73 Evaluation(s)
Ayala Pamplona, Luis Adrian		96% of 50 Evaluation(s)
Guizar Razo, Fernanda		96% of 53 Evaluation(s)

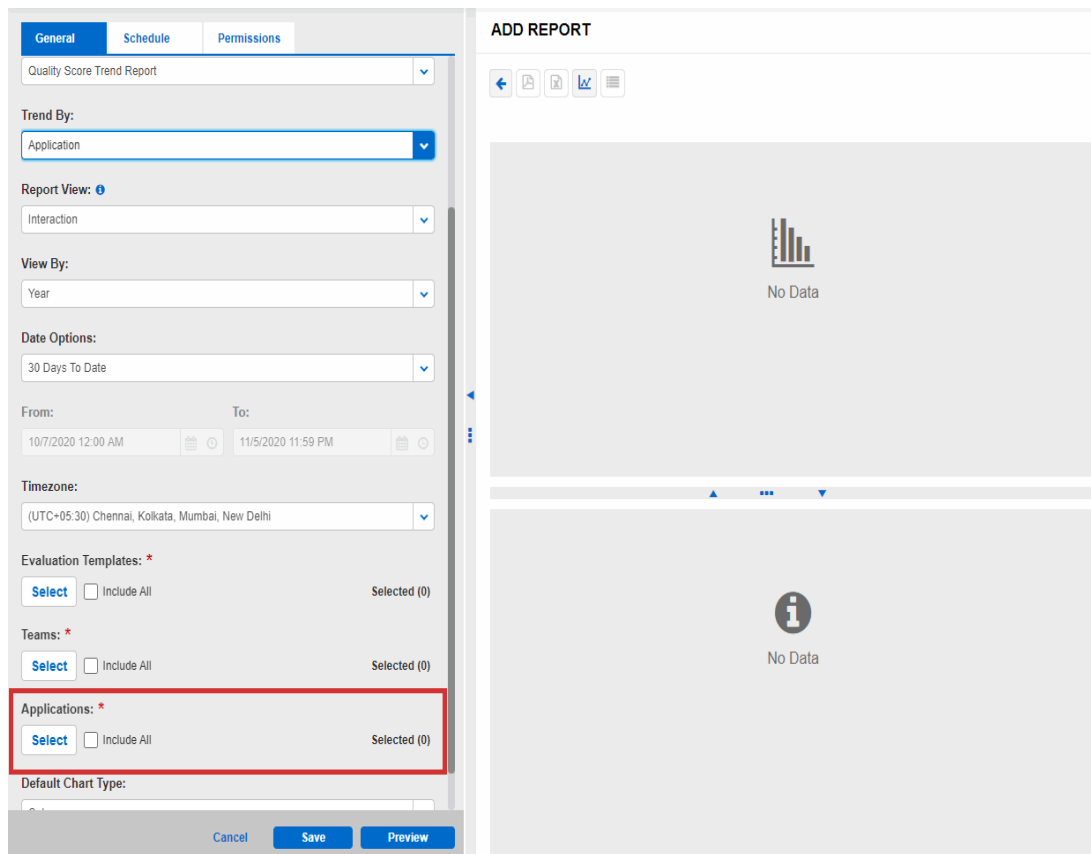
- Also, click on the Year as shown above, to drill down the report to Quarter, Month, Week and Date respectively.

After drilling down the grid (Year column) from **Year > Quarter > Month > Week**, the folders will be shown below the buttons as shown below.

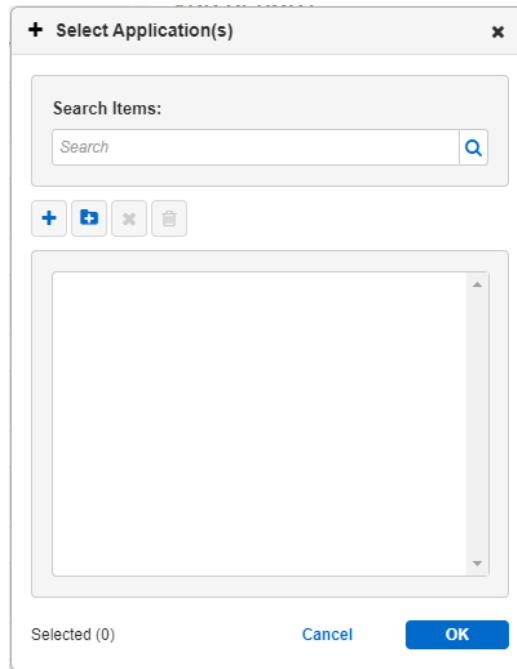


8.3.4.1.5 Trend By Application

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 on Select button. The Select Application(s) window opens.

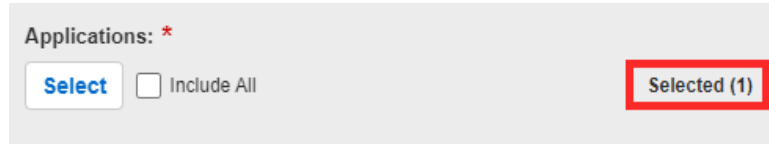


2. Search for an Application in the Search Items text box by clicking Search and select Yes. A window opens with the list of available applications. Active Applications display in the list box, and the table is, by default, sorted in ascending alphabetical order.

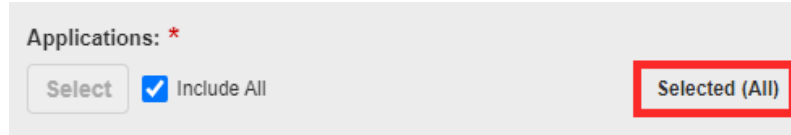
Name	Switch Name	Status
baseApplication1	DR_UIP	Active
baseApplication1	UIP ENCTIPS_STRATUS	Active
BLGUA	PROD_UIP	Active
BLGUA	DR_UIP	Active
BRGUA_DS	DR_UIP	Active
BRGUA_DS	PROD_UIP	Active
CALAX	PROD_UIP	Active
CALAX	DR_UIP	Active
CAMON	PROD_UIP	Active
CAMON	DR_UIP	Active
CIGUA_DS	DR_UIP	Active
CIGUA_DS	PROD_UIP	Active
COGUA_DS	DR_UIP	Active
COGUA_DS	PROD_UIP	Active

Note: By default, only Active Applications will be displayed. Refer to [Edit My Preferences on page 4-239](#), if you would like to see the Inactive Applications along with the Active Applications in the reports.

- Select the Application and click OK to return to the General tab. Under the Agent Group(s) section, number of Agent Group is mentioned, as shown below.



Note: If you have checked the Include All, then the Select button will be disabled and “All” will be mentioned as shown below.



Note: Only active templates, teams, applications, agent groups results will be displayed when the Preview button is clicked. If you want to see inactive entities details along with active in report result then refer to [Edit My Preferences on page 4-239](#).

- Click on the Preview button, the report will show on the right side of the grid.

The screenshot shows the 'ADD REPORT' interface with the 'Quality Score Trend Report' selected. The left sidebar contains configuration options for 'Trend By', 'Report View', 'View By', 'Date Options', 'Timezone', 'Evaluation Templates', 'Teams', 'Applications', and 'Default Chart Type'. The right pane displays a bar chart and a table of application data.

Application Name	2016	2017
ARGUA_DS	100% of 1 Evaluation(s)	96% of 1776 Evaluation(s)
BLGUA		78% of 2 Evaluation(s)
CALAX	93% of 5 Evaluation(s)	94% of 219 Evaluation(s)
CAMON	100% of 1 Evaluation(s)	96% of 179 Evaluation(s)
CIGUA_DS		97% of 3 Evaluation(s)
COGUA_DS	100% of 2 Evaluation(s)	96% of 1868 Evaluation(s)
CRGUA		75% of 2 Evaluation(s)
ECGUA_DS	91% of 5 Evaluation(s)	96% of 304 Evaluation(s)

- To drill down the report from Application to Team, click on the Application as shown above and the following window appears.

The screenshot shows the 'Quality Score Trend Report' configuration panel on the left and the report visualization on the right. The configuration panel includes sections for 'General', 'Schedule', and 'Permissions'. The 'General' section shows the report title 'Quality Score Trend Report', 'Trend By' set to 'Application', 'Report View' set to 'Interaction', and 'View By' set to 'Year'. The 'Date Options' section shows a custom date range from 11/7/2016 12:00 AM to 11/5/2020 11:59 PM. The 'Timezone' is set to '(UTC+05:30) Chennai, Kolkata, Mumbai, New Delhi'. The 'Evaluation Templates', 'Teams', and 'Applications' sections all have 'Include All' checked. The 'Default Chart Type' is set to 'Stacked Bar'. The report visualization on the right shows a 'Quality Score Trend Report' for 'Applications / ARGUA_DS'. The chart displays data for 2016 and 2017. Below the chart is a table with columns for 'Team Name', '2016', and '2017'. The 'AMEGUA SPN OB DEDICADO' team is highlighted with a red box in the table.

Team Name	2016	2017
<Default>		97% of 20 Evaluation(s)
AMEGUA SPN OB DEDICADO	100% of 1 Evaluation(s)	96% of 266 Evaluation(s)
ARGUA Inactive Users		96% of 250 Evaluation(s)
ARGUA Support		96% of 984 Evaluation(s)
ECGUA Support		98% of 17 Evaluation(s)
MXGUA Javier Maciel		99% of 11 Evaluation(s)
MXGUA Jesus Gonzalez SO		100% of 3 Evaluation(s)
MXGUA_QUALITY_AND_TRAINNING_MX		96% of 149 Evaluation(s)

Note:

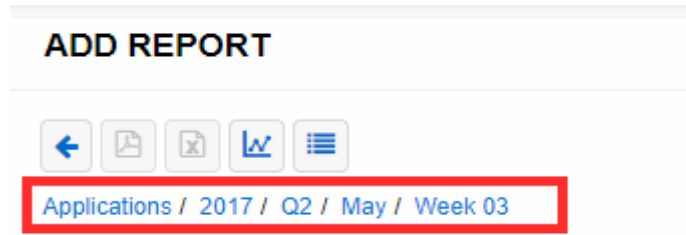
- Click on the Team, as shown above, to drill down the report to associated Agents as shown below.

The screenshot shows the 'Quality Score Trend Report' configuration panel on the left and the report visualization on the right. The configuration panel is identical to the previous screenshot. The report visualization on the right shows a 'Quality Score Trend Report' for 'Applications / ARGUA_DS / AMEGUA SPN OB DEDICADO'. The chart displays data for 2016 and 2017. Below the chart is a table with columns for 'Agent Name', '2016', and '2017'. The 'Astorga Romero, Alejandra Gabriela' agent is highlighted with a red box in the table.

Agent Name	2016	2017
Astorga Romero, Alejandra Gabriela		98% of 11 Evaluation(s)
Banuelos Covarrubias, Vanessa		90% of 11 Evaluation(s)
Calderon, Miriam Lourdes	100% of 1 Evaluation(s)	96% of 7 Evaluation(s)
Casillas Moran, Celia Alejandra		97% of 25 Evaluation(s)
Ciruelo, Juan Manuel		94% of 16 Evaluation(s)
De los Santos Juarez, Juanita Sarai		98% of 20 Evaluation(s)
Gomez Navarro, Luis Humberto		86% of 10 Evaluation(s)
Guerra, Hector Ignacio		93% of 14 Evaluation(s)
Juarez Ruelas, Carlos Octavio		99% of 3 Evaluation(s)

- Also, click on the Year as shown above, to drill down the report to Quarter, Month, Week and Date respectively.

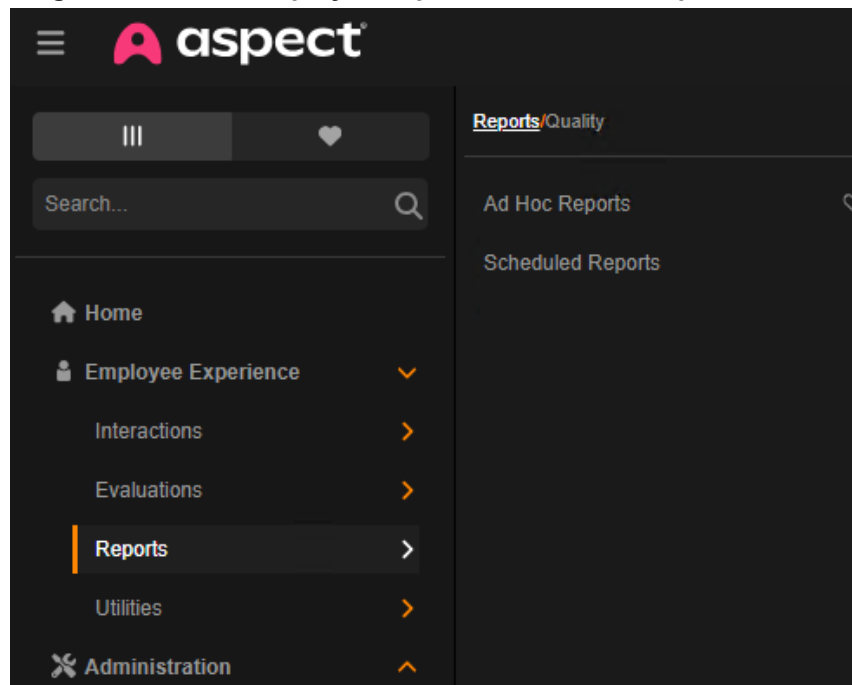
After drilling down the grid (Year column) from **Year > Quarter > Month > Week**, the folders will be shown below the buttons as shown below.



8.3.5 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, click **Employee Experience** and click **Reports**.



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 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.

5. Select the report which you want to edit and click on the Edit button as shown below.

REPORTS

Scheduled Reports | Ad Hoc Reports

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

Name	Report Type	Created Da...	Created By	Last Run D...	Last Run By	Sch...	Next S...	Active	Stat
Audit schedule	Audit Activity Detail Report	10/20/2021 7:12:14 PM	AQM, Administrator	10/20/2021 7:17:12 PM	System	One Time 10/20/2021 7:13 PM	N/A	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
QSTR-ET	Quality Score Trend Report	10/20/2021 7:06:58 PM	AQM, Administrator	10/20/2021 7:17:11 PM	System	One Time 10/20/2021 7:08 PM	N/A	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Appl	Quality Score Trend Report	10/20/2021 7:05:30 PM	AQM, Administrator	10/20/2021 7:17:13 PM	System	One Time 10/20/2021 7:06 PM	N/A	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
GA-application	Quality Score Trend Report	10/20/2021 5:23:42 PM	AQM, Administrator	10/20/2021 7:16:28 PM	System	One Time 10/20/2021 6:10 PM	N/A	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
QSTR-	Quality Score Trend Report	9/21/2021 11:52:50 PM	AQM, Administrator	9/22/2021 12:00:01 AM	System	One Time 9/22/2021 12:00 AM	N/A	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
audit report11	Audit Activity Detail Report	9/21/2021 11:51:01 PM	AQM, Administrator	9/22/2021 12:00:06 AM	System	One Time 9/22/2021 12:00 AM	N/A	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Time	Quality Detail Report	9/16/2021 11:28:15 PM	AQM, Administrator			Weekly at 11:38 AM on Friday every	N/A	<input checked="" type="checkbox"/>	<input type="checkbox"/>

1 - 62 of 62 items

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.

General
Schedule
Permissions

Name: *
Via_S10

Description:

Report Type: *
Quality Score Trend Report

Trend By:
Evaluation Template

Report View:
Interaction

View By:
Year

Date Options:
30 Days To Date

From: 9/17/2020 12:00 AM **To:** 10/16/2020 11:59 PM

Timezone:
(UTC+05:30) Chennai, Kolkata, Mumbai, New Delhi

Evaluation Templates: *
 Select Include All Selected (All)

EDIT REPORT

←
🖨
📄
📊
☰

Templates

Via_S10

2020

Evaluation Template Name

- Competency and Compliance/Medical Quality 5/1/2019
- Compliance/Medical Quality Evaluation Form 03/01/2019

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

Evaluation Template Name	2020
Competency and Compliance/Medical Quality 5/1/20...	100% of 1 Evaluation(s)
Compliance/Medical Quality Evaluation Form 03/01/...	100% of 2 Evaluation(s)

1 - 2 of 2 items

- b. **Quality Detail Report:** If you select a Quality Detail Report to edit, the following window appears.

Evaluation Template Name	Numb...	High ...	Low S...	Avera...
All Types Classic	1	100%	100%	100%
All types of questions and dependent questions	1	0%	0%	0%
Auto Template 10/1/2020 10:24:39 PM	1	100%	100%	100%
Auto Template 10/1/2020 10:32:17 PM	1	100%	100%	100%
Auto Template 10/1/2020 10:46:34 PM	1	100%	100%	100%
Auto Template 10/1/2020 10:55:57 PM	1	100%	100%	100%
Auto Template 10/1/2020 8:30:03 AM	1	100%	100%	100%
Auto Template 10/1/2020 8:44:41 PM	1	100%	100%	100%

This report displays 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.

- 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.

The screenshot shows the 'VIEW REPORT' interface. On the left is the 'REPORT PARAMETERS' panel with fields for Name (EDR), Description, Report Type (Evaluation Detail Report), Report View (Interaction), Report By (Reviewer), Timezone (UTC-06:00 Central Time (US & Canada)), Evaluation Template (All_in_one), Teams (BG3_Team, AGM 3, <Expert>), and Agents From Selected Teams. The main 'VIEW REPORT' area shows a table with columns: Section, Points Earned, Points Possible, and Success Rate. The data is grouped by 'Contact Info' and 'Call Type'. A 'Date Range' of 10/9/2020 - 11/7/2023 is displayed at the top right.

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.

This screenshot shows a more detailed view of the report. The 'REPORT PARAMETERS' panel is on the left. The main 'VIEW REPORT' area shows a table with columns: Option Text, Total Response, Points Earned, Points Possible, and Success Rate. The data is grouped by 'Call Type'. A 'Date Range' of 10/9/2020 - 11/7/2023 is displayed at the top right. Below the table, a 'Comments' section is visible for a specific question, showing the reviewer's name and the comment text.

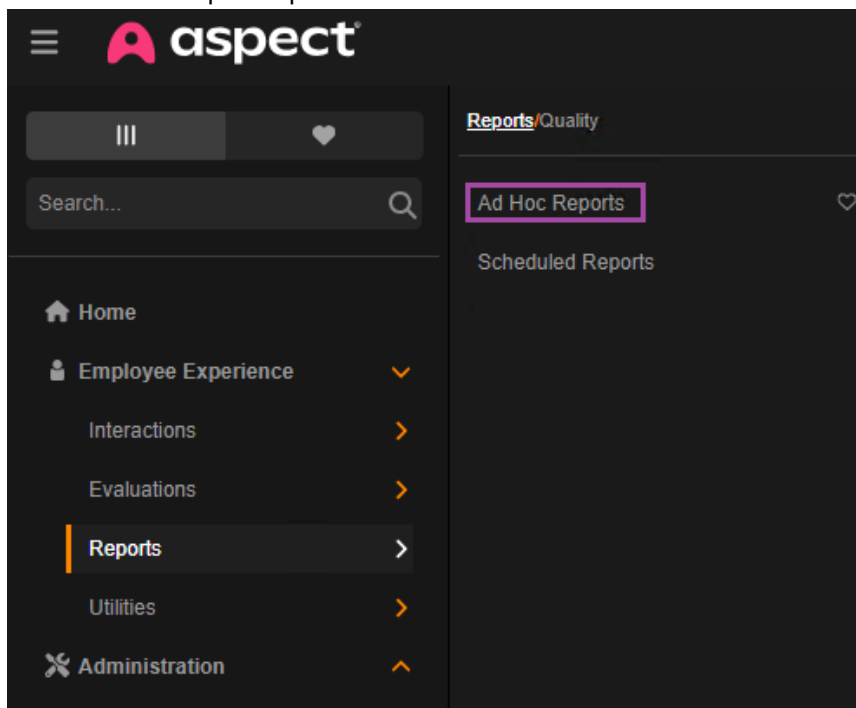
7. Edit the fields under the [General Tab](#), [Schedule Tab](#) and [Permissions Tab](#) based on the requirement.
8. Before saving the report, click on the **Preview** button to preview the report.
9. Click on **Save** button to complete the edit process.

8.3.6 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.
2. Go to **Navigation** bar and click **Quality**.
3. Click on **Scheduled Reports** or **Ad Hoc Reports**.

Example: The Ad Hoc Reports option is selected on the below screenshot.



4. The Reports window appears and the Ad Hoc Reports tab is selected as shown below.

REPORTS

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

Name	Report Type	Created Date TI...	Created By	Last Run Date	Last Run By	Status
Ah15-timezone changed	Quality Score Trend Report	10/14/2020 8:57:21 PM	AQM, Administrator	10/14/2020 8:57:34 PM	AQM, Administrator	Success
Ah14-View by as Quarter	Quality Score Trend Report	10/14/2020 8:48:43 PM	AQM, Administrator	10/14/2020 8:49:21 PM	AQM, Administrator	Success
AH13-quarter	Quality Score Trend Report	10/14/2020 8:44:22 PM	AQM, Administrator	10/14/2020 8:44:39 PM	AQM, Administrator	Success
AH12-year	Quality Score Trend Report	10/14/2020 8:42:12 PM	AQM, Administrator	10/14/2020 8:42:35 PM	AQM, Administrator	Success
AH11	Quality Score Trend Report	10/14/2020 8:40:11 PM	AQM, Administrator	10/14/2020 8:40:28 PM	AQM, Administrator	Success
AH10	Quality Score Trend Report	10/14/2020 8:37:03 PM	AQM, Administrator	10/14/2020 8:37:27 PM	AQM, Administrator	Success
AdHoc2	Quality Score Trend Report	10/14/2020 8:16:38 PM	AQM, Administrator	10/14/2020 8:17:03 PM	AQM, Administrator	Success
AdHoc1	Quality Score Trend Report	10/14/2020 6:39:55 PM	Ericka, Haywood	10/14/2020 6:39:56 PM	Ericka, Haywood	Success
Via_Ah10	Quality Score Trend	10/14/2020 4:35:42 PM	AQM, Administrator	10/14/2020 4:35:59 PM	AQM, Administrator	Success

- Select the report and click on the expand button as highlighted below, the reports grid will expand as shown below.

REPORTS

Scheduled Reports | **Ad Hoc Reports**

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

Name	Report Type	Created Date ...	Created By	Last Run Date	Last Run By	Active	Status
BG Agent groups	Quality Score Trend Report	8/25/2022 4:40:35 PM	uccx, agent10	8/25/2022 4:40:36 PM	uccx, agent10	☑	Success
▼ BG-Agents	Quality Score Trend Report	8/25/2022 4:39:50 PM	uccx, agent10	8/25/2022 4:45:46 PM	AQM, Administrator	☑	Success

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

Run Date	Run By	Status
8/25/2022 4:45:46 PM	AQM, Administrator	Success
8/25/2022 4:39:51 PM	uccx, agent10	Success

1 - 2 of 2 items

▶ BG-template, teams application	Quality Score Trend Report	8/25/2022 4:38:47 PM	uccx, agent10	8/25/2022 4:38:48 PM	uccx, agent10	☑	Success
▶ BG_Agent Group	Quality Score Trend Report	8/4/2022 11:37:13 AM	AQM, Administrator	8/4/2022 11:37:14 AM	AQM, Administrator	☑	Success
▶ BG_Application	Quality Score Trend Report	8/4/2022 11:33:05 AM	AQM, Administrator	8/4/2022 11:33:12 AM	AQM, Administrator	☑	Success
▶ BG_Evaluation	Evaluation Detail Report	8/4/2022 11:26:59 AM	AQM, Administrator	8/4/2022 11:45:14 AM	AQM, Administrator	☑	Success
▶ BG1	Audit Activity Detail Report	8/4/2022 11:04:03 AM	AQM, Administrator	8/4/2022 11:04:03 AM	AQM, Administrator	☑	Success

1 - 51 of 51 items

- Select the report from the expanded grid (Child grid) and click on the View Report button.

REPORTS

Scheduled Reports | **Ad Hoc Reports**

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

Name	Report Type	Created Date ...	Created By	Last Run Date	Last Run By	Active	Status
▶ BG Agent groups	Quality Score Trend Report	8/25/2022 4:40:35 PM	uccx, agent10	8/25/2022 4:40:36 PM	uccx, agent10	☑	Success
▼ BG-Agents	Quality Score Trend Report	8/25/2022 4:39:50 PM	uccx, agent10	8/25/2022 4:45:46 PM	AQM, Administrator	☑	Success

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

Run Date	Run By	Status
8/25/2022 4:45:46 PM	AQM, Administrator	Success
8/25/2022 4:39:51 PM	uccx, agent10	Success

1 - 2 of 2 items

▶ BG-template, teams application	Quality Score Trend Report	8/25/2022 4:38:47 PM	uccx, agent10	8/25/2022 4:38:48 PM	uccx, agent10	☑	Success
▶ BG_Agent Group	Quality Score Trend Report	8/4/2022 11:37:13 AM	AQM, Administrator	8/4/2022 11:37:14 AM	AQM, Administrator	☑	Success
▶ BG_Application	Quality Score Trend Report	8/4/2022 11:33:05 AM	AQM, Administrator	8/4/2022 11:33:12 AM	AQM, Administrator	☑	Success
▶ BG_Evaluation	Evaluation Detail Report	8/4/2022 11:26:59 AM	AQM, Administrator	8/4/2022 11:45:14 AM	AQM, Administrator	☑	Success
▶ BG1	Audit Activity Detail Report	8/4/2022 11:04:03 AM	AQM, Administrator	8/4/2022 11:04:03 AM	AQM, Administrator	☑	Success

1 - 51 of 51 items

Note: Select a row in the child grid for which you want to view the result.

- 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.

REPORT PARAMETERS

Name:
Ah15-timezone changed

Description:

Report Type:
Quality Score Trend Report

Trend By:
Evaluation Template

Report View:
Interaction

View By:
Year

Timezone:
(UTC+05:00) Islamabad, Karachi

Evaluation Templates:
VS_TEST_1(Inactive)
Trend Based Competency and Compliance/Medical Quality Evaluation Form 05/01/2019(Inactive)

Teams:
E-7-TBR-LOZA-SUMMERLIN(Inactive)
Rachel Kent's Team

VIEW REPORT

Date Range: 10/1/2020 - 10/16/2020

Templates

Report for test

2020

Evaluation Template Name

- Competency and Compliance/Medical Quality 5/1/2019
- Compliance/Medical Quality Evaluation Form 03/01/2019

Evaluation Template Name	2020
Competency and Compliance/Medical Quality 5/1/20...	100% of 1 Evaluation(s)
Compliance/Medical Quality Evaluation Form 03/01/...	100% of 2 Evaluation(s)

b. **Quality Detail Report:** If you select a Quality Detail Report to view, the following window appears.

REPORT PARAMETERS

Name:
Test - Quality Detail Report

Description:

Report Type:
Quality Detail Report

Report View:
Interaction

Timezone:
(UTC+05:30) Chennai, Kolkata, Mumbai, New Delhi

Evaluation Templates:
Auto Template 10/5/2020 12:17:29 PM
Auto Template 10/5/2020 3:50:31 PM
Auto Template 10/8/2020 3:07:56 PM

Teams:
MXGUA Daniela Diaz(Inactive)
USLAX Nikki Rawnsley
MXGUA Karina Hernandez

Chart Type:
Column

VIEW REPORT

Date Range: 1/18/2018 - 2/18/2021

Templates

Test - Quality Detail Report

Evaluation Template Name	Numb...	High ...	Low S...	Avera...
All Types Classic	1	100%	100%	100%
All types of questions and dependent questions	1	0%	0%	0%
Auto Template 10/1/2020 10:24:39 PM	1	100%	100%	100%
Auto Template 10/1/2020 10:32:17 PM	1	100%	100%	100%
Auto Template 10/1/2020 10:46:34 PM	1	100%	100%	100%
Auto Template 10/1/2020 10:55:57 PM	1	100%	100%	100%
Auto Template 10/1/2020 8:30:03 AM	1	100%	100%	100%
Auto Template 10/1/2020 8:44:41 PM	1	100%	100%	100%

This report displays 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.

- c. **Evaluation Details Report:** If you select a Evaluation Details Report to view, the following window appears. This report provides the details of a question such as dependent questions, Question Type, Point Earn, Points Possible and Success Rate.

REPORT PARAMETERS

Name: Evaluation Detail Report with Total Response

Description:

Report Type: Evaluation Detail Report

Report View: Interaction

Timezone: (UTC-05:30) Chennai, Kolkata, Mumbai, New Delhi

Evaluation Template: AQMSCRUM_10155

Teams: Team_TX

Agents From Selected Teams: pfefer, james, smith, tm

VIEW REPORT

Date Range: 1/19/2022 - 1/20/2022

Section	Points Earned	Points Possible	Success Rate
Section: Dependent Questions	90	80	75%

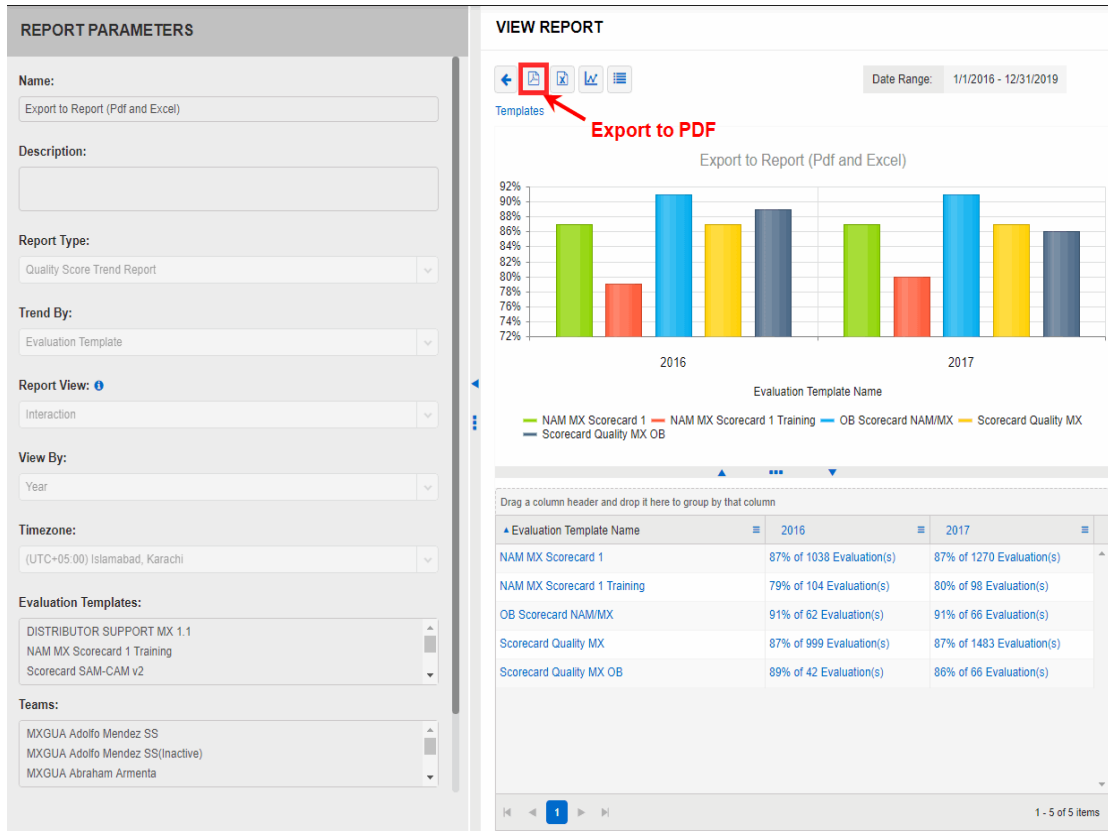
Question	Type	Total Response	Points Earned	Points Possible	Success Rate
Parent Question: Choose or more with weight	List	FX (2) FY (3) FZ (2)	27	40	50%
Dependent Question: True or False	True/False	True (0) False (1) na (1)	0	45	0%
Dependent Question: Scored Scale Low to High	Scored Scale	SLA (1) SLB (0) SLC (2)	15	15	100%
Question: True or False	True/False	True (3) False (1) na (0)	25.5	34	75%
Dependent Question: Choose one or more	List	DPA (2) DPB (3) DPC (0)	N/A	N/A	N/A
Section: Non Scorable Question	N/A	N/A	N/A	N/A	N/A
Question	Type	Total Response	Points Earned	Points Possible	Success Rate
		P (3)			

8.3.6.1 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.



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

Timezone: (UTC+05:00) Islamabad, Karachi

Evaluation Templates: DISTRIBUTOR SUPPORT MX 1.1, NAM MX Scorecard 1 Training, Scorecard SAM-CAM v2

Teams: MXGUA Adolfo Mendez SS, MXGUA Adolfo Mendez SS(Inactive), MXGUA Abraham Armenta

VIEW REPORT

Date Range: 1/1/2016 - 12/31/2019

Export to PDF

Export to Report (Pdf and Excel)

Bar Chart Data:

Evaluation Template Name	2016	2017
NAM MX Scorecard 1	87%	87%
NAM MX Scorecard 1 Training	79%	80%
OB Scorecard NAM/MX	91%	91%
Scorecard Quality MX	87%	87%
Scorecard Quality MX OB	89%	86%

Table Data:

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)

Note:

- The Export to PDF button will be disabled 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

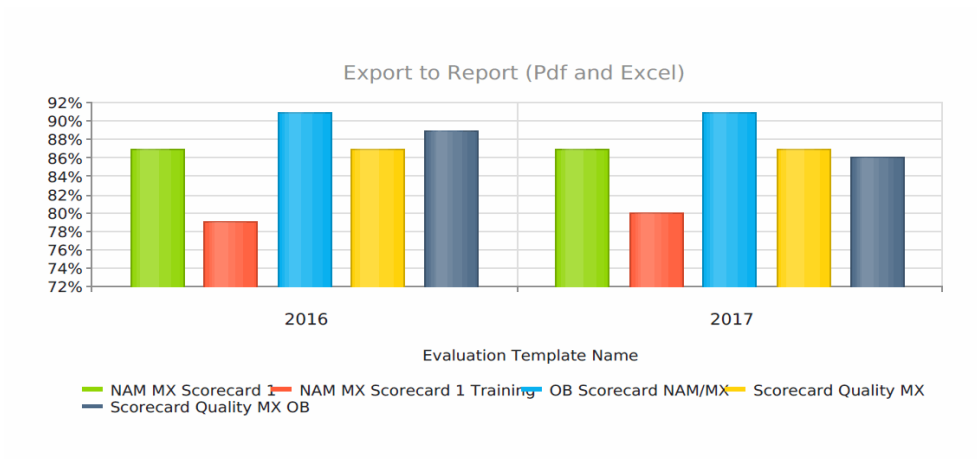
Evaluation Templates:

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 1111111111111111(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

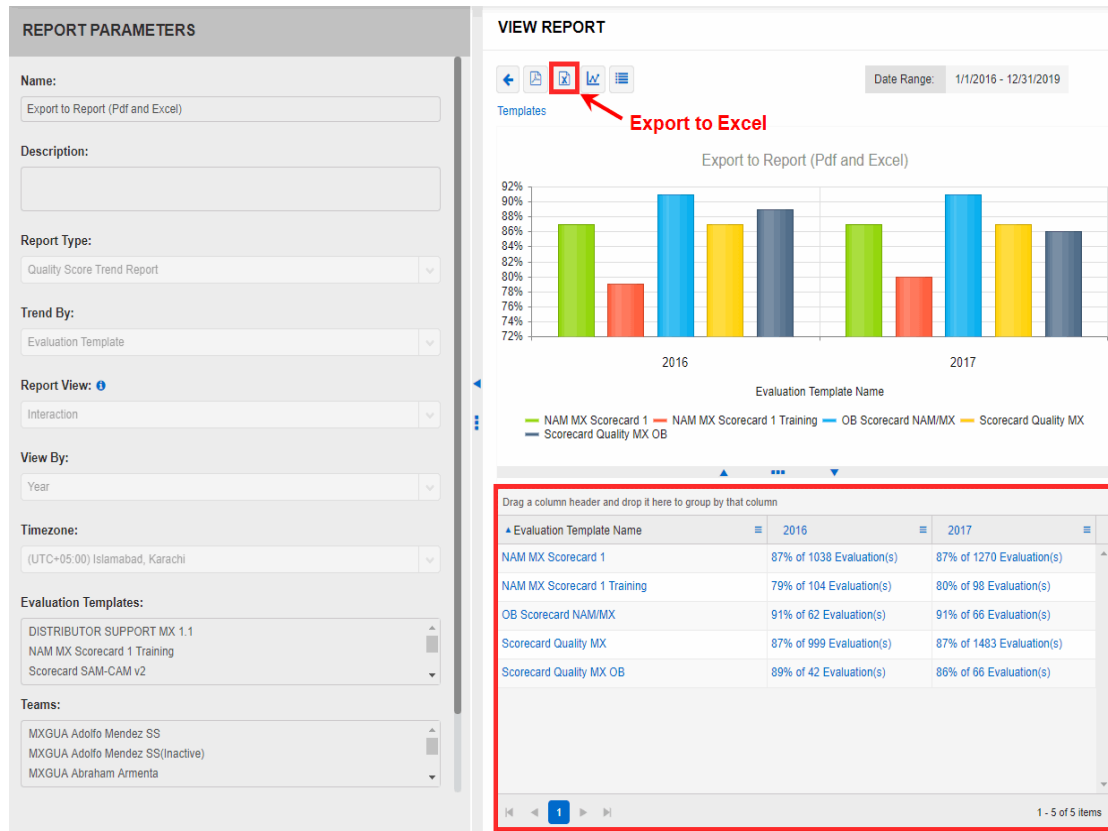
▲ Evaluation Template Name	2016	2017
NAM MX Scorecard 1	87% of 1038 Evaluation(s)	87% of 1270 Evaluation(s)
NAM MX Scorecard 1 Training	79% of 104 Evaluation(s)	80% of 98 Evaluation(s)
OB Scorecard NAM/MX	91% of 62 Evaluation(s)	91% of 66 Evaluation(s)
Scorecard Quality MX	87% of 999 Evaluation(s)	87% of 1483 Evaluation(s)
Scorecard Quality MX OB	89% of 42 Evaluation(s)	86% of 66 Evaluation(s)

1 - 5 of 5 items

8.3.6.2 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.



The screenshot shows the 'VIEW REPORT' interface. On the left is the 'REPORT PARAMETERS' panel with fields for Name, Description, Report Type, Trend By, Report View, View By, Timezone, and Evaluation Templates. On the right is the 'VIEW REPORT' panel showing a bar chart titled 'Export to Report (Pdf and Excel)' for the years 2016 and 2017. A red arrow points to the 'Export to Excel' button in the top toolbar. Below the chart is a table with the following data:

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 NAMMX	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)

Note:

- The Export to excel will be disabled 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.

	A	B	C	D
1	Evaluation Template Name	2016	2017	
2	NAM MX Scorecard 1	87% of 1038 Evaluation(s)	87% of 1270 Evaluation(s)	
3	NAM MX Scorecard 1 Training	79% of 104 Evaluation(s)	80% of 98 Evaluation(s)	
4	OB Scorecard NAM/MX	91% of 62 Evaluation(s)	91% of 66 Evaluation(s)	
5	Scorecard Quality MX	87% of 999 Evaluation(s)	87% of 1483 Evaluation(s)	
6	Scorecard Quality MX OB	89% of 42 Evaluation(s)	86% of 66 Evaluation(s)	
7				
8				

8.3.6.3 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:

- Report By: Reviewer** – Reports result will be exported and will be displayed by grouping reviewer for each question.
- Report By: Agent** – Reports result will be exported and will be displayed by grouping by agent.

Report by Reviewer

Name	Team	Section	Points Earned	Points Possible	Success Rate	Question	Evaluated Interactions	Options	Question Points Earned	Question Points Possible	Question Success Rate
Administrator, AGM		Fruits	10.00	30.00	33	Apple	Yes (1) No (0) N/A (0)		10.00	10.00	100
landlord, up - UIP_73	new team 2 uplandford, Aspect Support, new team	Fruits	10.00	30.00	33	Apple	Yes (0) No (1) N/A (0)		0.00	10.00	0
Administrator, AGM		Fruits	10.00	30.00	33	Mango	Pass (0) Fail (1) N/A (0)		0.00	10.00	0
landlord, up - UIP_73	new team 2 uplandford, Aspect Support, new team	Fruits	10.00	30.00	33	Mango	Pass (0) Fail (1) N/A (0)		0.00	10.00	0
Administrator, AGM		Fruits	10.00	30.00	33	Orange	True (1) False (0) N/A (0)	10.00	10.00	100	
landlord, up - UIP_73	new team 2 uplandford, Aspect Support, new team	Fruits	10.00	30.00	33	Orange	True (0) False (1) N/A (0)	0.00	10.00	0	
Administrator, AGM		Fruits	10.00	30.00	33	Banana	Evaluation 1				
landlord, up - UIP_73	new team 2 uplandford, Aspect Support, new team	Fruits	10.00	30.00	33	Banana	All False				
Administrator, AGM		States	5.50	25.00	22	Karnataka	Bangalore (0) Mysore (0) Mangalore (1) Bijapur (0) Madikeri (0) N/A (0)	5.00	10.00	50	

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: $\text{Sum of the weights of the question option selected} / \text{Total number of times the evaluation is evaluated}$

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: $\text{Question Points Earned} / \text{Question Points Possible}$

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		TEL, Cable Consumer Specialist, Continuum Sales, z_Sabo, Myke(Senior I, z_Cable Repair CRA I New Hire, SF CCO Retail New Hire, Marks, Stephanie Tech Supt Svc, Stapleton, JMBSSC Senior, Greene, Sue Adv Voice and Data, z_)												
Agents		Henry, Minder, landlord, up												
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 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	Karnataka	1	Tirupathi (0) Vishakapatnam (1) Vijaywada (1) Ongole (0) Tadipatri (0)	5.00	15.00	33			
landlord, up - UIP_73	new team 2 uplandlord, 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, up - UIP_73	new team 2 uplandlord, 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, up - UIP_73	new team 2 uplandlord, Aspect Support, new team	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.

8.3.7 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.

REPORTS										
Scheduled Reports Ad Hoc Reports										
Drag a column header and drop it here to group by that column										
Name	Report Type	Created Da...	Created By	Last Run D...	Last Run By	Sch...	Next S...	Active	Status	
Daily6	Audit Activity Detail Report	7/16/2021 7:17:56 PM	AQM, Administrator	7/30/2021 12:00:04 AM	System	Daily at 12:00 AM every 2 day(s)	N/A		Success	
weekly 5	Audit Activity Detail Report	7/16/2021 4:33:22 PM	AQM, Administrator	7/16/2021 4:33:28 PM	System	Weekly at 12:00 AM on Friday every 1 week(s)	N/A	☑	Success	
MOnthly3	Audit Activity Detail Report	7/16/2021 4:31:17 PM	AQM, Administrator	7/16/2021 4:31:27 PM	System	Monthly at 12:00 AM on 16, 19	N/A	☑	Success	
weekly3	Audit Activity Detail Report	7/16/2021 4:26:29 PM	AQM, Administrator	7/16/2021 4:26:38 PM	System	Weekly at 12:00 AM on Thursday every 2 week(s)	N/A	☑	Success	
Weekly2	Audit Activity Detail Report	7/16/2021 4:24:56 PM	AQM, Administrator	7/16/2021 4:25:27 PM	System	Weekly at 12:00 AM on Friday every 2 week(s)	N/A	☑	Success	

- Click on the **Activate**  button and the check mark will be shown on the Active column for the selected report as shown below.

REPORTS

Scheduled Reports | Ad Hoc Reports

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

Name	Report Type	Created Da...	Created By	Last Run D...	Last Run By	Sch...	Next S...	Active	Status
Daily6	Audit Activity Detail Report	7/16/2021 7:17:56 PM	AQM, Administrator	7/30/2021 12:00:04 AM	System	Daily at 12:00 AM every 2 day(s)	N/A	<input checked="" type="checkbox"/>	Success
weekly 5	Audit Activity Detail Report	7/16/2021 4:33:22 PM	AQM, Administrator	7/16/2021 4:33:28 PM	System	Weekly at 12:00 AM on Friday every 1 week(s)	N/A	<input checked="" type="checkbox"/>	Success
MOnthly3	Audit Activity Detail Report	7/16/2021 4:31:17 PM	AQM, Administrator	7/16/2021 4:31:27 PM	System	Monthly at 12:00 AM on 16, 19	N/A	<input checked="" type="checkbox"/>	Success
weekly3	Audit Activity Detail Report	7/16/2021 4:26:29 PM	AQM, Administrator	7/16/2021 4:26:38 PM	System	Weekly at 12:00 AM on Thursday every 2 week(s)	N/A	<input checked="" type="checkbox"/>	Success
Weekly2	Audit Activity Detail Report	7/16/2021 4:24:56 PM	AQM, Administrator	7/16/2021 4:25:27 PM	System	Weekly at 12:00 AM on Friday every 2 week(s)	N/A	<input checked="" type="checkbox"/>	Success

1 - 62 of 62 items

8.3.8 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.


REPORTS

Scheduled Reports | Ad Hoc Reports

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

Name	Report Type	Created Da...	Created By	Last Run D...	Last Run By	Sch...	Next S...	Active	Status
Daily6	Audit Activity Detail Report	7/16/2021 7:17:56 PM	AQM, Administrator	7/30/2021 12:00:04 AM	System	Daily at 12:00 AM every 2 day(s)	N/A	<input checked="" type="checkbox"/>	Success
weekly 5	Audit Activity Detail Report	7/16/2021 4:33:22 PM	AQM, Administrator	7/16/2021 4:33:28 PM	System	Weekly at 12:00 AM on Friday every 1 week(s)	N/A	<input checked="" type="checkbox"/>	Success
MOnthly3	Audit Activity Detail Report	7/16/2021 4:31:17 PM	AQM, Administrator	7/16/2021 4:31:27 PM	System	Monthly at 12:00 AM on 16, 19	N/A	<input checked="" type="checkbox"/>	Success
weekly3	Audit Activity Detail Report	7/16/2021 4:26:29 PM	AQM, Administrator	7/16/2021 4:26:38 PM	System	Weekly at 12:00 AM on Thursday every 2 week(s)	N/A	<input checked="" type="checkbox"/>	Success
Weekly2	Audit Activity Detail Report	7/16/2021 4:24:56 PM	AQM, Administrator	7/16/2021 4:25:27 PM	System	Weekly at 12:00 AM on Friday every 2 week(s)	N/A	<input checked="" type="checkbox"/>	Success

1 - 62 of 62 items

2. Click on the **Deactivate**  button and the Active column will be blank for the selected report as shown below.

REPORTS

Scheduled Reports | Ad Hoc Reports

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

Name	Report Type	Created Da...	Created By	Last Run D...	Last Run By	Sch...	Next S...	Active	Status
Daily6	Audit Activity Detail Report	7/16/2021 7:17:56 PM	AQM, Administrator	7/30/2021 12:00:04 AM	System	Daily at 12:00 AM every 2 day(s)	N/A		Success
weekly 5	Audit Activity Detail Report	7/16/2021 4:33:22 PM	AQM, Administrator	7/16/2021 4:33:28 PM	System	Weekly at 12:00 AM on Friday every 1 week(s)	N/A	<input checked="" type="checkbox"/>	Success
MOnthly3	Audit Activity Detail Report	7/16/2021 4:31:17 PM	AQM, Administrator	7/16/2021 4:31:27 PM	System	Monthly at 12:00 AM on 16, 19	N/A	<input checked="" type="checkbox"/>	Success
weekly3	Audit Activity Detail Report	7/16/2021 4:26:29 PM	AQM, Administrator	7/16/2021 4:26:38 PM	System	Weekly at 12:00 AM on Thursday every 2 week(s)	N/A	<input checked="" type="checkbox"/>	Success
Weekly2	Audit Activity Detail Report	7/16/2021 4:24:56 PM	AQM, Administrator	7/16/2021 4:25:27 PM	System	Weekly at 12:00 AM on Friday every 2 week(s)	N/A	<input checked="" type="checkbox"/>	Success

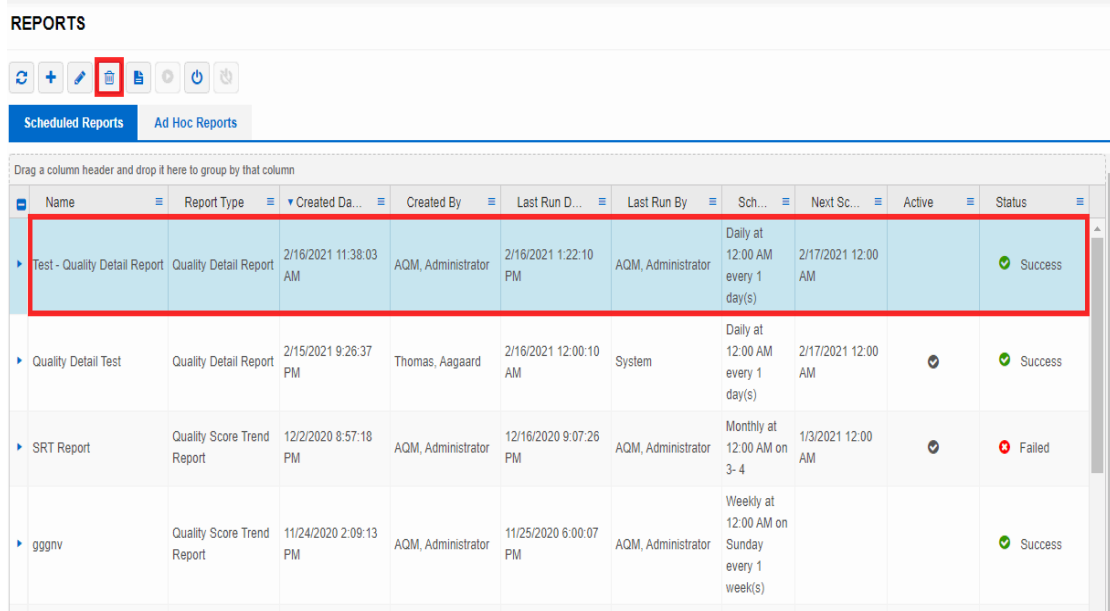
1 - 62 of 62 items

Example: In this scenario, the Daily report was created on 16th July, 2021 and as the report is deactivated, the daily report will not run.

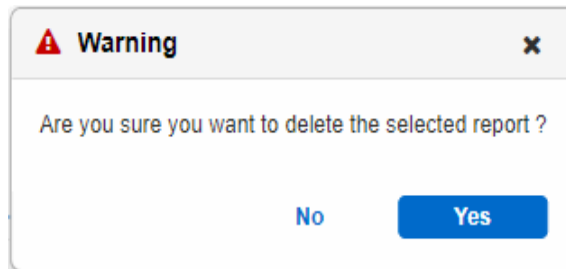
8.3.9 Delete a Report

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.



8.4 Create Reports in WEM similar to Classic UI

The Classic UI Reports are now available in WEM.

The table lists the name of the Classic UI Reports and corresponding name of the reports that are available in WEM:

	Classic UI Report Name	WEM Report Name
1.	Agent Detail Filter by Scorecard Template	Quality Detail Report (Classic UI Report Name - Agent Detail Filter by Scorecard Template)

	Classic UI Report Name	WEM Report Name
2.	Agent Percentage Score Comparison to Peers - Agent Group	Quality Score Trend Report by Agent Group
3.	Agent Scores on Questions of a Scorecard by Team	<p>Option 1: To know question level details use Evaluation Detail Report</p> <p>Option 2: To know the High Score/ Low Score, Average Score Details use Quality Detail Report</p> <p>Question level details and High or Low Score</p>
4.	Quality Monitor Detail by Agent	Quality Detail Report (Classic UI Report Name – Quality Monitor Detail by Agent)
5.	Quality Monitor Summary by Agent	Quality Detail Report (Classic UI Report name is Quality Monitor Summary by Agent)
6.	Scored Call Summary by Agent	Quality Detail Report (Classic UI Report name is Scored Call Summary by Agent)
7.	Supervisor Review Performance by Date	Quality Score Trend Report by Agent
8.	Team Comparison – Specific Scorecard	Quality Detail Report (Classic UI Report Name is Team Comparison – Specific Scorecard)
9.	Team Detail with Bar Graph	Quality Detail Report (Classic UI Report Name – Team Detail with Bar Graph)
10.	Team Scores on Questions of a Scorecard	<p>Option 1: To know question level details use Evaluation Detail Report</p> <p>Option 2: To know the High Score/ Low Score, Average Score Details use Quality Detail Report</p> <p>Evaluation Detail Report, High or Low Score and Average Score (Classic UI Report Name - Team Scores on Questions of a Scorecard)</p>
11.	Trend Report Average Quality Score by Agent – Month View	Quality Score Trend Report by Agent with View by as Month
12.	Trend Report Average Quality Score by Agent – Week View	Quality Score Trend Report by Agent with View by as Week
13.	Trend Report Average Quality Score by Agent	Quality Score Trend Report by Agent with View by as Day
14.	Trend Report Average Quality Score by Application	Quality Score Trend Report by Application with View by as Day

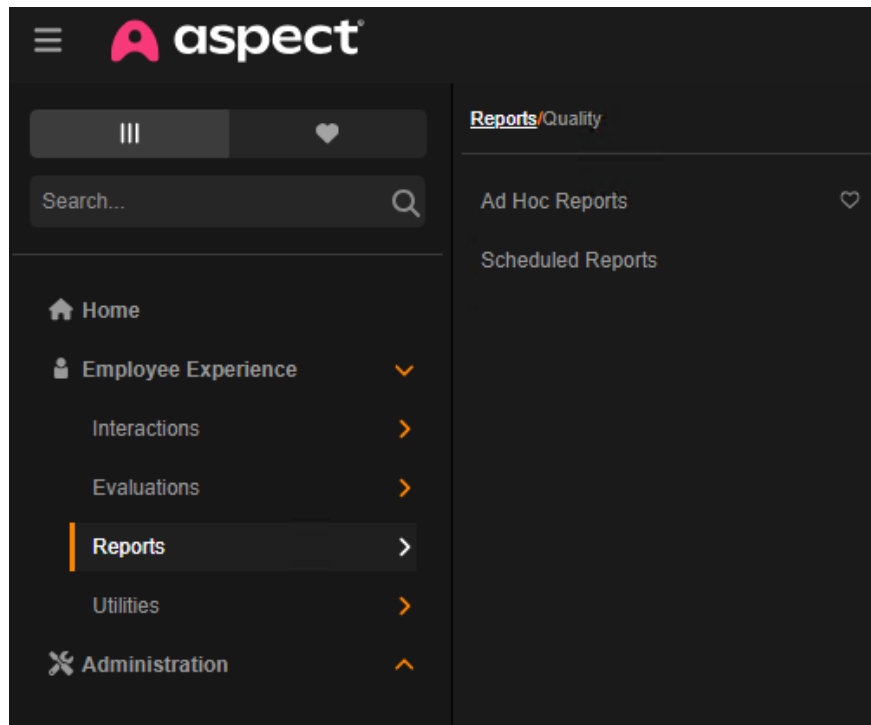
	Classic UI Report Name	WEM Report Name
15.	Trend Report Average Quality Score by Scorecard Template	Quality Score Trend Report by Evaluation Template with View by as Day
16.	Trend Report Average Quality Score by Teams – All Scorecards	Quality Score Trend Report by Team with all templates selected and view by as Day
17.	Trend Report Average Quality Score by Teams – Specific Scorecard	Quality Detail Report (Classic UI Report Name – Team Comparison – Specific Scorecard)
18.	Trend Report Daily Agent Comparison to Peers - Agent Group	Quality Score Trend Report by Agent Group (Classic UI Report Name – Trend Report Daily Agent Comparison to Peers - Agent Group)
19.	Trend Report Daily Agent Comparison to Peers – Bar Graph - Agent Group	Quality Score Trend Report by Agent Group (Trend Report Daily Agent Comparison to Peers – Bar Graph - Agent Group)
20.	Audit Activity Detail Report	Audit Activity Detail Report

8.4.1 Accessing Reports

Follow the steps to access **Reports**:

1. Login to **WEM**.
2. Click the **main menu** icon.
3. Expand **Employee Experience**.

4. Select Reports.



Note: The above steps are universal to access the different WEM reports starting with **Section 7.4.2 till Section 7.4.21**. The below sections illustrate how to create a report in WEM similar to classic UI.

8.4.2 Quality Detail Report (Classic UI Report Name - Agent Detail Filter by Scorecard Template)

To create Agent Detail Filter by Scorecard Template Report in WEM, follow the below steps:

1. Click **Ad-Hoc** or **Scheduled Reports**. This depends on which report you want to create.
2. Select **Quality Detail Report** in Report Type.
3. Enter the data for other required parameters.
4. Click on the **Preview** button.
5. Click on **Evaluation Template Name** link available in the result grid. **Teams** based data will be displayed. (Shown in blue color Classic UI Report).
6. Click on the **Teams** link available in the grid > **Agents** based data will be displayed.

WEM Report

General | Schedule | Permissions

Name: *
1

Description:

Report Type: *
Quality Detail Report

Report View: 0
Interaction:

Date Options:
Custom Date Range

From: * To: *
1/10/2020 12:00 AM 7/21/2023 11:59 PM

Timezone:
UTC-05:30 Chennai, Kolkata, Mumbai, New Delhi

Evaluation Templates: *
Select Include All Selected (All)

Teams: *
Select Include All Selected (All)

Default Chart Type:
Column

Buttons: Cancel Save Preview

ADD REPORT

Templates

Quality Detail Report

Evaluation Template Name	Number of Evaluations	High Score	Low Score	Average Score
10019	4	100%	50%	57%
2 sections	3	100%	0%	57%
TX	9	N/A	N/A	N/A
Active temp	2	100%	100%	100%
80007	12	100%	0%	83%
choose one	2	0%	0%	0%
closed in vts	1	N/A	N/A	N/A
comment	1	N/A	N/A	N/A
Compare Classic and WFO	9	100%	23%	73%

Classic UI Report



Alvaria™ EX Quality

Agent Detail - Filter by Scorecard Template

Team %
 Scorecard Template Name: %
 Date From 7/1/2015 12:00:00AM
 Date To 7/31/2023 12:00:00AM
 Time Zone (UTC-08:00) Central Time (US & Canada)

Report Generation Date: 7/24/2023 6:40:29AM

Site Name: Default Site
 Switch Name: Avaya 7.x
 Team BHagya Team3

Agent Name	Number of Calls Monitored	Number of Scorecards Entered	High Score	Low Score	Average Score
DMCC load13123, DMCC load13123 (13123)	10,001	10,001	100.00	100.00	100.00
H323 Load Extension17037, H323	10,000	10,001	100.00	100.00	100.00
H323 Load Extension17170, H323	9,999	9,999	100.00	100.00	100.00
H323 Load Extension17399, H323	10,003	10,004	100.00	-2000.00	99.79
H323 Load Extension17470, H323	10,000	10,000	100.00	100.00	100.00
Load Agent 16400, Load Agent 16400 (16400)	10,000	10,000	100.00	100.00	100.00
Load Agent 16624, Load Agent 16624 (16624)	10,006	10,009	300.00	0.00	99.99
Load Agent 16735, Load Agent 16735 (16735)	10,000	10,000	100.00	100.00	100.00
Load Agent 16791, Load Agent 16791 (16791)	10,000	10,000	100.00	100.00	100.00
Load Agent 16909, Load Agent 16909 (16909)	10,001	10,002	300.00	100.00	100.02
BHagya Team3 - Totals	100,010	100,016	300.00	-2000.00	99.98

8.4.3 Quality Score Trend Report by Agent Group

Classic UI Report Name - Agent Percentage Score Comparison to Peers - Agent Group

WEM Report - Quality Score Trend Report by Agent Group

To create Agent Percentage Score Comparison to Peers Report in WEM, follow the below steps:

1. Click **Ad-Hoc** or **Scheduled Reports**. This selection depends on which report you want to create.
2. Select **Quality Score Trend Report** in Report Type.
3. Select Trend By as **Agent Group** and View By as **Day**.
4. Enter the data for other required parameters.
5. Click on the **Preview** button.
6. If you want to view the report created details based on **Evaluation**, select **View By** as Evaluation or select **Interaction** to view the details based on the interactions.
7. Click on **Agent Groups** link > **Teams** link > **Agent Details** will display.

Note: The All agents Score based on teams can be viewed under Team details result.

WEM Report

General | Schedule | Permissions

Quality Score Trend Report

Trend By: Agent Group

Report View: Evaluation

View By: Day

Date Options: Custom Date Range

From: 6/22/2020 12:00 AM To: 7/21/2023 11:59 PM

Timezone: (UTC+05:30) Chennai, Kolkata, Mumbai, New Delhi

Evaluation Templates: Select Include All Selected (All)

ADD REPORT

Agent Groups / AQM_Inbound / Test Team Sandesh



Quality Score Trend Report

Agent Name	Score
Dwivedy, Abhay	53.5%
Godihuggi, Bhagyashree	49.5%

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

Agent Name	12/23/2020	12/17/2020
Dwivedy, Abhay	53% of 1 Evaluation(s)	
Godihuggi, Bhagyashree		50% of 1 Evaluation(s)

Classic UI Report

Agent Percentage Score Comparison to Peers - Agent Group

Agent Group	AQM_Inbound		
Team	<Default>		
Date From	7/1/2020 12:00:00AM		
Date To	7/31/2023 12:00:00AM		
Time Zone	(UTC-06:00) Central Time (US & Canada)		Report Generation Date

Site Name: Default Site

Switch Name: sp4ectips

Team

	6/21/2021	9/21/2021	Average
Godihuggi, Bhagya (2116)	100.00	125.00	75.00
All Agents	100.00	125.00	75.00

8.4.4 Question level details and High or Low Score

Classic UI Report Name - Agent Scores on Questions of a Scorecard by Team

WEM Report:

Option 1: To know question level details use Evaluation Detail Report

Option 2: To know the High Score/Low Score, Average Score Details use Quality Detail Report

To create Agent Detail Filter by Scorecard Template Report in WEM, follow the below steps:

1. Click **Ad-Hoc** or **Scheduled Reports**. This depends on which report you want to create.
2. Select **Evaluation Detail Report** in Report Type.
3. Enter the data for other required parameters.
4. Click on the **Preview** button.
5. The Question details will be displayed along with the Scores, Number of Responses, Points Earned, Points Possible and Success Rate.
6. To drill down for each question details on which an agent scored, click on the Question link in the grid.

WEM Report: Drill Down by Question

Evaluation Template Name	Number of Evaluations	High Score	Low Score	Average Score
150919	4	100%	50%	57%
2 sections	3	100%	0%	57%
TX	9	N/A	N/A	N/A
Active temp	2	100%	100%	100%
80507	12	100%	0%	83%
choose one	2	0%	0%	0%
closed in vts	1	N/A	N/A	N/A
comment	1	N/A	N/A	N/A
Compare Classic and WFD	9	100%	23%	73%

WEM Report: Template and Section Level

Section	Points Earned	Points Possible	Success Rate
Section 1	7.5	15	50%

Question	Type	Total Res.	Points Ea.	Points Po.
Question 1	Yes/No	Yes (2)	10	10
		No (0)		
		N/A (0)		
Question 2	True/False	True (0)	0	10
		False (1)		
		N/A (1)		
Question 3	Scored Scale	Option 1 (0)	N/A	10
		Option 2 (0)		
		Option 3 (0)		
		N/A (2)		

WEM Report: Drill Down by Question

Classic UI Report: Template and Section Level

Alvaria™ EX Quality

Agent Scores on Questions of a Scorecard by Team

Scorecard Template Name: 150919
 Team: %
 Scorecard Template Total Weight: 10
 Date From: 7/1/2015 12:00:00AM
 Date To: 7/31/2023 12:00:00AM
 Time Zone: (UTC+05:30) Chennai, Kolkata, Mumbai, New Delhi

Report Generation Date: 7/24/2023 11:47:09AM

Site Name: Default Site
 Switch Name: Cisco UCCX

Template: **150919**
 Section: Section 1
 Description:
 Question: Question 1
 Question Type: Yes - No
 Question Weight: 10

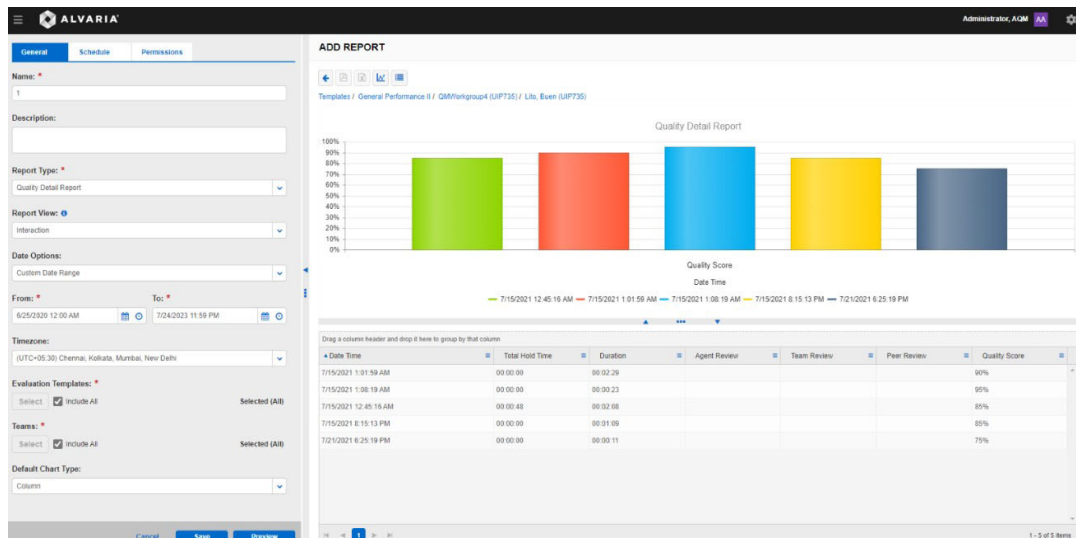
AgentName:	Number of Calls Scored	Number of Times Question Scored N/A	Question High Score	Question Low Score	Question Average Score
agent10, uccx (Agentx10)	1	0	10	10	10.00
Total	1	0	10	10	10.00

8.4.5 Quality Detail Report (Classic UI Report Name – Quality Monitor Detail by Agent)


To create Quality Monitor Detail by Agent in WEM, follow the below steps:

1. Click **Ad-Hoc or Scheduled Reports** depends on what you want to create
2. Select the Report Type as **Quality Detail Report**
3. Provide other needed parameters
4. Click on the **Preview** button.
5. The Evaluation Template details along with Scores will be displayed.
6. To drill down for each interaction details on which agent scored, click on **Evaluation Template > Team > Agent** links respectively in the grid.

WEM Report



Classic UI Report


Alvaria™ EX Quality

Quality Monitoring Detail by Agent

Team: <Default>
 Date From: 7/1/2020 12:00:00AM
 Date To: 7/31/2023 12:00:00AM
 Time Zone: (UTC-06:00) Central Time (US & Canada)
 Sort By: Quality Score

Switch Name	UIP73SP4ECTIPS						
MGR. Noble (2111)	Total Hold	Talk Time	Agent Review	Team Review	Scoring Template Used	Quality Score	
Date/Time	Application	Skill Group Taken By					
2021-10-07 06:37:28	baseApplication1	Inbound_General	00:00:00	00:00:41	New Scorecard Template_m	100	
2021-10-19 22:14:29	baseApplication1	Inbound_General	00:00:00	00:02:02	save as final	12	
2021-10-07 06:02:08	baseApplication1	Inbound_General	00:00:00	00:01:07	choose one	0	
2021-10-19 22:14:29	baseApplication1	Inbound_General	00:00:00	00:02:02	BG007	0	
2021-10-19 21:46:30	baseApplication1	Inbound_General	00:00:00	00:01:07	Template1	0	

8.4.6 Quality Detail Report (Classic UI Report name is Quality Monitor Summary by Agent)

To create Quality Monitor Summary by Agent in WEM, follow the below steps:

1. Click **Ad-Hoc** or **Scheduled Reports** depends on what you want to create
2. Select the Report Type as **Quality Detail Report**
3. Provide other needed parameters
4. Click on the **Preview** button.
5. The Evaluation Template details along with Scores will be displayed.
6. To drill down for each agent summary details on which agent scored, click on **Evaluation Template > Team** links respectively in the grid.

Classic UI

Switch Total	Number of Calls Monitored	Number of Calls Scored	High Score	Low Score	Average Score
UCCE	20000	20,000	100.00	100.00	100.00
Switch	UIP73_SP2_RCTIPS				
Agent Name					
Godihuggi, Bhagya (2115)					
Agent Group	Number of Calls Monitored	Number of Calls Scored	High Score	Low Score	Average Score
[N/A]	1	1	100.00	100.00	100.00
Agent Total	1	1	100.00	100.00	100.00

WEM Report

General | Schedule | Permissions

Name: *
1

Description:

Report Type: *
Quality Detail Report

Report View: *
Interaction

Data Options:
Custom Date Range

From: *
8/25/2020 12:00 AM

To: *
7/24/2023 11:59 PM

Timezone:
(UTC-05:30) Chennai, Kolkata, Mumbai, New Delhi

Evaluation Templates: *
Select Include All Selected (All)

Teams: *
Select Include All Selected (All)

Default Chart Type:
Column

Cancel Save Preview

ADD REPORT

Template: / 159919 / AGMDev_Team1 (Cisco UCCEX)

Quality Detail Report

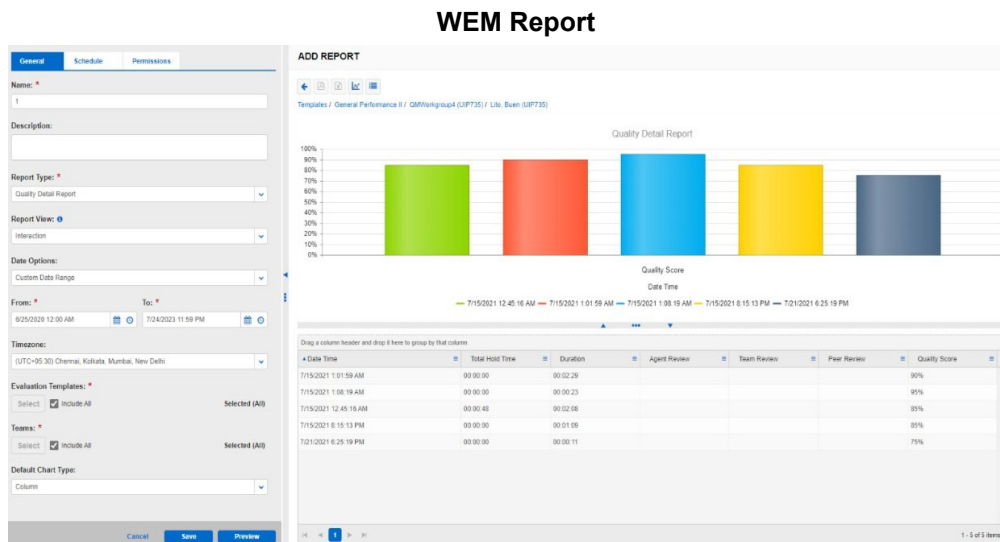
Agent Name	Number of Evaluations	High Score	Low Score	Average Score
agent10, ucce (Cisco UCCEX)	1	50%	50%	50%

1 - 1 of 1 items

8.4.7 Quality Detail Report (Classic UI Report name is Scored Call Summary by Agent)

To create Scored Call Summary by Agent in WEM, follow the below steps:

1. Click **Ad-Hoc** or **Scheduled Reports** depends on what you want to create
2. Select the Report Type as **Quality Detail Report**
3. Provide all required parameters
4. Click on the **Preview** button.
5. The Evaluation Template details along with Scores will be displayed.
6. To drill down for each interaction details on which agent scored, click on **Evaluation Template > Team > Agent** links respectively in the grid.



Classic UI

Scored Call Summary by Agent

Team: <Default>
 Date From: 7/1/2020 12:00:00AM
 Date To: 7/31/2023 12:00:00AM
 Time Zone: (UTC-06:00) Central Time (US & Canada)
 Report Generation Date: 7/25/2023 6:17:04AM

Site Name:	Default Site					
Switch Name:	sp4ectips					
Agent Name:	Dwivedi, Sujit (2111)					
Date/Time of Call	Agent Group	ANI/CLI	Application	Duration	Score	
12/2/2021 6:28:27AM	Inbound_General	1002	baseApplication1	00:01:06	100	
Average Score					100.00	
Agent Name:	Godihuggi, Bhagya (2116)					
Date/Time of Call	Agent Group	ANI/CLI	Application	Duration	Score	
6/21/2021 12:05:52AM				00:00:00	100	
9/21/2021 5:23:06AM				00:00:00	125	
7/6/2022 2:18:48AM				00:00:00	0	
Average Score					75.00	
<Default> Average Score					81.25	

8.4.8 Quality Score Trend Report by Agent

To create Supervisor Review Performance by Date in WEM, follow the below steps:

1. Click **Ad-Hoc or Scheduled Reports** depends on what you want to create
2. Select the Report Type as **Quality Score Trend Report**
3. Select Trend By as **Agent** and View By as **Year/Month** and provide other needed parameters
4. Click on the **Preview** button.
5. If you want to view the report created details based on **Evaluation**, select **View By** as Evaluation or select **Interaction** to view the details based on the interactions.
6. Click the Year header or data link to navigate through **Year > Quarter > Month**. The total number of records will be displayed for each Year.

WEM Report

General | Schedule | Permissions

Report View: Interaction

View By: Year

Date Options: Custom Date Range

From: 6/26/2020 12:00 AM To: 7/25/2023 11:59 PM

Timezone: (UTC+05:30) Chennai, Kolkata, Mumbai, New Delhi

Evaluation Templates: Include All Selected (All)

Agents: Include All Selected (1)

Default Chart Type: Column

Cancel Save Preview

ADD REPORT

Quality Score Trend Report

Agent Name

Agent Name	2020	2022
agent10, ucxx	0% of 1 Evaluation(s)	75% of 2 Evaluation(s)

1 - 1 of 1 items

Classic UI

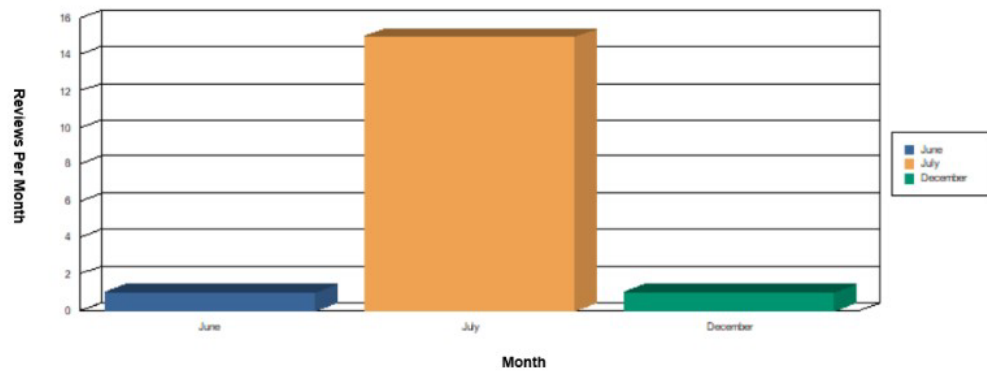
Date To: 2023-07-31 12:00:00AM | Time Zone: (UTC-06:00) Central Time (US & Canada) | Report Generation Date: 7/25/2023 7:10:35AM

Site Name: Default Site

Switch Name: Avaya 7.x

Supervisor Name: Administrator, AQM (AQMAdmin)

Year: 2021



Month Evaluations Performed

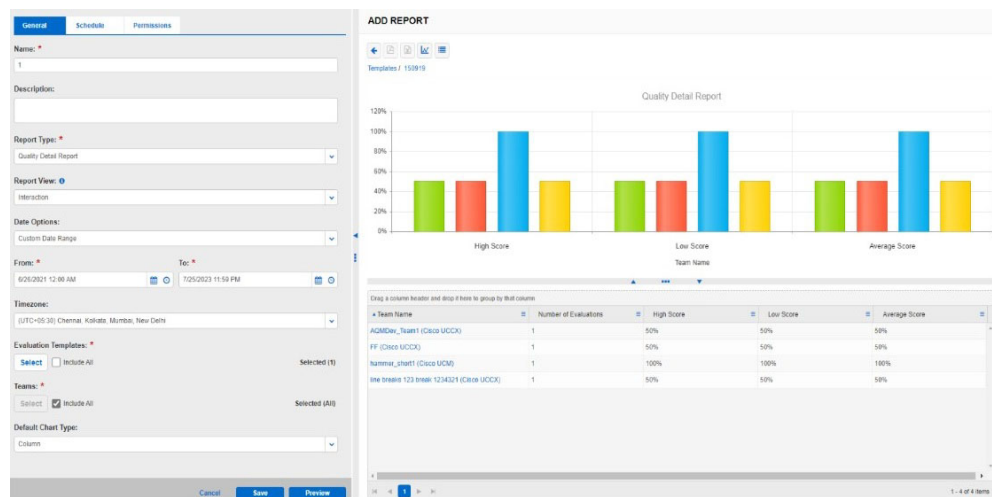
June	1
July	15
December	1
Annual Total:	17

8.4.9 Quality Detail Report (Classic UI Report Name is Team Comparison – Specific Scorecard)

To create Team Comparison – Specific Scorecard in WEM, follow the below steps:

1. Click **Ad-Hoc or Scheduled Reports** depends on what you want to create
2. Select the Report Type as **Quality Detail Report**
3. Provide other needed parameters and click the **Preview** button.
4. To drill down for team details, click **Template** link in the grid.

WEM Report



Classic UI

Alvaria™ EX Quality

Team Comparison - Specific Scorecard

Team	<Default>	
Scorecard Template Name:	%	
Date From	7/1/2021 12:00:00AM	
Date To	7/31/2023 12:00:00AM	Report Generation Date:
Time Zone	(UTC-06:00) Central Time (US & Canada)	7/25/2023 7:40:21AM

Site Name: Default Site

Switch Name: sp4ectips

Scorecard Template: %

Team	Number of Calls Monitored	Number of Calls Scored	High Score	Low Score	Average Score
<Default>	5	4	125.00	0.00	75.00
Switch (sp4ectips) Total	5	4	125.00	0.00	75.00

Switch Name: UIP73SP4ECTIPS

Scorecard Template: %

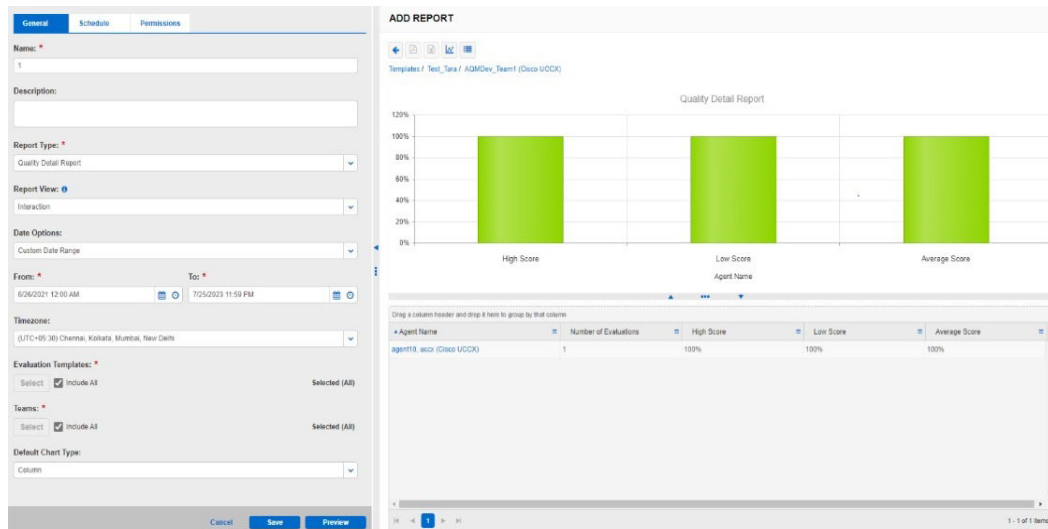
Team	Number of Calls Monitored	Number of Calls Scored	High Score	Low Score	Average Score
<Default>	4	4	100.00	0.00	22.40
Switch (UIP73SP4ECTIPS) Total	4	4	100.00	0.00	22.40
Site (Default Site) Total	9	8	125.00	0.00	42.13

8.4.10 Quality Detail Report (Classic UI Report Name – Team Detail with Bar Graph)

To create Team Detail with Bar Graph in WEM, follow the below steps:

1. Click **Ad-Hoc or Scheduled Reports** depends on what you want to create
2. Select the Report Type as **Quality Detail Report**
3. Provide other needed parameters
4. Click on the **Preview** button.
5. To drill down for agent details, click on **Template > Team** link in the grid.

WEM Report



Classic UI

Alvaria™ EX Quality

Team Detail with Bar Graph

Team: <Default>
 Date From: 7/1/2021 12:00:00AM
 Date To: 7/31/2023 12:00:00AM
 Time Zone: (UTC-08:00) Central Time (US & Canada)
 Sorted By: Agent Last Name

Report Generation Date: 7/25/2023 8:01:44AM

Site Name **Default Site**
Switch Name **sp4ectips**

Agent Name	Number of Calls Monitored	Number of Calls Scored	High Score	Low Score	Average Score
Dwivedi, Sujit (2111)	1	1	100.00	100.00	100.00
Godihuggi, Bhagya (2116)	3	3	125.00	0.00	62.50
Totals	4	4	125.00	0.00	75.00
Total - All Team	4.00	4	125.00	0.00	75.00

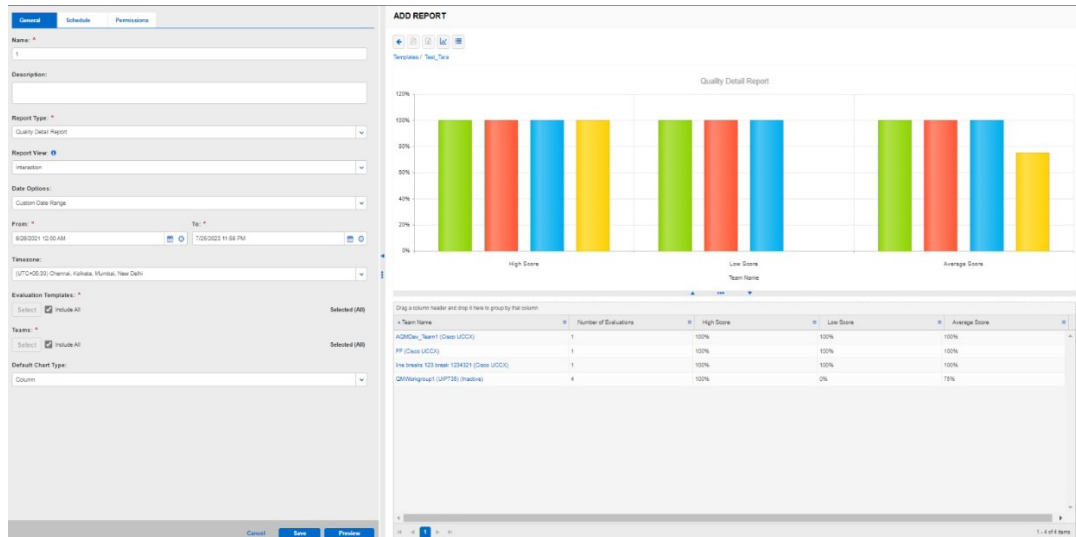
8.4.11 Evaluation Detail Report, High or Low Score and Average Score (Classic UI Report Name - Team Scores on Questions of a Scorecard)

To create Team Scores on Questions of a Scorecard in WEM, follow the below steps:

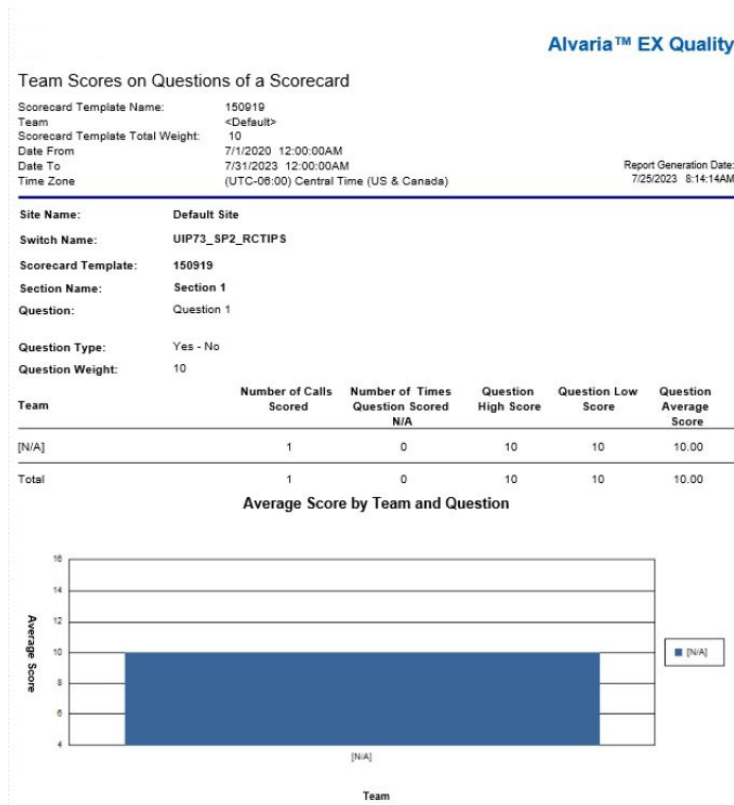
1. Click **Ad-Hoc or Scheduled Reports** depends on what you want to create

2. Select the Report Type as **Evaluation Detail Report/Quality Detail Report**
3. Provide other needed parameters
4. Click on the **Preview** button.
5. To drill down for each team details on which agent scored, click the **Template** link in the grid.

WEM Report



Classic UI



8.4.12 Quality Score Trend Report by Agent with View by as Month

To create Trend Report Average Quality Score by Agent – Month View in WEM, follow the below steps:

1. Click **Ad-Hoc or Scheduled Reports** depends on what you want to create
2. Select the Report Type as **Quality Score Trend Report**
3. Select Trend By as **Agent** and View By as **Month** and provide other needed parameters
4. Click on the **Preview** button.
5. The trend report by agent on month basis will be displayed in the grid

WEM Report

ADD REPORT

Agents

Quality Score Trend Report

Agent Name	June 2021	July 2021	September 2021	October 2021	December 2021	June 2022	July 2022
1392_Cisco IP Communicator				100% of 10000 Ev...			
1487_Cisco IP Communicator		50% of 2 Evaluat...		100% of 10002 Ev...			95% of 2 Evaluat...
1488_Cisco IP Communicator				100% of 10001 Ev...			
agent10_sccc						100% of 1 Evaluat...	50% of 1 Evaluat...
agent11_sccc			71% of 1 Evaluat...				
DMCC lead13123_DMCC lead13123				100% of 10000 Ev...			
Divived_Supt					100% of 1 Evaluat...		
Egamaram_Thangaraj		300% of 1 Evaluat...	100% of 1 Evaluat...	100% of 10000 Ev...			
Godfrugg_Bhagya			125% of 1 Evaluat...				0% of 1 Evaluat...
H323 Load Extension7007_H323 Load Extensio...				100% of 10001 Ev...			

Classic UI

Aspect® Quality Management

Trend Report - Average Quality Score by Agent - Month View

Agent Group: AQM_Inbound
 Team: UIP73SP3_Team
 Date From: 6/1/2018 12:00:00AM
 Date To: 7/1/2018 12:00:00AM
 Time Zone: (UTC-06:00) Central Time (US & Canada)

Report Generation Date: 8/9/2018 12:12:14PM

Site Name: Default Site
 Switch Name: UIP73_SP3_RCTIPS
 Agent Group: AQM_Inbound
 User1, Ux (2105)

Average Score by Group Over Time

Average Score

6/27/2018

Taken Agent Group:	6/27/2018
AQM_Inbound	100.00
All Agent Groups	100.00

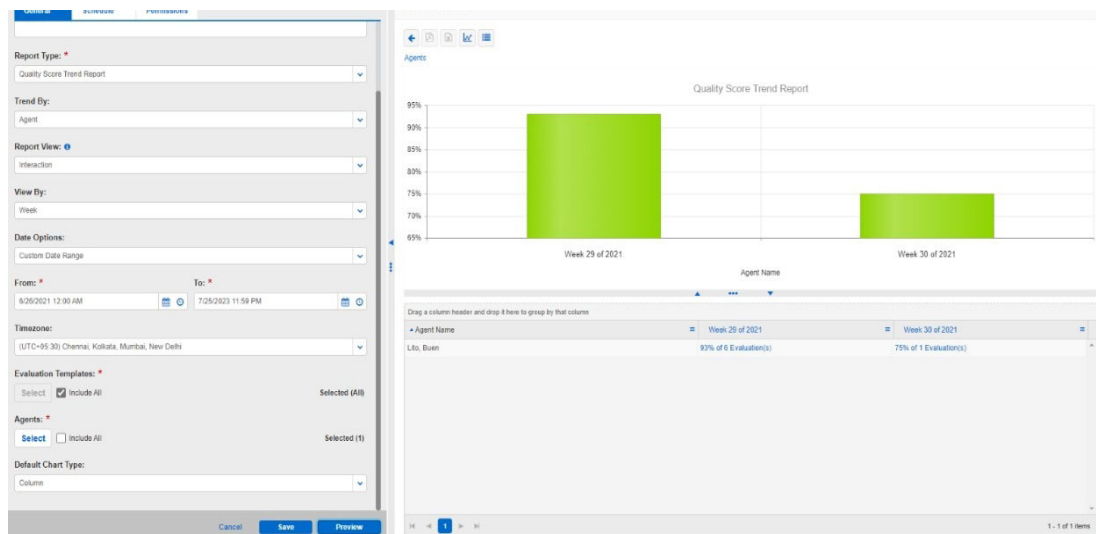
as_AQM004.rpt Aspect Software Page 1 of 2

8.4.13 Quality Score Trend Report by Agent with View by as Week

To create Trend Report Average Quality Score by Agent – Week View in WEM, follow the below steps:

1. Click on **Ad-Hoc or Scheduled Reports** depends on what you want to create
2. Select the Report Type as **Quality Score Trend Report**
3. Select Trend By as **Agent** and View By as **Week** and provide other needed parameters
4. Click on the **Preview** button.
5. The trend report by agent on week basis will be displayed in the grid

WEM Report



Classic UI



8.4.14 Quality Score Trend Report by Agent with View by as Day

To create Trend Report Average Quality Score by Agent in WEM, follow the below steps:

1. Click **Ad-Hoc or Scheduled Reports** depends on what you want to create
2. Select the Report Type as **Quality Score Trend Report**
3. Select Trend By as **Agent** and View By as **Day** and provide other needed parameters
4. If you want to view the report based on **Evaluation** then select **View By as Evaluation** or select **Interaction** to view the details based on the interactions
5. Click on the **Preview** button.
6. The trend report by agent on day basis will be displayed in the grid.

WEM Report

Classic UI

Alvaria™ EX Quality

Trend Report - Average Quality Score by Agent

Team: <Default>
 Date From: 7/1/2020 12:00:00AM
 Date To: 7/31/2023 12:00:00AM
 Time Zone: (UTC-06:00) Central Time (US & Canada)
 Report Generation Date: 7/25/2023 11:10:47AM

Site Name: Default Site
 Switch Name: sp4ectips

Agent Name	12/2/2021
Dwivedi, Sujit (2111)	100.00
All Agents	100.00

Average Score Over Time

For <Default>

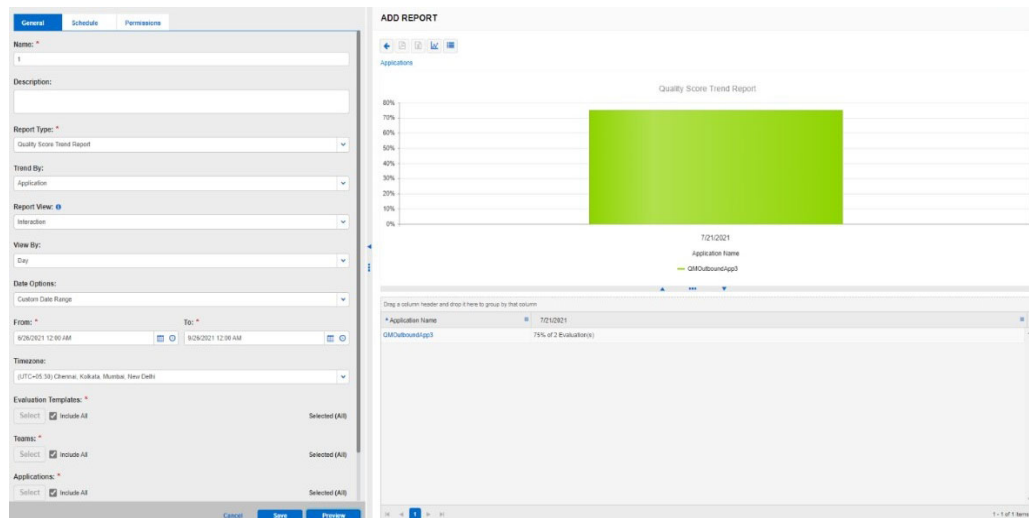


8.4.15 Quality Score Trend Report by Application with View by as Day

To create Trend Report Average Quality Score by Application in WEM, follow the below steps:

1. Click **Ad-Hoc** or **Scheduled Reports** depends on what you want to create
2. Select the Report Type as **Quality Score Trend Report**
3. Select Trend By as **Application** and View By as **Day** and provide other needed parameters
4. If you want to view the report based on **Evaluation** then select **View By as Evaluation** or select **Interaction** to view the details based on the interactions
5. Click on the **Preview** button.
6. The trend report by application on day basis will be displayed in the grid.

WEM Report



Classic UI

Trend Report - Average Quality Score by Application

Team <Default>
 Date From 7/1/2020 12:00:00AM
 Date To 7/31/2023 12:00:00AM
 Time Zone (UTC-06:00) Central Time (US & Canada)

Report Generation Date: 7/25/2023 11:15:18AM

Site Name Default Site

Switch Name sp4ectips

Team <Default>

Agent Name Dwivedi, Sujit (2111)

Average Score Over Time

By Agent Group



Application	12/2021	Total
baseApplication1	100.00	100.00
Total	100.00	100.00

8.4.16 Quality Score Trend Report by Evaluation Template with View by as Day

To create Trend Report Average Quality Score by Scorecard Template in WEM, follow the below steps:

1. Click **Ad-Hoc** or **Scheduled Reports** depends on what you want to create
2. Select the Report Type as **Quality Score Trend Report**
3. Select Trend By as **Evaluation Template** and View By as **Day** and provide other needed parameters
4. If you want to view the report based on **Evaluation** then select **View By as Evaluation** or select **Interaction** to view the details based on the interactions.
5. Click on the **Preview** button.
6. The trend report by evaluation template on day basis will be displayed in the grid.

WEM Report

General | Schedule | Permissions

Name: *
1

Description:

Report Type: *
Quality Score Trend Report

Trend By:
Evaluation Template

Report View: *
Interaction

View By:
Day

Date Options:
Custom Date Range

From: * 6/29/2021 12:00 AM To: * 9/29/2021 12:00 AM

Timezone:
(UTC+05:30) Chennai, Kolkata, Mumbai, New Delhi

Evaluation Templates: *
Select Include All Selected (All)

Teams: *
Select Include All Selected (All)

Default Chart Type:
Column

Cancel Save Preview

ADD REPORT

Templates

Quality Score Trend Report

6/29/2021 7/1/2021 7/2/2021 7/8/2021 7/12/2021 7/15/2021 7/21/2021 9/2/2021

Evaluation Template Name

- 2 sections
- Compare Classic and WFO
- Copy of TX
- Copy of New Scorecard Template
- Failure Condition - Question
- Failure Condition - Section
- FFI
- General Performance II
- Negative
- Normal WFO Template
- Section less than question - dependent and bonus
- Section weigh different than sum of question weights (%)
- Section weight less than sum of question weights
- Section, question dependent
- Test Data

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

Evaluation Template Name	6/29/2021	7/1/2021	7/2/2021	7/8/2021	7/12/2021	7/15/2021	7/21/2021	9/2/2021
2 sections								100% of 7 Evaluation(s)
Compare Classic and WFO			50% of 1 Evaluation(s)		100% of 2 Evaluation(s)			
Copy of TX								
Copy of New Scorecard Template								
Failure Condition - Question								100% of 4 Evaluation(s)

1 - 19 of 19 items

Classic UI

Aspect® Quality Management

Trend Report - Average Quality Score by Scorecard Template

Team: <Default>
 Date From: 6/30/2016 12:00:00AM
 Date To: 6/27/2019 12:00:00AM
 Time Zone: (UTC+05:30) Chennai, Kolkata, Mumbai, New Delhi
 Report Generation Date: 6/27/2019 1:05:08PM

Site Name: Default Site
 Switch Name: UIPRCTIPS

Agent Name: Pissay, Tara (2116)

Average Score By Template Over Time

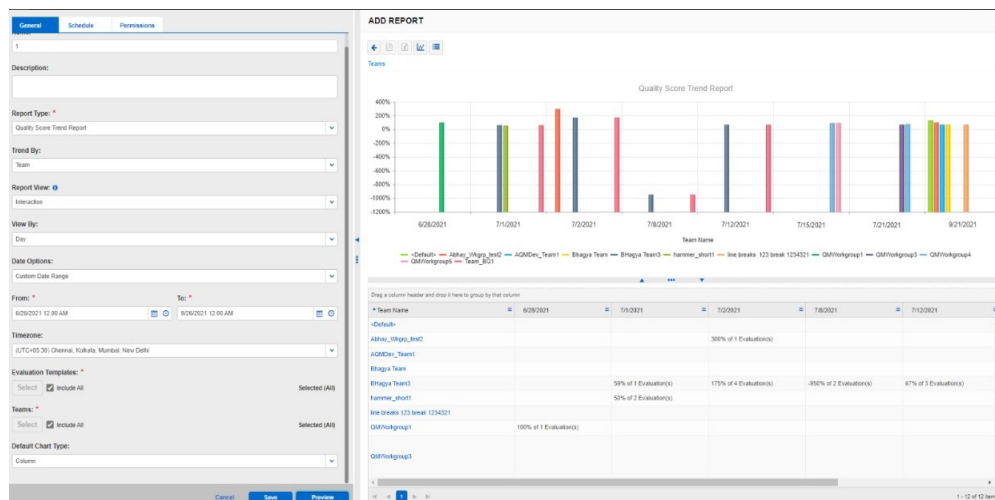
Scorecard Template	9/19/2017
After upgrade in Classic	100.00
All Templates	100.00

8.4.17 Quality Score Trend Report by Team with all templates selected and view by as Day

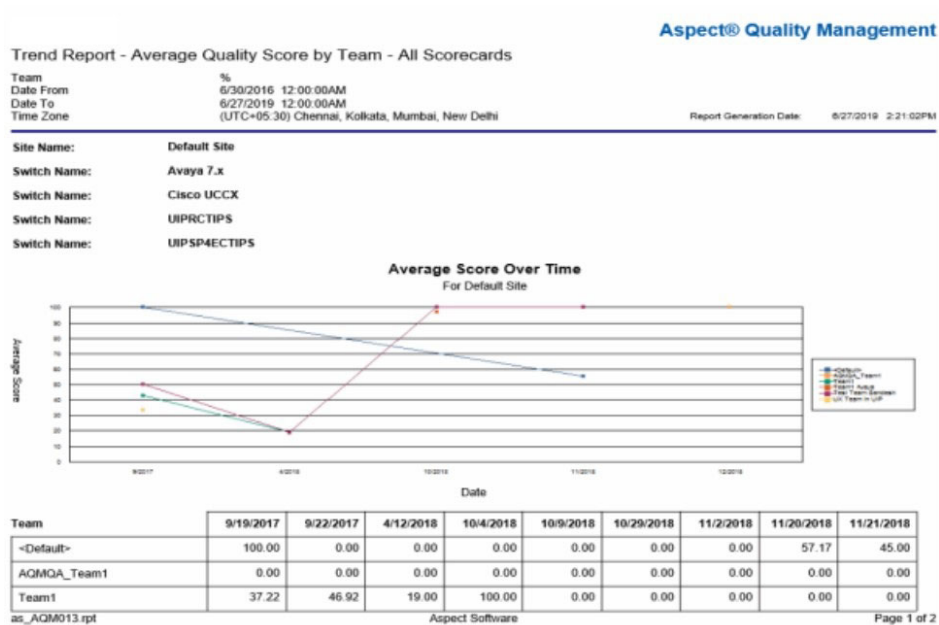
To create Trend Report Average Quality Score by Teams – All Scorecards in WEM, follow the below steps:

1. Click **Ad-Hoc** or **Scheduled Reports** depends on what you want to create
2. Select the Report Type as **Quality Score Trend Report**
3. Select Trend By as **Team**, Select All for Evaluation Templates and View By as **Day** and provide other needed parameters
4. If you want to view the report based on **Evaluation** then select **View By as Evaluation** or select **Interaction** to view the details based on the interactions.
5. Click on the **Preview** button.
6. The trend report by teams on a day basis for all evaluation templates will be displayed in the grid.

WEM Report



Classic UI



8.4.18 Quality Detail Report (Classic UI Report Name – Team Comparison – Specific Scorecard)

To create Trend Report Average Quality Score by Teams – Specific Scorecard in WEM, follow the below steps:

1. Click **Ad-Hoc** or **Scheduled Reports** depends on what you want to create
2. Select the Report Type as **Quality Detail Report**
3. Provide other needed parameters and click on **Preview** button.
4. To drill down for team details, click on **Template link** in the grid.

WEM Report

General | Schedule | Permissions

Name: *
1

Description:

Report Type: *
Quality Detail Report

Report View: Quality Detail Report

Interaction: Interaction

Date Options:
Custom Date Range

From: *
6/26/2021 12:00 AM

To: *
7/25/2023 11:59 PM

Timezone:
(UTC+05:30) Chennai, Kolkata, Mumbai, New Delhi

Evaluation Templates: *
 Include All Selected (1)

Teams: *
 Include All Selected (All)

Default Chart Type:
Column

Buttons: Cancel Save Preview

ADD REPORT

Templates / 150919

Quality Detail Report

Team Name	Number of Evaluations	High Score	Low Score	Average Score
AGMDev_Team1 (Cisco UCCK)	1	50%	50%	50%
FF (Cisco UCCK)	1	50%	50%	50%
NativeNet_Oper1 (Cisco UCM)	1	100%	100%	100%
live training 123 brnsh 1234321 (Cisco UCCK)	1	50%	50%	50%

Buttons: Cancel Save Preview

Classic UI

Alvaria™ EX Quality

Team Comparison - Specific Scorecard

Team: <Default>
 Scorecard Template Name: %
 Date From: 7/1/2021 12:00:00AM
 Date To: 7/31/2023 12:00:00AM
 Time Zone: (UTC-06:00) Central Time (US & Canada)

Report Generation Date: 7/25/2023 7:40:21AM

Site Name: Default Site
Switch Name: sp4ectips

Scorecard Template: %

Team	Number of Calls Monitored	Number of Calls Scored	High Score	Low Score	Average Score
<Default>	5	4	125.00	0.00	75.00
Switch (sp4ectips) Total	5	4	125.00	0.00	75.00

Switch Name: UIP73SP4ECTIPS

Scorecard Template: %

Team	Number of Calls Monitored	Number of Calls Scored	High Score	Low Score	Average Score
<Default>	4	4	100.00	0.00	22.40
Switch (UIP73SP4ECTIPS) Total	4	4	100.00	0.00	22.40
Site (Default Site) Total	9	8	125.00	0.00	42.13

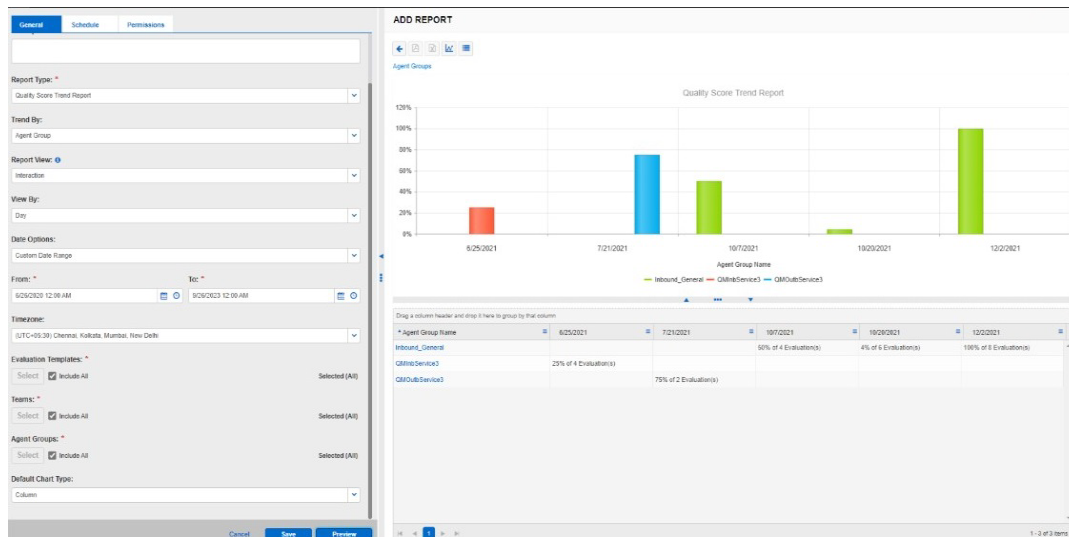
8.4.19 Quality Score Trend Report by Agent Group (Classic UI Report Name – Trend Report Daily Agent Comparison to Peers - Agent Group)

To create Trend Report Daily Agent Comparison to Peers - Agent Group in WEM, follow the below steps:

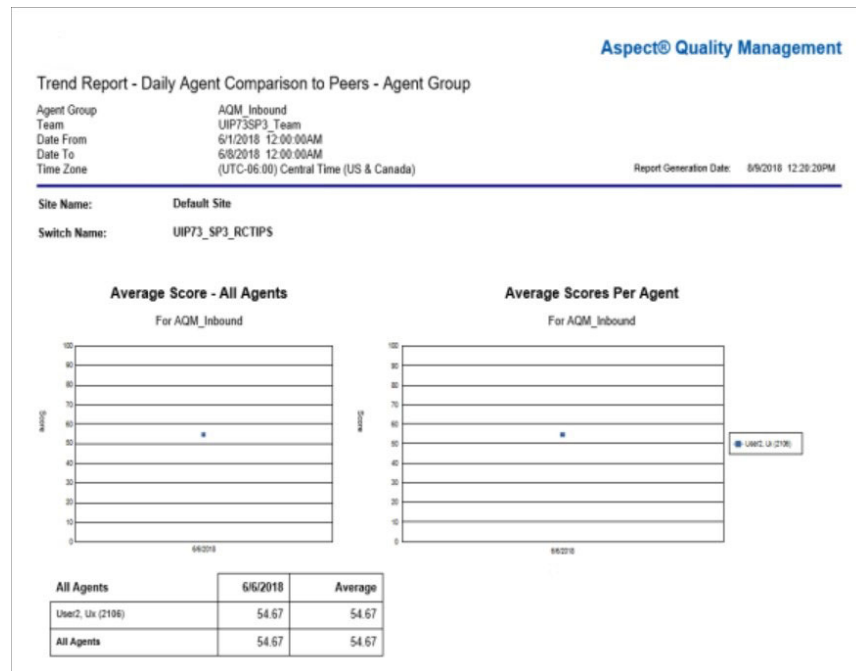
1. Click **Ad-Hoc** or **Scheduled Reports** depends on what you want to create
2. Select the Report Type as **Quality Score Trend Report**
3. Select Trend By as **Agent Group** and View By as **Day** and provide other needed parameters
4. If you want to view the report based on **Evaluation** then select **View By as Evaluation** or select **Interaction** to view the details based on the interactions.
5. Click on **Preview** button.
6. Click on **Agent Groups link > Teams link** and the Agent Details will display.

Note: The All agents Score based on teams can be viewed under Team details result.

WEM Report



Classic UI



8.4.20 Quality Score Trend Report by Agent Group (Trend Report Daily Agent Comparison to Peers – Bar Graph - Agent Group)

To create Trend Report Daily Agent Comparison to Peers – Bar Graph - Agent Group in WEM, follow the below steps:

1. Click **Ad-Hoc** or **Scheduled Reports** depends on what you want to create
2. Select the Report Type as **Quality Score Trend Report**
3. Select Trend By as **Agent Group**, Default Chart Type as **Bar Graph** and View By as **Day** and provide other needed parameters
4. If you want to view the report based on **Evaluation** then select **View By as Evaluation** or select **Interaction** to view the details based on the interactions.
5. Click on **Preview** button.
6. The agent group details with bar graph will be displayed as results.

WEM Report

ADD REPORT

Templates / Test_Tera / AQMDev_Team1 (Cisco UCCX)

Quality Detail Report

Agent Name	Number of Evaluations	High Score	Low Score	Average Score
agent1@_sccc (Cisco UCCX)	1	100%	100%	100%

Classic UI

Alvaria™ EX Quality

Team Detail with Bar Graph

Team <Default>
Date From 7/1/2021 12:00:00AM
Date To 7/31/2023 12:00:00AM
Time Zone (UTC-08:00) Central Time (US & Canada)
Sorted By Agent Last Name

Report Generation Date:
 7/25/2023 8:01:44AM

Site Name Default Site
Switch Name sp4ectips

Agent Name	Number of Calls Monitored	Number of Calls Scored	High Score	Low Score	Average Score
Dwivedi, Sujit (2111)	1	1	100.00	100.00	100.00
Godihuggi, Bhagya (2116)	3	3	125.00	0.00	62.50
Totals	4	4	125.00	0.00	75.00
Total - All Team	4.00	4	125.00	0.00	75.00

8.4.21 Audit Activity Detail Report

1. Click **Ad-Hoc** or **Scheduled Reports** depends on what you want to create
2. Select the Report Type as **Audit Activity Detail Report**

3. Select Option **User Audit** to see the report for user actions OR choose **System Audit** to view the report for the actions automatically done by system and provide other needed parameters
4. Click on **Preview** button.
5. All the actions will be audited, and the report will be displayed similar to Classic UI.

WEM Report

Classic UI

Web Audit Activity Detail

Date From: 7/1/2023 12:00:00AM
 Date To: 7/31/2023 12:00:00AM
 Time Zone: (UTC+05:30) Chennai, Kolkata, Mumbai, New Delhi
 User Name: %
 Site Name: %
 Report Generation Date: 7/25/2023 11:45:29AM

Site Name		Default Site					
User Name		Administrator, AQM (AQMAdmin)					
Date/Time	Action	Entity Type	Entity Accessed	Permission	Entity Granted Permission	Comment	Duration
7/17/2023 4:52:30PM	Logged On	Web Server				Logged in to WFO.	00:00:00
7/18/2023 10:38:13AM	Logged On	Web Server				Logged in to WFO.	00:00:00
7/18/2023 10:37:13AM	Created	User Preference	User Preference			{"keyid": "ec4cb544-2825-ee11-aa2e-5b1ac9c92db0", "valueid": "ec4cb544-2825-ee11-aa2e-5b1ac9c92db0"}	00:01:00
7/18/2023 10:41:02AM	Logged On	Web Server				Logged in to WFO.	00:00:00
7/18/2023 10:43:38AM	Updated	User	agent10, uocx (Agentx10)				00:02:38
7/18/2023 10:43:55AM	Created	Assign Media	Email Test			70545B11-0BB3-4F09-ACB3-82E4F9324851	00:00:17
7/18/2023 10:48:15AM	Logged On	Web Server				Logged in to WFO.	00:00:00
7/18/2023 11:34:46AM	Created	Assign Media	Email - Change Tenant			7CCF98BB-DC51-43A9-9843-831055172406	00:48:31
7/18/2023 11:48:56AM	Logged On	Web Server				Logged in to WFO.	00:00:00
7/18/2023 11:47:06AM	Logged On	Web Server				Logged in to WFO.	00:00:00
7/18/2023 11:48:14AM	Updated	Assign Media	Email - Change Tenant			7CCF98BB-DC51-43A9-9843-831055172406	00:01:08
7/18/2023 11:49:19AM	Logged On	Web Server				Logged in to WFO.	00:00:00
7/18/2023 11:55:23AM	Updated	Media				7DCB43AC-32B6-4441-8BF9-F4851D2F0000A81	00:00:00
7/18/2023 11:55:23AM	Updated	Media				0CDB29A3-1903-4F09-8BCF-A86979B28D49	00:00:04
7/18/2023 11:55:30AM	Updated	Media				7DCB43AC-32B6-4441-8BF9-F4851D2F0000A81	00:00:07
7/18/2023 11:55:31AM	Updated	Media				0CDB29A3-1903-4F09-8BCF-A86979B28D49	00:00:01
7/18/2023 11:55:52AM	Created	Assign Media	Archive Interactions Email check			AE3186E3-55FD-4775-A2CC-3616DD87E000C1C8	00:00:21
7/18/2023 11:56:40AM	Logged On	Web Server				Logged in to WFO.	00:00:00
7/18/2023 11:57:32AM	Created	Calibration Review	Calibration Review				00:00:52

Tips:

1. User can perform **sorting and filtering** the data based on any column in all the reports grid.
2. The reports can be exported to **Excel or PDF** as is viewed in the UI.
3. The Chart Type can be viewed in different ways, based on the options available using the Default Chart Type option.
4. Graph Data can be filtered based on the report type data displayed using the **Legend** option.
5. Chart Type can be viewed in **Stacked** mode.

9. Import

This chapter will explain about *Import metadata and recording files to Aspect Quality* feature in Workforce Engagement Management. The chapter consists of the below features.

- Create Import Process in Workforce Engagement Management UI
- Import Jobs
 - Creating Jobs
 - Listing Import Jobs
 - Processing the Import Jobs
 - Editing Jobs
 - Deleting Jobs
 - Activating and Deactivating Jobs
- Global Custom Field Definition

9.1 Import Overview

Import feature allows to import third party recording files and metadata files which were recorded in an external system into the Aspect Quality to playback and evaluate.

As a pre-requisite, third parties must provide the metadata and recording files in below format.

- **Metadata File** - .xml

Note:

- Aspect Quality does not expect the XML in a particular format and Aspect Quality accepts any XML format.
- An xml file with attribute/element having data alias will not accept.

- **Media Files**

- Audio - .mp3,.mp4, .wav and .wma
- Chat and Email - .json

An Import Job must be created with a schedule and mentioning a UNC path where you place the exported recording and xml file from an external system which Aspect Quality wants to import. When the schedule of the import job is reached, the Importer process will process the metadata and media files available in the Import location and create interactions by mapping

the values from xml file to the Aspect Quality fields. Once the job has runs successfully, the interactions will be available to view, playback and evaluate in Aspect Quality.

9.2 Create Importer Process

1. To import the third party media and metadata files to Aspect Quality, user must create an Importer Process. Refer to *System Administration Guide* to know how to create a process.
2. You can either have a separate server where Import process can run or can club this in an existing server where you are already running a Aspect Quality process.

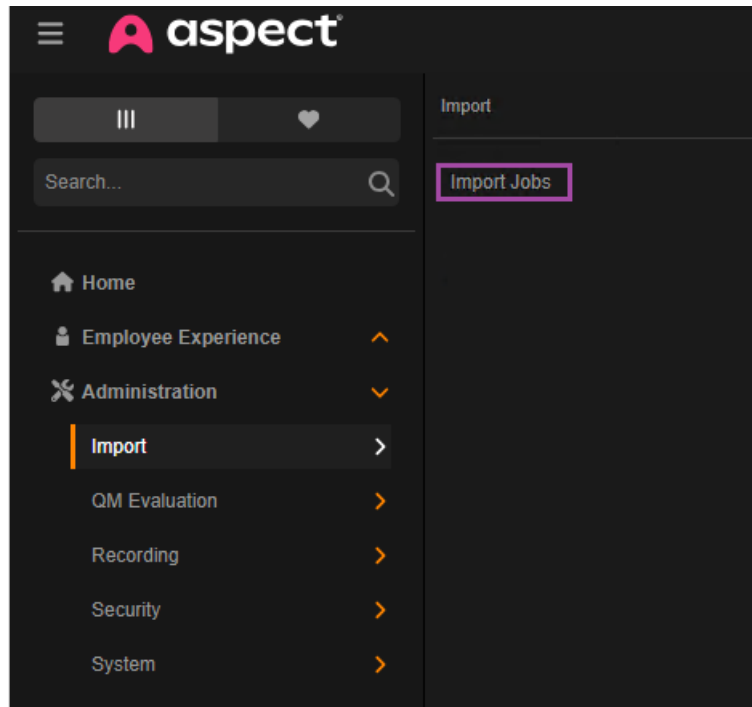
Note:

- After Importer process is created, system will also create a “Default Import Switch” for which all the Import Jobs and the imported interactions will be associated.
To view the saved recordings in disk space, then go to the switch to turn on the encryption.
- System will also create “Default Import Storage Group” to associate with the import switch.
Storage group is created by default but if you think while creating a job you want to choose a different storage group other that what system has created you can do so.

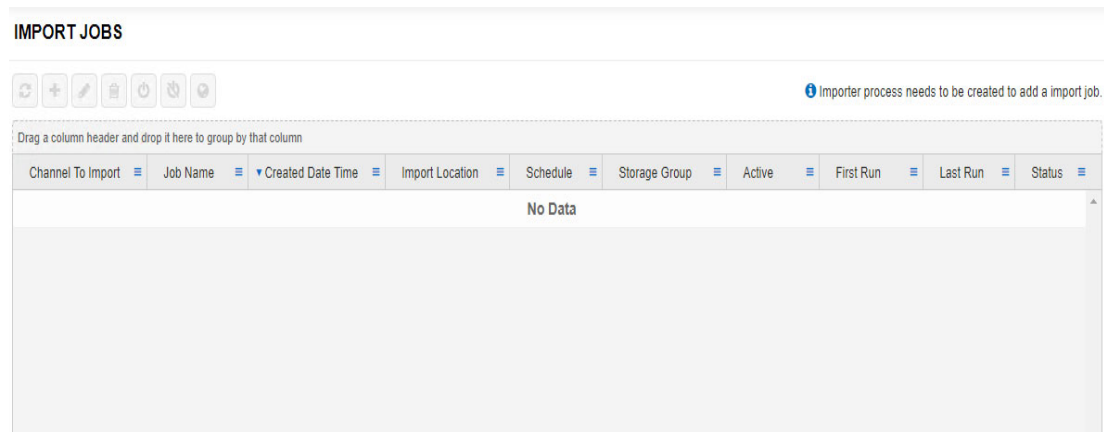
9.3 Import Jobs

Import Jobs navigation menu is displayed under “Administration” section of WEM. Follow the steps below to import a job.

1. Click on main menu and go to **Administration > Import > Import jobs**.

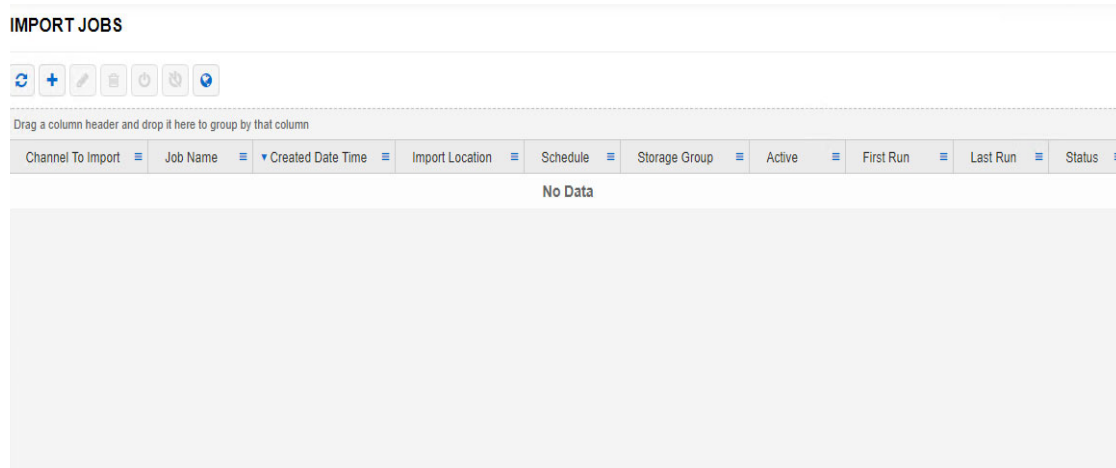


2. **Import Jobs** window appears as shown below. The grid/table is empty for the first time.



3. **Refresh, Add, Edit, Delete, Activate, Deactivate, and Global Custom Metadata Definition** buttons will be enabled when “Importer” process is created in Workforce Engagement Management UI. (Information message will display the information)

- After creating the importer process the Import Job page will be displayed as shown in below screenshot.



Note: Edit, Delete, Activate, Deactivate buttons will be disabled when import jobs not exist in the grid.

- First row contains the buttons as mentioned in the below table.

Table 9-1 Import Job Menu Options

Button Name	Description
Refresh	Refreshes the import job grid with latest import job changes. Instead of user clicking on the browser refresh button user can click on this which will refresh only the grid data and not the entire page.
Add	Creates a new import job.
Edit	Updates the details of existing import job.
Delete	Deletes the import job.
Activate	Allows to activate an import job which is in inactive state.
Deactivate	Allows to deactivate an import job which is in active state.
Global Custom Field Definition	Allows to define/update/delete custom field names for import job.

9.3.1 Create Import Job

It allows to configure new import job, which include defining the schedule, Channel Type to import (though for first phase we support only Voice channel), Storage Group, Import Location, and Metadata Mapping. Follow the steps below to create import job.

Note: Ensure the Importer Process is created in Workforce Engagement Management UI before creating the Import Job.

- Click on **Add** button  to add a new import Job.

2. **Add Job** window appears as shown below.

The description of the fields in **Add Job** window is given below.

Table 9-2 Import Job Field Definition

Field Name	Description
Job Name (Mandatory and Unique)	<ul style="list-style-type: none"> Provide Job Name which will help you identify this job Allows 100 characters and restricted with special characters mentioned below \ / : * ? " < > Note: System does not allow the above special characters because system will create the results file with the job name and windows does not allow to create files with the above special characters Job Name is mandatory to create an import Job and it should be unique.
Description	<ul style="list-style-type: none"> Allows to enter 256 character Enter a detailed description for this job This field is optional

Table 9-2 Import Job Field Definition

Field Name	Description
Schedule	<ul style="list-style-type: none"> Allows to schedule the import Job to run Allows to set the Start Date, End Date, Job Start Time and Run on Days Refer to Import Job Schedule section for more details.
Start Date (Mandatory)	<ul style="list-style-type: none"> Start Date must set to create import Job and its mandatory Start Date shouldn't be past Date.
End Date	<ul style="list-style-type: none"> End Date is Optional – by default End Date will be OFF. When End Date is specified, job will run until the end date is reached. End Date cannot be in lesser than Start Date
Job Start Time (Mandatory)	<ul style="list-style-type: none"> Job Start Time must set to create the import job and its mandatory Specify the time when the job should run.
Run on Days (mandatory)	<ul style="list-style-type: none"> Run on Days must set to create the import job and its mandatory Specify on which days the job should run.
Define Mapping	<ul style="list-style-type: none"> Allows to configure the Channel Type, Storage Group, Import Location, and Metadata Mapping
Channel Type (Mandatory)	<ul style="list-style-type: none"> Supports Audio, Chat and Email channel types. Select an appropriate channel for the import job from the drop-down list.
Storage Group (Mandatory)	<ul style="list-style-type: none"> Its recommended to use a separate storage group for Imported Jobs compare to the storage group what you use to store Aspect Quality recorded recordings or have a storage group defined for each job what you create which will help you to search for recordings manually through windows file explorer
Import Location (Mandatory)	<ul style="list-style-type: none"> Enter the location from where to import the media files and metadata xml file. Please ensure this folder has read access from the server where the Import process is running Valid server path required. Please do not use mapped drives from your client. For example type \\server\FolderLocation
Add Metadata Mapping	<ul style="list-style-type: none"> Opens the Add Metadata Mapping dialog page and mandatory to fill the required field. Refer to Add Metadata Mapping section for more details.

9.3.2 Import Job Schedule

Set up the Start Date, End Date, Start Time and Run on Days to schedule an import job daily, weekly, and so on based on the requirement.

9.3.2.1 Schedule a Job to Run Daily

Select the specific options to run an import job every day. Refer the below screen shot.

The screenshot shows a 'Schedule' dialog box with the following fields:

- Start Date:** 7/5/2019
- End Date:** 9/30/2019 (with a green checkmark icon)
- Job Start Time:** 4:38 PM
- Run On Days:** Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, Sunday

The job will run every day at 4:38 PM till the **End date**.

9.3.2.2 Schedule a Job to Run Weekly

Select the specific options to run on specific day in a week. Refer the below screen shot.

The screenshot shows an 'Add Job' dialog box with the following sections and fields:

- Job Name:** Job Name
- Description:** Description
- Schedule:**
 - Start Date:** 7/5/2019
 - End Date:** No End Date (disabled)
 - Job Start Time:** 4:38 PM
 - Run On Days:** Monday
- Define Mapping:**
 - Channel Type:** Audio
 - Add Metadata Mapping:** + Add Metadata Mapping
 - Storage Group:** Please select storage group.
 - Import Location:** \\server\path

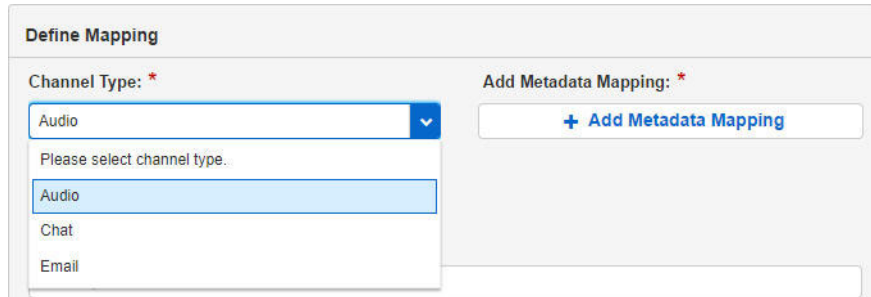
Buttons: Cancel, OK

The job will run every week on Monday at 4:38 PM.

9.3.2.2.1 Add Metadata Mapping

Pick up a sample XML file from the list of xml files that you want to import and use that sample xml file to define the mapping. In the Add Metadata Mapping screen you should upload the sample xml file and map what xml field value should be parsed and update to Aspect Quality fields. If you find no relevant Aspect Quality field for your field in XML then you can map that to custom fields.

The Metadata Mapping can be done based on the Channel Type. These are:



- [Channel Type: Audio](#)
- [Channel Type: Chat](#)
- [Channel Type: Email](#)

Channel Type: Audio

1. Select the Channel Type as **Audio** from the drop-down list.
2. Click on **Add Metadata Mapping** on Add Job dialog page.

- Mapping tab will be enabled and few fields under the Mapping tab will be disabled. Custom Fields tab will be disabled as shown in the **Add Metadata Mapping** screen below.

- Click on **Select File** button to select a XML file.
- Select the xml file from the import location.
- Select a sample XML file from the list of xml files which needs to import. Upload the xml file then all the elements and attributes which has a value or self-closing elements and attributes in the xml file will be displayed in each combo box.
- Enter a field name and the combo box will show the matched results and if you don't know the exact name click on the combo box and choose a field name which you want to map. Refer the below [Table 9-3](#) for the details on what Aspect Quality fields mean.

Sample Audio XML file:

```
<?xml version="1.0" encoding="UTF-8"?>
<CAudioFile xmlns:xsd="http://www.w3.org/2001/XMLSchema"
xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance">
  <CRI>
    <StartTime>2018-10-15T19:43:41.9000000+0000</StartTime>
    <Filename>SampleAudio.mp3</Filename>
    <Duration>390</Duration> <ANI>2082326773</ANI>
    <DNIS>35394011</DNIS>
    <Direction>1</Direction>
    <AgentPBXID>31432</AgentPBXID>
    <AgentID>0</AgentID>
  </CRI>
```

</CAudioFile>

- After Selecting the xml file, Mapping and Custom Fields will enable to map fields. Xml attributes/elements will be available in the combo box as shown in the below screenshot.

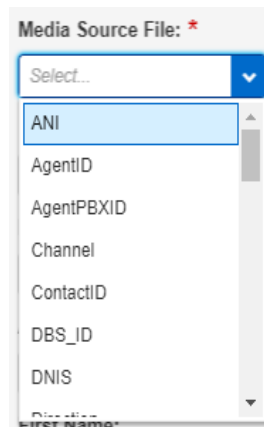


Table 9-3 Audio Mapping Definition

Field Name	Aspect Quality Field	Description
Interaction Type	<ul style="list-style-type: none"> Type of the interaction. Aspect Quality Support four types of interaction Namely ACD Call, Inbound Direct Call, Outbound Direct Call, Outbound Queued call are the types. 	Map the xml attribute that contains the value for Interaction type.
ACD Call	Used for calls made to a Service and routed through ACD (Automatic Call Distributor) to an agent.	<ul style="list-style-type: none"> Provides the value for the Type available in xml file to map for ACD Call type for interaction in Aspect Quality. Allows to provide multiple values by comma separated. If the input value(s) matches with the value in the xml file interaction type will be updated with ACD.
Inbound Direct Call	Used for calls made directly to an agent's extension	<ul style="list-style-type: none"> Provides the value for the Type available in xml file to map for Inbound Direct Call type for interaction in Aspect Quality. Allows to provide multiple values by comma separated. If the input value (s) matches with the value in the xml file interaction type will be updated with Inbound Direct Call.

Table 9-3 Audio Mapping Definition

Field Name	Aspect Quality Field	Description
Outbound Queued Call	Used for calls that are dialed by the system and connected with agent.	<ul style="list-style-type: none"> Provides the value for the Type available in xml file to map for Outbound Queued Call type for interaction in Aspect Quality. Allows to provide multiple values by comma separated. If the input value (s) matches with the value in the xml file interaction type will be updated with Outbound Queued Call.
Outbound Direct Call	Used for calls manually dialed by the agent.	<ul style="list-style-type: none"> Provides the value for the Type available in xml file to map for Outbound Direct Call type for interaction in Aspect Quality. Allows to provide multiple values by comma separated. If the input value (s) matches with the value in the xml file interaction type will be updated with Outbound Direct Call.
Media Source File (Mandatory)	Filename of the media which will be associated to an interaction.	<ul style="list-style-type: none"> Map the xml attribute that contains the media file name. Aspect Quality supports the files with ".wav, .wma, .mp3 and .mp4" formats only.
Start Time (Mandatory)	Interaction Start date time.	<ul style="list-style-type: none"> Map the xml attribute that contains the Start Time. Refer to Date Time Format for Import Job section.
End Time (Mandatory)	Interaction End date time.	Map the xml attribute that contains the End Time. Refer to Date Time Format for Import Job section.
ACD Login (Mandatory)	Username or the login id of the agent for the ACD associated who handled the interaction.	Map the xml attribute that contains the ACD Login.
First Name	First Name of the agent, who handled the interaction.	Map the xml attribute that contains the first name.
Last Name (Mandatory)	Last Name of the agent who handled the interaction	Map the xml attribute that contains the last name.
Queue Name	Agent group/Queue associated with the interaction.	Map the xml attribute that contains the agent group name.
Hold Count	<ul style="list-style-type: none"> Number of time agent put the conversation on Hold It is a numeric value 	Map the xml attribute that contains the Hold Count.

Table 9-3 Audio Mapping Definition

Field Name	Aspect Quality Field	Description
Maximum Hold Time	<ul style="list-style-type: none"> Maximum duration, agent kept conversation on Hold. Will be in format HH:MM:SS Eg. Agent kept Conversation on Hold twice. First hold for 30 sec and Second hold for 1:30 second, then Maximum Hold Time will display as 00:01:30 	Map the xml attribute that contains the Maximum Hold Time.
Total Hold Time	<ul style="list-style-type: none"> Total hold Time is the sum of all the hold duration. Will be in format HH:MM:SS Eg. Agent kept Conversation on Hold twice. First hold for 30 sec and Second hold for 1:30 second, then Total Hold Time will display as 00:02:00 	Map the xml attribute that contains the Total Hold Time.
ANI	<ul style="list-style-type: none"> ANI (Automatic number identification) When agent receive the call through Service or Direct, ANI will update with the customer number 	Map the xml attribute that contains the ANI.
DNIS	<ul style="list-style-type: none"> Dialed Number Identification Service Dialed number identification service (DNIS) is a service number given by corporations that allows customer to dial to reach the agents. 	Map the xml attribute that contains the DNIS.
UCID	Universal Call ID of the interaction.	Map the xml attribute that contains the UCID.
Host ID	<ul style="list-style-type: none"> Host Id is a unique identifier for each interaction. It will be same for complete call scenario. (If we have a conference call all the interactions as part of the scenario will have same Host ID). 	Map the xml attribute that contains the Host ID.
Extension	Station ID of the agent where the agent is logged in	Map the xml attribute that contains the Extension.

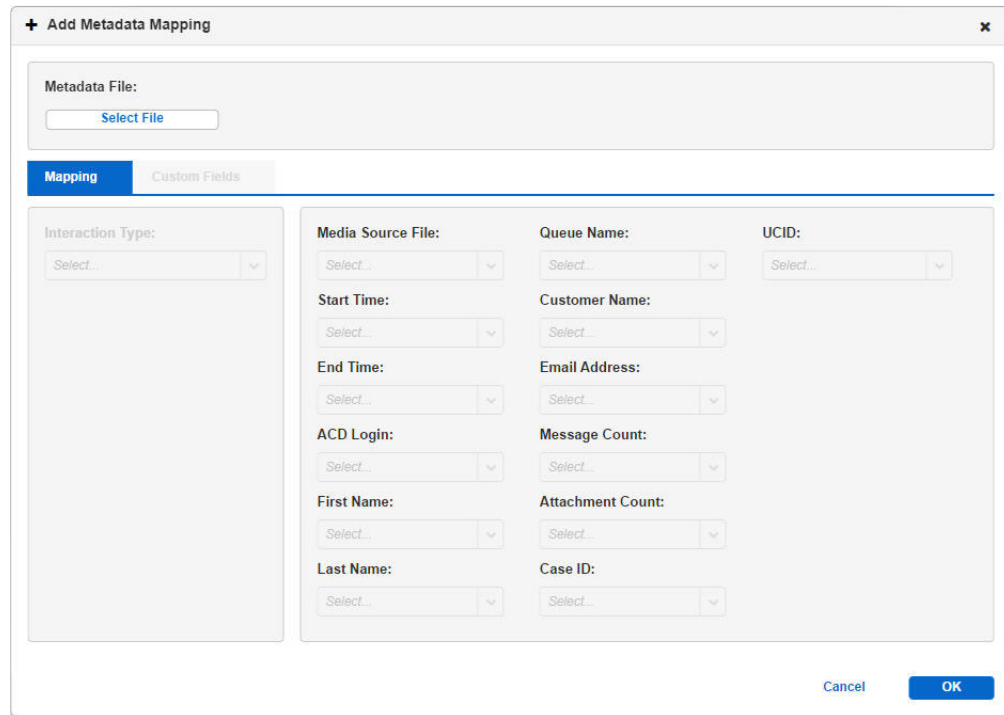
9. Map the metadata for the Mapping fields as shown in the below screenshot.

Note: Now go to [step 10](#) to complete the Metadata Mapping.

Channel Type: Chat

1. Select the Channel Type as **Chat** from the drop-down list.
2. Click on **Add Metadata Mapping** on Add Job dialog page.

3. Mapping tab will be enabled and few fields under the Mapping tab will be disabled. Custom Fields tab will be disabled as shown in the **Add Metadata Mapping** screen below.



4. Click on **Select File** button to select a XML file.
5. Select the xml file from the import location.
6. Select a sample XML file from the list of xml files which needs to import. Upload the xml file then all the elements and attributes which has a value or self-closing elements and attributes in the xml file will be displayed in each combo box.
7. Enter a field name and the combo box will show the matched results and if you don't know the exact name click on the combo box and choose a field name which you want to map. Refer the below [Table 9-4](#) for the details on what Aspect Quality fields mean.

Sample Chat XML file:

```
<?xml version="1.0" encoding="utf-8"?>
<recording>
  <metadata>
    <Filename>0687d1c6-dc78-4e5a-adbc-07d5849f3eb0.json</
Filename>
    <CallStartUTC>04/12/2023 16:11:45.000 +0530</CallStartUTC>
    <CallEndUTC> 04/12/2023 16:30:40.000 +0530</CallEndUTC>
    <ACDLogin>ktandon</ACDLogin>
    <AgentGroup> ATEAM_IBChatWT2_KT2</AgentGroup>
    <AgentFirstName>cloud_kushalmgr</AgentFirstName>
    <AgentLastName>tandon</AgentLastName>
    <MessageCount>0</MessageCount>
```

```

<Attachments>0</Attachments>
<Customer>cust6_chateagles</Customer>
<Email>cust6_chateagles@gmail.com</Email>
<Subject>100007</Subject>
</metadata>
</recording>
    
```

- After Selecting the xml file, Mapping and Custom Fields will enable to map fields. Xml attributes/elements will be available in the combo box as shown in the below screenshot.

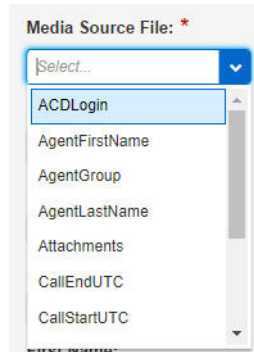


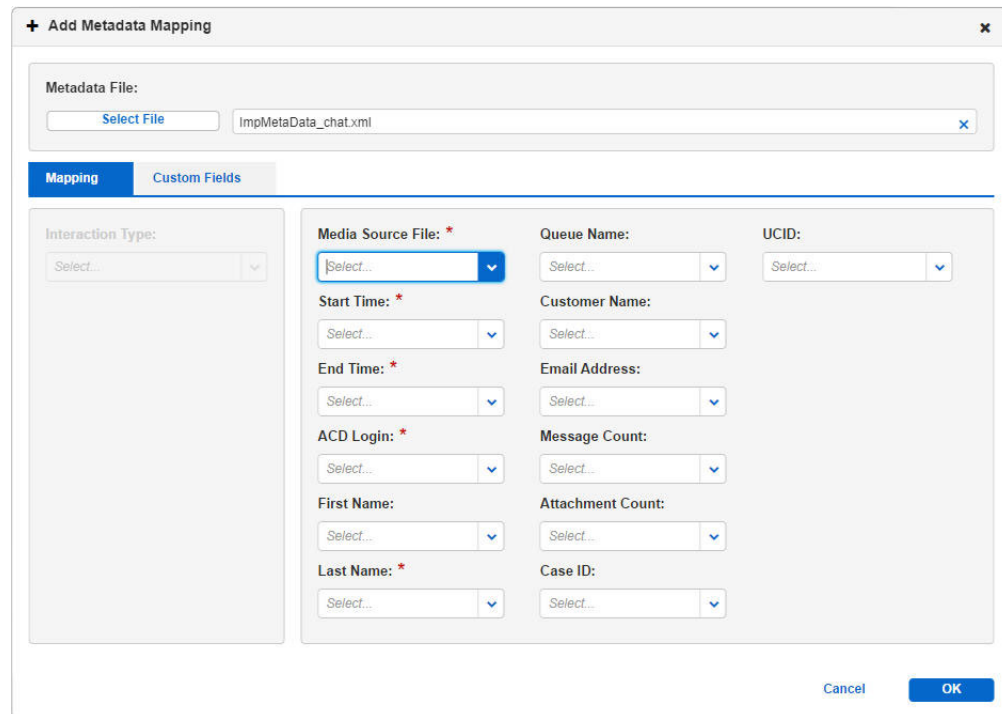
Table 9-4 Chat Mapping Definition

Field Name	Aspect Quality Field	Description
Interaction Type	Aspect Quality Support chat type of interaction.	For Chat type of interaction, mapping is not required.
Media Source File (Mandatory)	Filename of the media which will be associated to an interaction.	<ul style="list-style-type: none"> Map the xml attribute that contains the media file name. Aspect Quality supports the files with “.json” formats only.
Start Time (Mandatory)	Interaction Start date time.	<ul style="list-style-type: none"> Map the xml attribute that contains the Start Time. Refer to Date Time Format for Import Job section.
End Time (Mandatory)	Interaction End date time.	<ul style="list-style-type: none"> Map the xml attribute that contains the End Time. Refer to Date Time Format for Import Job section.
ACD Login (Mandatory)	Username or the login id of the agent for the ACD associated who handled the interaction.	Map the xml attribute that contains the ACD Login.
First Name	First Name of the agent, who handled the interaction.	Map the xml attribute that contains the first name.
Last Name (Mandatory)	Last Name of the agent who handled the interaction	Map the xml attribute that contains the last name.

Table 9-4 Chat Mapping Definition

Field Name	Aspect Quality Field	Description
Queue Name	Agent group/Queue associated with the interaction.	Map the xml attribute that contains the agent group name.
Customer Name	Name of the customer.	Map the xml attribute that contains the name of the customer.
Email Address	Email address of the customer.	Map the xml attribute that contains the Email address of the customer.
Message Count	Number of message threads between the customer and an agent, during a chat.	Map the xml attribute that contains the Number of message threads.
Attachment Count	Number of attachments, during a chat.	Map the xml attribute that contains the Number of attachments.
Case ID	Case ID of the interaction.	Map the xml attribute that contains the Case ID.
UCID	Universal Call ID of the interaction.	Map the xml attribute that contains the UCID.

9. Map the metadata for the Mapping fields as shown in the below screenshot.

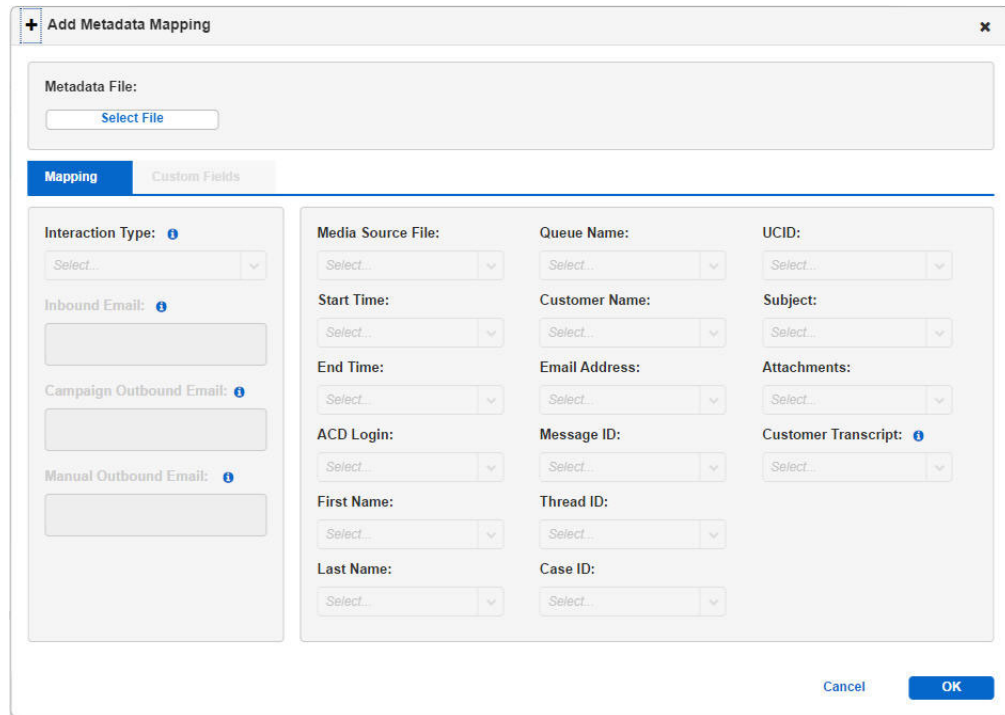


Note: Now go to [step 10](#) to complete the Metadata Mapping.

Channel Type: Email

1. Select the Channel Type as **Email** from the drop-down list.
2. Click the **Add Metadata Mapping** in the Add Job window.

- Mapping tab is enabled and few fields under the Mapping tab will be disabled. Custom Fields tab will be disabled as shown in the **Add Metadata Mapping** screen below.



- Click on **Select File** button to select a XML file.
- Select the xml file from the import location.
- Select a sample XML file from the list of xml files which needs to import. Upload the xml file then all the elements and attributes which has a value or self-closing elements and attributes in the xml file will be displayed in each combo box.
- Enter a field name and the combo box will show the matched results and if you don't know the exact name click on the combo box and choose a field name which you want to map. Refer the below [Table 9-5](#) for the details on what Aspect Quality fields mean.

Sample XML file for Agent:

```
<?xml version="1.0" encoding="utf-8"?>
<recording>
  <metadata>
    <Filename>email-Agent.json</Filename>
    <CallStartUTC>2023-04-10 14:58:23:000 +0530</CallStartUTC>
    <CallEndUTC>2023-04-10 14:59:07:000 +0530</CallEndUTC>
    <ACDLogin>BManager</ACDLogin>
    <AgentGroup>SWAT_Email</AgentGroup>
    <AgentFirstName>Reba</AgentFirstName>
    <AgentLastName>Manager</AgentLastName>
    <EmailType>InboundEmail</EmailType>
```

```

    <ThreadId>579960963</ThreadId>
    <MessageId>297282</MessageId>
    <Customer>Anthony</Customer>
    <Email>anthony@Alvaria.com</Email>
    <CaseId>1</CaseId>
    <Subject>RE: [Ref#: 579960963] TEST with Attached</Subject>
    <DisplayRecord>>true</DisplayRecord>
    <Attachments>SampleAttach1.txt,level1\OpenSSL.txt</
Attachments>
  </metadata>
</recording>

```

Sample XML file for Customer:

```

<?xml version="1.0" encoding="utf-8"?>
<recording>
  <metadata>
    <Filename>email-Customer.json</Filename>
    <CallStartUTC>2023-04-10 14:58:23:000 +0530</CallStartUTC>
    <CallEndUTC>2023-04-10 14:58:23:000 +0530</CallEndUTC>
    <ACDLogin>BManager</ACDLogin>
    <AgentGroup>SWAT_Email</AgentGroup>
    <AgentFirstName>Reba</AgentFirstName>
    <AgentLastName>Manager</AgentLastName>
    <EmailType>InboundEmail</EmailType>
    <ThreadId>579960963</ThreadId>
    <MessageId>297282</MessageId>
    <Customer>Anthony</Customer>
    <Email>anthony@Alvaria.com</Email>
    <CaseId>1</CaseId>
    <Subject>TEST with Attached</Subject>
    <DisplayRecord>>false</DisplayRecord>
    <Attachments>customer\AspectSampleText.txt</Attachments>
  </metadata>
</recording>

```

8. After Selecting the xml file, Mapping and Custom Fields will enable to map fields. Xml attributes/elements will be available in the combo box as shown in the below screenshot.

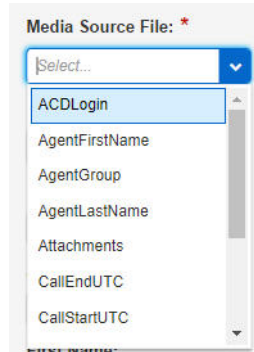


Table 9-5 Email Mapping Definition

Field Name	Aspect Quality Field	Description
Interaction Type	<ul style="list-style-type: none"> Type of the interaction. Aspect Quality Support three types of interaction Namely Inbound Email, Campaign Outbound Email, Manual Outbound Email are the types. 	Map the xml attribute that contains the value for Interaction type.
Inbound Email	Used for emails sent directly to an agent.	<ul style="list-style-type: none"> Provides the value for the Type available in xml file to map for Inbound Email type for interaction in Aspect Quality. Allows to provide multiple values by comma separated. If the input value (s) matches with the value in the xml file interaction type will be updated with Inbound Email.
Campaign Outbound Email	Used for emails that are sent by the system and were connected to an agent.	<ul style="list-style-type: none"> Provides the value for the Type available in xml file to map for Campaign Outbound Email type for interaction in Aspect Quality. Allows to provide multiple values by comma separated. If the input value (s) matches with the value in the xml file interaction type will be updated with Campaign Outbound Email.
Manual Outbound Email	Used for emails manually sent by the agent.	<ul style="list-style-type: none"> Provides the value for the Type available in xml file to map for Manual Outbound Email type for interaction in Aspect Quality. Allows to provide multiple values by comma separated. If the input value (s) matches with the value in the xml file interaction type will be updated with Manual Outbound Email.

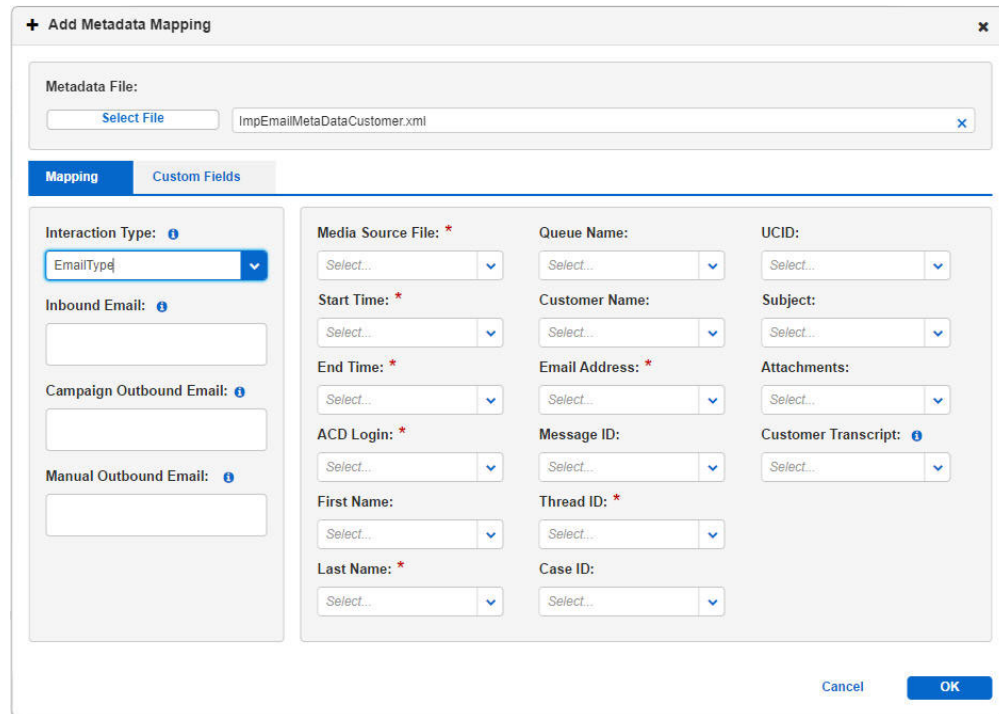
Table 9-5 Email Mapping Definition

Field Name	Aspect Quality Field	Description
Media Source File (Mandatory)	Filename of the media which will be associated to an interaction.	<ul style="list-style-type: none"> Map the xml attribute which contains the media file name. Aspect Quality supports the files with “.json” formats only.
Start Time (Mandatory)	Interaction Start date time.	<ul style="list-style-type: none"> Map the xml attribute which contains the Start Time. Refer to Date Time Format for Import Job section.
End Time (Mandatory)	Interaction End date time.	Map the xml attribute which contains the End Time. Refer to Date Time Format for Import Job section.
ACD Login (Mandatory)	Username or the login id of the agent for the ACD associated who handled the interaction.	Map the xml attribute that contains the ACD Login.
First Name	First Name of the agent, who handled the interaction.	Map the xml attribute that contains the first name.
Last Name (Mandatory)	Last Name of the agent who handled the interaction	Map the xml attribute that contains the last name.
Queue Name	Agent group/Queue associated with the interaction.	Map the xml attribute that contains the agent group name.
Customer Name	Name of the customer.	Map the xml attribute that contains the name of the customer.
Email Address	Email address of the customer.	Map the xml attribute that contains the Email address of the customer.
Message ID	The identification number for the email message. For a reply email, the agent and customer must have the same message ID value.	Map the xml attribute that contains the Message ID.
Thread ID	The identification number for the email thread. For a reply email, the agent and customer must have the same thread ID value.	Map the xml attribute that contains the Thread ID.
Case ID	The Case ID for the interaction.	Map the xml attribute that contains the Case ID.
UCID	Universal Call ID of the interaction.	Map the xml attribute that contains the UCID.
Subject	The subject of the email interaction.	Map the xml attribute that contains the subject of the email.
Attachments	Name of the attachment file in the email.	<ul style="list-style-type: none"> Map the xml attribute that contains the attachments filename of the email. Allows to provide multiple values by comma separated.

Table 9-5 Email Mapping Definition

Field Name	Aspect Quality Field	Description
Customer Transcripts	Indicates whether the imported email record should be displayed individually as an agent transcript or customer transcript. If the email is a customer transcript, it will not be displayed as separate recording, instead it will be associated with the corresponding agent reply.	<ul style="list-style-type: none"> Map the xml attribute that contains the customer transcripts. For example, when the xml is not mapped or when mapping xml has value of Yes, True or greater than 0, then it is considered as an agent record. Any other value will be considered as customer record.

9. Map the metadata for the Email Mapping fields as shown in the below screenshot.



10. Once the mapping is done in the **Mapping** tab for either of the Channel Type; Audio, Chat or Email, next is **Custom Fields** tab.

11. Click on **Custom Fields** tab to map the custom defined fields, as shown in the below screenshot.

Note:

- The user must map data for fields other than those provided in Mapping field, they can define their own Custom Fields and map the data.
- Custom Field Name defines when mapping the metadata or using “Global Custom Field Name Definition” (Refer to [Global Custom Field Definition](#) section) and use them while mapping.

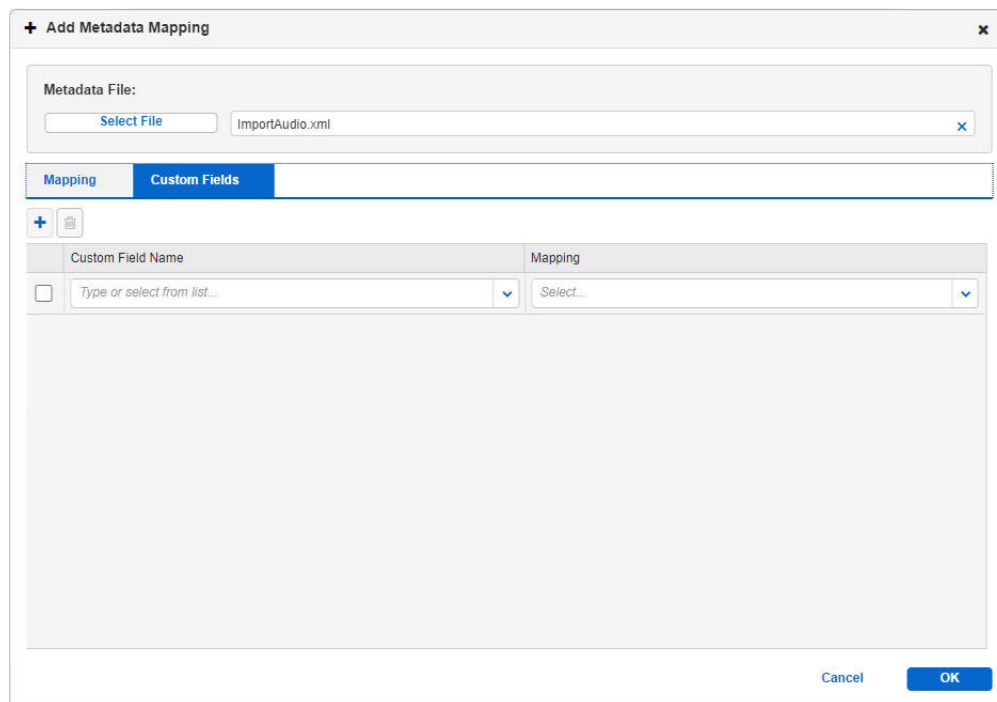


Table 9-6 Custom Fields Definition

Field Name	Description
Add Button	<ul style="list-style-type: none"> Allows user to add the custom filed names. Maximum of 30 custom fields can be added for an import job.
Delete Button	<ul style="list-style-type: none"> Allows to delete the selected custom field row. When one custom field row exists, user will not be allowed to delete.
Custom Fields Name	<ul style="list-style-type: none"> This is a text box as well as a drop-down list. All the custom fields available for Import switch will be displayed in the drop-down list. User also defines a new custom field name for the import job.
Mapping	Allows user to map the xml attributes to the custom field.

12. Click **OK** Button, will close the Add Metadata Mapping and opens the **Add Job** page.

Note: When the metadata is mapped for an import job, the button will be displayed as **Edit Metadata Mapping**. It allows to edit the metadata mapping details and the user can not completely remove the metadata mapping.

13. Click **OK** Button on Add Job dialog page. The import Job is saved and populated on the Import Job Grid, as shown in the below screen.

IMPORT JOBS

Channel To Import	Job Name	Created Date ...	Import Location	Schedule	Storage Group	Active	First Run	Last Run	Status
Audio	Import Job	6/25/2019 2:25:41 PM	\\SG2016SRV01\Import...	Every Sun, Mon, Tue, Wed, Thu... at 03:00 AM	Import Default Storage Group	<input type="checkbox"/>			Pending

14. **First Run** and **Last Run** will be empty when import job is created and the status is in **Pending** status.

9.3.2.2.2 Date Time Format for Import Job

The date-time format is specified in the Importer configuration file. The importer configuration file, Importer.exe.config, is located where the product was installed to. The default location is C:\Program Files (x86)\Aspect Software\AQM\Server\.

The default formats in the configuration file are:

```
<add key="ImportJobDateFormats" value="yyyy-MM-dd HH:mm:ss:fff zzz, yyyy-MM-ddTHH:mm:ss.ffffffzzz" />
```

which would import dates such as:

```
2024-12-13 12:54:51:308 -06:00
2024-12-13T12:54:51.3080842-06:00
2024-12-13T20:03:06.1635209Z
```

The ImportJobDateFormats value is a comma separated list of format strings. Each format string must follow the Microsoft .net date-time format string specification. A search for '.net custom datetime format strings' should locate the Microsoft documentation and many examples. The current Microsoft documentation at the time of writing is available at: <https://learn.microsoft.com/en-us/dotnet/standard/base-types/custom-date-and-time-format-strings>

Letters in the format string represent parts of a date.

Common format specification parts are:

- yyyy four digit year
- MM 01 to 12 month number
- dd 01 to 31 day of month

The Importer process will adjust the times to Universal Coordinated time based on the provided format. If no timezone information is provided, the times are assumed to be in Universal Coordinated Time.

The Importer process must be restarted to apply any changes made to Importer.exe.config file

For example, the start and end times required metadata fields. In the metadata XML files, these times could be represented as:

```
<StartTime>5/30/2019 11:53:07 PM</StartTime>
```

```
<EndTime>5/30/2019 11:53:07 PM</EndTime>
```

which would require an `ImportJobDateFormats` value containing: "M/d/yyyy h:m:ss tt".

Note: This example is not the best way to represent and parse dates because there is no timezone information. The format of the metadata depends on the external system which supplies the metadata XML.

The `ImportJobDateFormats` option allows the Importer process to work with different external systems. The RFC-3339 (ISO-8601) defines a standard for exchanging dates between systems as shown in this example:

```
<callBeginTime>2024-12-13T19:50:25.3701610Z</callBeginTime>
```

```
<callEndTime>2024-12-13T19:55:55.3171714Z</callEndTime>
```

which would require an `ImportJobDateFormats` value containing:yyyy-MM-ddTHH:mm:ss.ffffffK

Note: The XML element names are not part of any standard. You just need to map the names provided by the external system to AQM fields. This is described in the "Add Metadata Mapping" section.

9.3.2.2.3 Parse Single XML field for First Name and Last Name

XML file can have single xml field containing First Name and Last Name with Separator.

Examples:

```
<AgentName>john,doe</AgentName>
<AgentName> ,doe</AgentName>
<AgentName>john,</AgentName>
<AgentName>john.doe,smith</AgentName>
<AgentName>john doe</AgentName>
<Entity AgentName = "john,doe" />
```

Separator:

Below are list samples

- , (comma)
- . (Dot)
- (Blank-space)
- _ (Underscore)

To Parse the XML which has `FirstName` and `LastName` in single xml field, A Default Key "`ImportJobUserNameSeparators`" with value "," will be deployed in the `Importer.exe.config` file. As show in the below.

```
<add key="ImportJobUserNameSeparators" value="," />
```

Multiple separators can also be specified. As show in the below.

```
<add key="ImportJobUserNameSeparators" value=" , . _" />
```

While Parsing xml whichever separator occur first based on that Users FirstName and LastName will be processed.

Note: If any changes are done in the Importer Configuration file, recommend to restart the importer process is required to update the changes.

For example, with comma separator specified, when the same AgentName element is mapped against Aspect Quality Field **First Name & Last Name**, it will be parsed as

XML Field	First Name	Last Name
<AgentName>john,doe</AgentName>	john	doe
<AgentName>,doe</AgentName>		doe
<AgentName>john,</AgentName>***	john	john
<AgentName>john,doe,smith</AgentName>	john	doe, smith

Note: *** - When the **Last Name** is blank in the XML field, then the **First Name** is mentioned as the **Last Name** by default.

If the key "ImportJobUserNameSeparators" is not specified, then whatever value is present in the mapping field will be used directly.

9.4 Import Job Grid

Import Job grid displays all the import jobs available in the system. Users grid contains information as mentioned in the below table.

Table 9-7 Import Job Grid Attribute Details

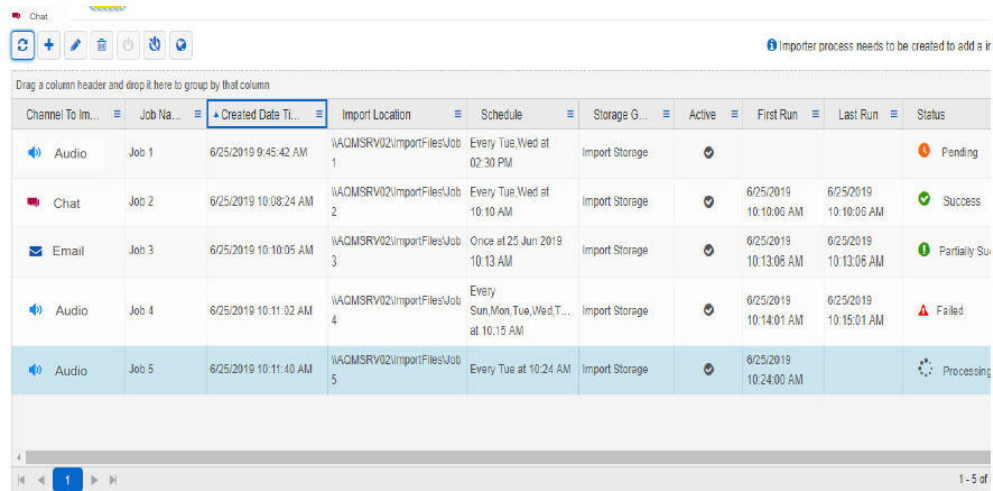
Column Name	Description	Default Column	Optional Column
Channel to Import	<ul style="list-style-type: none"> Channel type selected for the import job. We are supporting interactions with "Audio", "Chat" and "Email" channels. 	✓	
Job Name	Displays name of the import job	✓	
Description	Displays description of the import job		✓
Created Date Time	Displays date time when the import job is created. Note: Date time will be displayed based the locale and client machine time zone.	✓	
Last Modified Date Time	Displays date time when the import job recently updated. Note: Date time will be displayed based the locale and client machine time zone.		✓
Import Location	Displays the location from where the metadata and media files to import can be picked.	✓	

Table 9-7 Import Job Grid Attribute Details

Column Name	Description	Default Column	Optional Column
Schedule	Displays when the import job will run. <ul style="list-style-type: none"> For e.g. If an import job is scheduled to run on every Monday and Tuesday at 12:00 PM then the schedule will display as below. Every Mon, Tue at 12:00 PM If the import job is scheduled to run only one day at 2:30 PM then the schedule will be display as below. Once at 24 July 2019 02:30 PM 	✓	
Storage Group	Displays the storage group assigned for import job where the media files will be moved after the interactions are imported.	✓	
Active	Indicates the import job is active or inactive <ul style="list-style-type: none"> Checked (✓) – import job is active Unchecked () – import job is inactive 	✓	
Start Date	Displays the start date of the import job. i.e. when the job should start to run / have ran.		✓
End Date	Displays the end date of the import job. If No End date is specified, then this column will have a blank value. i.e. until when the job should run.		✓
First Run	Date Time when the import job ran for the first time. Note: Date time will be displayed based the locale and client machine time zone.	✓	
Last Run	The recent date time when the import job ran. Date time gets changed every time when the import job is run. Note: Date time will be displayed based the locale and client machine time zone.	✓	

Table 9-7 Import Job Grid Attribute Details

Column Name	Description	Default Column	Optional Column
Status	<p>Displays the recent run status of the import job.</p> <p>Status can be any one from the below mentioned list.</p> <ul style="list-style-type: none"> • PENDING – displays when the import job is created and not run at least once. • SUCCESS – displays when all the metadata and media files available in the import location is imported to Aspect Quality successfully. • PARTIAL SUCCESS – displays when some of the metadata and media files available in the import location is imported to Aspect Quality and some of the metadata and media files failed to import to Aspect Quality. • FAILED – displays when no metadata and media files from the import location is imported to Aspect Quality. • PROCESSING – displays when the import job is running and processing the metadata and media files from import location to Aspect Quality. 	✓	



Note:

- Grid will be sorted on **Created Date Time** by default.
- User is able to sort on column in the grid and the customizations will be persisted till the user signs out from the WEM or Resets the grid layout.
- Per page 100 import jobs will be displayed.
- Use the Filter option available in the menu to filter any column based on the requirement.

9.5 Importer Process

After the import job is created and When the schedule reaches for the job the import job will run.

Note: Import job will not run if any one of the below statements is true.

- Importer Process is not started.
- Import Job is in inactive state.
- Import Location in the import job mentioned is not accessible.
- Storage Group assigned to an import job is inactive.

9.5.1 What does the importer process do?

1. Check for the schedule of the job and once the schedule is reached, starts to process the job.
2. Gets the metadata file (xml) and media file from the importer location.
 - For each xml file there should be a media file available. (one to one mapping)
Example: Ideally If 10 xml files is available then 10 media files should be available.
3. Each XML file in the Import location will be processed.
 - 1 interaction will be created for every successfully parsed XML file.
 - Based on the Metadata mapping (Refer to [Add Metadata Mapping](#) section) system will parse the XML file and find the XML Attribute/element which is mapped to a Aspect Quality field and update the Aspect Quality field with the corresponding value of the XML element or attribute mapped.
4. Creates an interaction in Aspect Quality by associating the values parsed from xml for the fields mapped.

Example: If xml contains attribute as below

```
<ACD Login> Agent1 </ACD Login>
```

If ACD Login attribute is mapped to “ACD Login” field in Aspect Quality, then value for agent in the interaction will be assigned a value as “Agent1”.

5. Once interactions are imported to Aspect Quality, metadata file will be deleted from the import location and media file will be moved to the storage group specified in the import job.
6. Creates the Result file for job for each schedule. Import Job run details can be viewed. (Refer to [Import Job Results File](#) section)

Note:

- ACD Login and Last name is mandatory fields in Aspect Quality, if the user specified in the xml file is not available in Aspect Quality for import then Importer process will create a new user with ACD Login and Last name provided and associate the user to the interaction.
- If Agent Group is mapped and if the agent group specified in xml does not exists for the import, then the importer process will create the agent group and associate to the interaction.

7. Once import Job ran then it will fall into one of the below status.

- Processing
- Success
- Partial Success
- Failed

Note: Import Job will be in **Pending** status when the job is created and not run at least once.

9.5.2 Import Job Success

1. Import location should be accessible.
2. Import job should be in active state.
3. Storage Group selected in Import Job should be active.
4. Once the schedule is reached, importer process will run the import Job.
5. All the metadata and media files exist in the import location processed without any failures then the job will succeed. Run status will get updated in Import Job grid.
 - Status will update to Success.
 - If Job runs for the first time, then First Run and Last Run will be the same date time when the job is run. Next time when the job will run only Last Run gets updated and the First run remains same.

Example: Out of 100 metadata and media files, all 100 metadata and media file processed success –Success
6. Metadata file will be deleted from the import location and Media files will be moved to the storage group
7. For each xml file and corresponding media file one interaction will be created in Aspect Quality. (Refer to [Imported Interactions](#) section)
8. Results File will be generated which will contain the details of the job run. (Refer to [Import Job Results File](#) section)

9.5.2.1 Nothing to Import

If metadata and media files does not exist in Import Location and if the schedule is reached, the job will not process anything, and the job status will be Success.

- No interactions will get imported to Aspect Quality.
- Status of the job will be displayed as Nothing to Import in Results file.
- Last Run Status in UI will be displayed as Success

9.5.3 Import Job Partial Success

1. Import location should be accessible.
2. Import job should be in active state.
3. Storage Group selected in Import Job should be active.
4. Once the schedule is reached, importer process will run the import Job.
5. All the metadata and media files exist in the import location processed with few failures then the job will succeed partially. Run status will get updated in Import Job grid.
 - Status will update to Partial Success.
 - If Job runs for the first time, then First Run and Last Run will be the same date time when the job is run. Next time when the job will run only Last Run gets updated and the First run remains same.

Example:

 - Out of 100 metadata and media files, only 1 metadata and media file processed success – partial Success.
 - Out of 100, only 99 process success -Partial Success.
6. Successfully processed Metadata file will be deleted from the import location and Media files will be moved to the storage group.
7. Media and metadata files failed to parse will be moved to the Failed folder (Refer to [Import Job Failed](#) section)
8. For each xml file and corresponding media file processed successfully, one interaction will be created in Aspect Quality.
9. Results File will get generated which will contain the details of the job run. (Refer to [Import Job Results File](#) section)

9.5.4 Import Job Failed

1. Import location should be accessible.
2. Import job should be in active state.
3. Storage Group selected in Import Job should be active.
4. Once the schedule is reached, importer process will run the import Job.
5. All the metadata and media files exist in the import location processed with failures (Refer to [Possible reasons for the Import Job Failure](#) section) then the job will fail. Run status will get updated in Import Job grid.
 - Status will be updated as Failed.
 - If Job runs for the first time, then First Run and Last Run will be the same date time when the job is run. Next time when the job will run only Last Run gets updated and the First run remains same.

Example: Out of 100 metadata and media files, all 100 metadata and media file processed with failures – Failed
6. Metadata and Media files will be moved to the Failed folder inside the import location.

7. No interactions will get imported to Aspect Quality.
8. Results File will get generated which will contain the details of the job run. (Refer to [Import Job Results File](#) section)

9.5.4.1 Possible reasons for the Import Job Failure

1. Media file does not exist for a metadata file in the Import Location.
2. Media Files with invalid file types.

Note: Files supported formats in Aspect Quality - .WAV, .WMA, .MP3 .MP4, and .JSON
3. Data for the Aspect Quality mandatory fields mapped is missing/Blank.

Example: ACD Login is a mandatory field in Aspect Quality and if xml file contains no value for the attribute/element mapped for ACD Login, then the job will fail.
4. Date Time format is incorrect (format which does not supported by Aspect Quality. Refer to [Date Time Format for Import Job](#))

9.5.5 Imported Interactions

Users can search, playback and evaluate the imported interactions in Aspect Quality.

9.5.5.1 Search Imported Interactions

User can add an Imported search criterion as shown in below screenshot and search for the Imported Interactions.

The screenshot displays a search window titled "Search" with a close button (X). Below the title bar, there are tabs for "Search" and "Saved Searches" (with a count of 13). The main area is divided into several sections:

- Search Type:** A dropdown menu set to "New Search". Below it, there are options for "My Searches" and "-- Nothing Selected --".
- Date Options:** A dropdown menu set to "30 Days To Date".
- Channel:** A dropdown menu with a red asterisk, set to "Voice Only, Screen Only, Voice a...".
- From:** A date and time selector set to "5/27/2019 12:00 AM".
- Status:** A dropdown menu with a red asterisk, set to "Current, Historical, Pending Disp...".
- To:** A date and time selector set to "6/25/2019 11:59 PM".
- Retrieve By:** A dropdown menu set to "Date Time - Descending".
- Criteria Summary:** A section with a "+" icon and a list of criteria: "Search Type: Recording Information" and "Imported Equals Yes".

At the bottom right, there are "Cancel" and "Search" buttons.

All the imported interactions will be displayed in the search results grid. **Imported** column is added in the search results grid (hidden column) which will indicate interactions imported to Aspect Quality.

Imported column displays “Yes” for the imported interactions as shown in the below screenshot.

SEARCH RESULTS

Q [] [] []

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

<input type="checkbox"/>	Channel	Direction	Date Time	Duration	Agent	Extension	Analytics	ANI	DNIS	Status	Imported
<input type="checkbox"/>		Inbound	5/31/2019 3:52:38 PM	0:04:00	Puttappa						<input checked="" type="checkbox"/>
<input type="checkbox"/>		Inbound	5/31/2019 3:52:38 PM	0:04:00	Puttappa						<input checked="" type="checkbox"/>
<input type="checkbox"/>		Inbound	5/31/2019 3:52:38 PM	0:04:00	Puttappa						<input checked="" type="checkbox"/>
<input type="checkbox"/>		Inbound	5/31/2019 3:52:38 PM	0:04:00	Puttappa						<input checked="" type="checkbox"/>
<input type="checkbox"/>		Inbound	5/31/2019 3:52:38 PM	0:04:00	Puttappa						<input checked="" type="checkbox"/>

9.5.5.2 Playback imported interactions

User can “Create Playlist” to playback the interactions. (Refer to [Create a Playlist on page 4-163](#) section).

9.5.6 Import Job Results File

1. Import Job result file contains the details about each iteration of a schedule of the import job. User can view the complete details of each schedule of an import job in the results file.
2. Result file will be created by the importer process for each schedule of an import job within a storage group specified for the import job. Result file will be in “.txt” format.
3. Structure of the Result file is as mentioned below

```
“\\<StorageGroup>\Import Results\ImportJobName-JobID\Result-YYYYMMDD-HHMM.txt”
```

Note:

- Job Name will be displayed with first 10 characters specified in the import job.
 - Date time will be the start date time of the import job.
4. Result file contains the information mentioned below.
 - Import Job Name
 - Import Job Id
 - Import Job Results

- Execution Start Time - Date time when the schedule of the import job started. Date time will be displayed in both local and UTC time zone.
- Execution End Time - Date time when the schedule of the import job ended. Date time will be displayed in both local and UTC time zone.
- Next Execution Time - Date time when the next schedule for the import job. Date time will be displayed in both local and UTC time zone.
If the import job end date is reached and no schedules are available, then N/A will be displayed which indicates there is no further schedules.
- Parsed Interactions - Total number of interactions parsed. This includes xml and media file as one interaction which includes passed and failed interactions.
- Imported Interactions - Total Number of interactions imported successfully. This includes xml and media file as one interaction.
- Failed Interactions - Total Number of interactions failed to import. This includes xml and media file as one interaction.
- Status - Status of the job. (Success, Partial Success, Failed and Nothing to import)
If the status is Failed or Partially success, failure reasons will be displayed.

9.5.7 Import Job Failed Folder

1. When an import job failed to parse the media and metadata files, then all the media and metadata files will be moved to Failed folder.
2. Failed folder will be created by the importer process if the parsing of the files is failed.
3. Failed folder gets created within the import location specified for an import job.
4. Failed folder structure will be as mentioned below.

```
"\\<ImportLocation>\Failed\Jobname-  
JobID\YYYYMMDD\<media_metadata_files>"
```

Note:

- Job Name will be displayed with first 10 characters specified in the import job.
 - Date will be the interaction date (start date) specified in the xml file
5. When the import job is failed for the reasons mentioned in section, Possible reasons for the Import Job Failure user can get the files failed to parse from the Failed folder and correct the errors and add those media and metadata files to the import location so that the job will parse those files for the next schedule.


9.5.8 Importer Process and Import Job Log File

1. Log file can be used to know what went wrong in the importer process and the details of the import job.
2. Aspect Quality will provide 2 log files for Import.
 - Importer Process Log file
 - Log file for Importer process will get created when the importer process is started.
 - Details of the importer process and Import Job will be logged. Actions performed on each import job like Create/Edit/Delete/Activate/Deactivate will be logged in importer log file.

- If the import job not ran after the schedule is reached (Example: Reason like Import Job is inactive) the reason will be logged.
- Importer Process log file will be generated in below mentioned location.
`"C:\ProgramData\Aspect Software\Quality Management\Log\Importer"`.
- Import Job Log file
 - Log file for each import job gets created by the importer process when the import job run.
 - Details of the import job schedule and job results will be logged.
 - Importer Process log file will be generated in below mentioned location.
`"C:\ProgramData\Aspect Software\Quality Management\Log\Importer\Import-JobName-JobID\Import-JobName-JobID_HHMMSSmmm"`.

9.5.9 Edit Import Job

Edit button will be enabled when one import job is selected in the import jobs grid.

1. Click on Edit button  to update the import job detail.

9.5.9.1 Edit basic details

1. Select an import job from the import jobs grid and Click on Edit button.

2. Edit Job dialog displays as shown in the below **Edit Job** screen.

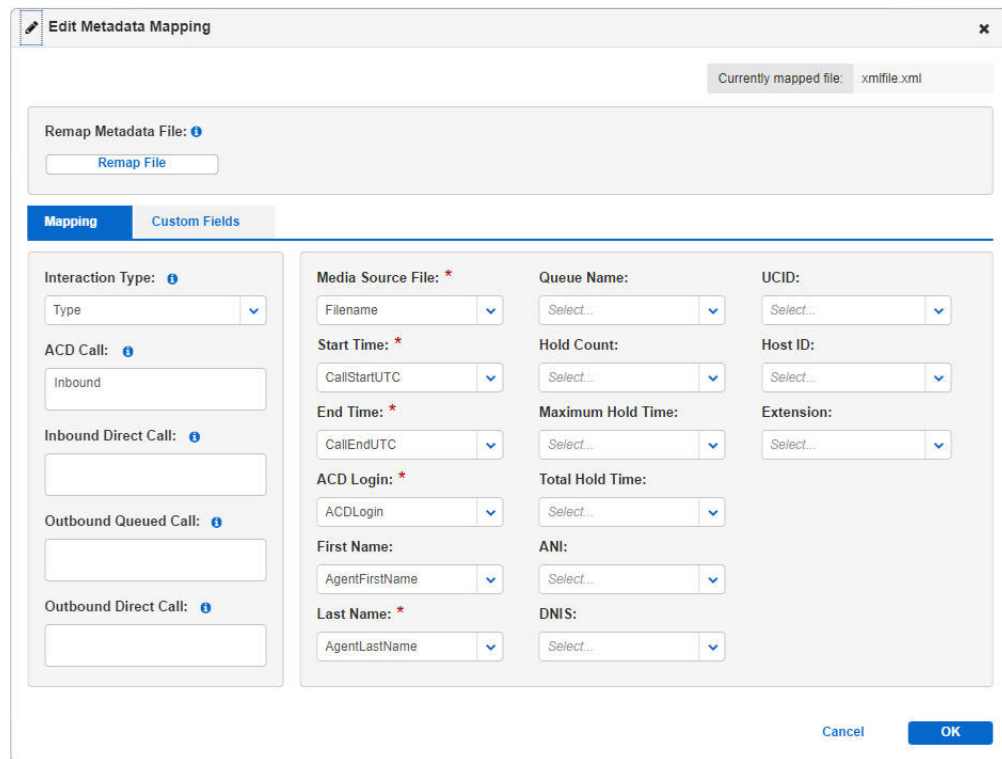
3. All the fields will be enabled, and the user is able to update data for any field and save the import job.

Note: For more information, refer to [Table 9-2](#). When editing the data for each field all the information mentioned in the table will be applicable.

9.5.9.2 Edit Metadata Mapping

Follow the steps below to edit a metadata mapping.

1. Click on **Edit Metadata Mapping** button to edit the metadata mapped for the import job. The **Edit Metadata Mapping** dialog appears as shown below. The **Mapping** tab is selected by default.



2. The mapped metadata filename will be displayed at the top right corner of the dialog.
3. Click on the drop-down list to update the mapped data based on the requirements.

Note:

- Mandatory **Mapping** fields are marked with asterisk (*).
- Non-mandatory **Mapping** fields are editable based on the requirements.

4. Go to **Custom Fields** tab to add/update/remove for the Import Job.

Note: Functionality of all the fields will remain same as in **Add Metadata Mapping** dialog. (Refer [Add Metadata Mapping](#) section)

5. Click on **Remap File** button to remap different metadata.
6. Click on **Remap File** button and select a different metadata file. It remaps the metadata fields from the latest metadata file selected.

Note: When mapped values do not exist in the new metadata file, then those will get obsolete and will display with a red triangle as shown on the below screenshot.

Note: All the metadata fields which are showing in Red does not exist in the latest metadata file selected. User must select the correct mapping value and save the metadata for the import job.

- Click on **Import Location** field and edit the import job details as shown below.

8. Click on **OK** button to save with the updated details and displays in the import jobs grid as shown below.

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


Channel...	Job Na...	Created Date ...	Import Location	Schedule	Storage Group	Active	First Run	Last Run	Status
Audio	Job 1	6/25/2019 9:45:42 AM	\\AQMSRV02\ImportFiles\Job 1_Edited	Every Tue,Wed at 02:30 PM	Import Storage	<input checked="" type="checkbox"/>			● Pending

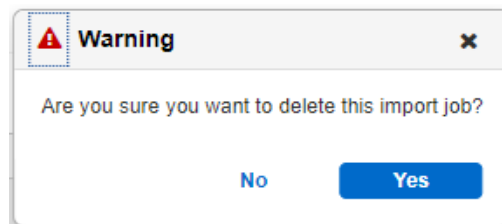
Note:

- After updating the import job basic data and metadata mapping fields, the changes will be applicable for the next available run of the import job.
- Import Jobs can be updated regardless of the status of the import job. Even when the import job is in Processing state the details can be updated. The updated details will get considered for the next run of the import job. The Updates will not be considered for the current run.

9.5.10 Delete Import Job

Follow the steps below to delete an Import Job.

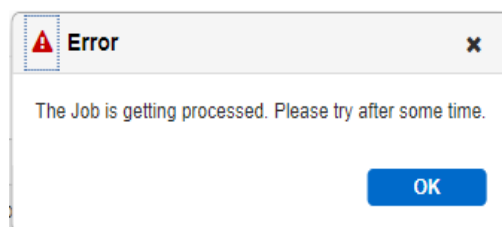
1. Select the import job which needs to be deleted and click on **Delete**  button.
2. Selecting an import job which is in other than Processing state and clicking on the Delete button will display a confirmation message as shown in the below screenshot.



3. Clicking on **No** button will cancel the delete action and will not delete the import job.
4. Clicking on **Yes** button will delete the import job successfully.

Note: Deleting the import job will not remove the interactions imported as part of the deleted import job.



5. Selecting an import job with **Processing** status will display an alter message as shown in the below screenshot.




6. Clicking on **OK** button will not delete the import job. Once the job is completed then user can delete the job.



Note: Import Jobs Created, Updated, and Deleted will be audited in Audit Activity Detail Report.


9.5.11 Activate and Deactivate Import Jobs

Activate  and Deactivate  buttons allow to activate and deactivate one import job from the import jobs list page.


1. Activate button will be enabled when one deactivated import job is selected in the Import Jobs grid
 - Clicking on Activate button will update the selected import job status to active.
 - Check mark  will be displayed under Active column for the corresponding import job as shown in the below screen.

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

Channel...	Job Na...	Created Date ...	Import Location	Schedule	Storage Group	Active	First Run	Last Run	Status
Audio	Job 1	6/25/2019 9:45:42 AM	\\AQMSRV02\ImportFiles\Job 1	Every Tue,Wed at 02:30 PM	Import Storage				 Pending

2. Deactivate button will be enabled when one active import job is selected in the Import Jobs grid.
 - Clicking on Deactivate button will update the selected import job status to inactive.
 - Check mark  will not be displayed and the column will appear blank under Active column for corresponding import job as shown in below screen.

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

Channel...	Job Na...	Created Date ...	Import Location	Schedule	Storage Group	Active	First Run	Last Run	Status
Audio	Job 1	6/25/2019 9:45:42 AM	\\AQMSRV02\ImportFiles\Job 1	Every Tue,Wed at 02:30 PM	Import Storage				 Pending

Note:

- When an import job is running and if it is in Processing state, deactivating the job will not stop the job processing. The process will complete the run for the job.
- Only one import job can be activated/deactivated/deleted at a time.

9.5.12 Global Custom Field Definition

User is able to add/edit/delete the **Global Custom Metadata Mapping** fields for Importer.

9.5.12.1 Add Custom Field Name

1. Click on **Global Custom Field Definition**  button will open dialogue as shown below.

Note: When custom fields are not defined for an import job then all 30 custom filed names will be displayed as blank.

2. Maximum of 30 custom fields will be defined for Importer.
3. Enter the custom field name in one or more text box and click the **OK** button.

4. Entered custom fields will get saved for the Import switch. The defined custom fields are used to map the data when creating/editing import job.

Note:

- Custom File Name must be unique.
- Maximum 50 characters are allowed for Custom field name.

9.5.12.2 Edit Custom Field Name

1. After saving the custom fields, click on **Global Custom Metadata Mapping** button will display all the saved custom field names.

2. Custom Field with asterisk indicates that the field is mapped for one or more imported interactions.
3. Defined custom fields are displayed in alphabetical order on the Global Custom Metadata Mapping dialog.
4. Update the existing custom field name and click on OK button will save the custom field name.
5. Also user is able to define new custom field names. (Refer to [Add Custom Field Name](#) section)

Note: When a custom field is defined from Add/Edit Metadata Mapping when creating/ editing an import job those custom field names will also be displayed.

9.5.12.3 Delete Custom Field Name

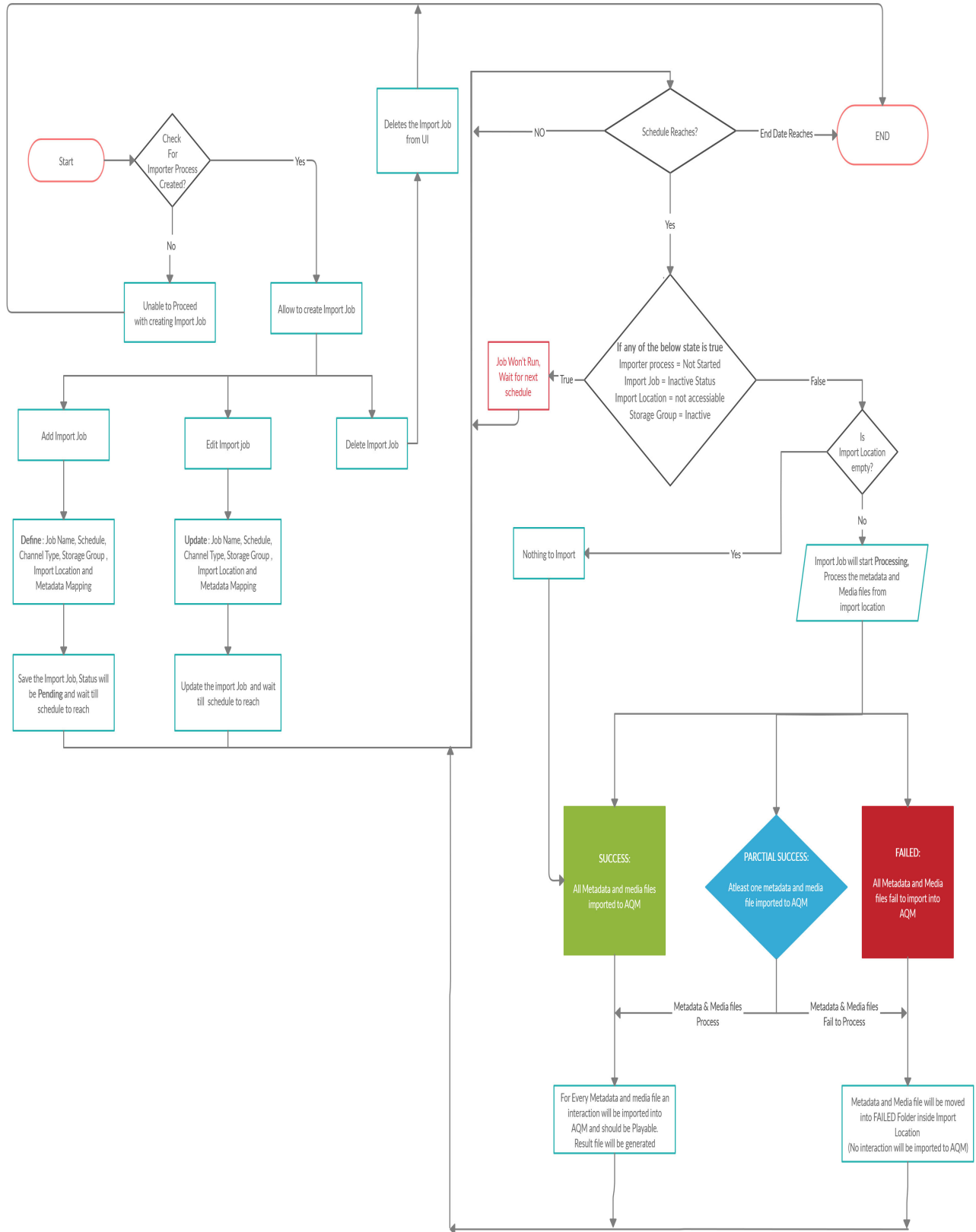
1. Custom Field which is not mapped for any import job or not associated with any imported interaction can be deleted/removed.
2. Custom Field which is mapped to minimum one import job displays with asterisk indicating that the custom field name cannot be deleted. It can be only updated.

- To delete the custom field, clear the data in the corresponding custom field text box and click on **OK** button as shown below.

The screenshot shows a dialog box titled "Global Custom Field Definition". At the top, there is an information icon and the text "Custom information field names can be edited below." Below this is a grid of 30 text input fields, labeled "Custom Field 1:" through "Custom Field 30:". Custom Field 1 contains the text "Disposition". Custom Field 2 is highlighted with a blue border and is currently empty. All other fields are also empty. At the bottom right of the dialog, there are two buttons: "Cancel" and "OK".

The **Custom Field 2** (Local IP Host) is removed from the import switch.

9.5.12.3.1 *Import Job Flow Diagram*



10. Aspect Quality Evaluation

This chapter describes about how Aspect Quality uses Evaluation Templates to evaluate the scores and Workforce Configuration to upload the scores.

The features of Quality Evaluation are listed below:

- [Evaluation Templates](#)
- [Workforce Configuration](#)

10.1 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.

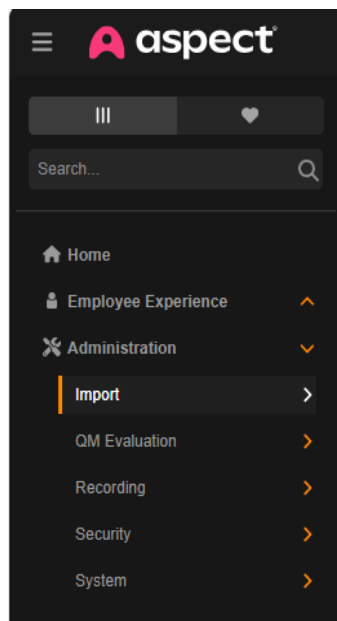
You can use Workforce Engagement Management to create, edit, and duplicate templates. Then, you can save the template as Draft or as Final. Once you have saved a template as Final, you can use the template to evaluate a call.

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

10.1.1 Navigating the Evaluation Template Window

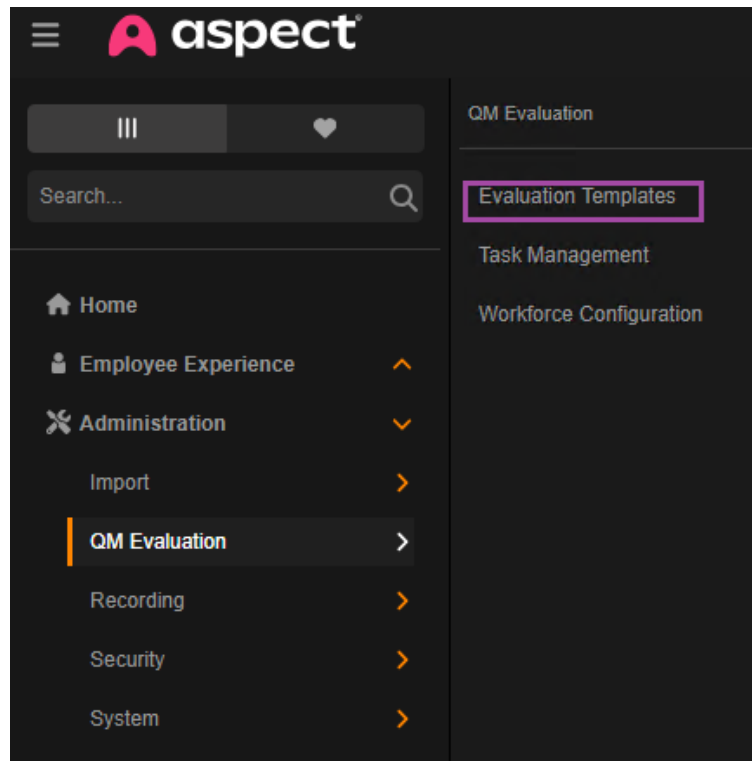
This section describes the Evaluation Templates list window, where templates that you save as Draft and Complete are displayed. On the Evaluation Templates window, you can create a new template; duplicate, edit, or delete a template; or make a template active or inactive.

1. Launch Workforce Engagement Management.
2. Log in as an Administrator.
3. From the menu, select **Administration**.



The Administration dashboard opens.

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 table.

EVALUATION TEMPLATES

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

Name	Description	Created By	Created Date	Status	Active	Is Used
6 failure condition in classic		Administrator, AQM	6/24/2021 7:18:06 PM	Complete	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
6 failure condition-clone		Administrator, AQM	6/24/2021 7:19:52 PM	Draft	<input checked="" type="checkbox"/>	
ALL in One template		Administrator, AQM	10/21/2021 2:24:58 PM	Complete	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
award point for yes or no question		Administrator, AQM	4/27/2021 7:26:35 PM	Complete	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
bad request		Administrator, AQM	5/7/2021 10:44:27 AM	Draft	<input checked="" type="checkbox"/>	
Classic with Questin Failure Condition		Administrator, AQM	6/24/2021 5:39:20 AM	Complete	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
clone		Administrator, AQM	2/25/2021 1:57:30 PM	Complete	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
clone of yes or no wiht award point 2		Administrator, AQM	4/28/2021 1:30:13 PM	Complete	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
clone-2		Administrator, AQM	3/28/2021 4:45:58 PM	Complete	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
clone-score adjustment		Administrator, AQM	4/28/2021 12:59:54 PM	Complete	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
clone-yes or No to validate warning message		Administrator, AQM	4/28/2021 6:06:05 PM	Complete	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
cloning Classic Ui question failure		Administrator, AQM	6/24/2021 7:14:57 PM	Draft	<input checked="" type="checkbox"/>	
Competency and						

1 - 56 of 56 items

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

Column Name	Description
Name	The name of the template. Note: By default, the list of templates are sorted based on the Names in the ascending order.
Description	The description of the template.
Created By	The name of the user who created the evaluation template. Note: <ul style="list-style-type: none"> 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: <ul style="list-style-type: none"> Evaluation Templates that you did not create in Workforce Engagement Management do not display any value in the Created Date column. To get the recently saved evaluation template at the top of the list, user can sort the grid based on the Created Date in the descending order.
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/Inactive	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.

The following table describes the menu options.

Menu Option	Description
Refresh	Refreshes the Evaluation Template grid with latest evaluation template changes. Instead of the browser refresh button user can click on this menu button which will refresh only the grid data and not the page.
Add	Creates the new Evaluation Template and lists to the grid.
Edit	Opens the Draft template for you to edit. Once a template is Complete, this option no longer displays in the cog wheel menu.
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.

Menu Option	Description
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.

10.1.1.1 Definition and Administration

A Team Lead 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	<p>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:</p> <ul style="list-style-type: none"> • Section 1: Greeting behavior • Section 2: Hold time
Section Weight	<p>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 weights 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.</p> <p>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.</p> <p>Note: The numbers for Section weight are non-negative integers.</p>

Template Section	Description
Question Type	<p>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.</p> <p>Following are the question types that can have a question weight:</p> <ul style="list-style-type: none"> • 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) <p>Following are the question types that cannot have question weight:</p> <ul style="list-style-type: none"> • Free Form Text • List (if the Enable Weights check box is deselected)
Question Weight	<p>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.</p> <p>Note: The numbers for Question weight are non-negative integers.</p>
Question Description	<p>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.</p> <div data-bbox="841 1203 1200 1413" style="border: 1px solid #ccc; padding: 5px; margin: 10px auto; width: fit-content;"> <p>1. Q1 i</p> <hr/> <p>i Info x</p> <p>List question type</p> </div>

10.1.2 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 new evaluation template**.



The Create Evaluation Template window opens.

- 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.
- (Optional) In the **Description** text box, type description for the evaluation template. The maximum number of characters allowed is 1024.
- 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.

- 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 below
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	<ul style="list-style-type: none"> 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. <p>Note: By default, the option for Weight for N/A Answer Choice is Not included in the score.</p>
Highest weight of the question	<ul style="list-style-type: none"> When the user selects N/A in the interaction, the system permits the highest weight of the question. For example, if <ol style="list-style-type: none"> The Question Type is Yes/No The Yes option has a weight of 10 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	<ul style="list-style-type: none"> When the user selects N/A in the interaction, the system permits the lowest weight of the question. For example, if <ol style="list-style-type: none"> The Question Type is Yes/No The Yes option has a weight of 10 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)

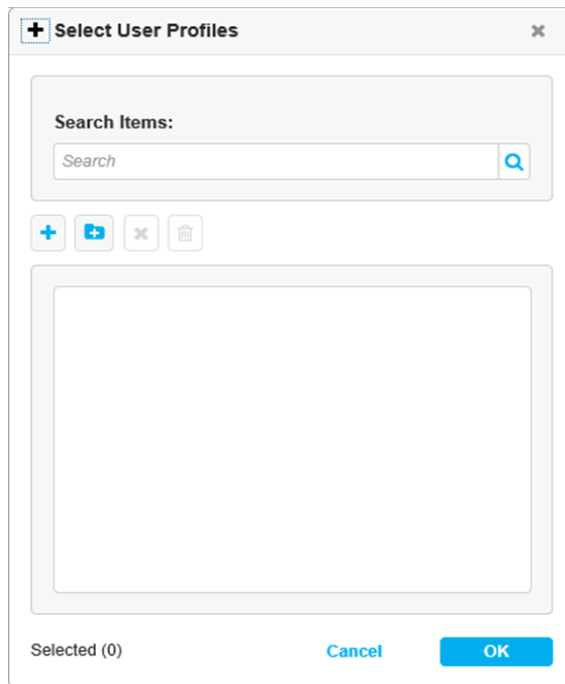
10. When the Team Lead uses a template to evaluate a call, and if the evaluation has a maximum score, then the configured value overrides the overall score.

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)

- 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.

- 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 Via, every user has their user profile, and the user must be select the corresponding user profile.

- Click **OK**. The Create Evaluation Templates window is active.

14. To save the basic template details, click **OK**. The Create Evaluation Template window opens.

The screenshot shows the 'CREATE EVALUATION TEMPLATE' window. At the top, there are fields for 'Name: Demo_2' and 'Description: N/A'. Below this is a section titled 'Section 1 - 1 Questions - Weight N/A - Comments: Disabled'. Inside this section, there is a form for 'Question 1 - Weight N/A - Comments: Disabled'. The form includes fields for 'Name: *', 'Description:', 'Weight: N/A', 'Options: N/A', 'Text: *', 'Type: *', 'Display Mode: Dropdown', 'Auto Fail: Interaction', and 'Response Required'. There are also checkboxes for 'Enable Comments', 'Enable Question Comment', 'Add to Library', and 'Dependent Questions'. At the bottom of the section, there are buttons for '+ Add Question' and '+ Add Section'.

OR

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

15. In the next procedure, you can [Add a New Section](#).

10.1.2.1 Add a New Section

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

This screenshot is identical to the one above, showing the 'CREATE EVALUATION TEMPLATE' window with the same form fields and layout.

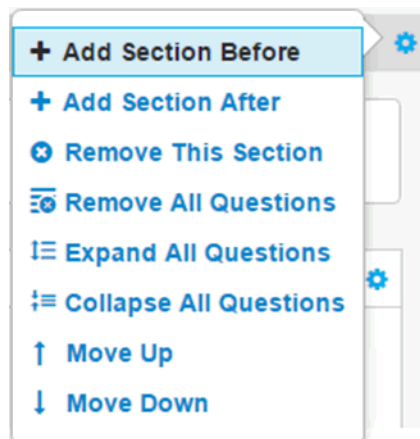
To complete the Section, perform the following steps.

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

Note: The fields marked (*) are mandatory 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	<p>Displays the sum of question weights, or displays N/A when there are no possible question weights. The System calculates the section weight by the sum of all the (Scorable) question weight within the section or user can override the sum of question weight by entering the section weight manually.</p> <p>Note:</p> <ul style="list-style-type: none"> • Dependent questions and Bonus questions are not included in the Section weight. • If user updates the existing question weight or adds a new question (which is scorable) will override the section weight entered with the sum of the question weights. • After adding questions and adjusting the question weights, change the section weight if you want to. • When Section Weight is blank and if user saves the template as Draft/ Final, a validation message as "Please supply section weight" will be displayed.
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.
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.

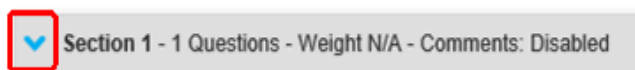
Note: You can also add a Section at the bottom of the Create Evaluation Template by clicking **Add Section**.



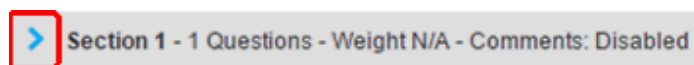
3. See [Add a New Question](#).

10.1.2.1.1 *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.

10.1.2.2 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: The fields marked (*) are mandatory 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	<p>If the reviewer selects Yes, then the question gets the highest score (the weight is defined in the question).</p> <p>If the reviewer selects No, then the question gets the score 0.</p> <p>You cannot assign custom weights for options, because the weight of the question is assigned to Yes, and 0 is assigned to No.</p> <p>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.</p>
True/False Bonus: True/False	<p>If the reviewer selects True, then the question gets the highest score (the weight is defined in the question).</p> <p>If the reviewer selects False, then the question gets the score 0.</p> <p>You cannot assign weights for options, because the weight of the question is assigned to True, and 0 is assigned to False.</p> <p>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.</p>
Pass/Fail Bonus: Pass/Fail	<p>If the reviewer selects Pass while evaluating, then the question gets the highest score (the weight is defined in the question).</p> <p>If the reviewer selects Fail while evaluating, then the question gets the score 0.</p> <p>You cannot assign custom weights for options, because the weight of the question is assigned for Pass, and 0 is assigned for Fail.</p> <p>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.</p>
Scored Scale Bonus: Scored Scale	<p>This question Type can have multiple options. For specific directions, see Scored Scale and Bonus: Scored Scale.</p>
List	<p>This question Type can have multiple options. For specific directions, see List.</p>
Free Form Text	<p>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.</p>

Note: Once you have completed the fields described in the preceding table, continue to [step 2](#).

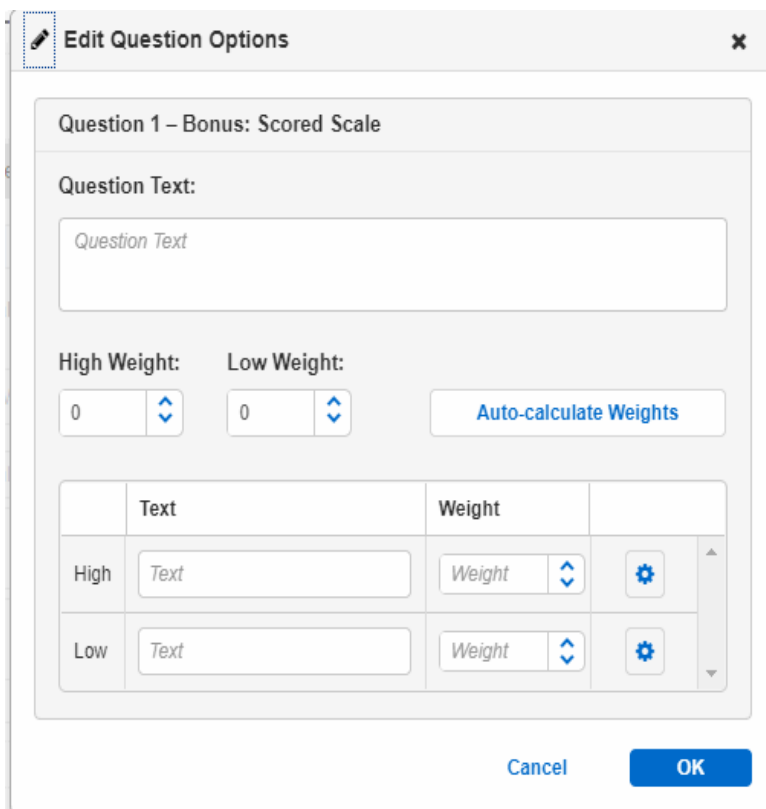
10.1.2.2.1 *Scored Scale and Bonus: Scored Scale*

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:

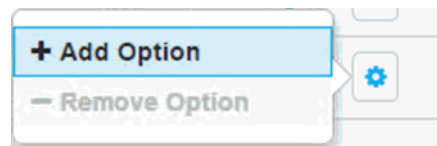
$$\text{High} - (((\text{High} - \text{Low}) / (\text{Total Options} - 1)) * (\text{Option number} - 1))$$

- e. By default, two (2) 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.

10.1.2.2.2 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.

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

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

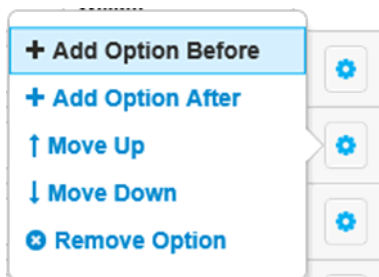
- c. In the Question Text text box, you can add or modify the question text.
- d. If you want this question to have weight so that during evaluation, this question’s score gets contributed to the evaluations score, enable the **Enable Weights** button.
Note: The Enable Weights button will be **disabled** if the Choose One button is **selected**.
- e. By default, five 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: <ul style="list-style-type: none"> • 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.

Menu	Description
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.

- 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.

- 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.

- 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.

- From the Auto Fail Interaction drop-down list box, select the entity that you want to fail: either **Interaction** (Evaluation), **Section**, or **Question**.
- 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 10-496](#).

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 10-509](#). 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.

The screenshot displays a configuration interface for a question. At the top, a title bar reads "Question 1: 'Sample question 1' - Yes/No - Weight N/A - Comments: Disabled" with a cog wheel icon on the right. Below this, the main question configuration includes:

- Type:** A dropdown menu set to "Yes/No".
- Text:** A text input field containing "Sample question 1".
- Description:** A text input field containing "Description of sample question 1".
- Options:** A text input field containing "N/A" with an edit icon.
- Weight:** A numeric input field with up/down arrows, containing "Weight".
- Display Mode:** A dropdown menu set to "Dropdown".
- Auto Fail:** A dropdown menu set to "Interaction" followed by an "If" dropdown set to an empty field.
- Response Required:** An unchecked checkbox.
- Enable Question Comments:** An unchecked checkbox.
- Add to Library:** An unchecked checkbox.
- Dependent Questions:** A checked checkbox, followed by a dropdown menu set to "Yes".

 Below the main question, a section titled "If 'Yes'" contains a dependent question configuration:

- Title:** "Question 1 (Yes)" with a cog wheel icon.
- Type:** A dropdown menu set to "Select a type".
- Text:** A text input field containing "Text".
- Description:** A text input field containing "Description".
- Options:** A text input field containing "N/A" with an edit icon.
- Weight:** A numeric input field with up/down arrows, containing "Weight".
- Display Mode:** A dropdown menu set to "Dropdown".
- Auto Fail:** A dropdown menu set to "Interac..." followed by an "If" dropdown set to an empty field.
- Response Required:** An unchecked checkbox.
- Enable Question Comments:** An unchecked checkbox.
- Add to Library:** An unchecked checkbox.

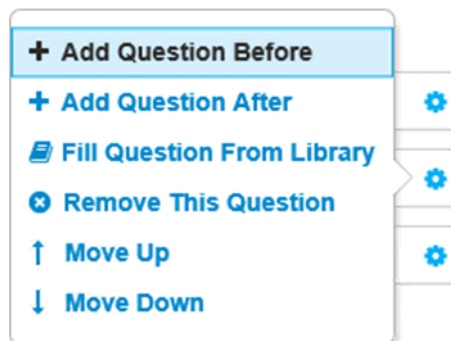
 At the bottom of the dependent question section, there is a blue "+ Add Question" button. At the bottom of the entire interface, there is another blue "+ Add Question" button.

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.



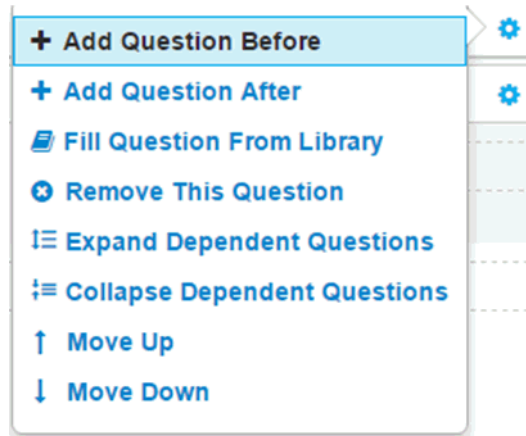
The following table describes the functions of the Dependent Question cog wheel icon menu.

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	<p>Imports a question and its options into the current dependent question.</p> <p>To import a question, once you select the Fill Question From Library option, perform the following steps.</p> <ul style="list-style-type: none"> 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. <p>Note: Once the library question overwrites the current question or dependent question, you can not undo the action.</p>
Remove This Question	<p>Removes the current dependent question and its options.</p> <p>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.</p>
Move Up	<p>Moves the current dependent question one question above.</p> <p>For example, if the current dependent question number is 2, then this dependent question moves up and displays as dependent question 1.</p> <p>Note: If there are no dependent questions above the current dependent question, then the Move Up option is inactive.</p>
Move Down	<p>Moves the current dependent question one question below.</p> <p>For example, if the current dependent question number is 2, then this dependent question moves down and displays as dependent question 3.</p> <p>Note: If there are no dependent questions below the current dependent question, then the Move Down option is inactive.</p>

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.

10.1.2.2.3 *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 = $20+10 = 30$

Review: None Complete: 150%

Creator: Administrator AQM Template: Template with Bonus Question types

Award Agent on Performance

	Question	Description	Answer	Result
1.	How was the agent's performance?		Excellent	100%
2.	Award the points to Agent		Excellent	100%
				Section Result: 150%

Note:

Optional

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 = $20+7.5 = 27.5$

Review: Complete: 138%

Creator: Administrator AQM Template: Template with Bonus Question types

Award Agent on Performance

	Question	Description	Answer	Result
1.	How was the agent's performance?		Excellent <input type="button" value="v"/>	100%
2.	Award the points to Agent		Best <input type="button" value="v"/>	75%

Section Result: 138%

Note:

Optional

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.

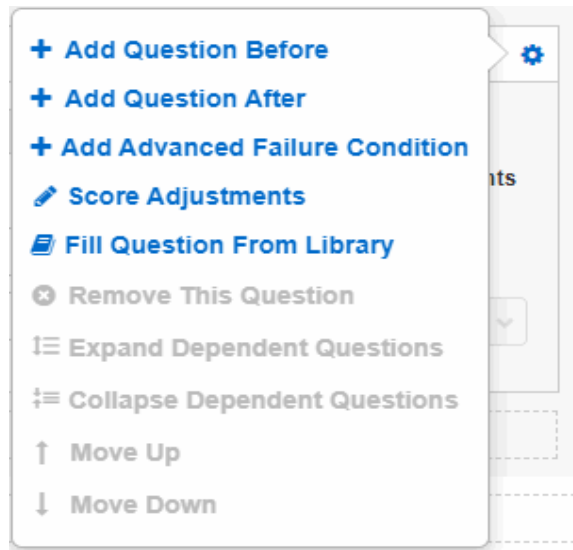
10.1.2.2.4 Auto Fail

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. The 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.



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 10-513](#) section, under the [Advanced Failure Condition on page 10-512](#).

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

The screenshot shows the configuration for a question within an evaluation template. The 'Auto Fail' dropdown menu is expanded, showing three options: 'Interaction', 'Section', and 'Question'. Each option has a blue checkmark next to it, and the entire menu is enclosed in a red rectangular box. Other visible fields include 'Name', 'Weight', 'Text', 'Options', 'Display Mode', and 'If'.

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**.

This screenshot shows the same configuration interface as above, but the 'If' dropdown menu is now set to 'Pass'. The 'Auto Fail' dropdown menu is closed. The 'Type' is set to 'Pass/Fail' and the 'Weight' is 5.

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**.

This screenshot shows the configuration interface with the 'Auto Fail' dropdown menu set to 'Question'. The 'If' dropdown menu remains set to 'Pass'. The 'Type' is 'Pass/Fail' and the 'Weight' is 'N/A'.

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.

The screenshot shows the configuration for a 'Scored Scale' question. The 'Auto Fail' dropdown menu is open, displaying 'NO DATA FOUND'. The configuration includes fields for Name, Weight, Description, Text, and Display Mode. A note indicates that for 'Scored Scale', the weight should be set in the 'Options' field.

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

The screenshot shows the 'Evaluation' tab of the interface. It displays a table with the following data:

Section AutoFail	Complete: Fail 0%
1. Pass /Fail AutoFail	Fail 0%
Pass	Fail 0%

10.1.2.2.5 List Type

When you create a List type answer option in an evaluation template, 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** check-box. It enables the comment field for the section.

2. From the Type drop-down list box, select **List**.

CREATE EVALUATION TEMPLATE

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

CREATE EVALUATION TEMPLATE

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 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.

Text	Weight	
1	N/A	⚙️
2	N/A	⚙️
3	N/A	⚙️
4	N/A	⚙️
5	N/A	⚙️
Max Possible Weight:		N/A

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:

- The Enable Weights button will be **disabled** if the Choose One button is **enabled**.

- 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.

Edit Question Options

Question 1 – List

Choose One

Question Text:

Choose One

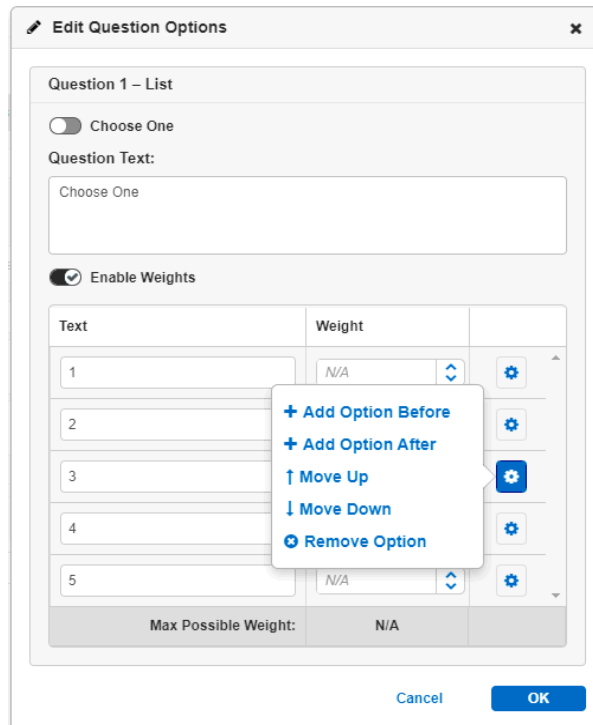
Enable Weights

Text	Weight	
1	N/A	⚙️
2	N/A	⚙️
3	N/A	⚙️
4	N/A	⚙️
5	N/A	⚙️
Max Possible Weight:		N/A

Cancel **OK**

At the bottom of the window, the **Max 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: 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 (2) 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.

Details **Evaluation** Annotations Attachments

Review: ▼ Draft

Creator: **Administrator, AQM** Template: **Test A12**

Section 1

Question	Description	Answer	Result
1. Please select the reason for choosing us as your service provider	Please select options which describes... More	<input checked="" type="checkbox"/> Service <input checked="" type="checkbox"/> Quality <input checked="" type="checkbox"/> Location <input checked="" type="checkbox"/> Value for money <input type="checkbox"/> Other	

Note:

Optional

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

The screenshot shows the 'Evaluation' tab of a software interface. At the top, there are tabs for 'Details', 'Actions', 'Evaluation' (selected), 'Annotations', and 'Attachments'. Below the tabs is a 'Review:' dropdown menu set to 'None' with an information icon. The main content area is titled 'S1' and contains a table with the following structure:

	Question	Description	Answer	Result
1.	Q1		Yes	
	Comment:	Optional		
1A.	DQ1		Yes	
	Comment:	Optional		
	Comment:	Optional		

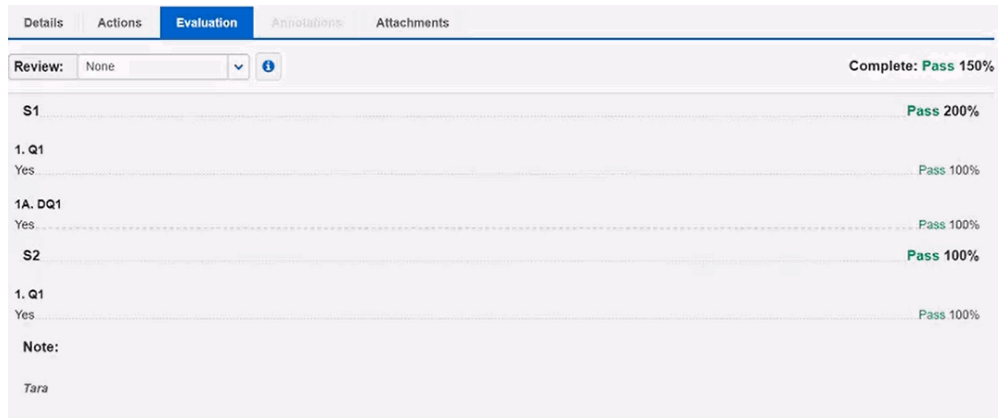
At the bottom right of the table area, it says 'Section Result: Draft'.

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.

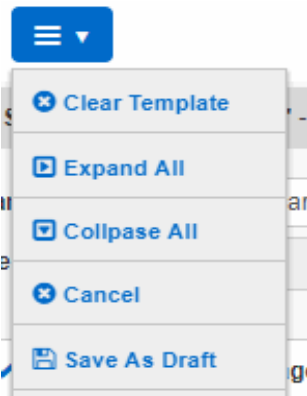
This screenshot shows the 'Evaluation' tab with a dropdown menu open. The menu options are: 'Email Evaluation', 'Assign Coaching', 'Print Evaluation', 'Cancel', 'Delete', 'Save as Draft', and 'Submit' (highlighted). The background shows the 'Evaluation' tab with a 'Review:' dropdown set to 'None'. The main content area is titled 'S2' and contains a table similar to the one in the previous screenshot, but with a 'Result' column containing 'Pass 100%'. Below the table, it says 'Section Result: Pass 100%'. At the bottom, there is a 'Note:' field containing the following HTML code:

```
<script>
document.getElementById("demo").innerHTML = "Hello JavaScript!";
</script>
<b>Tara</b>
```

- 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 triple-bar icon to view the following menu.

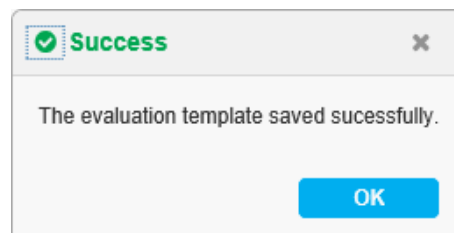


The following table describes the functions of the triple bar icon menu.

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.
Cancel	<p> Cancels the changes in the template, closes the Create Evaluation Template window, and the Evaluation Templates window is active.</p> <p>Note: If you click Cancel before saving the changes, the system displays a Warning window. To delete the changes, click Yes.</p>

Menu	Description
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.

10.1.2.3 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.

The screenshot shows the 'Evaluation' tab for a template named 'Administrator AQM, Draft, Template for Agent Performance'. The 'Review' status is 'None' and the overall status is 'Draft'. The section is titled 'Greeting'.

Question	Description	Answer	Result
1.	Did agent greeted the customer? More	Yes	
1A.	Did agent greeted the customer politely? More	No	
1B.	Information from the agent is useful?	True	

Section Result: Draft

Note: Optional

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.

The screenshot shows an 'Information' popup window over the question table. The popup text reads: 'You are seeing this question because you answered 'Yes' to the previous question.'

Question	Description	Answer	Result
1.	Did agent greeted the customer? More	Yes	
1A.	Did agent greeted the customer politely? More	No	
1B.	Information from the agent is useful?	True	

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.

Creator: Administrator, AQM Template: Template for Agent Performance

Greeting

	Question	Description	Answer	Result
1.	Did agent greeted the customer?	If agent have not greeted customer PL... More	Yes <input type="button" value="v"/>	
1A.	i Did agent greeted the customer politely?	If agent have not greeted customer politely Please elaborate reason. Less	No <input type="button" value="v"/>	
1B.	i Information from the agent is useful?		True <input type="button" value="v"/>	

10.1.2.3.1 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	$(\text{Sum of selected question options weight} / \text{Question Weight}) * 100$	$(\text{Sum of selected dependent question options weight} / \text{Dependent Question Weight}) * 100$	$((\text{Sum of selected question options weight} + \text{Sum of selected dependent question options weight}) / \text{Section weight}) * 100$	$(\text{Sum of all section score} / \text{Sum of weights of all sections}) * 100$
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

10.1.2.4 Advanced Failure Condition

All the existing automatic failure conditions in earlier versions of Aspect EX Quality have replaced with a new set of failure conditions. The Add Advanced Failure Condition feature which allows you to fail a question based on Percentage Score or Point Score.

Example: You have a question as "Rate Agent Performance", and available options are 1) Excellent 2) Very good 3) Good 4) Intermediate 5) Needs improvement. You want to fail the question for Intermediate or Needs improvement then, you can use the Advanced failure condition and add a condition to fail based on the Percentage or Point Score. The failure conditions have the following properties.

- You can define failure condition for question types such as
 - Yes/No

- Pass/Fail
- True/False
- Score Scale
- List (Applies only when weight is chosen)

Note: Advanced Failure Condition cannot be defined for Bonus Question types or Dependant question types.

10.1.2.5 Failure Conditions at Question Level

There are two parameters to define the failure conditions at question level such as [Percentage Score](#) and [Point Score](#).

10.1.2.5.1 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.

CREATE EVALUATION TEMPLATE

Name: 19 Description: N/A

Section 1 - 1 Questions - Weight N/A - Comments: Disabled

Name: * Description: *

Weight: N/A Enable Comments

Question 1 - Weight N/A - Comments: Disabled

Type: * Options: N/A Response Required

Text: * Bonus: Yes/No Weight: Weight

Description: Free Form Text Display Mode: Dropdown Enable Question Comments

List Auto Fail: Add to Library

Pass/Fail Dependent Questions

Scored Scale Dependent Question Trigger

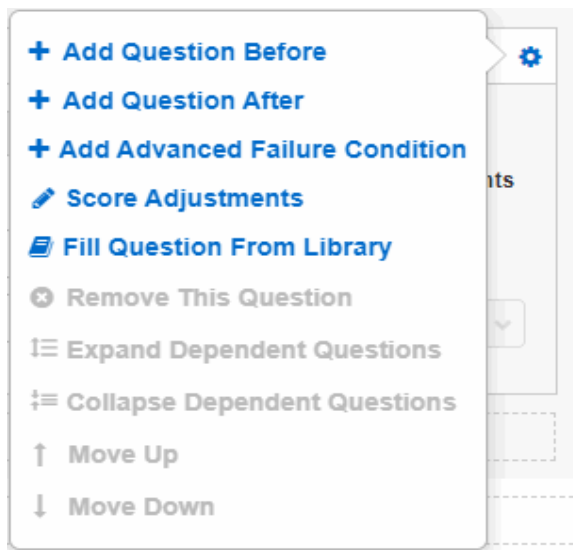
True/False

Yes/No

+ Add Question

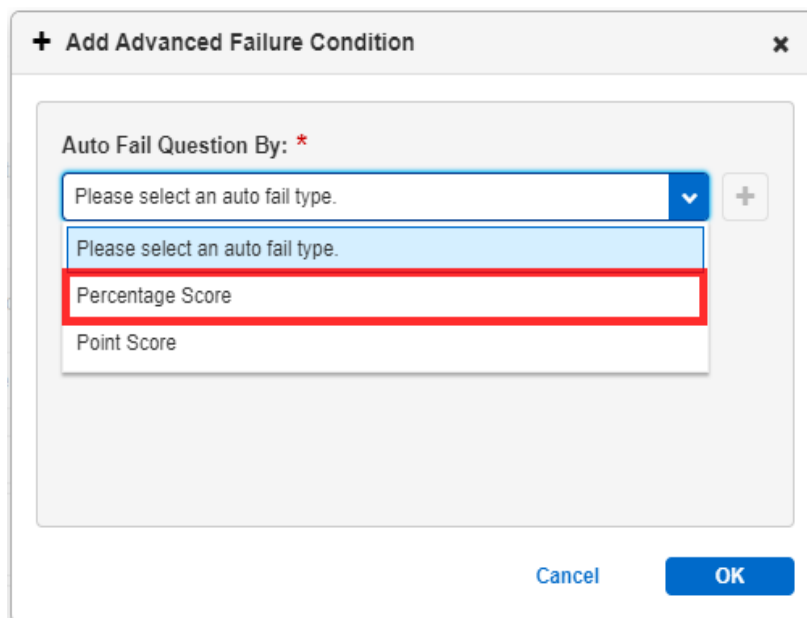
+ Add Section

- 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 mentioned question type, the Add Advanced Failure Condition option will be **enabled**.

- Click on the **Add Advanced Failure Condition** option and the Add Advanced Failure Condition window appears.
- Click on the **Auto Fail Question By** drop-down and select **Percentage Score**.



- 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 lesser than 50%, then the question fails. Even though the failure condition is satisfied and the question fails, the score of the question is 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.

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

10.1.2.5.2 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.

CREATE EVALUATION TEMPLATE

Name: 19 Description: N/A

Section 1 - 1 Questions - Weight N/A - Comments: Disabled

Name: * Description: Weight: N/A Enable Comments

Question 1 - Weight N/A - Comments: Disabled

Type: * Options: N/A Response Required

Text: * Weight: Enable Question Comments

Description: Display Mode: Dropdown Add to Library

Auto Fail: If Dependent Questions

Dependent Question Trigger

Pass/Fail

Scored Scale

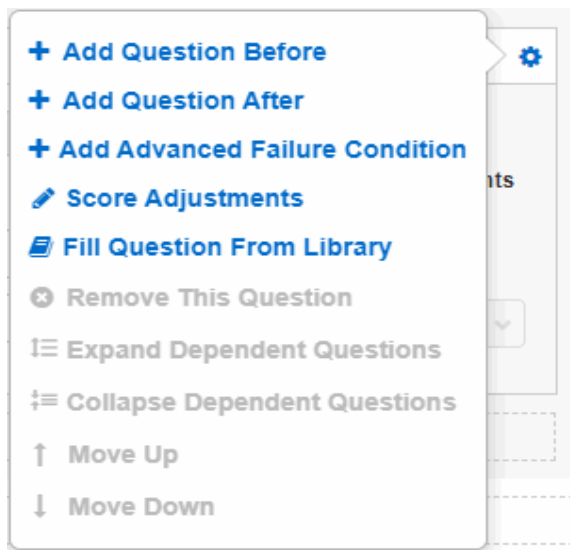
True/False

Yes/No

+ Add Question

+ Add Section

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 mentioned 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.

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

- After selecting the Point Score, click on **+** button.
- 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 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.

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

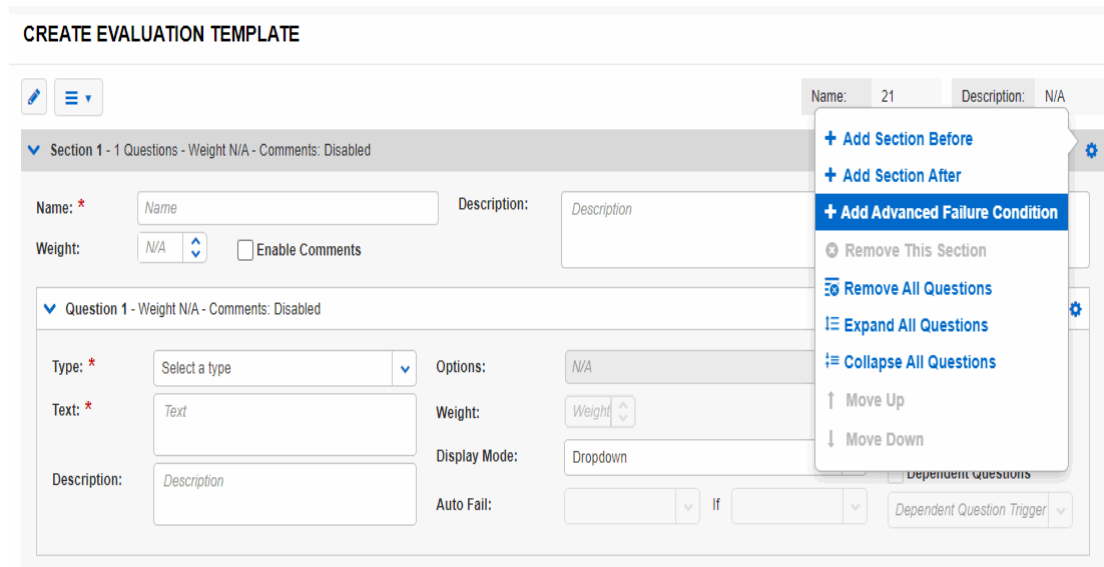
10.1.2.6 Failure Conditions at Section Level

There are two parameters to define the failure conditions at section level such as [Percentage Score](#) and [Point Score](#).

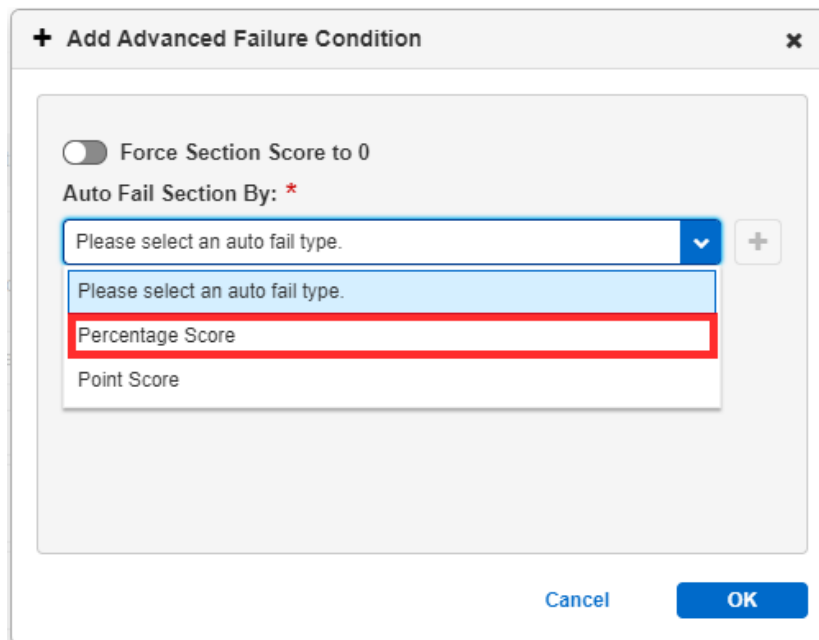
10.1.2.6.1 Percentage Score

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

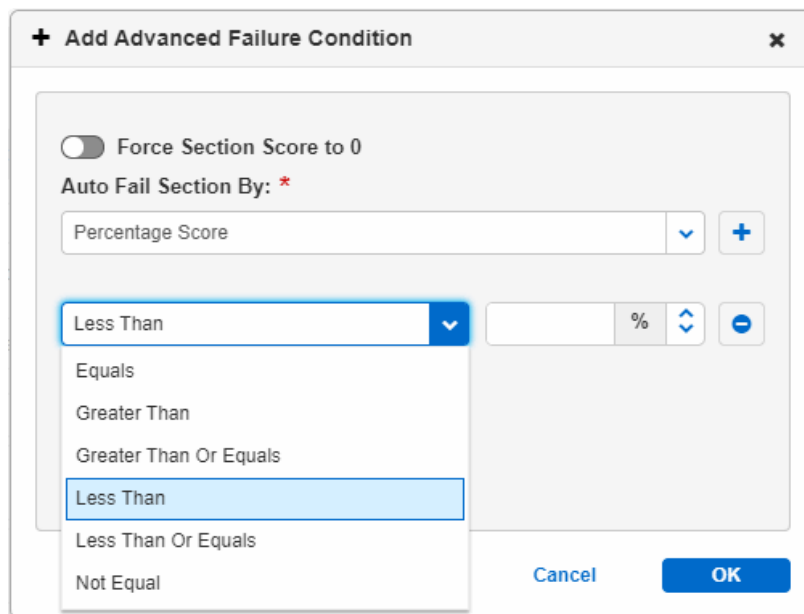
1. At the end of the Section title bar, click the **cog wheel** icon to view a menu that displays various actions that you can perform on the Section level.
2. Click on **Add Advanced Level Failure Condition** as shown below.



3. Click on the **Auto Fail Section By** drop-down and select **Percentage Score**.



4. After selecting the Percentage Score, click on **+** button.
5. 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 section score is lesser than 50%, then the section fails. You must have the Section Scores Display option set to Percentage Score & Pass/Fail, Point Score & Pass/Fail, or Pass/Fail to determine if this section has failed or not.

Note: If you toggled on the **Force Section Score to 0** toggle button, the section score is set to 0 when the answer meets the failure condition and criteria.

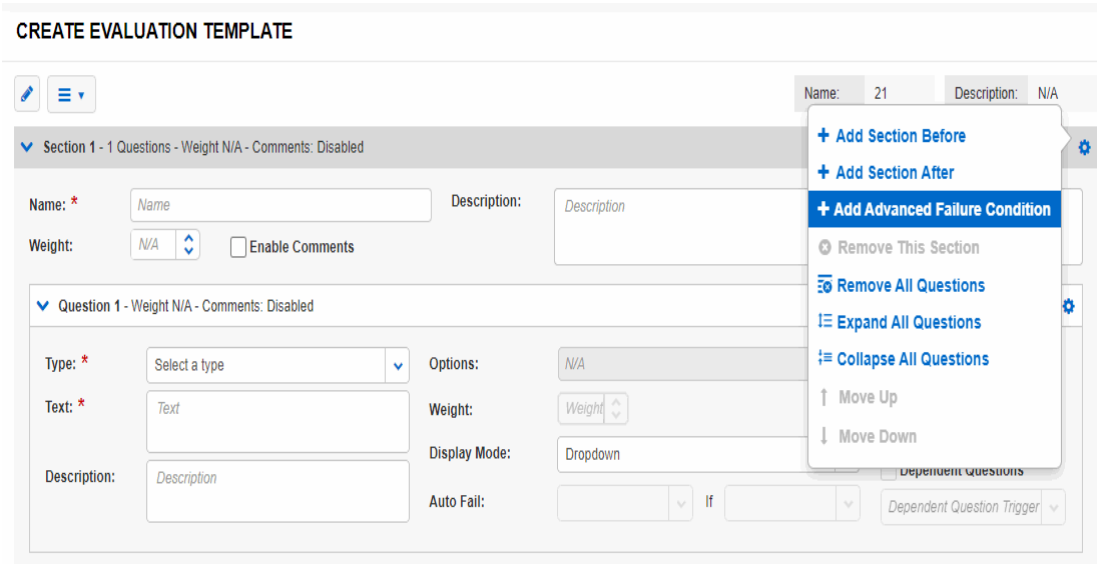
- Click on **OK** button to complete the process. The Advanced Failure Condition is enabled as shown below.



10.1.2.6.2 Point Score

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

- At the end of the Section title bar, click the **cog wheel** icon to view a menu that displays various actions that you can perform on the Section level.
- Click on **Add Advanced Level Failure Condition** as shown below.



- Click on the **Auto Fail Section By** drop-down and select **Point Score**.

- 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 section gets a point score of 10, then the section fails. You must set the Section Scores display option to Percentage Score & Pass/Fail, Point Score & Pass/Fail, or Pass/Fail to know whether or not this question failed.

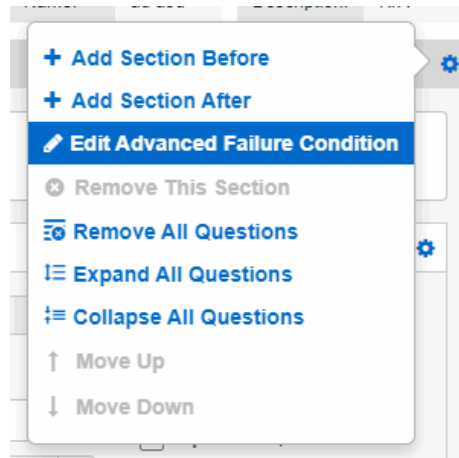
Note: If you toggled on the **Force Section Score to 0** toggle button, the section score is set to 0 when the answer meets the failure condition and criteria.

- Click on **OK** button to complete the process. The Advanced Failure Condition is enabled as shown below.

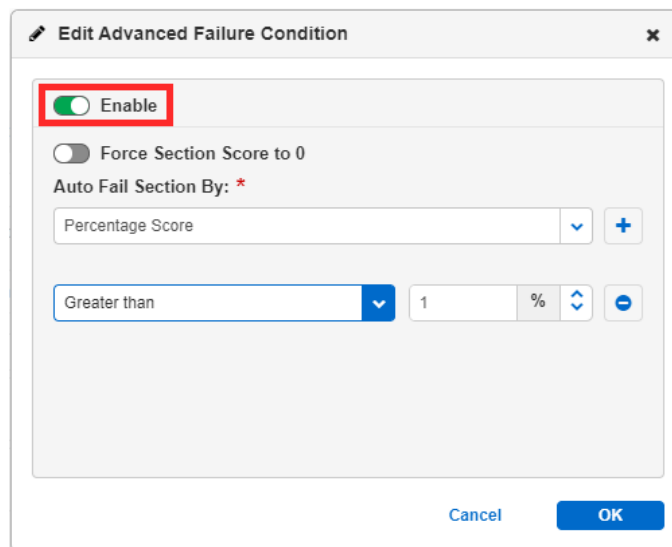


If you want to clear the section level failure condition, follow the steps below.

- Click on the cog wheel and select **Edit Advanced Failure Condition**.



- Toggle off the **Enable** toggle button to disable the Advanced Failure Condition and click on **OK** button.

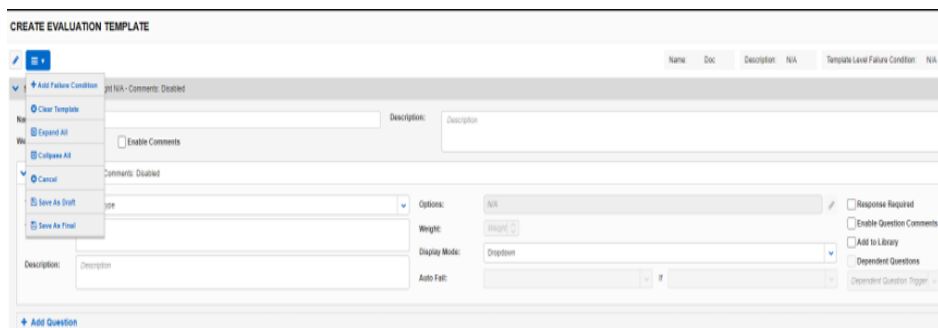


10.1.2.7 Failure Conditions at Template Level

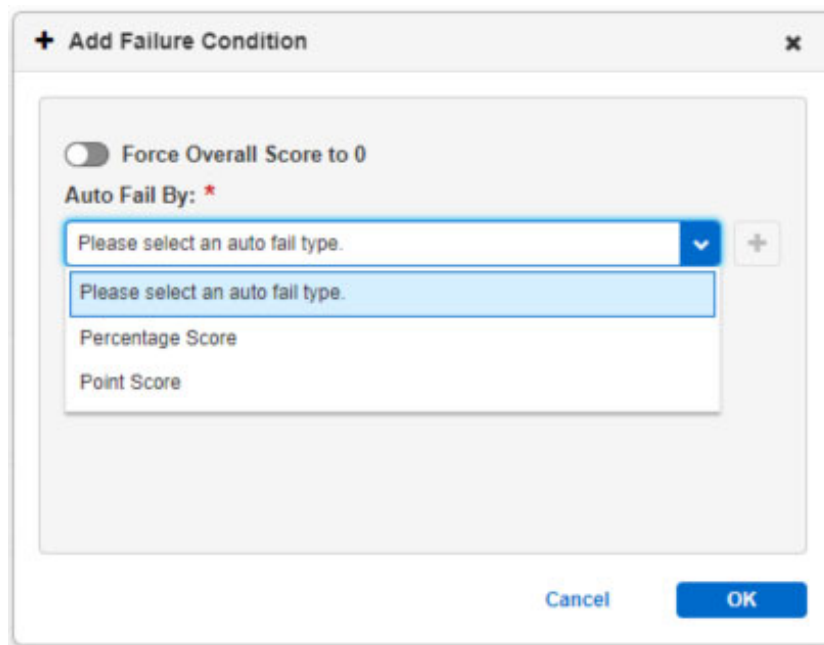
To define the failure condition at the template level (for Overall Score of the template) user can use this failure condition. There are two parameters to define the failure conditions at template level such as **Percentage Score** and **Point Score**.

To define the failure conditions at the template level, follow the steps below.

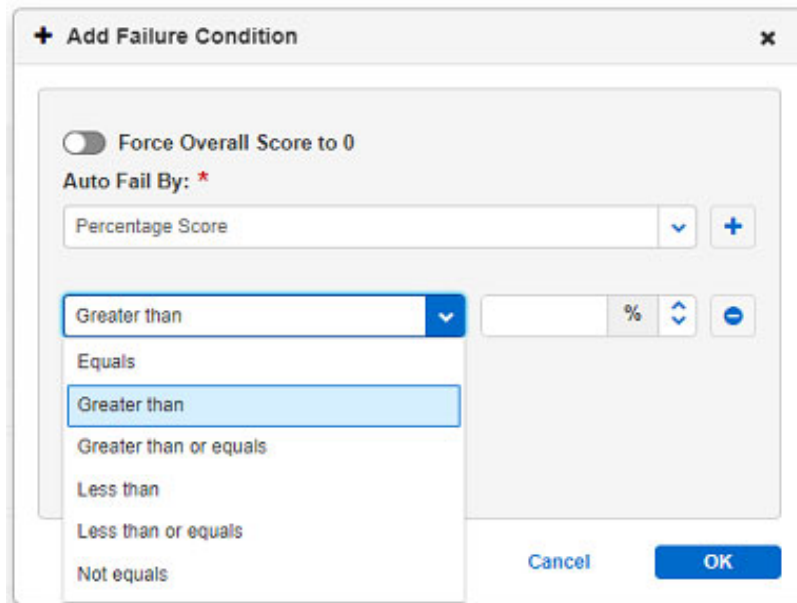
1. Click on Action menu in the tool bar of Create Evaluation Template page and Select “Add Failure Condition” option.



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 drop down list to set the failure condition. Set the failure condition as per the requirement.



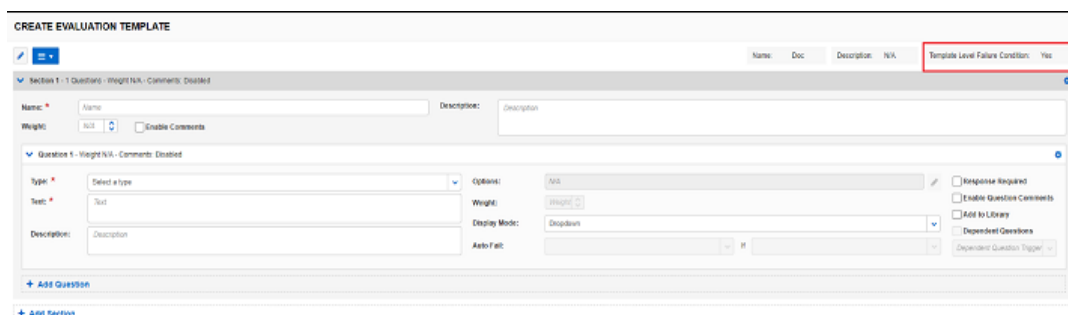
Example: If you create a failure condition called Percentage Score < 50 while scoring a call using this template, and if the overall score is lesser than 50%, then the overall score fails. **OR**

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.

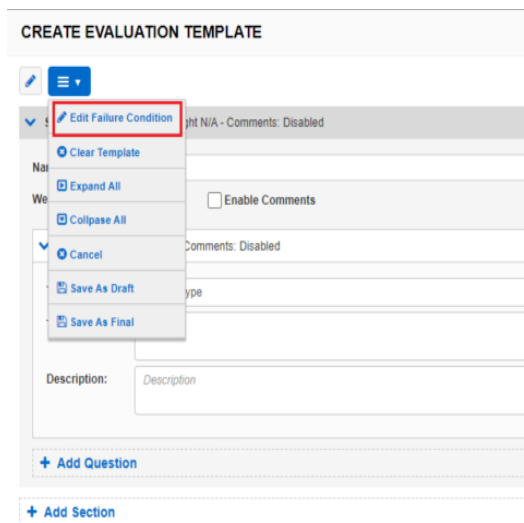
You must have the Overall Score Display option set to Percentage Score & Pass/Fail, Point Score & Pass/Fail, to determine if this overall score has failed or not.

Note:

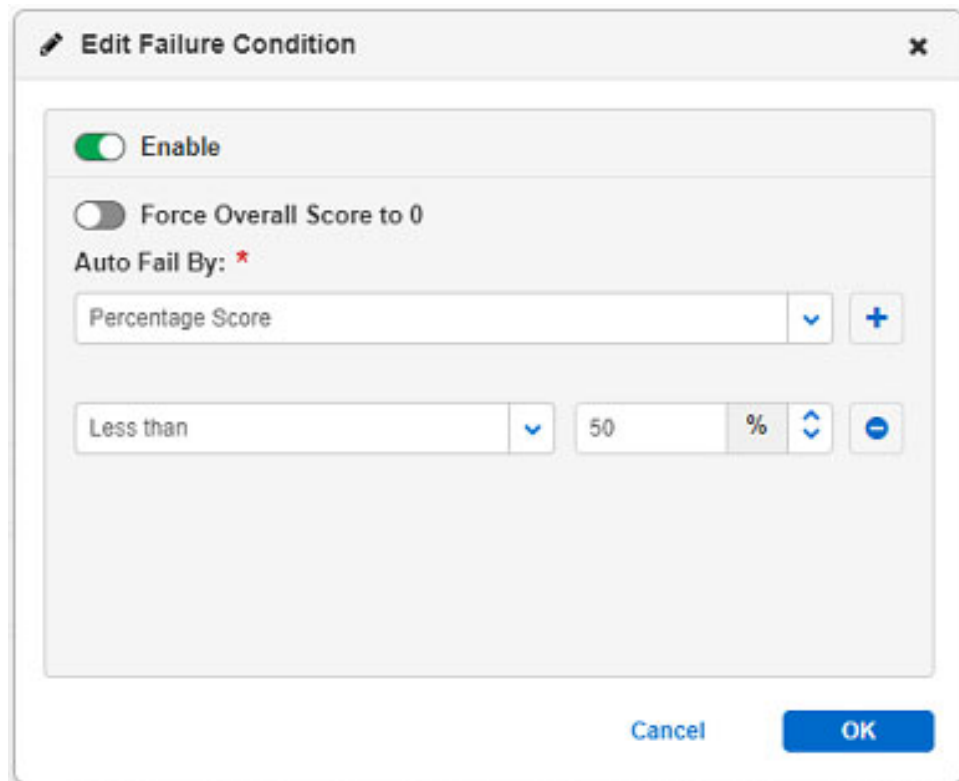
- a. A maximum of 4 different failure conditions can be added by clicking on “+” button.
 - b. To remove the condition added click on the “-”(remove) button of the corresponding condition row.
 - c. If you toggled on the Force Overall Score to 0 toggle button, the Overall score will be set to 0 when 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.



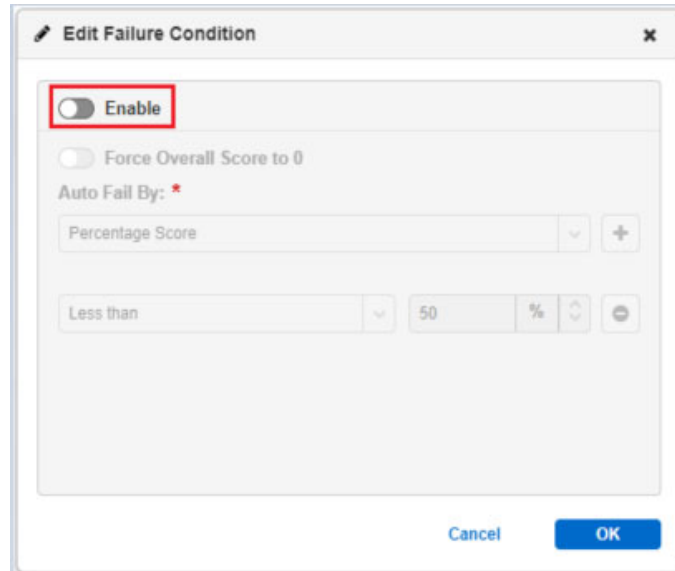
5. If you want to update the failure condition defined, click on the Action menu in the tool bar in the Create Evaluation Template page and Select **Edit Failure Condition** option.



6. Update the failure condition as required and Click on **OK** button.



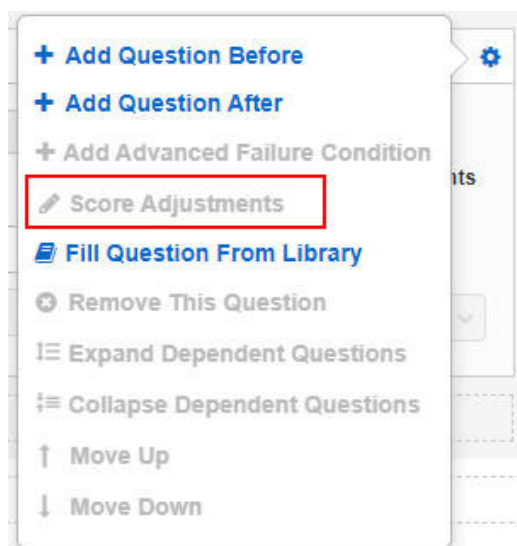
- To clear or remove the Failure condition added, turn off the Enable toggle button and Click the **OK** button.



10.1.3 Score Adjustments

To award or deduct points the user can use the option of **Score Adjustments**. Although the points are awarded or deducted based on the certain conditions that are specified, while syncing the Score Adjustments to a Question Type.

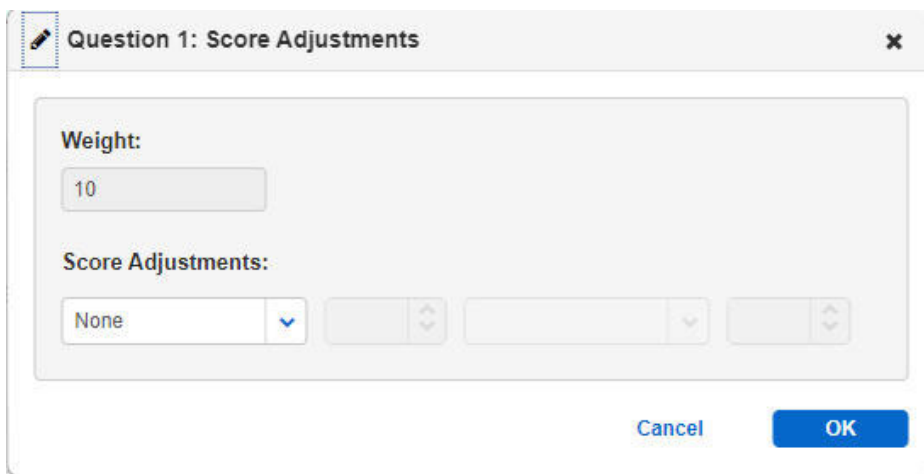
Initially the option Score Adjustment will be disabled, as shown below.



Once the user selects the question type from the **Type*** drop down list box, the Score Adjustments option will be enabled.

Now, enter the weight in the **Weight*** text box, either by clicking the up down arrow keys, or manually.

Click **Score Adjustments**, the dialog appears as shown below:



The **Weight** text box shows the same value, as entered on the Evaluation Template, Question Weight.

The **Score Adjustments** drop down list box, by default shows the option as None. It lists the following options, other than None:

- Award Points
- Deduct Points

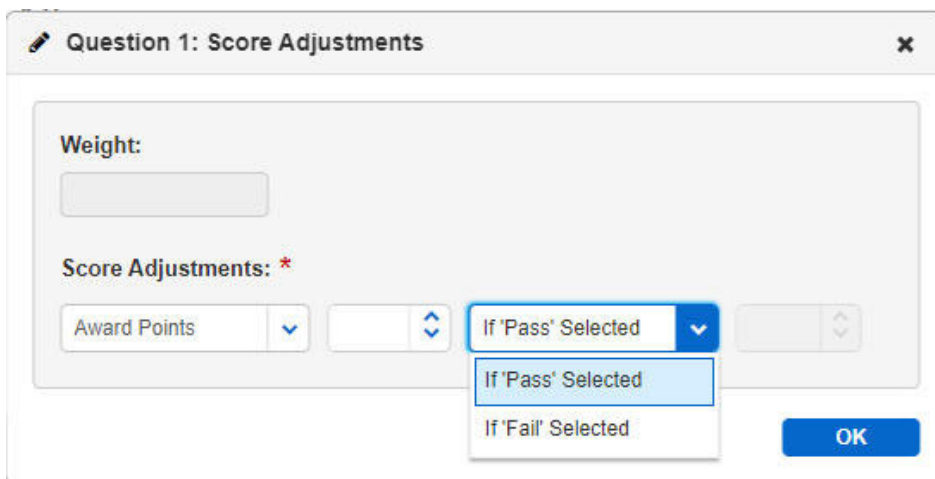
These options are given below:

1. Award Points

The user can award the points based on the certain conditions that are specified in the Score Adjustments dialog box to assign the Award points.

Once the Award Points is selected, based on the Question Type selected either all the three text boxes, next to Award Points will be enabled or only two text boxes will be enabled.

In the below example, based on the type of question, only the first text box and the second list box for the Award Points option is enabled.



Enter the value in the text box that user should be awarded with. This is a mandatory field, if left blank, a validation message appears to enter a weight in the box.

The next list box has two options, based on the Question Type* selected. Select either of the conditions to be assigned to the Question to Award the user.

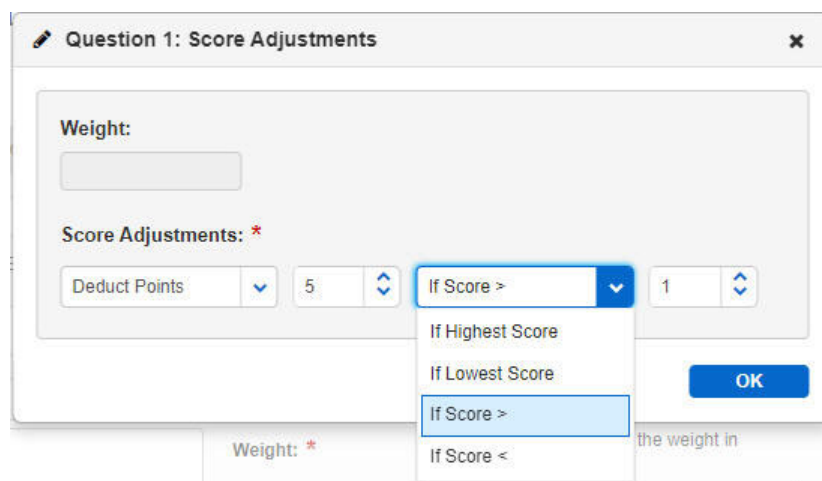
Click the **OK** button to assign the Award Points.

2. Deduct Points

The user can deduct the points based on the certain score attained by the user.

Once the Deduct Points is selected, based on the Question Type selected either all the three text boxes, next to Deduct Points will be enabled or only two text boxes will be enabled.

In the below example, based on the type of question, all the three text boxes for the Deduct Points option are enabled.



Enter the value in the text box that user should be deducted with. This is a mandatory field, if left blank, a validation message appears to enter a weight in the box.

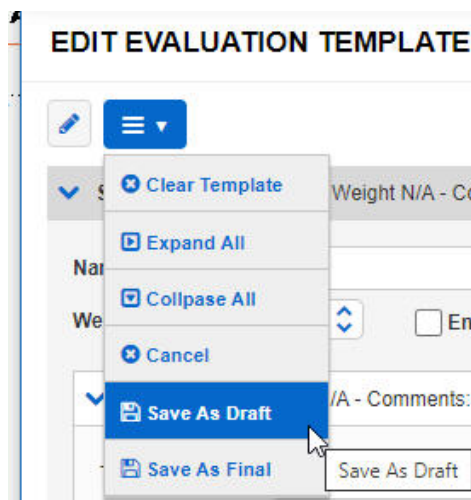
The next list box has four options, based on the Question Type* selected. Select either of the conditions to be assigned to the Question to Deduct the user.

In the above example, **If Score >** option is selected, the immediate next text box is enabled. Enter the value in the next text box. Say, if score is greater than 5, the points to be awarded or deducted. So, enter the value 5 in the next text box.

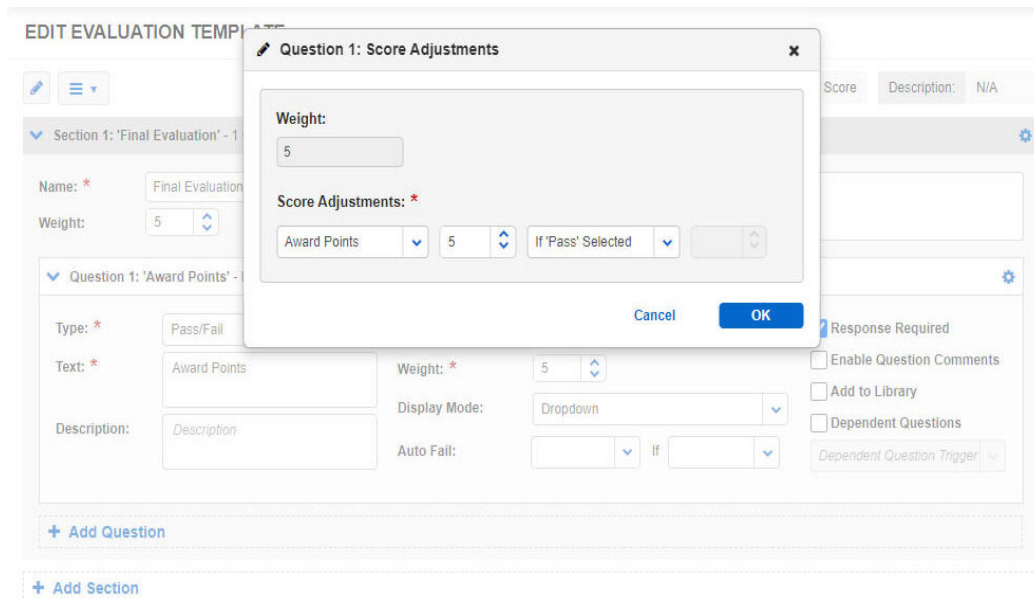
Click the **OK** button to assign the Deduct Points.

Note:

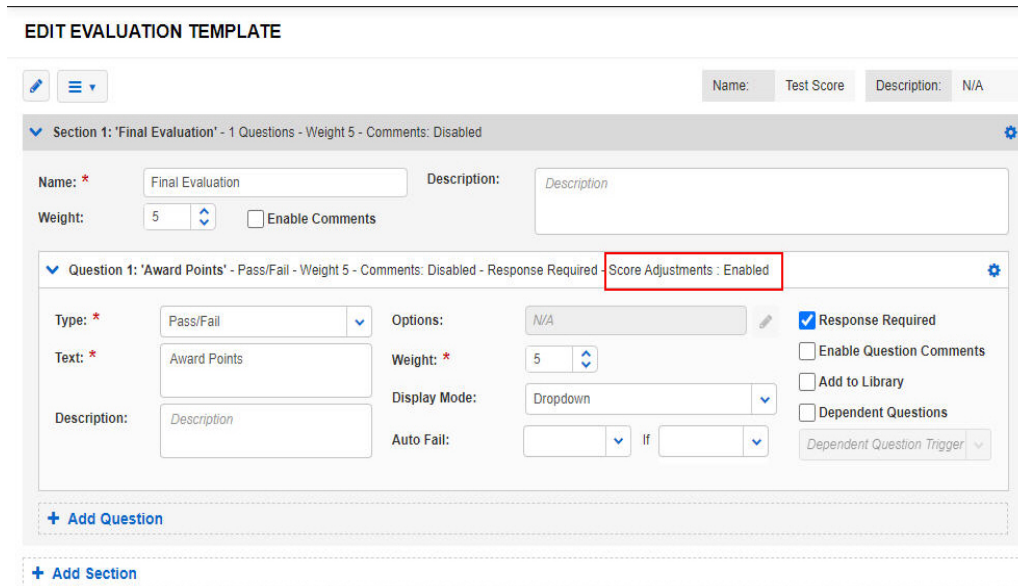
- a. For the Questions which has static options, for example: Yes or No, True or False, Pass or Fail; the third text box remains disabled for both Award Points as well as Deduct Points.
 - b. Weight has to be entered mandatorily on the Evaluation Template page for the Question, otherwise the Score Adjustments dialog will throw an error after clicking OK button and will not allow to save the Score Adjustments.
- You will return to either the Create or Edit **Evaluation Template** page (where you were already). Click the **Save As Draft** option from the main menu, as shown below:



- After saving the draft, when you click the **Cog Wheel** button, and select the **Score Adjustments** option. The Score Adjustments dialog appears again. Whatever values you have entered, will be saved for the Evaluation Template. Here, you can edit the values of Score Adjustments, if required and click the **OK** button to save.

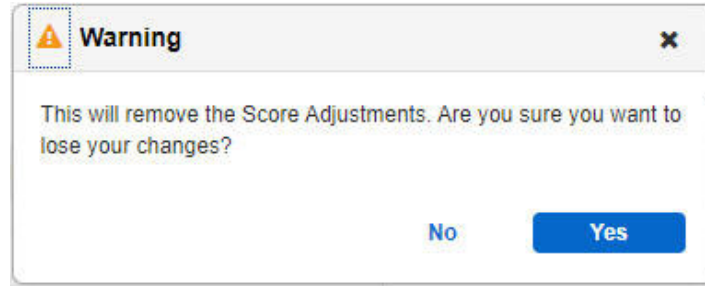


- Once you enter the Score Adjustments for a question, the header of that particular question shows the value as **Score Adjustments: Enabled**, as shown below:



- If you have not selected the Score Adjustments, the header will show as **Score Adjustments: Disabled**.

- When the user try to edit the question type, after syncing the Score Adjustments, a **Warning** dialog box appears to remove the Score Adjustments. Select **Yes** or **No**, to save or revert the changes, as shown below:



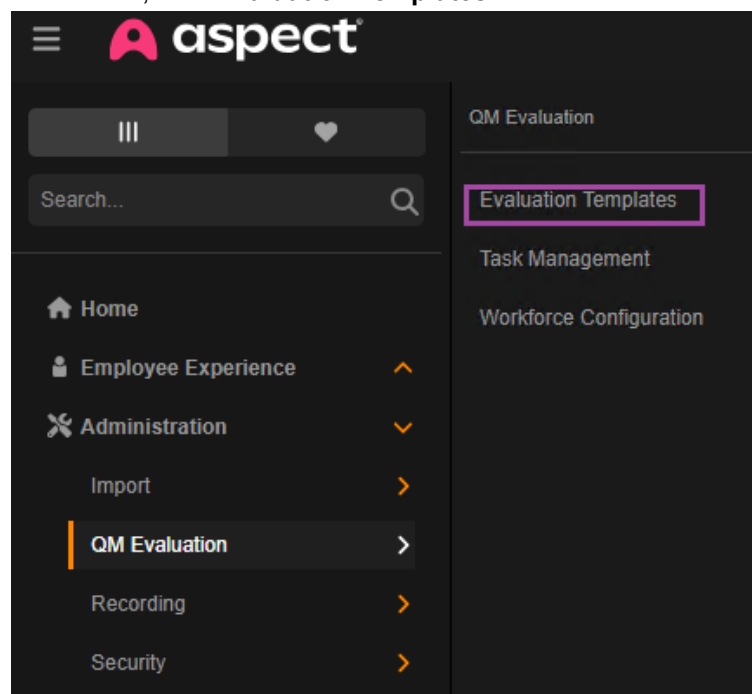
Note: Score Adjustments is not applicable for the Dependant Questions type. In the Cog Wheel button, the Score Adjustments option will not appear at all for the dependant questions.

10.1.4 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, 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.

EVALUATION TEMPLATES

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








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	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
List		Administrator, AQM	12/19/2019 5:08:29 PM	Complete	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Section Question Comments		Administrator, AQM	12/19/2019 2:35:04 PM	Complete	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
15		Administrator, AQM	12/19/2019 12:36:41 PM	Complete	<input checked="" type="checkbox"/>	
14		Administrator, AQM	12/19/2019 12:12:28 PM	Complete	<input checked="" type="checkbox"/>	
13		Administrator, AQM	12/19/2019 11:58:19 AM	Complete	<input checked="" type="checkbox"/>	
12		Administrator, AQM	12/19/2019 11:56:54 AM	Complete	<input checked="" type="checkbox"/>	

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

10.1.4.1 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.

EVALUATION TEMPLATES

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

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	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
List		Administrator, AQM	12/19/2019 5:08:29 PM	Complete	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Section Question Comments		Administrator, AQM	12/19/2019 2:35:04 PM	Complete	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
15		Administrator, AQM	12/19/2019 12:36:41 PM	Complete	<input checked="" type="checkbox"/>	
14		Administrator, AQM	12/19/2019 12:12:28 PM	Complete	<input checked="" type="checkbox"/>	
13		Administrator, AQM	12/19/2019 11:58:19 AM	Complete	<input checked="" type="checkbox"/>	
12		Administrator, AQM	12/19/2019 11:56:54 AM	Complete	<input checked="" type="checkbox"/>	
10		Administrator, AQM	12/19/2019 11:55:51 AM	Complete	<input checked="" type="checkbox"/>	
1		Administrator, AQM	12/19/2019 11:52:52 AM	Complete	<input checked="" type="checkbox"/>	

The Edit Evaluation Template window opens.

2. To edit the template Name and other details, click **Edit**.

EVALUATION TEMPLATES

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

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

The Edit Evaluation Template details window opens.

EDIT EVALUATION TEMPLATE ✕

Name: *

Description:

Display Scoring:

Scoring Type: *

Default Question Response:

Display Question Numbers

Weight For N/A Answer Choice:

Override Minimum Possible Score:

Override Maximum Possible Score:

Allow Access To:

 Selected (2)

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 10-475](#).

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.

- When you have finished adding questions and sections, you want to either save the template as a Draft or as Final. Click the triple-bar icon and from the menu select either **Save As Draft** or **Save as Final**.

10.1.4.2 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.

EVALUATION TEMPLATES


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

Name	Description	Created By	Created Date	Status	Active	Used for Scoring
15 - Duplicate		Administrator, AQM	1/9/2020 10:11:16 AM	Complete	<input checked="" type="checkbox"/>	
knockDown-template1 Bold www.aspect.com	knockDown-template1 Bold www.aspect.com	Administrator, AQM	12/24/2019 12:02:35 PM	Complete	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
List		Administrator, AQM	12/19/2019 5:08:29 PM	Complete	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Section Question Comments		Administrator, AQM	12/19/2019 2:35:04 PM	Complete	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
15		Administrator, AQM	12/19/2019 12:36:41 PM	Complete	<input checked="" type="checkbox"/>	
14		Administrator, AQM	12/19/2019 12:12:28 PM	Complete	<input checked="" type="checkbox"/>	
13		Administrator, AQM	12/19/2019 11:58:19 AM	Complete	<input checked="" type="checkbox"/>	
12		Administrator, AQM	12/19/2019 11:56:54 AM	Complete	<input checked="" type="checkbox"/>	
10		Administrator, AQM	12/19/2019 11:55:51 AM	Complete	<input checked="" type="checkbox"/>	

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 Via, 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.

EVALUATION TEMPLATES							
Name	Description	Created By	Created Date	Status	Active	Used for Scoring	
15 - Duplicate		Administrator, AQM	1/9/2020 10:11:16 AM	Complete	<input checked="" type="checkbox"/>		
knockDown-template1	knockDown-template1 Bold www.aspect.com	Administrator, AQM	12/24/2019 12:02:35 PM	Complete	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
List		Administrator, AQM	12/19/2019 5:08:29 PM	Complete	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Section Question Comments		Administrator, AQM	12/19/2019 2:35:04 PM	Complete	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
15		Administrator, AQM	12/19/2019 12:36:41 PM	Complete	<input checked="" type="checkbox"/>		
14		Administrator, AQM	12/19/2019 12:12:28 PM	Complete	<input checked="" type="checkbox"/>		
13		Administrator, AQM	12/19/2019 11:58:19 AM	Complete	<input checked="" type="checkbox"/>		
12		Administrator, AQM	12/19/2019 11:56:54 AM	Complete	<input checked="" type="checkbox"/>		
10		Administrator, AQM	12/19/2019 11:55:51 AM	Complete	<input checked="" type="checkbox"/>		

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.


10.1.5 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.

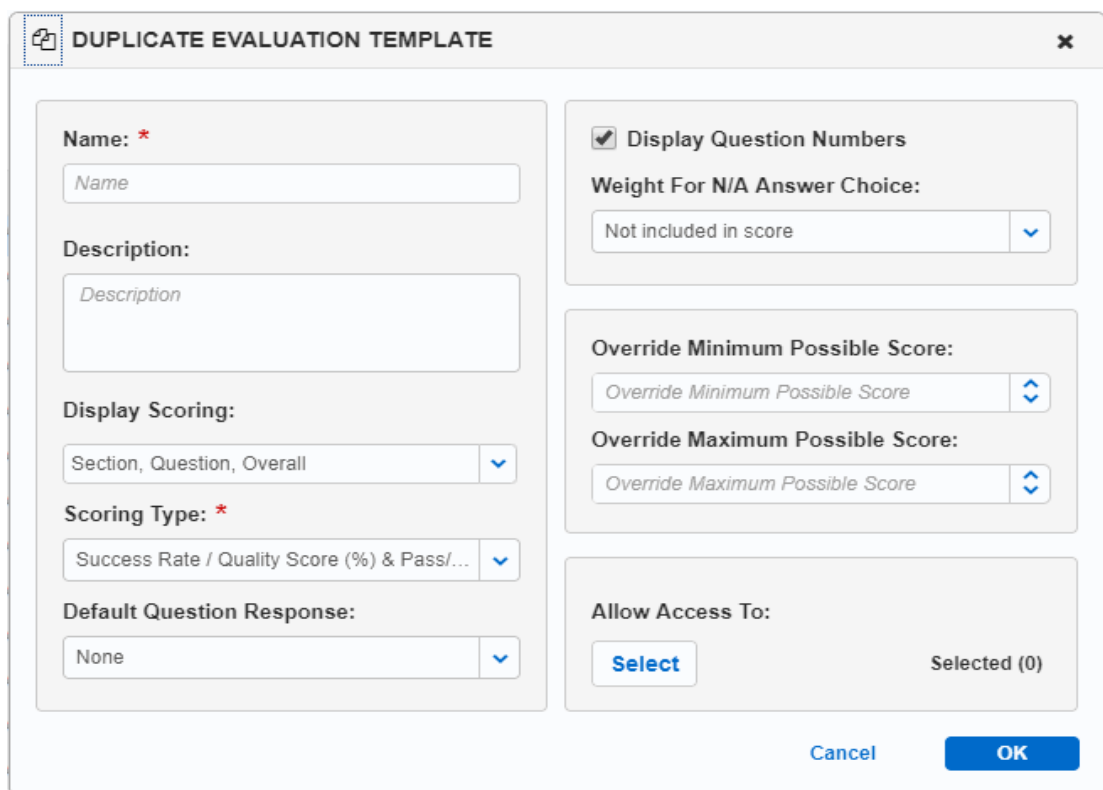
EVALUATION TEMPLATES



Name	Description	Created By	Created Date
knockDown-template1 Bold www.aspect.com	knockDown-template1 Bold www.aspect.com	Administrator, AQM	12/24/2019 12:02:35 PM
List		Administrator, AQM	12/19/2019 5:08:29 PM
Section Question Comments		Administrator, AQM	12/19/2019 2:35:04 PM
15		Administrator, AQM	12/19/2019 12:36:41 PM
14		Administrator, AQM	12/19/2019 12:12:28 PM
13		Administrator, AQM	12/19/2019 11:58:19 AM

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.



DUPLICATE EVALUATION TEMPLATE

Name: *

Description:

Display Scoring:

Scoring Type: *

Default Question Response:

Display Question Numbers

Weight For N/A Answer Choice:

Override Minimum Possible Score:

Override Maximum Possible Score:

Allow Access To:

 Selected (0)

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.

DUPLICATE EVALUATION TEMPLATE

The screenshot shows the 'DUPLICATE EVALUATION TEMPLATE' interface. At the top, there are icons for edit and menu, and a header bar with 'Name: 15 - Duplicate' and 'Description: N/A'. Below this is a section header: 'Section 1: 'S1' - 1 Questions - Weight 10 - Comments: Disabled'. The section configuration includes: Name: S1, Description: Description, Weight: 10, and an unchecked 'Enable Comments' checkbox. Below the section is a question configuration: 'Question 1: 'Q1' - Yes/No - Weight 10 - Comments: Disabled'. The question configuration includes: Type: Yes/No, Text: Q1, Description: Description, Options: N/A, Weight: 10, Display Mode: Dropdown, Auto Fail: Interaction, and several checkboxes: Response Required, Enable Question Comments, Add to Library, and Dependent Questions. There are also buttons for '+ Add Question' and '+ Add Section'.

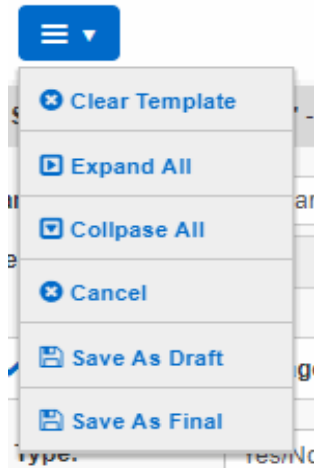
You can make changes to existing sections, question and dependent questions or you can add new sections, questions and dependent questions.

Note: To enable questions and comments, click on the check-boxes as shown below.

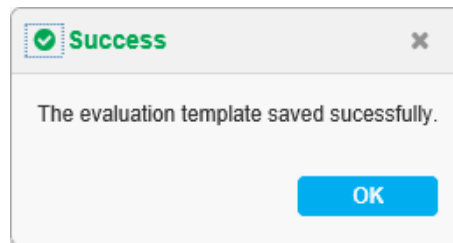
The screenshot shows the 'DUPLICATE EVALUATION TEMPLATE' interface with 'Comments: Enabled'. The section configuration is the same as above, but the 'Enable Comments' checkbox is now checked and highlighted with a red box. The question configuration is also the same, but the 'Enable Question Comments' checkbox is now checked and highlighted with a red box.

5. If you want to add a new section(s) to the duplicated template, see [Add a New Section on page 10-480](#).
6. If you want to add a new question(s) to the duplicated template, see [Add a New Question on page 10-483](#).

- 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 triple-bar icon 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.

- 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.

EVALUATION TEMPLATES



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

Name	Description	Created By	Created Date
15 - Duplicate		Administrator, AQM	1/9/2020 10:11:16 AM
knockDown-template1 Bold www.aspect.com	knockDown-template1 Bold www.aspect.com	Administrator, AQM	12/24/2019 12:02:35 PM
List		Administrator, AQM	12/19/2019 5:08:29 PM
Section Question Comments		Administrator, AQM	12/19/2019 2:35:04 PM
15		Administrator, AQM	12/19/2019 12:36:41 PM
14		Administrator, AQM	12/19/2019 12:12:28 PM

10.1.5.1 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 Aspect Quality	Displays as this in WEM
<ul style="list-style-type: none"> Choose one Choose one or more 	<ul style="list-style-type: none"> List, with Enable Options Weight deselected
<ul style="list-style-type: none"> Scored Scale (Low to High) 	<ul style="list-style-type: none"> Scored Scale <p>Note: The options order of this question Type displays as High to Low.</p>
<ul style="list-style-type: none"> Single Line Answer Multi Line Answer 	<ul style="list-style-type: none"> 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.








10.1.6 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 triple-bar, 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.

EVALUATION TEMPLATES
















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

Name	Description	Created By	Created Date	Status	Active	Used for Scoring
15 - Duplicate		Administrator, AQM	1/9/2020 11:14:21 AM	Complete	<input checked="" type="checkbox"/>	
knockDown-template1	knockDown-template1	Administrator, AQM	12/24/2019 12:02:35 PM	Complete	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Bold www.aspect.com	Bold www.aspect.com					
List		Administrator, AQM	12/19/2019 5:08:29 PM	Complete	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Section Question Comments		Administrator, AQM	12/19/2019 2:35:04 PM	Complete	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
15		Administrator, AQM	12/19/2019 12:36:41 PM	Complete		

5. Select the evaluation template and click on **Delete** button as shown below.

EVALUATION TEMPLATES

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

Name	Description	Created By	Created Date	Status	Active	Used for Scoring
15 - Duplicate		Administrator, AQM	1/9/2020 11:14:21 AM	Complete	<input checked="" type="checkbox"/>	
knockDown-template1	knockDown-template1	Administrator, AQM	12/24/2019 12:02:35 PM	Complete	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Bold www.aspect.com	Bold www.aspect.com					
List		Administrator, AQM	12/19/2019 5:08:29 PM	Complete	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Section Question Comments		Administrator, AQM	12/19/2019 2:35:04 PM	Complete	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
15		Administrator, AQM	12/19/2019 12:36:41 PM	Complete		

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.

10.1.7 Activate and Deactivate Evaluation Template/s

This section describes how to activate and deactivate one or multiple Evaluation Templates.

10.1.7.1 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.

EVALUATION TEMPLATES

↺
+
✎
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🗑️
⏻
🔌

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

Name	Description	Created By	Created Date	Status	Active	Used for Scoring
hkjfh ksd hfkjshd fjkhsd fkjhds fkhdsfjkghsd kjfhskdjfhkjsdf		Administrator, AQM	12/19/2019 11:41:25 AM	Complete		
9		Administrator, AQM	12/19/2019 11:40:37 AM	Complete		
8		Administrator, AQM	12/19/2019 11:40:03 AM	Complete		

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.

⚠️
Error
✕

System cannot have duplicate evaluation template(s) with the same name as shown below. Please edit the template(s) by changing the name or deactivate the template(s) before activating this evaluation template(s). Other selected template(s) are updated.

10.1.7.2 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.

- 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.

EVALUATION TEMPLATES

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

Name	Description	Created By	Created Date	Status	Active	Used for Scoring
13		Administrator, AQM	12/19/2019 11:58:19 AM	Complete	<input checked="" type="checkbox"/>	
12		Administrator, AQM	12/19/2019 11:56:54 AM	Complete	<input checked="" type="checkbox"/>	
10		Administrator, AQM	12/19/2019 11:55:51 AM	Complete	<input checked="" type="checkbox"/>	
1		Administrator, AQM	12/19/2019 11:52:52 AM	Complete	<input checked="" type="checkbox"/>	
2		Administrator, AQM	12/19/2019 11:51:54 AM	Draft	<input checked="" type="checkbox"/>	
3		Administrator, AQM	12/19/2019 11:50:55 AM	Complete	<input checked="" type="checkbox"/>	
4		Administrator, AQM	12/19/2019 11:49:02 AM	Complete	<input checked="" type="checkbox"/>	
5		Administrator, AQM	12/19/2019 11:48:18 AM	Complete	<input checked="" type="checkbox"/>	

- 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.

EVALUATION TEMPLATES

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

Name	Description	Created By	Created Date	Status	Active	Used for Scoring
1111		Administrator, AQM	1/9/2020 5:03:58 PM	Draft	<input checked="" type="checkbox"/>	
16		Administrator, AQM	1/9/2020 3:04:48 PM	Complete	<input checked="" type="checkbox"/>	
knockDown-template1	knockDown-template1	Administrator, AQM	12/24/2019 12:02:35 PM	Complete	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
List		Administrator, AQM	12/19/2019 5:08:29 PM	Complete	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Section Question		Administrator, AQM	12/19/2019 2:35:04 PM	Complete	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Comments		Administrator, AQM	12/19/2019 12:36:41 PM	Complete	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
15		Administrator, AQM	12/19/2019 12:36:41 PM	Complete	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
14		Administrator, AQM	12/19/2019 12:12:28 PM	Complete	<input checked="" type="checkbox"/>	

Activated Evaluation Templates (points to rows 1111, 16, knockDown-template1, List, Section Question, Comments, 15)

Deactivated Evaluation Template (points to row 14)

Note: Edit, Duplicate and Delete buttons are disabled when multiple evaluation templates are selected.

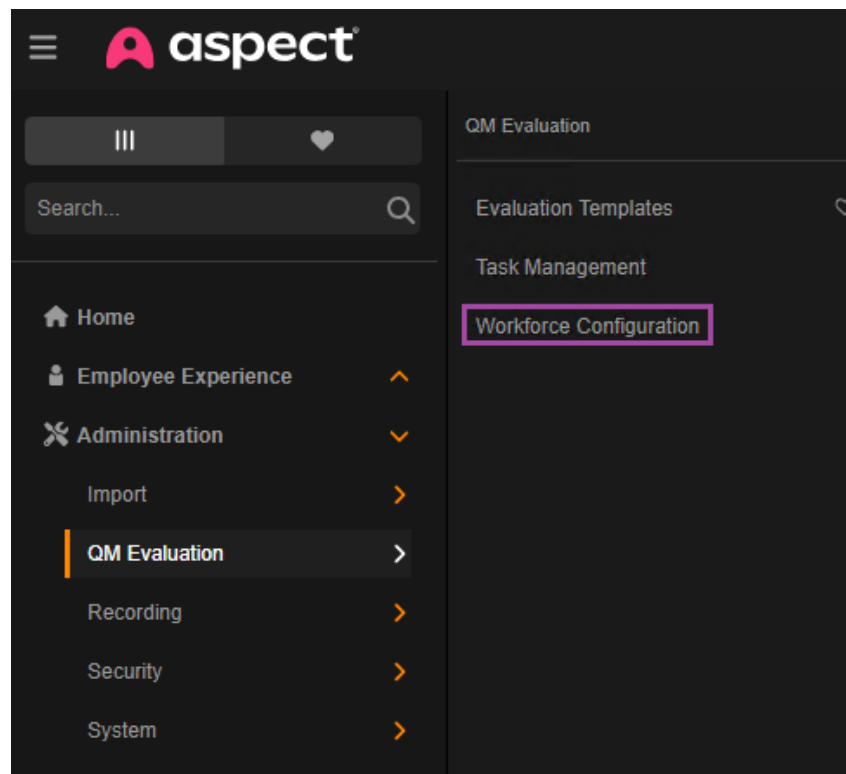
10.2 Workforce Configuration

This section discusses about the Workforce Configuration Navigation, Add, Edit and Upload Scores options.

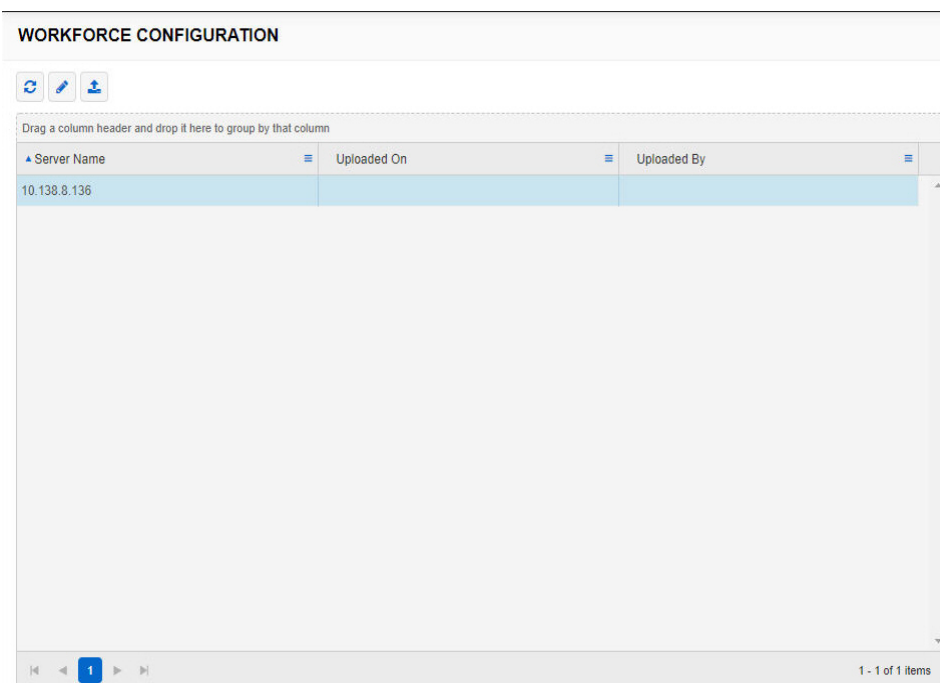
10.2.1 Navigation to Workforce Configuration

Follow the steps given below to navigate to the Workforce Configuration page:

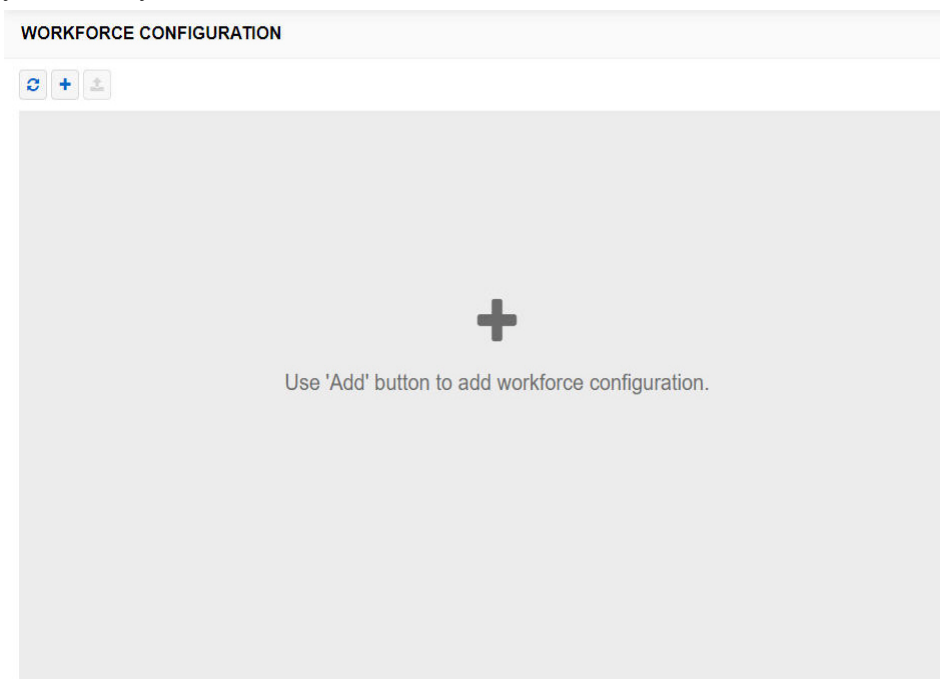
1. Go to the main menu.
2. Click **Administration > QM Evaluation> Workforce Configuration**.













3. The Workforce Configuration page appears as given below



Note: The menu options varies based on the existing Workforce Configuration. If there is not at all any Workforce Configuration listed the grid, then the Add button will appear, as shown below. The Upload Scores button will be disabled. If there is an existing Workforce Configuration listed in the grid, the Add button will not appear at all, instead of that the Edit button is replaced, the Upload Scores button will be enabled, as shown above. As there is no option to delete the Workforce Configuration, so once it is created, there isn't any option to add another configuration, you can only edit the same.



4. The Menu buttons    or    on the Workforce Configuration page are described below:

Icons	Description
Refresh 	Refreshes the Workforce Configuration grid with latest configuration changes. Instead of the browser refresh button user can click on this menu button which will refresh only the grid data and not the page.
Add 	Adds the new workforce configuration to the grid.
Edit 	Edits the selected workforce configuration existing in the grid.
Upload Scores 	Allows to upload the scores details. Note: The Upload Scores button will be enabled only when there is at least one Workforce Configuration listed in the Workforce Configuration grid.

5. The grid columns on the Workforce Configuration page are described below:

Column	Description
Server Name	The name of the server.
Uploaded On	The date and time, when the scores are uploaded to Aspect Workforce from Aspect Quality.
Uploaded By	The logged in user, who uploads the score to the Aspect Quality.

10.2.2 Create Workforce Configuration

To create a Workforce Configuration, perform the following steps.

1. Go to the main menu.
2. Click **Administration > QM Evaluation > Workforce Configuration**.
3. The Workforce Configuration page appears.

- Click on the Add button. The Add Workforce Configuration window appears as shown below.

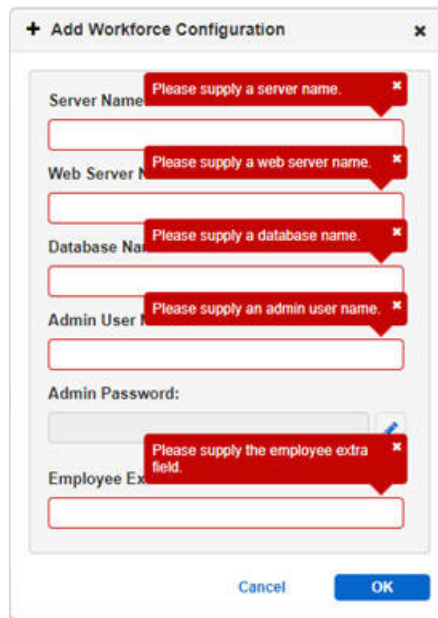
The fields marked (*) are mandatory fields.

- In the **Server Name** text box, enter the server name.
- In the **Web Server Name** text box, enter the web server name.
- In the **Database Name** text box, enter the database name.
- In the **Admin User Name** text box, enter the admin user name.
- In the **Admin Password** text box, enter the admin password. The **Edit** button is available next to Admin Password text box, when clicked **Change Password**, a dialog appears, as shown below.

The dialog allows to change the Admin password, which was entered on the Add Workforce Configuration definition window.

10. In the **Employee Extra Field Name** text box, enter the employee extra field name.

Note: When the value is not entered in the mandatory text boxes, a validation message appears for the blank fields, when clicked **OK**, as shown below.



11. Click **OK** to create a Workforce Configuration.

The created Workforce Configuration appears in the Workforce Configuration grid.

10.2.3 Edit Workforce Configuration

To edit a Workforce Configuration, perform the following steps.

1. Go to the main menu icon.
2. Click **Administration > QM Evaluation > Workforce Configuration**.
3. The Workforce Configuration page appears.
4. Select the available Workforce Configuration from the grid that needs to be edited and click the **Edit** icon.

5. The Edit Workforce Configuration window appears as shown below.


6. Edit the fields as per your requirement.

Note: Refer to [Create Workforce Configuration on page 10-546](#) section, step 4 to 10.

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

10.2.4 Upload Scores

To upload scores in the Workforce Configuration, perform the following steps.

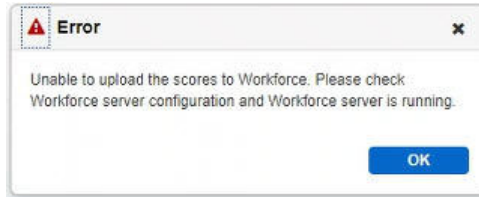
1. Go to the main menu icon.
2. Click **Administration > QM Evaluation > Workforce Configuration**.
3. The Workforce Configuration page appears.
4. Select the available Workforce Configuration from the grid for which the scores needs to be uploaded and click the **Upload Scores** icon  .
5. A Warning message dialog appears to confirm the scores upload as shown below.

6. Click **Yes** to complete the process.

The **Uploaded On** and **Uploaded By** column on the Workforce Configuration page will be updated and will display the date, time and name of the logged in user in the respective

columns.

If the Configuration details which are entered, are not validated either during creating or editing the Workforce Configuration, the error message is displayed on the Upload Scores page, as shown below.



This prohibits the user to upload scores, so enter the same passwords in the Change Password text boxes.

11. Recording

This chapter describes about how Aspect Quality uses different configuration to record a particular interaction.

Different features are covered within Recording. Recording features are listed below:

- [Agent Groups](#)
- [Audio Ports](#)
- [Locations](#)
- [Receiver Groups](#)
- [Recording Boards](#)
- [Recording Groups](#)
- [Recording Rules](#)
- [Skill Groups](#)
- [Switches](#)
- [Trunk Channels](#)
- [VOIP Tap Points](#)

11.1 Agent Groups

Agent Groups are the groups of agents defined with the common skill set.

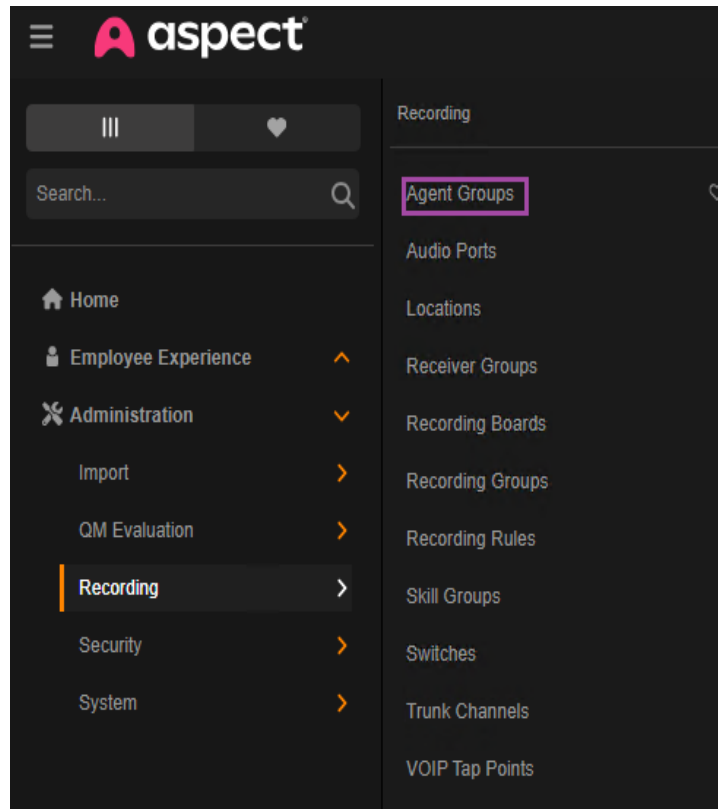
This section discusses about the Agent Groups information.

11.1.1 Navigation to Agent Groups

Follow the steps given below to navigate to the Agent Groups page:

1. Go to main menu icon.

2. Click **Administration > Recording > Agent Groups**.



3. The Agent Groups page appears as given below:


AGENT GROUPS




Refresh, Edit, Info icons

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

Name	Call Type	Number	Switch	Active
QMInboundService2	ACD Call	1000002	UIP7.4SP2_nata	<input checked="" type="checkbox"/>
QMInboundService3	ACD Call	1000003	UIP7.4SP2_nata	<input checked="" type="checkbox"/>
QMInboundService4	ACD Call	1000004	UIP7.4SP2_nata	<input checked="" type="checkbox"/>
QMInboundService5	ACD Call	1000012	UIP7.4SP2_nata	<input checked="" type="checkbox"/>
QMInboundService6	ACD Call	1000013	UIP7.4SP2_nata	<input checked="" type="checkbox"/>
QMMonitor		11000039	2014-02/26/2019 (Inactive)	<input checked="" type="checkbox"/>
QMMonitor		1000011	UIP7.4SP2_nata	<input checked="" type="checkbox"/>
QMMonitor		11000039	QA UIP ECTIPS (Inactive)	<input checked="" type="checkbox"/>
QMOutboundService1	Outbound Queued Call	1000005	UIP7.4SP2_nata	<input checked="" type="checkbox"/>
QMOutboundService2	Outbound Queued Call	1000006	UIP7.4SP2_nata	<input checked="" type="checkbox"/>
QMOutboundService3	Outbound Queued Call	1000007	UIP7.4SP2_nata	<input checked="" type="checkbox"/>
QMOutboundService4	Outbound Queued Call	1000008	UIP7.4SP2_nata	<input checked="" type="checkbox"/>

601 - 700 of 807 items

4. The Menu buttons    on the Agent Groups page are described below:

Icons	Description
Refresh 	Refreshes the agent groups grid with latest agent group changes. Instead of the browser refresh button user can click on this menu button which will refresh only the grid data and not the page.
Edit 	Edits the selected Agent Group existing in the grid.
Information 	Provides the information about the skill groups associated with the selected agent group from the grid.

5. The grid columns on the Agent Groups page are described below:


Column	Description
Name	The name of the Agent Group.
Call Type	The type of call to which the agent is connected and recorded.
Number	The unique number to identify the Agent Group.
Switch	The name of switch to which agent is connected.
Active	The agent group status is displayed by the icon, whether active or not.

11.1.2 Edit Agent Group

This section only applies if you are connecting to a Unified IP switch supporting the Enhanced CTIPS functionality. The configuration options are only available for ACD and Outbound Queued Call types; they are optional and override the settings defined for the switch to which the Agent Group is associated. You can define the Enhanced CTIPS options on a per-agent group level. You must start the Aspect Quality service on the Primary server in order to perform an initial data synchronization operation to load the agent groups into Aspect Quality.

To configure the enhanced CTIPS options for individual agent groups, perform the following steps.


Note: The edit button will be enabled only for those Agent Groups that is associated with UIP Enhanced CTIPS switches and call type other than chat. Also, the edit button remains disabled for UIP Enhanced CTIPS related switches, which are inactive.

1. Go to the main menu icon.
2. Click **Administration > Recording > Agent Group**.
3. The Agent Group page appears.
4. Select the available Agent Group from the grid that needs to be edited and click the **Edit** icon  .

5. The Edit Agent Group window appears as shown below:

Note: The **Name**, **Switch**, **Call Type** and **Agent Group Number** cannot be updated for any Agent Group that is once created and it will remain disabled for Edit Agent Group option.

- The **Override Switch Setting** toggle button is unflagged by default, flag it to enable other options in the window.

The information  button pop-up is available adjacent to the Override Switch Setting, stating, “Please make sure the selected recording tone settings are in compliance with local laws.”

- If you want Unified IP to record calls for the selected agent group when Aspect Quality is unable to communicate with the Unified IP system, flag the **Enable Full-Time Recording** toggle button.
- Once the Override Switch Setting toggle button is flagged, the **Record Tariff Tone Type** drop-down is enabled and is a mandatory field. Select from the following options listed in the drop-down:

Options	Description
No Tone	No tone or beep sounds.
Initiated Tone	A tone or beep sounds when recording begins.
Periodic Tone	A tone sounds repeatedly at intervals specified in seconds.

Note: If you select the Tariff Tone Type No Tone, then the Tariff Tone Duplex Type drop-down list is inactive.
If you select Initiated Tone or Periodic Tone, the agent and caller will hear the tones in the Unified IP call, as well as in the recordings.

- After providing the value in the Record Tariff Tone Type field, the **Record Tariff Tone Duplex Type** drop-down is enabled and is a mandatory field. Select from the following options listed in the drop-down:

Options	Description
Agent Half Duplex	Only the agent hears the tone or beep sounds.
Contact Half Duplex	Only the contact hears the tone or beep sounds.
Full Duplex	Both the agent and the contact hear the beep or tone.

Or

If you select the Record Tariff Tone Type Periodic Tone, then from the Record Tariff Tone Duplex Type drop-down list, select the following option.

Options	Description
Full Duplex	Both the agent and the contact hear the beep or tone.

Note: When Record Tariff Tone Type **No Tone** option is selected, the Record Tariff Tone Duplex Type field remains disabled.


- The **Record Tariff Tone Interval** field remains disabled for **Initiated Tone** and **No Tone** options. The field is enabled and is a mandatory, when **Periodic Tone** option is selected. Enter the value manually in seconds, after which you want the tone to repeat. The value should be a positive integer, less than 10 characters in length.

Note: Any modifications that you make in the Enhanced CTIPS configuration or the Record Tariff Tone configuration do not require that you restart the Aspect Quality Service in the Primary server.

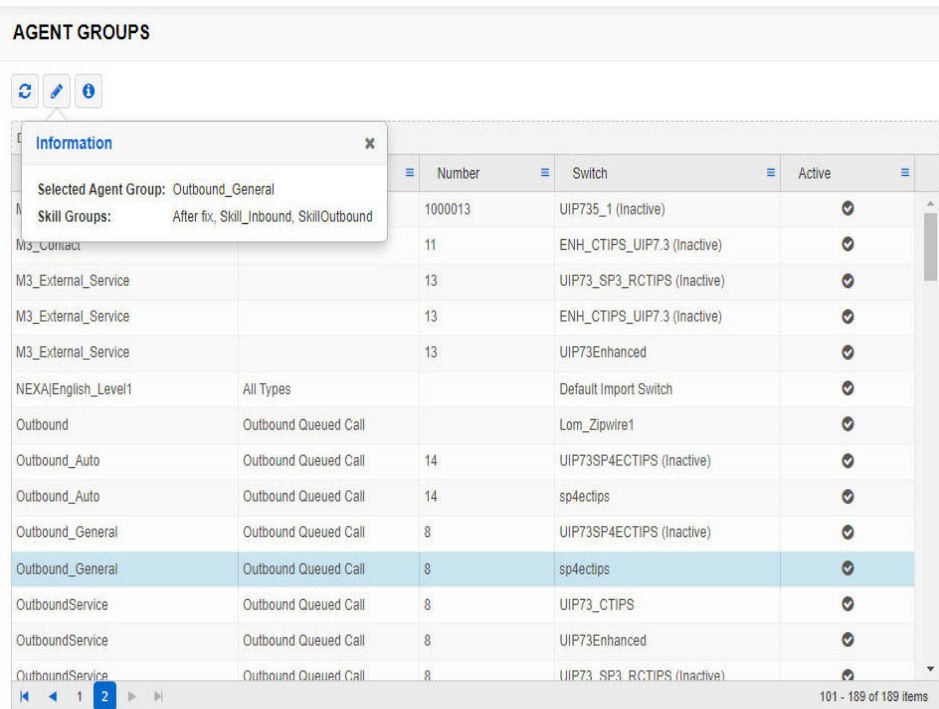
- Edit the field values as per your requirement.
- Click the **OK** button to complete the process.

11.1.3 Information about Agent Group

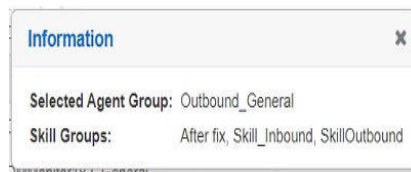
This Information icon briefly gives the skills group information associated with the Agent Group that is selected from the grid.

- Go to the main menu icon.
- Click **Administration > Recording > Agent Groups**.
- The Agent Groups page appears.
- From the Agent Groups page select the agent from the grid for whom you need to view the skill groups information. Then click the **Information**  icon.

5. The Agent Information appears as below:



6. The **Information** pop-up appears with following details:



Selected Agent Group: Name of the Agent Group to which the agent belongs.

Skill Groups: The name of the Skill Group assigned to the agent.

11.2 Audio Ports

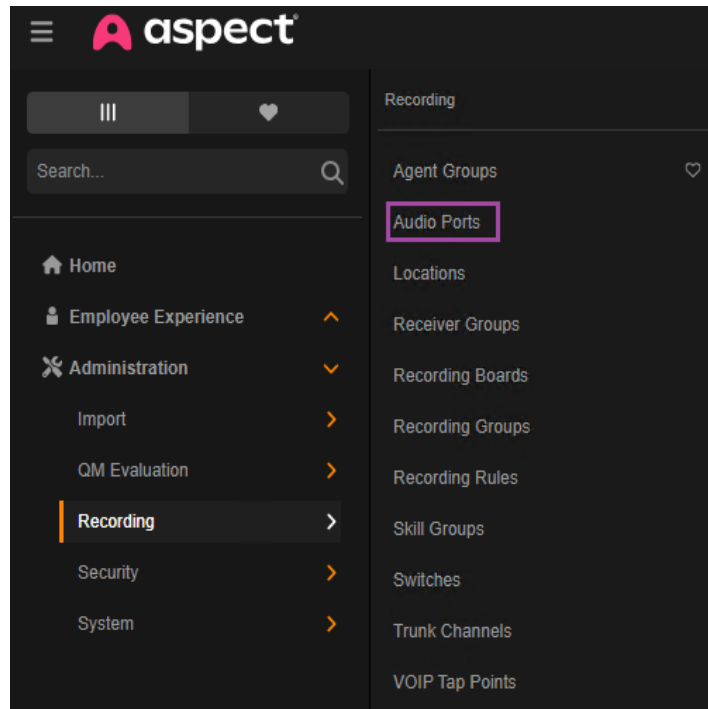
This section discusses about the Audio Ports. To navigate, create, edit, filter, and changing status of an audio port is given below.

11.2.1 Navigation to Audio Ports

Follow the steps given below to navigate to the Audio Ports page:

1. Go to main menu icon.

2. Click **Administration > Recording > Audio Ports**.






3. The Audio Ports page appears as given below:







AUDIO PORTS

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

Name	Description	Type	Server N...	Termi...	Mode	Cha...	Ena...	St...	Extension
PLBK10		SIP_CBK	AQM19SRV12		On Demand		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
PLBK100		SIP_CBK	AQM19SRV12		On Demand		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
PLBK1000		SIP_CBK	AQM19SRV12		On Demand		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
PLBK1001		SIP_CBK	AQM19SRV12		On Demand		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
PLBK1002		SIP_CBK	AQM19SRV12		On Demand		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
PLBK1003		SIP_CBK	AQM19SRV12		On Demand		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
PLBK1004		SIP_CBK	AQM19SRV12		On Demand		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
PLBK1005		SIP_CBK	AQM19SRV12		On Demand		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
PLBK1006		SIP_CBK	AQM19SRV12		On Demand		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
PLBK1007		SIP_CBK	AQM19SRV12		On Demand		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
PLBK1008		SIP_CBK	AQM19SRV12		On Demand		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
PLBK1009		SIP_CBK	AQM19SRV12		On Demand		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
PLBK101		SIP_CBK	AQM19SRV12		On Demand		<input checked="" type="checkbox"/>		
PLBK1010		SIP_CBK	AQM19SRV12		On Demand		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
PLBK1011		SIP_CBK	AQM19SRV12		On Demand		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
PLBK1012		SIP_CBK	AQM19SRV12		On Demand		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
PLBK1013		SIP_CBK	AQM19SRV12		On Demand		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
PLBK1014		SIP_CBK	AQM19SRV12		On Demand		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
PLBK1015		SIP_CBK	AQM19SRV12		On Demand		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	


1 - 100 of 1471 items

4. The Menu buttons       on the Audio Ports page are described below:

Icons	Description
Refresh 	Refreshes the Audio Ports grid with latest audio ports changes. Instead of the browser refresh button user can click on this menu button which will refresh only the grid data and not the page.
Filter 	Filters the grid based on the switches.
Add 	Adds the new Audio Port to the grid.
Edit 	Edits the selected Audio Port existing in the grid.
Information 	Provides the information about the switch associated with the selected audio port from the grid.
Change Status 	Changes the status of the Audio Port listed in the grid.

5. The grid columns on the Audio Ports page are described below:

Column	Description
Name	The name of the port.
Description	The description of the port.
Type	The type of the port, which is configured.
Server Name	The name of the server.
Terminal Number	The terminal number of the port.
Mode	The mode of the port.
Channel	The channel of the port.
Enabled	Indicates whether port is enabled or disabled by means of a check mark icon.
Status	Indicates whether port is active or inactive by means of a check mark icon.
Extension	The extension of the port, if provided.

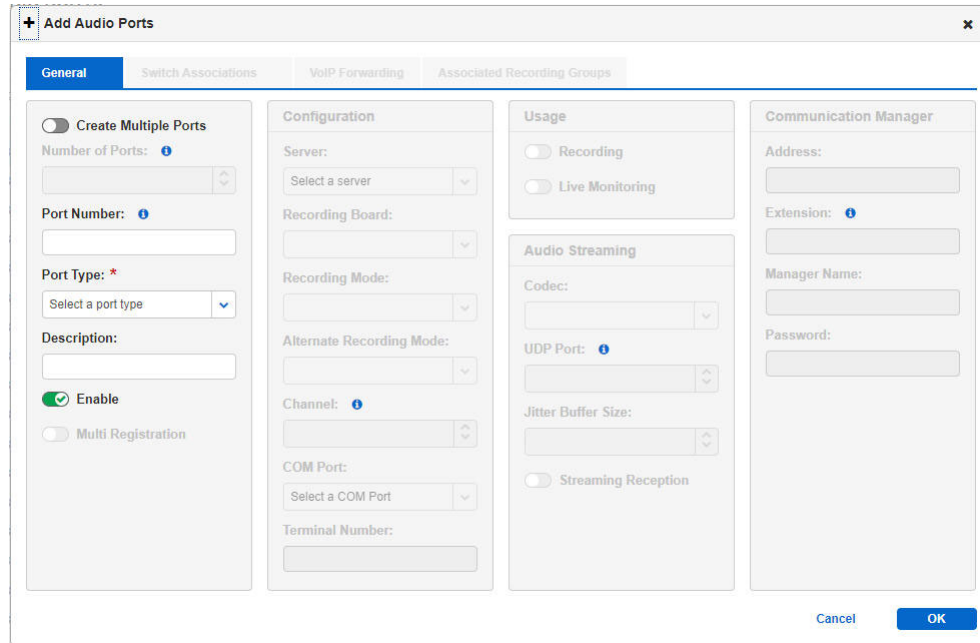
Note: Audio Ports offers the grid that can be filtered and sorted based on selecting any of the columns. Select the Column Settings  icon from the column that needs to be filtered.

11.2.2 Create Audio Ports

To create a new Audio Port, perform the following steps.

1. Go to the main menu.
2. Click **Administration > Recording > Audio Ports**.


3. The Audio Ports page appears.
4. Click on the Add button. The Add Audio Ports window appears with General tab active.



The fields marked (*) are mandatory fields.

Note:


- a. By default the Switch Associations, VOIP Forwarding, and Associated Recording Groups tabs are disabled.
 - b. The VOIP Forwarding tab will be enabled only for HPXM Port Type.
 - c. Associated Recording Groups tab will be enabled only when there is minimum one Switch Associations listed and Recording option should be flagged on the Usage section, in the General tab.
5. In the **General Tab:** In the General tab of the window, various controls are disabled, once Port Type is selected the corresponding controls are enabled. General tab broadly includes five sections; Basic, Configuration, Usage, Audio Streaming, and Communication Manager.
 6. The **Create Multiple Ports** toggle key is unflagged by default. Flag the key to create a group of audio ports. Leave it unflagged, if single port is to be created.
 7. The **Number of Ports** option text box will be enabled, once the Create Multiple Ports option is flagged. Enter the number of ports to be created in the Number of Ports text box.

The information  button pop-up is available adjacent to the Number of Ports, stating, "Sum of 'Number of Ports' and 'Port Number' cannot exceed maximum port size 100,000."

An error message displays, if the port number exceeds 100,000.

Either select the value by clicking the up-down arrow keys or manually enter it in the Number of Ports text box.

Number of Ports field cannot be blank, when enabled.

8. In the **Port Number** text box, the information  button pop-up is available adjacent to the Port Number, stating, “Enter the 'Port Number' between 1 and 100,000.”

Enter the unique value manually in the Port Number text box.

Port numbers appear in the Port Name Column after you configure the ports.

This field cannot be blank.


9. In the **Description** text box, enter the descriptive name for the ports.

10. The **Enable** toggle key is flagged by default. If user wants the audio ports to be able to record, leave it as is. User can unflag it, so that the port does not record.


11. The **Multi Registration** toggle key is unflagged and disabled by default. Flag the key as required.


Note: The Multi Registration key will be disabled for all the Port Types other than DMCC.



12. In the **Port Type** drop-down, the options that are available by default are given below. Also the **General** tab options pertaining to that Port Type are given in the below table:



Port Type	Configuration Section	Usage Section	Audio Streaming Section	Communication Manager Section
AC_HPXM	<p>Server:* Select from the available server options in the drop-down list box, the name of the server on which the audio port runs.</p> <p>Recording Board:* Select the recording board on which the audio port resides from the available options listed in the drop-down list box.</p> <p>Recording Mode: By default only the On Demand option to be selected.</p> <p>Channel:* Either select the value by clicking the up-down arrow keys or manually enter it in the Channel text box. The channel number of the physical port used to record.</p> <p>Note: The information  button pop-up is available adjacent to the Channel, stating, “Enter the 'Channel' between 1 and 9999.”</p>	<p>Recording: The Recording toggle key is unflagged by default. Flag it if you want to allow recording on this port.</p>	<p>Codec: Select from the available Codec options listed in the drop-down. The options are:</p> <ul style="list-style-type: none"> • Linear PCM 8KHz 8-bit mono • G.711 ulaw • G.711 alaw 	NA


Port Type	Configuration Section	Usage Section	Audio Streaming Section	Communication Manager Section
AL_LDPM	<p>Server:* Select from the available server options in the drop-down list box, the name of the server on which the audio port runs.</p> <p>Recording Board: Select the recording board on which the audio port resides from the available options listed in the drop-down list box.</p> <p>Recording Mode: Select from the options listed under drop-down.</p> <p>Alternate Recording Mode: Select from the options listed under drop-down.</p> <p>Channel:* Either select the value by clicking the up-down arrow keys or manually enter it in the Channel text box. The channel number of the physical port used to record.</p> <p>Note: The information ⓘ button pop-up is available adjacent to the Channel, stating, "Enter the 'Channel' between 1 and 9999."</p> <p>Terminal Number: This option is enabled only when single port is created.</p> <p>Note: If Create Multiple Ports option is flagged, the Terminal Number will be disabled.</p>	<p>Recording: The Recording toggle key is unflagged by default. Flag it if you want to allow recording on this port.</p> <p>Live Monitoring: The Live Monitoring toggle key is unflagged by default. Flag it if you want to allow recording on this port using Live Monitor.</p> <p>Note: Live Monitoring can be flagged only with the Recording Mode: On demand option.</p>	<p>Codec: Select from the available three Codec options listed in the drop-down. The options are:</p> <ul style="list-style-type: none"> • Linear PCM 8KHz 8-bit mono • G.711 ulaw • G.711 alaw <p>Note: When Live Monitoring option is flagged, Linear PCM 8KHz 8-bit mono option is not available.</p>	NA



Port Type	Configuration Section	Usage Section	Audio Streaming Section	Communication Manager Section
AL_DP	<p>Server:* Select from the available server options in the drop-down list box, the name of the server on which the audio port runs.</p> <p>Recording Board: Select the recording board on which the audio port resides from the available options listed in the drop-down list box.</p> <p>Recording Mode: Select from the options listed under drop-down.</p> <p>Alternate Recording Mode: Select from the options listed under drop-down.</p> <p>Channel:* Either select the value by clicking the up-down arrow keys or manually enter it in the Channel text box. The channel number of the physical port used to record.</p> <p>Note: The information  button pop-up is available adjacent to the Channel, stating, "Enter the 'Channel' between 1 and 9999."</p>	<p>Recording: The Recording toggle key is unflagged by default. Flag it if you want to allow recording on this port.</p> <p>Live Monitoring: The Live Monitoring toggle key is unflagged by default. Flag it if you want to allow recording on this port using Live Monitor.</p> <p>Note: Live Monitoring can be flagged only with the Recording Mode: On demand option.</p>	<p>Codec: Select from the available three Codec options listed in the drop-down. The options are:</p> <ul style="list-style-type: none"> • Linear PCM 8KHz 8-bit mono • G.711 ulaw • G.711 alaw <p>Note: When Live Monitoring option is flagged, Linear PCM 8KHz 8-bit mono option is not available.</p>	NA



Port Type	Configuration Section	Usage Section	Audio Streaming Section	Communication Manager Section
AL_DT_AM C	<p>Server:* Select from the available server options in the drop-down list box, the name of the server on which the audio port runs.</p> <p>Recording Board: Select the recording board on which the audio port resides from the available options listed in the drop-down list box.</p> <p>Recording Mode: By default only the On Demand option to be selected.</p> <p>Channel:* Either select the value by clicking the up-down arrow keys or manually enter it in the Channel text box. The channel number of the physical port used to record.</p> <p>Note: The information  button pop-up is available adjacent to the Channel, stating, "Enter the 'Channel' between 1 and 9999."</p> <p>COM Port:* Select a COM Port listed under the drop-down.</p>	<p>Recording: The Recording toggle key is unflagged by default. Flag it if you want to allow recording on this port.</p> <p>Live Monitoring: The Live Monitoring toggle key is unflagged by default. Flag it if you want to allow recording on this port using Live Monitor.</p> <p>Note: Live Monitoring can be flagged only with the Recording Mode: On demand option.</p>	<p>Codec: Select from the available three Codec options listed in the drop-down. The options are:</p> <ul style="list-style-type: none"> • Linear PCM 8KHz 8-bit mono • G.711 ulaw • G.711 alaw <p>Note: When Live Monitoring option is flagged, Linear PCM 8KHz 8-bit mono option is not available.</p>	NA


Port Type	Configuration Section	Usage Section	Audio Streaming Section	Communication Manager Section
AL_DT_CB K	<p>Server:* Select from the available server options in the drop-down list box, the name of the server on which the audio port runs.</p> <p>Recording Board:* Select the recording board on which the audio port resides from the available options listed in the drop-down list box.</p> <p>Channel:* Either select the value by clicking the up-down arrow keys or manually enter it in the Channel text box. The channel number of the physical port used to record.</p> <p>Note: The information  button pop-up is available adjacent to the Channel, stating, "Enter the 'Channel' between 1 and 9999."</p>	<p>NA</p> <p>Note: The Usage section is uneditable, but by default Live Monitoring is flagged in this section.</p>	<p>UDP Port:* Enter the value for the UDP Port text box for the Port Type, either using the up down arrow keys or manually.</p> <p>Note: The information  button pop-up is available adjacent to the UDP Port, stating, "Enter the 'UDP Port'."</p>	<p>NA</p>

Port Type	Configuration Section	Usage Section	Audio Streaming Section	Communication Manager Section
AL_DT_GSM	<p>Server:* Select from the available server options in the drop-down list box, the name of the server on which the audio port runs.</p> <p>Recording Board: Select the recording board on which the audio port resides from the available options listed in the drop-down list box.</p> <p>Recording Mode: By default only the On Demand option to be selected.</p> <p>Channel:* Either select the value by clicking the up-down arrow keys or manually enter it in the Channel text box. The channel number of the physical port used to record.</p> <p>Note: The information  button pop-up is available adjacent to the Channel, stating, "Enter the 'Channel' between 1 and 9999."</p>	<p>Recording: The Recording toggle key is unflagged by default. Flag it if you want to allow recording on this port.</p> <p>Live Monitoring: The Live Monitoring toggle key is unflagged by default. Flag it if you want to allow recording on this port using Live Monitor.</p>	<p>Codec: Select from the available three Codec options listed in the drop-down. The options are:</p> <ul style="list-style-type: none"> Linear PCM 8KHz 8-bit mono G.711 ulaw G.711 alaw <p>Note: When Live Monitoring option is flagged, Linear PCM 8KHz 8-bit mono option is not available.</p> <p>Streaming Reception: The Streaming Reception toggle key is enabled only when Live Monitoring option is flagged. By default Streaming Reception is unflagged. Flag it as required.</p> <p>UDP Port:* This option is enabled only when Streaming Reception option is flagged. Enter the value for the UDP Port text box for the Port Type, either using the up down arrow keys or manually.</p> <p>Note: The information  button pop-up is available adjacent to the UDP Port, stating, "Enter the 'UDP Port'."</p>	NA

Port Type	Configuration Section	Usage Section	Audio Streaming Section	Communication Manager Section
AL_NGX	<p>Server:* Select from the available server options in the drop-down list box, the name of the server on which the audio port runs.</p> <p>Recording Board: Select the recording board on which the audio port resides from the available options listed in the drop-down list box.</p> <p>Recording Mode: Select from the options listed under drop-down.</p> <p>Alternate Recording Mode: Select from the options listed under drop-down.</p> <p>Channel:* Either select the value by clicking the up-down arrow keys or manually enter it in the Channel text box. The channel number of the physical port used to record.</p> <p>Note: The information  button pop-up is available adjacent to the Channel, stating, "Enter the 'Channel' between 1 and 9999."</p> <p>Terminal Number: This option is enabled only when single port is created.</p> <p>Note: If Create Multiple Ports option is flagged, the Terminal Number will be disabled.</p>	<p>Recording: The Recording toggle key is unflagged by default. Flag it if you want to allow recording on this port.</p> <p>Live Monitoring: The Live Monitoring toggle key is unflagged by default. Flag it if you want to allow recording on this port using Live Monitor.</p> <p>Note: Live Monitoring can be flagged only with the Recording Mode: On demand option.</p>	<p>Codec: Select from the available three Codec options listed in the drop-down. The options are:</p> <ul style="list-style-type: none"> • Linear PCM 8KHz 8-bit mono • G.711 ulaw • G.711 alaw <p>Note: When Live Monitoring option is flagged, Linear PCM 8KHz 8-bit mono option is not available.</p>	NA

Port Type	Configuration Section	Usage Section	Audio Streaming Section	Communication Manager Section
DMCC	<p>Server:* Select from the available server options in the drop-down list box, the name of the server on which the audio port runs.</p> <p>Recording Board:* Select the recording board on which the audio port resides from the available options listed in the drop-down list box.</p> <p>Recording Mode: By default only the On Demand option to be selected.</p> <p>Channel:* Either select the value by clicking the up-down arrow keys or manually enter it in the Channel text box. The channel number of the physical port used to record.</p> <p>Note: The information  button pop-up is available adjacent to the Channel, stating, "Enter the 'Channel' between 1 and 9999."</p>	<p>Recording: The Recording toggle key is unflagged by default. Flag it if you want to allow recording on this port.</p> <p>Live Monitoring: The Live Monitoring toggle key is unflagged by default. Flag it if you want to allow recording on this port using Live Monitor.</p>	<p>Codec: Select from the available Codec options listed in the drop-down. The options are:</p> <ul style="list-style-type: none"> • G.711 ulaw • G.711 alaw <p>UDP Port:* Enter the value for the UDP Port text box for the Port Type, either using the up down arrow keys or manually.</p> <p>Note: The information  button pop-up is available adjacent to the UDP Port, stating, "Enter the 'UDP Port' between 10000 and 65534."</p> <p>Jitter Buffer Size:* Enter the value for the Jitter Buffer Size text box, either using the up down arrow keys or manually. The minimum value is 10.</p>	<p>Address:* Enter the IP Address in the Address text box.</p> <p>Extension:* Enter the extension number in the Extension text box.</p> <p>Manager Name:* Enter the name of the Manager in the Manager Name text box.</p> <p>Password:* Enter the password in the Password text box.</p> <p>Note: When the Create Multiple Ports key is flagged, the Manager Name and Password fields are not mandatory.</p>

Port Type	Configuration Section	Usage Section	Audio Streaming Section	Communication Manager Section
SIP	<p>Server:* Select from the available server options in the drop-down list box, the name of the server on which the audio port runs.</p> <p>Recording Board:* Select the recording board on which the audio port resides from the available options listed in the drop-down list box.</p> <p>Recording Mode: By default only the On Demand option to be selected.</p>	<p>Recording: The Recording toggle key is unflagged by default. Flag it if you want to allow recording on this port.</p> <p>Live Monitoring: The Live Monitoring toggle key is unflagged by default. Flag it if you want to allow recording on this port using Live Monitor.</p>	<p>Codec: Select from the available Codec options listed in the drop-down. The options are:</p> <ul style="list-style-type: none"> • G.711 ulaw • G.711 alaw <p>UDP Port:* Enter the value for the UDP Port text box for the Port Type, either using the up down arrow keys or manually.</p> <p>Note: The information  button pop-up is available adjacent to the UDP Port, stating, "Enter the 'UDP Port' between 10000 and 65534."</p>	NA
UCM_SIP	<p>Server:* Select from the available server options in the drop-down list box, the name of the server on which the audio port runs.</p> <p>Recording Board:* Select the recording board on which the audio port resides from the available options listed in the drop-down list box.</p> <p>Recording Mode: By default only the On Demand option to be selected.</p>	<p>Recording: The Recording toggle key is unflagged by default. Flag it if you want to allow recording on this port.</p> <p>Live Monitoring: The Live Monitoring toggle key is unflagged by default. Flag it if you want to allow recording on this port using Live Monitor.</p>	<p>Codec: Select from the available Codec options listed in the drop-down. The options are:</p> <ul style="list-style-type: none"> • G.711 ulaw • G.711 alaw • G.729 <p>UDP Port:* Enter the value for the UDP Port text box for the Port Type, either using the up down arrow keys or manually.</p> <p>Note: The information  button pop-up is available adjacent to the UDP Port, stating, "Enter the 'UDP Port' between 10000 and 65534."</p>	NA

Port Type	Configuration Section	Usage Section	Audio Streaming Section	Communication Manager Section
SIP_CBK	<p>Server:* Select from the available server options in the drop-down list box, the name of the server on which the audio port runs.</p> <p>Recording Board:* Select the recording board on which the audio port resides from the available options listed in the drop-down list box.</p>	<p>NA</p> <p>Note: The Usage section is uneditable, but by default Live Monitoring is flagged in this section.</p>	<p>UDP Port:* Enter the value for the UDP Port text box for the Port Type, either using the up down arrow keys or manually.</p> <p>Note: The information  button pop-up is available adjacent to the UDP Port, stating, "Enter the 'UDP Port' between 10000 and 65534."</p>	NA

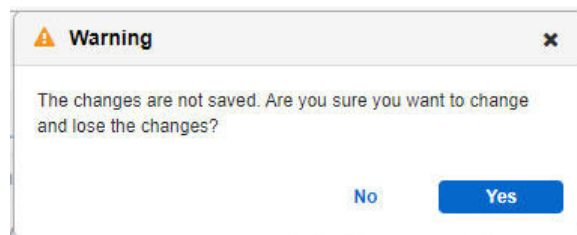
The fields marked (*) are mandatory fields.

See [Whenever once a Port Type is selected and an attempt is made to change the Port Type](#), irrespective of whether all the fields are populated or not being saved, a dialog box appears, stating to select Yes or No for whether to accept or revert the changes. As given below: for details.

See [Alternate Recording Mode](#) for details.

See [Codec](#) for details.

Note: Whenever once a Port Type is selected and an attempt is made to change the Port Type, irrespective of whether all the fields are populated or not being saved, a dialog box appears, stating to select Yes or No for whether to accept or revert the changes. As given below:



d. Recording Mode

In the Configuration section of the window, select one of the following **Recording Mode** from the drop-down list box.

Selection	Description
On Demand	This is the most common setting. Recording is controlled by the monitoring mode and the rules that are configured by the user.

Selection	Description
Call Events	This option is not available for every port type. From the Recording Mode drop-down list box, if you want to start or stop recordings using telephony hardware signals, select Call Events.
Activity Detection	This option is not available for every port type. In this mode, Audio Codes hardware attempts to detect voice activity and record when present.

e. Alternate Recording Mode

In the Configuration section of the window, select one of the following **Alternate Recording Mode** from the drop-down list box.

Selection	Description
Call Events	From the Alternate Recording Mode drop-down list box, if you want to start or stop recordings using telephony hardware signals, select Call Events.
Activity Detection	If you want to start or stop recordings when the system sense audio activity on the line, select Activity Detection.

Note: The Call Events mode is recommended if the integration supports it. Call Events provides much better call recordings. To use Call Events, the integration tap point must be between the outside caller and the call center. Call Events does not work for always-connected agent side taps (sometimes called “nailed-up” connections). Activity Detection breaks a single call into multiple recordings because periods of silence are interpreted as the end of a call, and then the recording stops. However, Activity Detection is the only alternate way to record for always-connected, nailed-up agent side taps.

f. Codec

In the Audio Streaming section of the window, select the **Codec** from the drop-down list box. Codec options specify the audio format which the audio port uses when writing a recording file to disk or when streaming across the network for live monitoring.

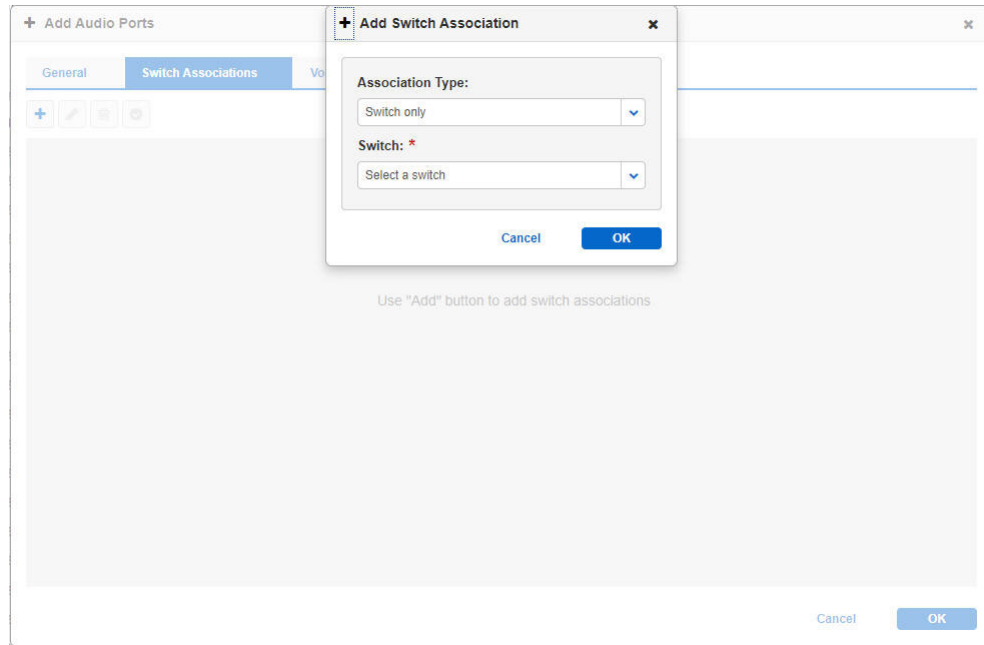
Note: In general, for sites in North America and Japan, select **ulaw**. For sites in Europe, select **alaw**.

Selection	Description
Linear PCM 8KHz 8-bit mono	An uncompressed version of the audio. Aspect Software does not recommend this format. If you select Live Monitoring for use on the audio port, this option is not available in the drop-down list.
G.711 ulaw	A compressed audio format. Aspect Software recommends that if the source from which the audio port is retrieving the audio is using this audio format, that you also set up the audio port to use the same audio codec.
G.711 alaw	A compressed audio format. Aspect Software recommends that if the source from which the audio port is retrieving the audio is using this audio format, that you also set up the audio port to use the same audio codec.

13. In the **Switch Associations** tab: By default only **Add** button is enabled to add switch associations.

The welcome screen for the first time shows, 'Use "Add" button to add switch associations'.

Click on the Add button. The Add Switch Associations window appears as given below:



Note: The fields marked (*) are mandatory fields.

Select the **Association Type** from the drop-down. The options listed in the drop-down varies as per the Port Type in the General tab. These are given in the below table:

Port Type	Association Type
AC_HPXM	Switch only
AL_LDPM	<ul style="list-style-type: none"> Position on switch: By default this option is selected. Enter the value in the Position:* combo text box. <p>Note: If Create Multiple Ports key is flagged in the general tab: Multiple Port Creation for Position on switch will increment by one for every new port position value in Switch Association tab for the selected switch type.</p> <ul style="list-style-type: none"> Agent on switch: When this option is selected, enter the value in the Agent:* combo text box from the drop-down. <p>Note: The Position selection should be unique to a Switch. For example: When you select Switch 1 as Position 1, you can still add Switch 2 as Position 1 or Switch 1 as Position 2. But, you cannot again associate Switch 1 with Position 1.</p>
AL_DP	Trunk Channel: By default this option is selected. Select the value from the drop-down in the Trunk Channel:* combo text box.
AL_DT_AMC	Switch only

Port Type	Association Type
AL_DT_CBK	Switch only
AL_DT_GSM	Switch only
AL_NGX	<ul style="list-style-type: none"> Position on switch: By default this option is selected. Enter the unique value in the Position:* combo text box. <p>Note: If Create Multiple Ports key is flagged in the general tab: Multiple Port Creation for Position on switch will increment by one for every new port position value in Switch Association tab for the selected switch type.</p> <ul style="list-style-type: none"> Agent on switch: When this option is selected, select the unique value in the Agent:* combo text box from the drop-down.
DMCC	<ul style="list-style-type: none"> Switch only: By default this option is selected. Position on switch: If this option is selected, enter the value in the Position:* combo text box. <p>Note: If Multi Registration key if flagged:</p> <ol style="list-style-type: none"> 1.) When you have only one Avaya switch in the system and Multi Registration option is flagged from the General tab, the Switch Association Position field will be automatically populated with the Extension number that is given by the user and the Switch Association is created itself. The Delete option will be disabled for the single Avaya Switch Associations for which the Multi registration key is flagged. Also Edit option is enabled, but will not allow to make any changes to these fields in the Switch Associations tab. 2.) When you have more than one Avaya switch in the system and the Multi Registration key is flagged, the Switch Association will not be automatically added by the system. The user has to select the Switch from the drop-down list box and then the Position field will be populated itself as in the Extension number. Select OK to create a Switch Association. This process needs to be repeated for as many switches listed. 3.) When more than one Port or multiple ports are created, the Switch Associations needs to be created only for one switch, and for next n number of switches, the Switch Associations will be created itself with the Port Number and the Extension number (Position field) will be automatically populated. The Port Number will be with existing Port Number + 1 and Extension number or Position also as existing Extension number + 1. <p>Note: If Create Multiple Ports key is flagged in the general tab: Multiple Port Creation for Position on switch will increment by one for every new port position value in Switch Association tab for the selected switch type.</p>
SIP	Switch only

Port Type	Association Type
UCM_SIP	Switch only Note: You should not define UCM_SIP audio ports dedicated for more than one switch in the same Recording server. A separate recording server needs to be configured for each additional switch. Example of non-supported configuration: (See table below)
SIP_CBK	Switch only

Ports	Switch	Server
1000 to 1100	Cisco SwitchA	RecordingServer1
2000 to 2100	Cisco SwitchB	RecordingServer1

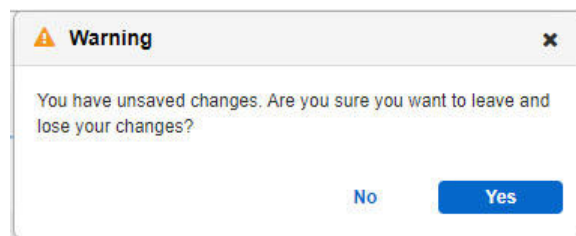
Select the **Switch** with which you associated the audio ports from the drop-down that lists all the active switches for the system.

Click **OK** to save.

The Switch Association created appears in the grid.

User can add more than one Switch Associations.



Note: Whenever once a Switch is selected and an attempt is made to change the Switch, irrespective of whether all the fields are populated or not being saved, a dialog box appears, stating to select Yes or No for whether to accept or revert the changes. As given below:




Once the Switch Association is created, all the other menu options are enabled. These are:


Icons	Description
Add	Adds the new switch to the grid.
Edit	Edits the selected switch existing in the grid.
Delete	Deletes the selected switch from the grid.
Set As Default	Sets the selected switch from the grid as default.

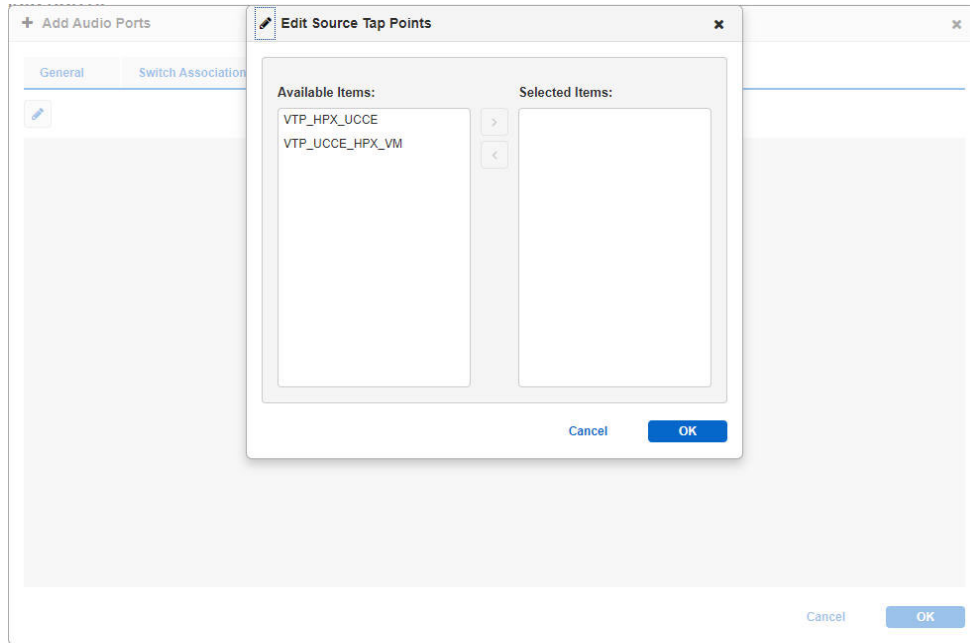
Note: By default the first line switch item will be marked as default, with a check mark icon in the default column.

Any switch item from the grid can be made as default, by selecting the required switch and click the Set as Default icon . The check mark  appears in the Default column for the respective switch.

- In the **VOIP Forwarding** tab: By default only **Edit**  button is enabled to change source tap points.


The welcome screen for the first time shows, 'Use "Edit" button to change source tap points'.

Click on the Edit  button. The Edit Source Tap Points window appears as given below:




Note: The VOIP Forwarding tab will be enabled only for HPXM Port Type.

In the Edit Source Tap Points window, shows all the VOIP Forwarding items in the **Available Items** column.

User can select the items from Available Items section and move it to **Selected Items** by using the **Add items**  arrow key.


To select more than one item from the Available Items section, long press the Ctrl key.

To remove the items from the **Selected Items** section, use the **Remove items**  arrow key.


Once the required VOIP Forwarding items are in the Selected Items section, click the **OK** button.

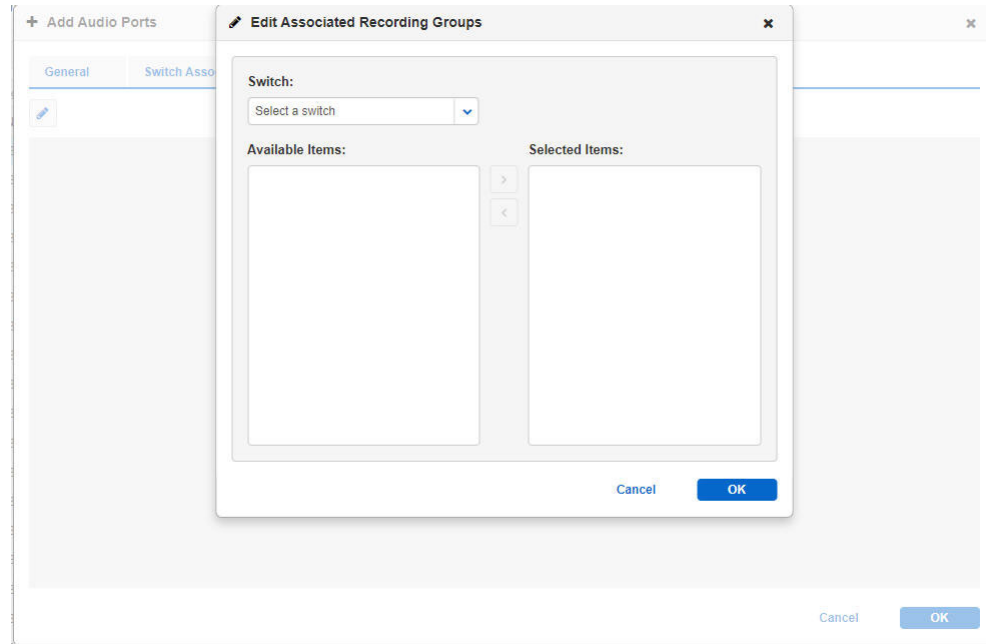
Now, the VOIP Forwarding grid is updated and all the Selected Items will be listed.

The VOIP Forwarding grid comprises of one column, that is **Name**. Name includes all the VOIP Forwarding details.

- In the **Associated Recording Groups** tab: By default only **Edit**  button is enabled to change associated recording groups.

The welcome screen for the first time shows, 'Use "Edit" button to change associated recording groups'.


Click on the Edit  button. The Edit Associated Recording Groups window appears as given below:




Note: Associated Recording Groups tab will be enabled only when there is minimum one Switch Associations listed and Recording option should be flagged on the Usage section, in the General tab.

The **Switch** drop-down will list all the switches that were created in the Switch Associations tab.

Select any of the Switch from the drop-down and all the Recording Groups from the selected Switch will be displayed under the **Available Items** section.

If user wants to select any or all of the Available Items select them with the help of Ctrl key and click the **Add items**  arrow key.

Now, the selected items will be displayed in the **Selected Items** section.

To remove the items from the **Selected Items** section, use the **Remove items**  arrow key.

If user wants to select the different recording group from a different switch, first select the switch from the Switch drop-down, and then select the respective recording groups as required.

Although, when you select the different Switch, the previously selected recording groups will not be listed under the Selected Items section. But, when the previous Switch is reselected, same recording groups will be populated itself under the Selected Items section.


Once the required recording groups are in the Selected Items section, click the **OK** button.

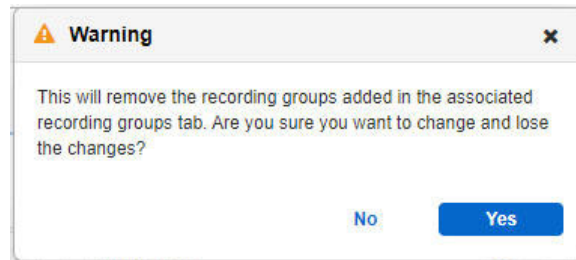
Now, the Associated Recording Groups grid is updated and all the Selected Items will be listed. This list includes all the recording groups added by means of all the different selected switches.

The Associated Recording Groups grid comprises of two columns, these are **Name** and **Switch**.

Name includes all the Recording Group names.

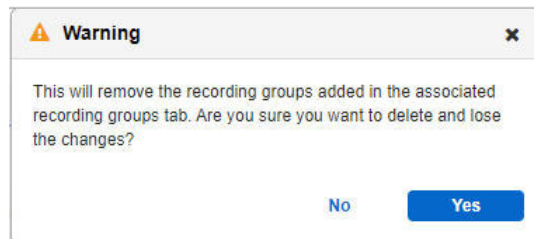
Switch includes the name of the switch to which the Recording Group belongs.

16. After updating the recording groups in the Associated Recording Groups tab, click the **Switch Associations** tab for editing a switch. Select the name of the Switch that needs to be edited. Click on the Edit  button. The edit Warning dialog box appears, as shown below:



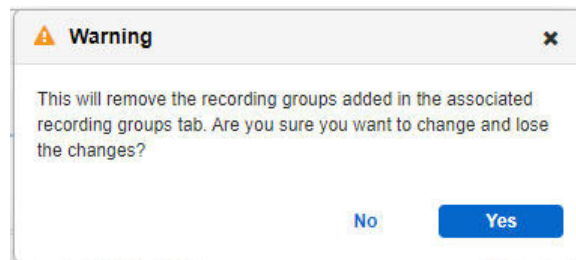
Click **Yes**, if you want to remove the recording groups added in the associated recording groups tab. Click **No**, if you don't want any changes.

17. After updating the recording groups in the Associated Recording Groups tab, click the **Switch Associations** tab for deleting a switch. Select the name of the Switch that needs to be deleted. Click on the Delete button. The delete Warning dialog box appears, as shown below:



Click **Yes**, if you want to delete the recording groups added in the associated recording groups tab. Click **No**, if you don't want any changes.

18. After updating the recording groups in the Associated Recording Groups tab, click the **General** tab. The Recording toggle key was flagged to enable the Associated Recording Groups tab. Again unflag the **Recording** toggle key in the Usage section. The Warning dialog box appears, as shown below:




Click **Yes**, if you want to change the recording groups added in the associated recording groups tab. Click **No**, if you don't want any changes.

- Once all the required fields are populated, select the **OK** button on the General tab to complete the process.

The created audio port appears in the Audio Ports grid.

11.2.3 Edit Audio Ports

To edit an Audio Port, perform the following steps.


- Go to the main menu.
- Click **Administration > Recording > Audio Ports**.
- The Audio Ports page appears.
- Select the available Audio Port from the grid that needs to be edited and click the **Edit** icon .
- The Edit Audio Ports window appears with General tab active as shown below:

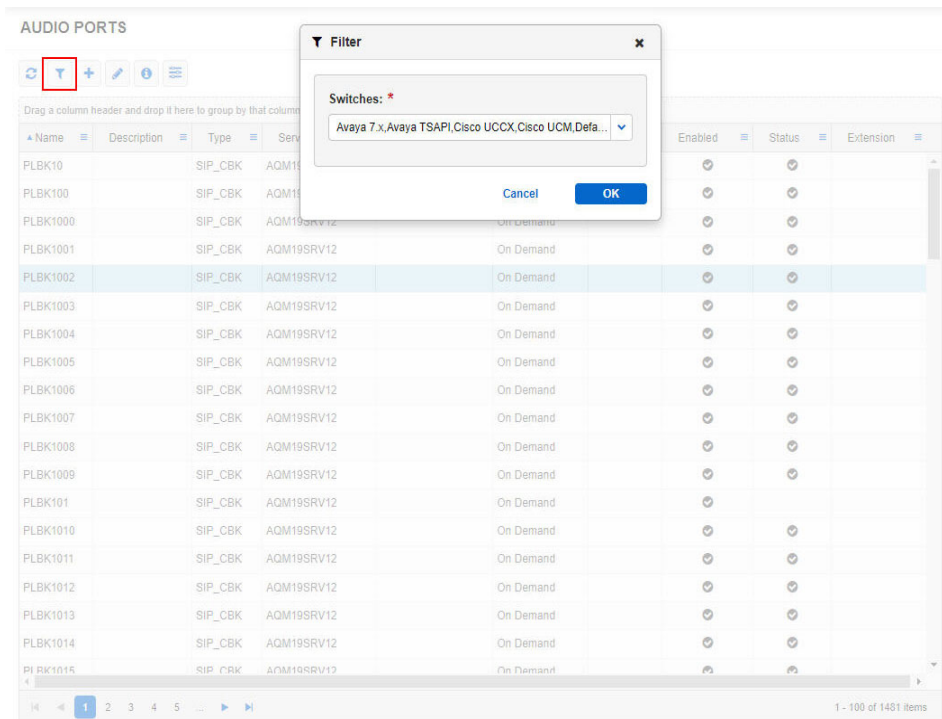
Note: The **Port Type** cannot be updated for any Audio Port that is already created and it will remain disabled for Edit Audio Ports option.

- Edit the fields as per your requirement.
 - Note:** Refer to [Create Audio Ports on page 11-559](#) section, step 4 to 18.
- Click the **OK** button to complete the process.

11.2.4 Filter Audio Ports

The Filter icon filters the audio ports listed in the grid on the basis of switches.

1. Go to the main menu.
2. Click **Administration > Recording > Audio Ports**.
3. The Audio Ports page appears.
4. From the Audio Ports page click the **Filter**  icon.
5. The Filter window appears as below:




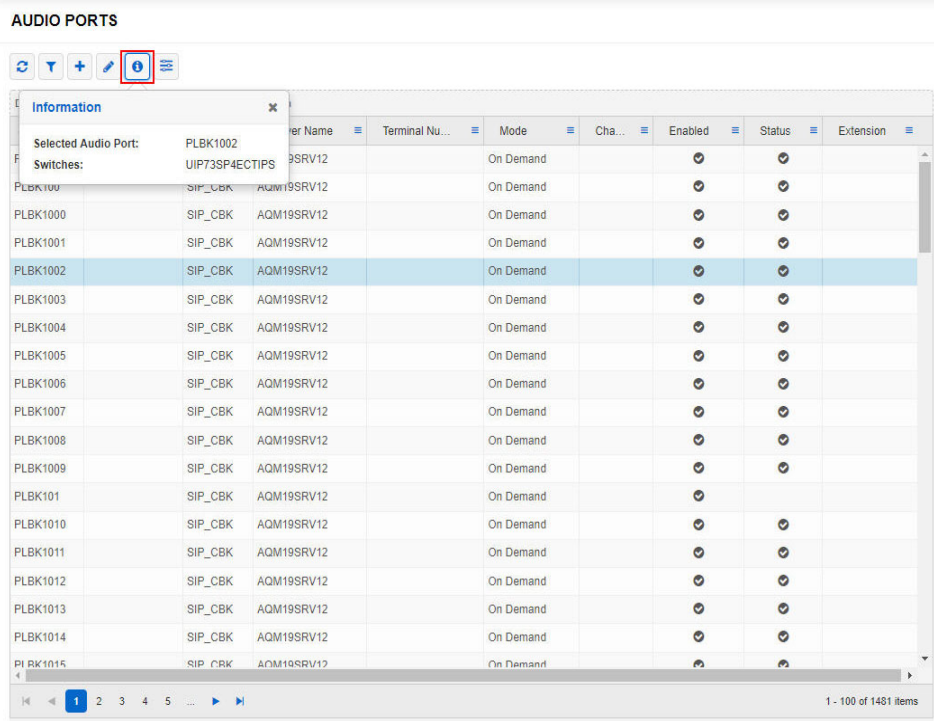
6. **Switches:*** From the Switches drop-down list box, select the type of switch associated to the port, that should be listed on the Audio Ports page. Multiple switches can be selected at once.
7. Click **OK** to complete the process.

11.2.5 Information about Audio Ports

The Information icon briefly gives the audio ports information associated with the switches that is selected from the grid.

1. Go to the main menu icon.
2. Click **Administration > Recording > Audio Ports**.
3. The Audio Ports page appears.

- From the Audio Ports page select the Name from the grid for which you need to view the switches information. Then click the **Information**  icon.
- The Audio Port Information appears as below:



- The **Information** pop-up appears with following details:




Selected Audio Port: Name of the Audio Port.

Switches: The name of the Switches associated to the port.

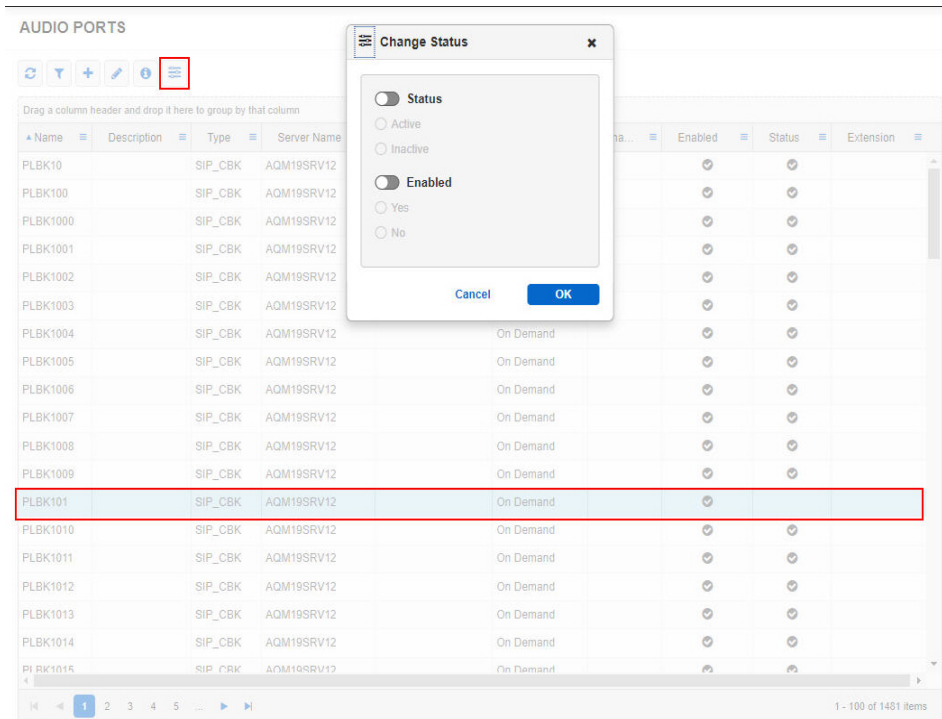
11.2.6 Change Status of an Audio Port

The Change Status icon allows to edit only the audio ports status that is selected from the grid.

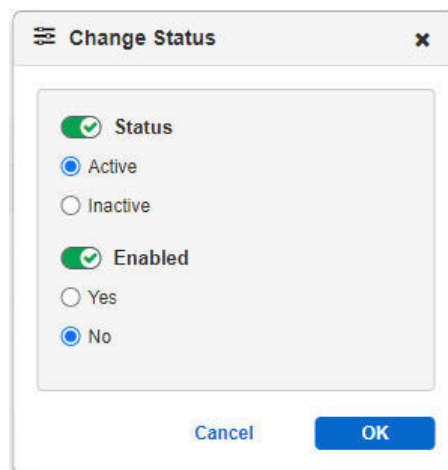
- Go to the main menu.
- Click **Administration > Recording > Audio Ports**.
- The Audio Ports page appears.
- From the Audio Ports page select the Name from the grid for which you need to edit the status information. Then click the **Change Status**  icon.

Note: **Status** can be updated for multiple audio ports selected at once.

5. The Change Status window appears as below:



6. By default the Change Status dialog box for the selected audio port, shows the Status and Enabled toggle keys unflagged, irrespective of whether they are active in the grid. The radio buttons beneath both the options are disabled as well.
7. Notice the selected Audio Port highlighted in the grid for Change Status. Enabled column is active and Status column shows inactive.
8. Edit the Change Status dialog as required.



Here, Status is flagged to **Active** and Enabled is flagged to **No**.

9. Click the **OK** button to save the changes.

10. The changes will be updated in the Audio Ports grid as shown below:

AUDIO PORTS

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

Name	Description	Type	Server Name	Terminal Nu...	Mode	Cha...	Enabled	Status	Extension
PLBK10		SIP_CBK	AQM19SRV12		On Demand		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
PLBK100		SIP_CBK	AQM19SRV12		On Demand		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
PLBK1000		SIP_CBK	AQM19SRV12		On Demand		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
PLBK1001		SIP_CBK	AQM19SRV12		On Demand		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
PLBK1002		SIP_CBK	AQM19SRV12		On Demand		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
PLBK1003		SIP_CBK	AQM19SRV12		On Demand		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
PLBK1004		SIP_CBK	AQM19SRV12		On Demand		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
PLBK1005		SIP_CBK	AQM19SRV12		On Demand		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
PLBK1006		SIP_CBK	AQM19SRV12		On Demand		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
PLBK1007		SIP_CBK	AQM19SRV12		On Demand		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
PLBK1008		SIP_CBK	AQM19SRV12		On Demand		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
PLBK1009		SIP_CBK	AQM19SRV12		On Demand		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
PLBK101		SIP_CBK	AQM19SRV12		On Demand		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
PLBK1010		SIP_CBK	AQM19SRV12		On Demand		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
PLBK1011		SIP_CBK	AQM19SRV12		On Demand		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
PLBK1012		SIP_CBK	AQM19SRV12		On Demand		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
PLBK1013		SIP_CBK	AQM19SRV12		On Demand		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
PLBK1014		SIP_CBK	AQM19SRV12		On Demand		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
PLBK1015		SIP_CBK	AQM19SRV12		On Demand		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

1 - 100 of 1481 items

11.3 Locations

You only need to define locations if one or more of the following conditions apply:

- You are configuring Aspect Quality with Unified IP.
- You are using Location Aware Recording servers in the system. For example, on Unified IP, the Aspect Quality Recording server is aware of the physical location of the DCP/TMS and knows which agents are configured to which DCP/TMS based on the configuration location settings.
- You are using distributed recording storages across three or more distinct geographic locations where the locations share the storage groups as alternate storages.

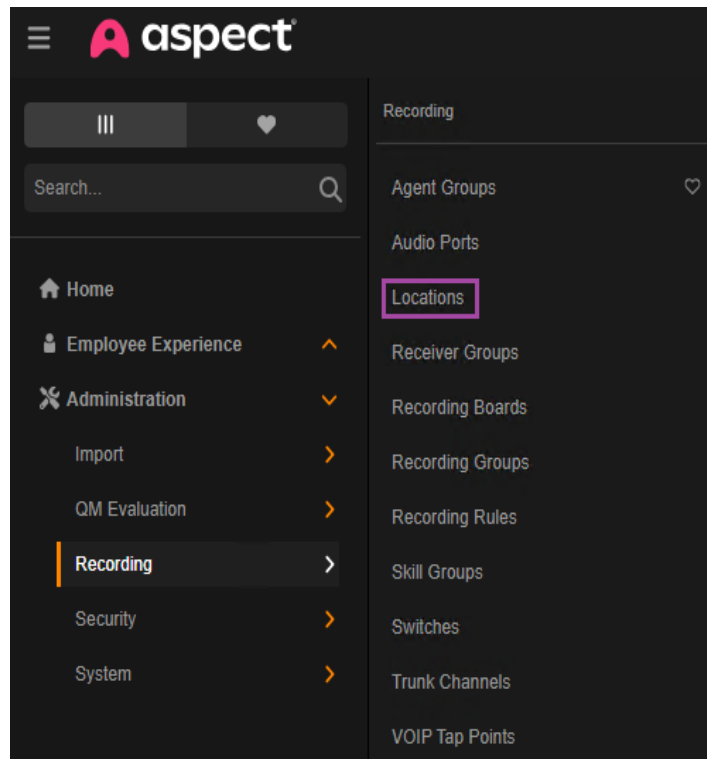
This section describes about Navigation, Add, Edit and Delete a Location.

11.3.1 Navigation to Locations

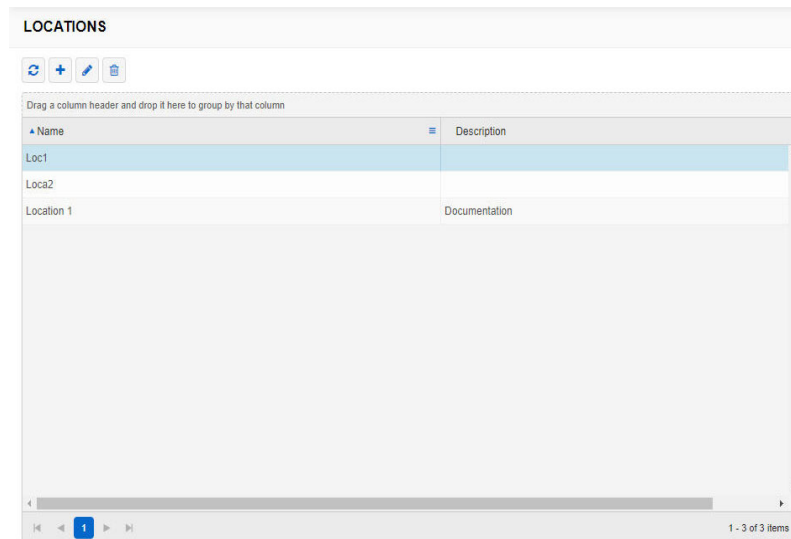
Follow the steps given below to navigate to the Locations page:





1. Go to main menu icon.


2. Click **Administration > Recording > Locations**.






3. The Locations page appears as given below:



4. The Menu buttons     on the Locations page are described below:

Icons	Description
Refresh 	Refreshes the locations grid with latest locations changes. Instead of the browser refresh button user can click on this menu button which will refresh only the grid data and not the page.

Icons	Description
Add 	Adds the new location to the grid.
Edit 	Edits the selected location existing in the grid.
Delete 	Deletes the selected location existing in the grid.

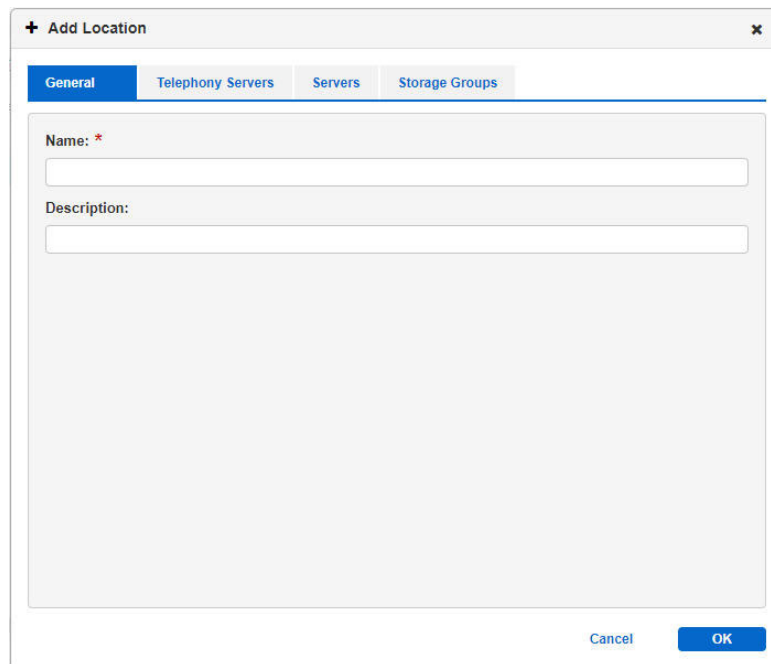
5. The grid columns on the Locations page are described below:

Column	Description
Name	The name of the locations.
Description	The details about the Location, if entered while creating a new location.

11.3.2 Create Locations

To create a new Location, perform the following steps.

1. Go to the main menu.
2. Click **Administration > Recording > Locations**.
3. The Locations page appears.
4. Click on the button. The **Add Location** definition window appears with the **General** tab active.



The fields marked (*) are mandatory fields.

5. On the **General** tab:
 - In the **Name** text box, type a name for the location.

- In the **Description** text box, type a short description of the location.

If the system does not use location aware recording servers, then go to [step 7](#).

6. On the **Telephony Servers** tab:

Under the **Switch** drop-down, only the UIP switches are listed, because the Telephony Server is based on the UIP.

After you select a UIP Switch from the drop-down list, in the **Available Items** window all the servers that are associated with that UIP switch are listed.

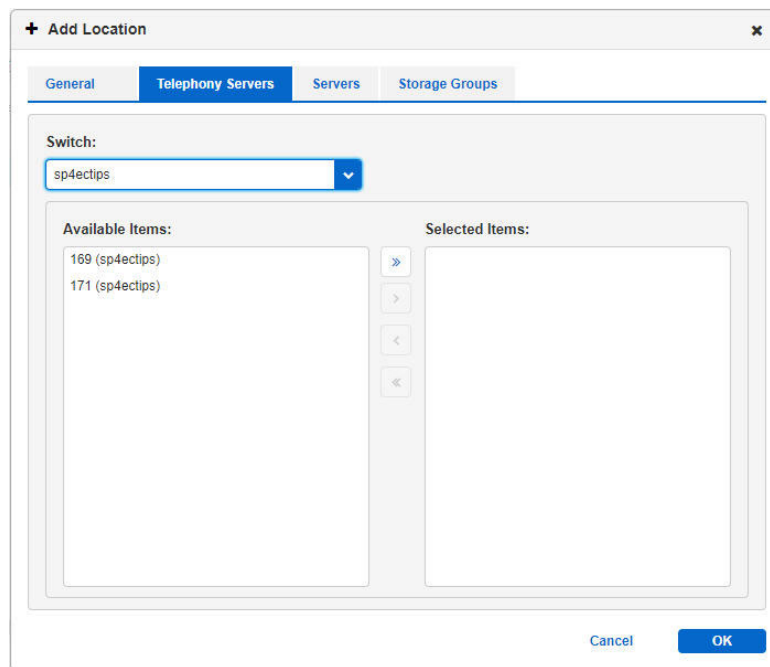
The naming configuration of Server is:

Server Name (Switch Name): For example, 100159 (UIP735)

You can **Add** or **Remove** a server associated with the switch to the Selected Items window, by using the arrow keys.

You cannot modify the **Telephony Servers** tab until the telephony server is available for selection, which occurs when the system is up and running.

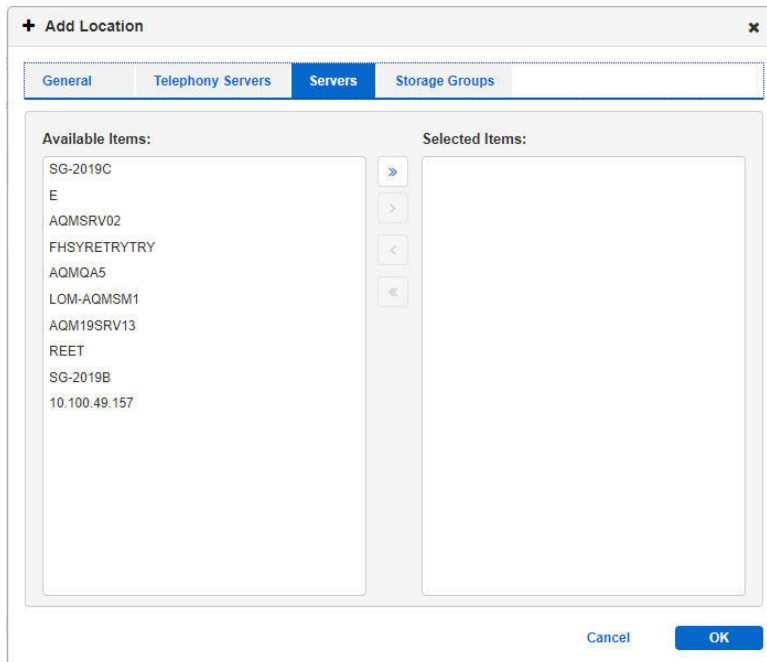
Note: For more information, see [Location Aware Recording Server on page 11-588](#).



7. If the system does not use distributed recording storages across three or more distinct geographic locations where the locations share the storage groups as alternate storages, then go to [step 10](#).

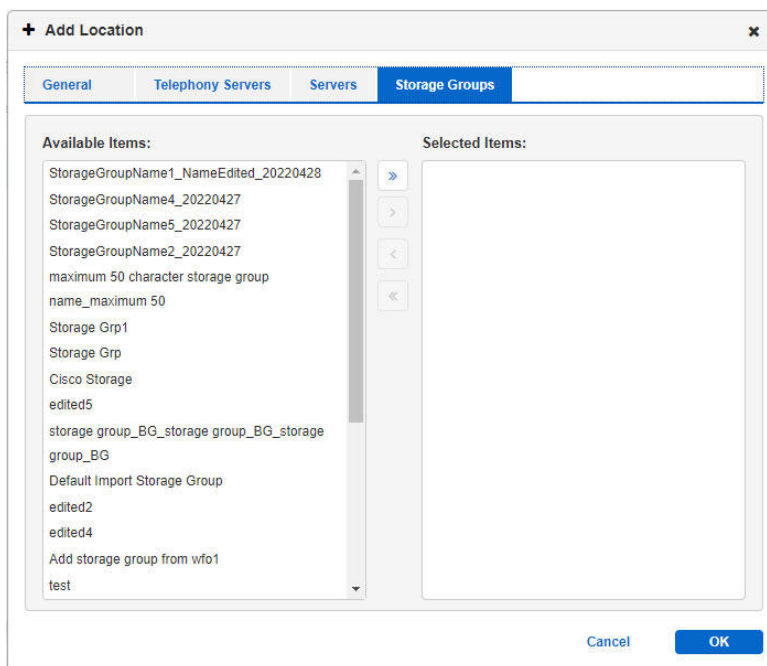
8. On the **Servers** tab:

In the **Available Items** window all the servers that are available in the system are displayed. You can **Add** or **Remove** the required servers that you want to associate with this particular location to the **Selected Items** window, by using arrow keys.



9. On the **Storage Groups** tab:

All the storage groups are linked and listed under the **Available Items** window. You can **Add** or **Remove** the required storage groups that you want to associate with this particular location to the **Selected Items** window, by using the arrow keys.




10. Click **OK**. The Add Location window closes, and the Location that you created displays in the grid on the Locations page.

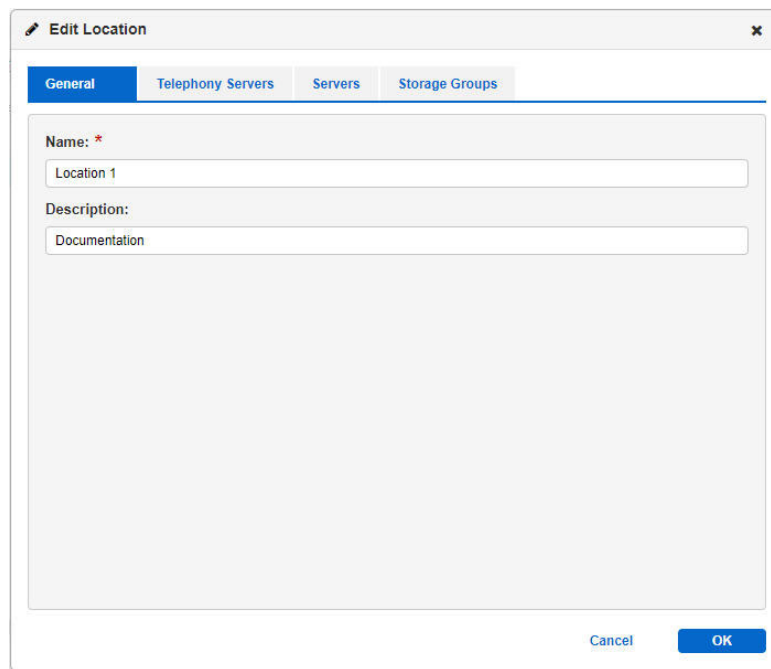
11. Repeat the procedure for all locations that are required in the system.

Note: Only **Name** of location on the General tab is the mandatory field to create a new location.

11.3.3 Edit Location

To edit a Location, perform the following steps.

1. Go to the main menu.
2. Click **Administration > Recording > Locations**.
3. The Locations page appears.
4. Select the available Location from the grid that needs to be edited and click the **Edit** icon .
5. The **Edit Location** window appears, as shown below.



6. Edit the field values as per your requirement.

Note: Refer to [Create Locations on page 11-584](#), step 4 to 10.

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

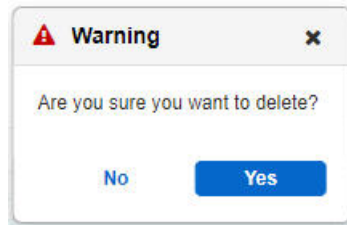
Note: Multiple switches can be selected from the drop-down list box on the Telephony Servers tab, and can be edited.

11.3.4 Delete Location

To delete a Location, perform the following steps.

1. Go to the main menu.

2. Click **Administration > Recording > Locations**.
3. The Locations page appears.
4. Select the available Location from the grid that needs to be deleted and click the **Delete** icon.
5. A warning message appears, if you want to delete or not, as shown below.



6. Select the **Yes** option to delete the location.

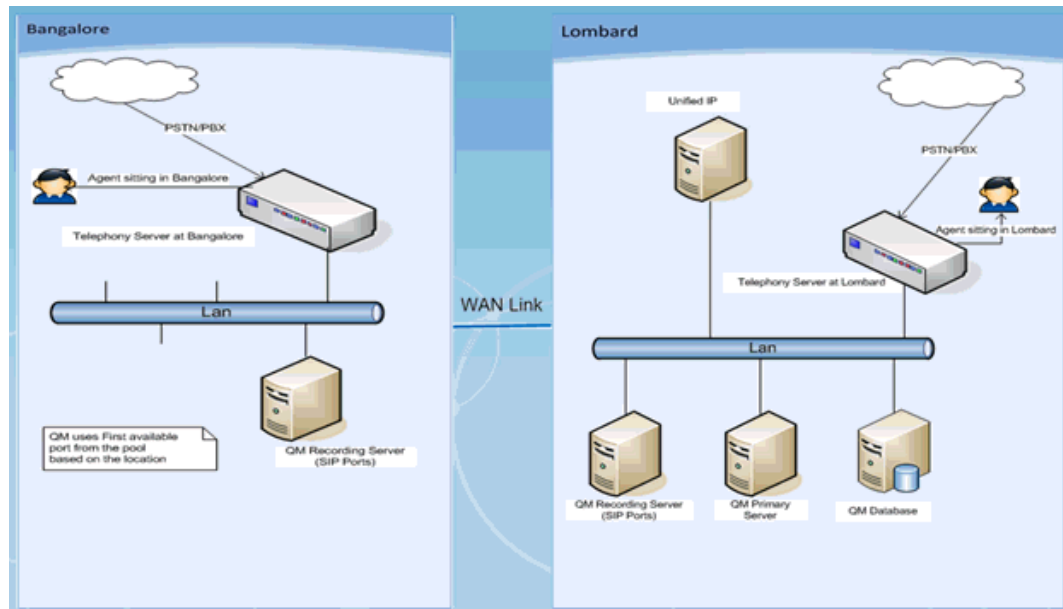
11.3.5 Location Aware Recording Server

In Aspect Quality, for example, when there are two recording servers at different locations, and when an agent answers the call from one location, Aspect Quality might select the port connected to a switch (Telephony Server ID) that resides at a different location. Another example is that you might be using a Unified IP system that has telephony in two different locations.

You can select a recording port on which to record calls, as explained below (see also the following diagram).

- In the first level, recording ports that are tied to the same Telephony Server as the agent audio path (where the agent is signed on) are preferred first. In the diagram example below, the location is named Bangalore.
- If for some reason all recording ports at the first level of preference are busy, and there is another telephony server tied to the Bangalore location, then the second telephony server ports are selected to record calls.

- If all ports of all telephony servers associated with the Bangalore location are busy, then recording ports are selected from the remaining pool of recording ports.



11.3.5.1 Prerequisites

- Aspect Quality version 24 and above
- Aspect Unified IP version 7.4 SP2 and above
- SIP Recording Ports
- Agent Trunk Tapping configuration only when telephony servers are in multiple locations when used with Aspect Quality.

11.4 Receiver Groups

Use Receiver Groups to create an association between File Receiver process(es) and Unified IP telephony servers for a switch. Receiver Groups only apply to Unified IP switch definitions configured to use Enhanced CTIPS.

You can use Receiver Groups to record on the Telephony Server and transmit the recording files for storage and retrieval in Aspect Quality.

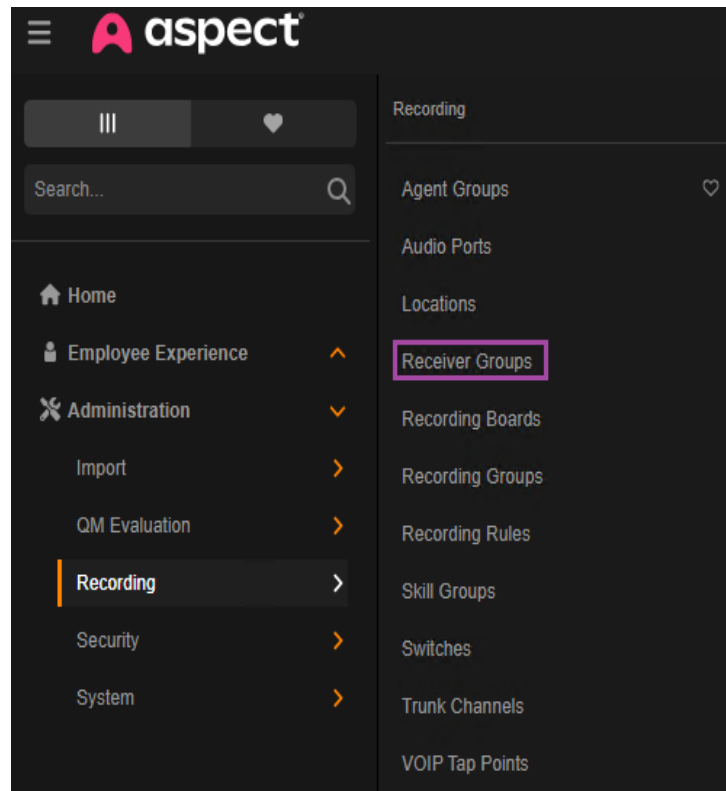
You must define at least one Receiver Group for each Unified IP switch with an Enhanced CTIPS integration.

This section describes about Navigation, Add, Edit, Delete a Receiver Groups.

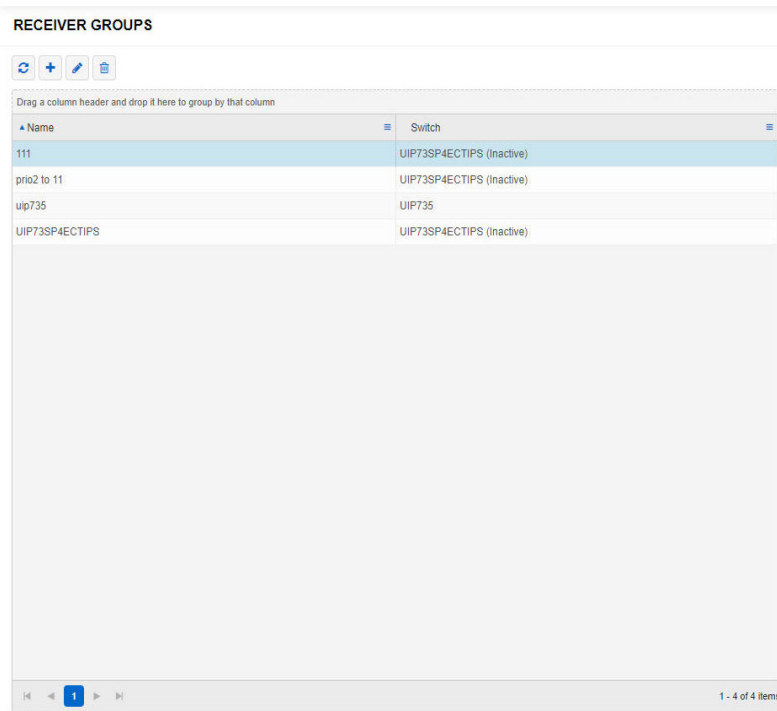
11.4.1 Navigation to Receiver Groups





Follow the steps given below to navigate to the Receiver Groups page:





1. Go to main menu.
2. Click **Administration > Recording > Receiver Groups**.



3. The Receiver Groups page appears as given below:



4. The Menu buttons     on the Receiver Groups page are described below:

Icons	Description
Refresh 	Refreshes the receiver groups grid with latest receiver group changes. Instead of the browser refresh button user can click on this menu button which will refresh only the grid data and not the page.
Add 	Adds the new receiver group to the grid.
Edit 	Edits the selected receiver group existing in the grid.
Delete 	Deletes the selected receiver group existing in the grid.

5. The grid columns on the Receiver Groups page are described below:

Column	Description
Name	The name of the Receiver Group.
Switch	The name of the switch to which the receiver group is associated.

11.4.2 Create Receiver Groups

To create a new Receiver Group, perform the following steps.

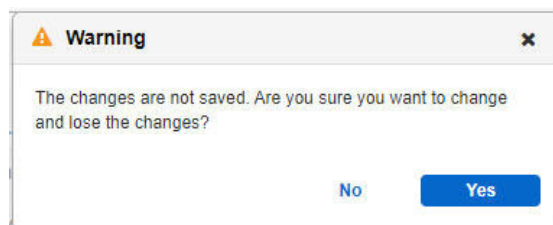
1. Go to the main menu.

2. Click **Administration > Recording > Receiver Groups**.
3. The Receiver Groups page appears.
4. Click on the **+** button. The **Add Receiver Group** definition window appears with the **General** tab active.

Note: The fields marked (*) are mandatory fields.

- In the **Name** text box, enter the name for the receiver group to be created.
- From the **Switch** drop-down list box that displays the active UIP Enhanced CTIPS switches, select the switch to which you want to associate the Receiver Group. The switch that you select determines the items that you can select on the Senders tab.

Note: When you select a **Switch** once, on the general tab, and you revisit to change the same, a warning dialog appears, if you want to change and lose the changes, as shown below.

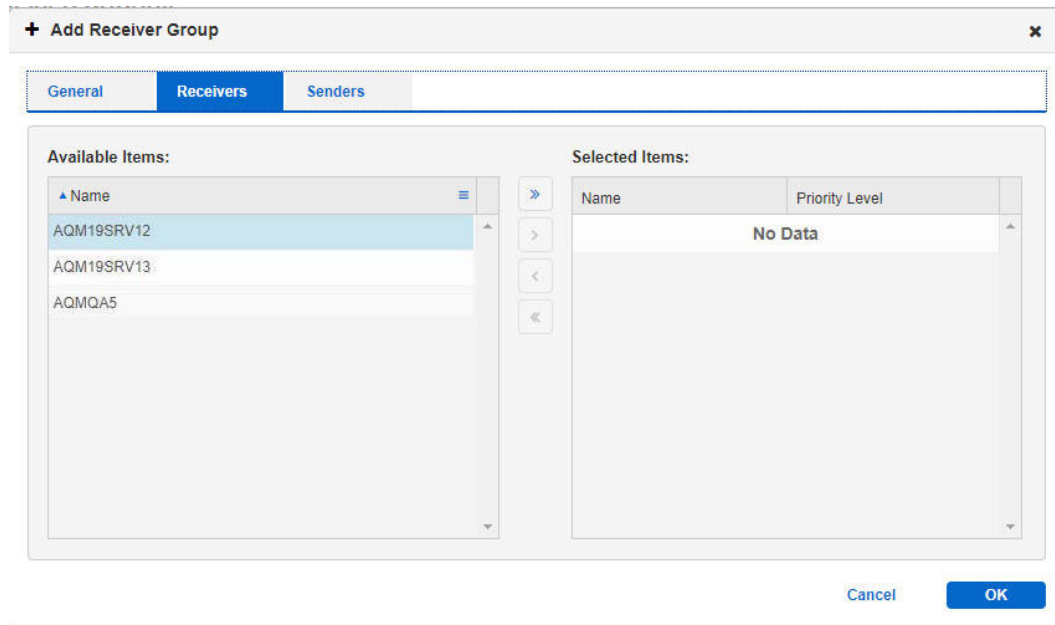


Once you enter the value in the General tab fields, other two tabs; **Receivers** tab and **Senders** tab, will be enabled.

5. On the **Receivers** tab, the **Available Items** window lists all the File Receiver Processes server names. You can **Add** or **Remove** a File Receiver process associated with the

Receiver Group to the **Selected Items** lists, by using the arrow keys. You must assign at least one File Receiver process to the Receiver Group.

Note: A File Receiver process cannot be associated with more than one Receiver Group with the same switch.



- On the **Senders** tab, the **Available Items** window lists all the Unified IP servers available for the selected switch. You can **Add** or **Remove** a selected Unified IP server(s) that you want to associate with the Receiver Group to the **Selected Items** window, using the arrow keys.

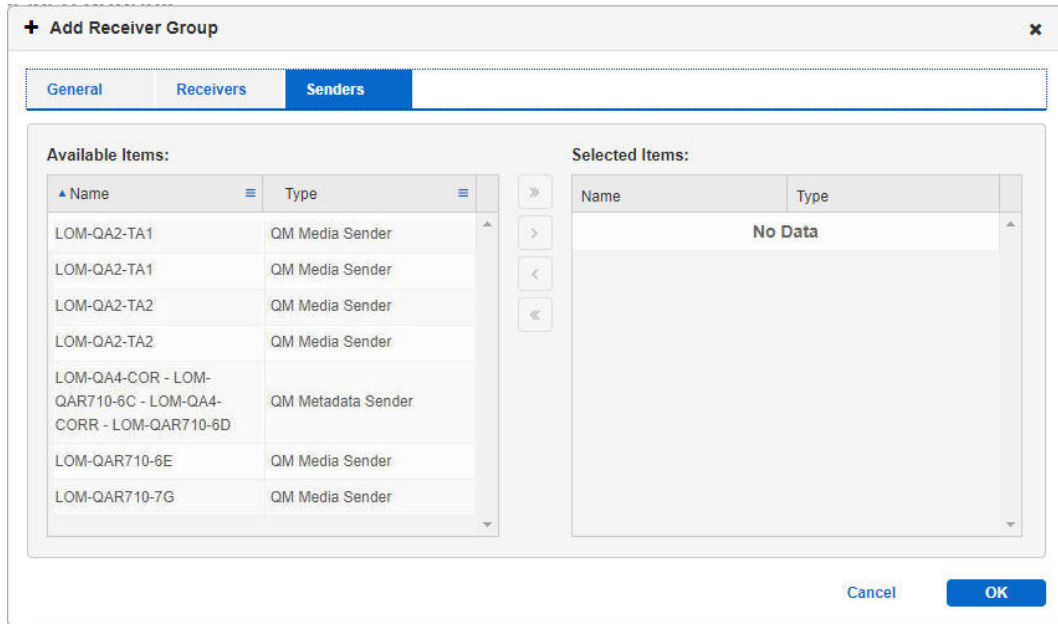
Add the Unified IP servers that use this Receiver Group. This maps or associates specific Unified IP servers with specific Aspect Quality File Receivers. Proper mapping allows sites to control how to move recordings.

Note: The Senders tab displays the list of valid Unified IP servers only after:

- You create a proper switch definition with Enhanced CTIPS switch type,
- You start Interaction Monitor, and
- The switch definition connects to Unified IP and data syncs.

There are two **Type** of Senders list:

- Quality Metadata Sender: These type of servers are all listed in one row only, separated by spaces and Hyphen (-).
- Quality Media Sender: These are listed individually in different rows.



The combination of Receiver Group options defines the File Receiver process(es) that handle the media and metadata files for the specified Unified IP servers.

The list of valid Unified IP servers must include all the Unified IP telephony servers and the Unified IP Centercord servers. The Chat server uses File Receiver to send chat transcript files as a reply to the user. Centercord servers use File Receivers to send recording metadata only when you enable Full Time recording, and there is an error condition preventing normal recording processing.

Unified IP servers consist of Telephony servers for media (vox files) and core machines for full time recording metadata (for example, Agent, Agent Group). If you enable Full Time Recording, you must add these Quality Metadata Sender machines to a Receiver Group. For chat integration, you must add the Quality Media Sender machines to a Receiver Group.

Note: The Unified IP Sender Type column is a read-only field that contains either Quality Media Sender or Quality Metadata Sender.


Unified IP Sender Type	Description
Quality Media Sender	The Unified IP system sends VOX files.
Quality Metadata Sender	The Unified IP system sends fields with information about the VOX files. The Unified IP chat server sends .json files with interaction content and metadata.

7. Click **OK**. The Add Receiver Group window closes, and the Receiver Group that you created displays in the grid on the Receiver Groups page.

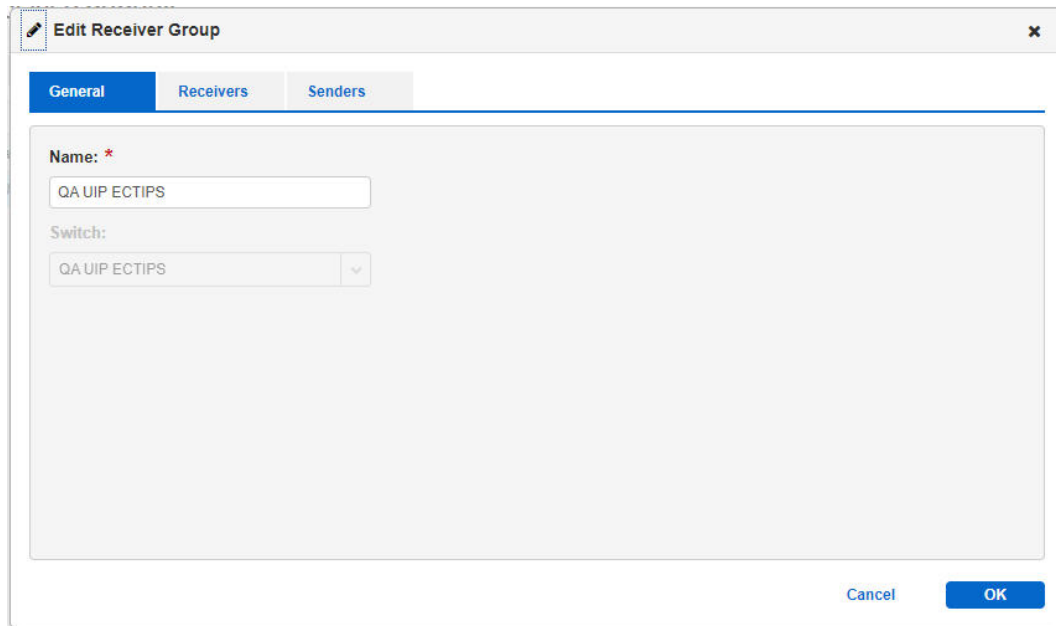
Note: It is mandatory to enter and select values in all the tabs, otherwise an error message appears with the exclamation tag on the tabs, as shown below.

11.4.3 Edit Receiver Groups

To edit a Receiver Group, perform the following steps.

1. Go to the main menu.
2. Click **Administration > Recording > Receiver Groups**.
3. The Receiver Groups page appears.
4. Select the existing Receiver Group from the grid that needs to be edited and click the **Edit** icon .

5. The **Edit Receiver Group** window appears as shown below.



6. Edit the field values as per your requirement.

Note: Refer to [Create Receiver Groups on page 11-591](#) section, step 4 to 7.

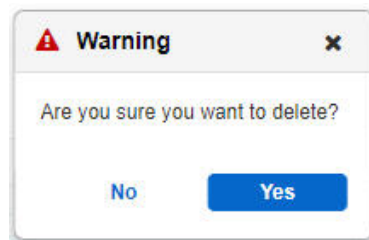
7. Click the **OK** button to complete the process.

Note: The Switch option will be disabled for editing, whether it is Active or Inactive. The inactive switch will be displayed in the window as **(Inactive)**.

11.4.4 Delete Receiver Group

To delete a Receiver Group, perform the following steps.

1. Go to the main menu.
2. Click **Administration > Recording > Receiver Groups**.
3. The Receiver Groups page appears.
4. Select the existing Receiver Group from the grid that needs to be deleted and click the **Delete** icon.
5. A warning message appears, if you want to delete or not, as shown below.



6. Select the **Yes** option to delete the receiver group.

11.5 Recording Boards

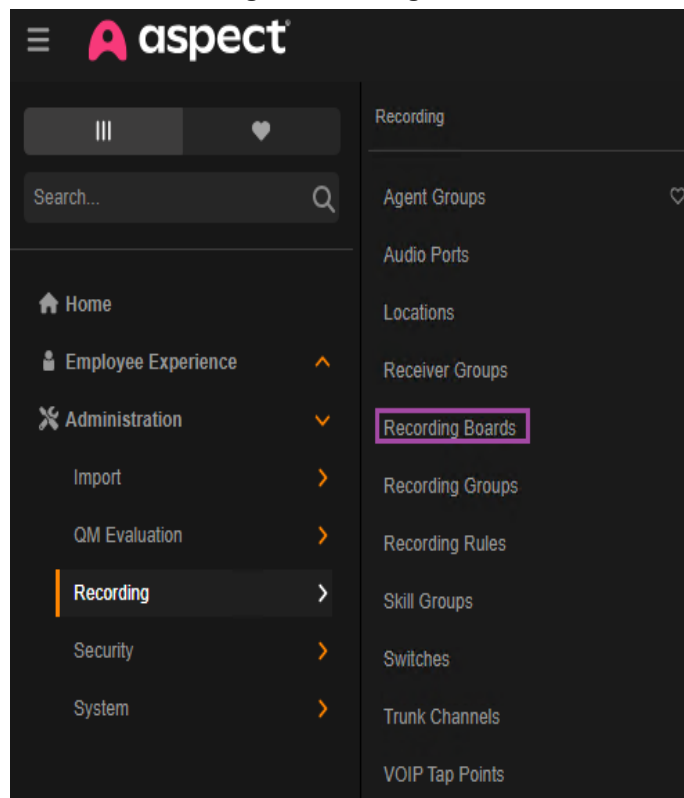
Recording Board lists all the available recording boards in the system.

This section describes about Navigation, Add, Edit, Activate and Deactivate a Recording Board.

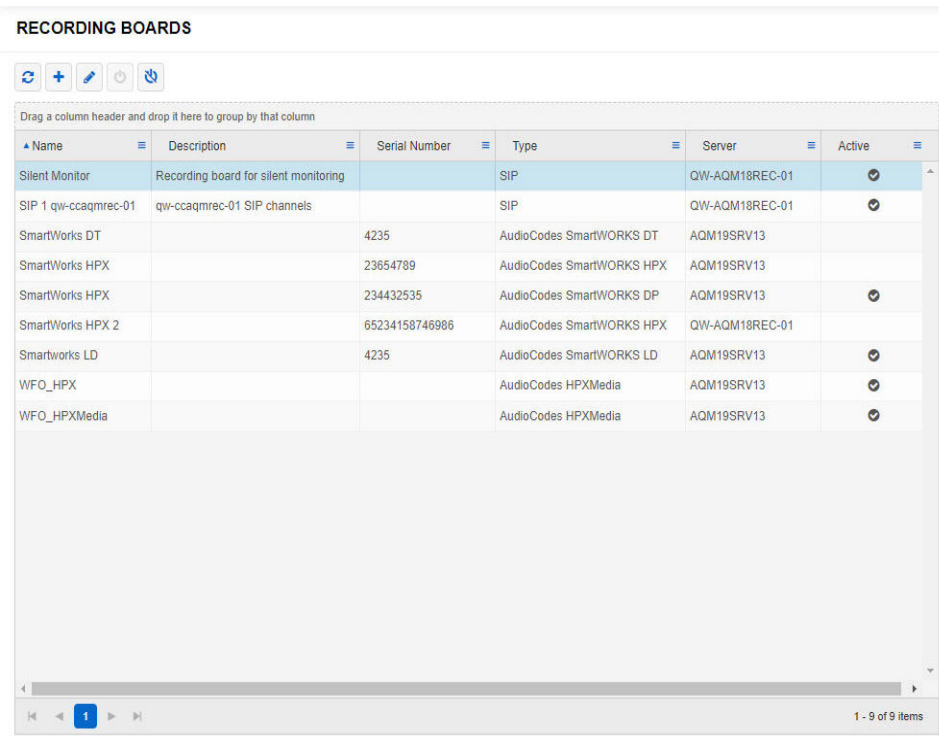
11.5.1 Navigation to Recording Boards


Follow the steps given below to navigate to the Recording Boards page:






1. Go to the main menu.
2. Click **Administration > Recording > Recording Boards**.



3. The Recording Boards page appears as given below:



4. The Menu buttons  on the Recording Boards page are described below:

Icons	Description
Refresh 	Refreshes the recording boards grid with latest recording board changes. Instead of the browser refresh button user can click on this menu button which will refresh only the grid data and not the page.
Add 	Adds the new recording board to the grid.
Edit 	Edits the selected recording board existing in the grid.
Activate 	Activates the existing recording board.
Deactivate 	Deactivates the existing recording board.

5. The grid columns on the Recording Boards page are described below:

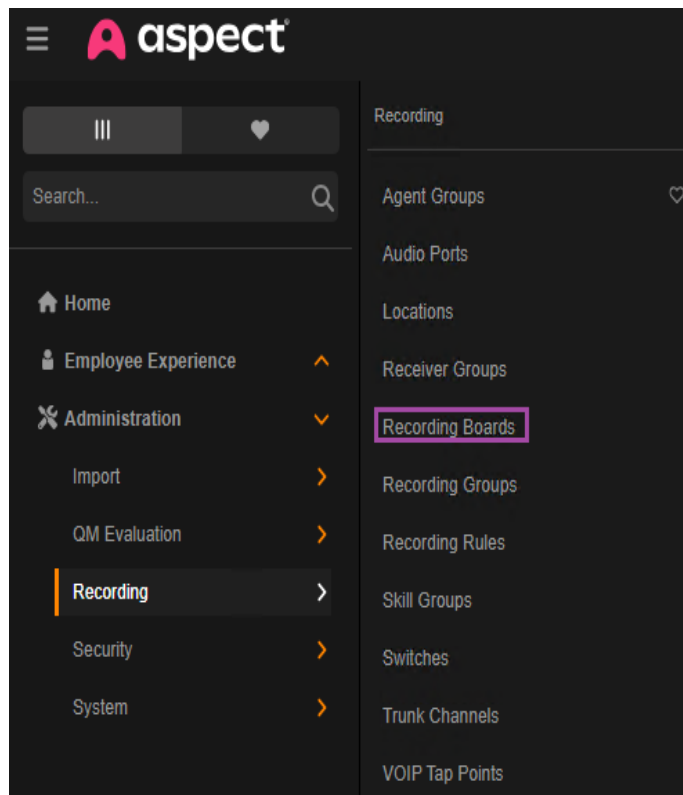
Column	Description
Name	The name of the Recording Board.
Description	Gives the description of the board, if any.
Serial Number	Gives the serial number of the particular recording board.
Type	Gives the recording board configuration.
Server	The name of server to which recording board is associated.

Column	Description
Active	The recording board status is displayed by the icon, whether active or not.

11.5.2 Create Recording Boards

To create a new Recording Group, perform the following steps.

1. Go to the main menu.
2. Click **Administration > Recording > Recording Boards**.



3. The Recording Boards page appears.

- Click on the  button. The Add Recording Boards definition window appears.

Note: The fields marked (*) are mandatory fields.

- In the **Name** text box, type a board name that uniquely identifies a recording board. This field cannot be blank.
- In the **Description** text box, type a short description of the board.
- Select the **Server** from the drop-down list box, in which you installed the board.
- In the **Board Configuration** section of the window, from the **Type** drop-down list box, select the type of board. There are total nine recording board types listed in the drop-down. In the example, the card is an AudioCodes HPXMedia.

By default the first type of recording board is selected, here it is AudioCodes HPXMedia.

Based on the Type of recording board selected, further section needs to be updated.

Type	Section (s)
AudioCodes HPXMedia	In the Network Adapter section of the window, enter the IP Address* .
AudioCodes SmartWORKS DP	In the Serial Number* text box enter a value.
AudioCodes SmartWORKS DT	In the Serial Number* text box enter a value.
AudioCodes SmartWORKS HPX	In the Serial Number* text box enter a value. Note: In the AudioCodes SmartWORKS HPX, the Serial Number need not be unique.
AudioCodes SmartWORKS LD	In the Serial Number* text box enter a value.
AudioCodes SmartWORKS NGX	In the Serial Number* text box enter a value.

Type	Section (s)
Avaya DMCC	<p>In the Primary AES Server section of the window, enter the following values in the text boxes:</p> <ul style="list-style-type: none"> • Address* • Port* • User Name* • Password* • Certificate* • Protocol Version* • TSAPI Link Name <p>In the Backup AES Server section of the window, enter the following values in the text boxes:</p> <ul style="list-style-type: none"> • Address • Port • User Name • Password • Certificate • Protocol Version • TSAPI Link Name <p>Note:</p> <ul style="list-style-type: none"> • In the Primary AES Server section window the fields marked with * are mandatory, but they aren't mandatory in the Backup AES Server section until and unless all these similar * fields are left blank. If any one of the similar to * marked fields are entered with any value in the Backup AES Server, all the similar * fields becomes mandatory in Backup AES Server. • Any modification made to an Avaya DMCC recording board requires restarting the Aspect Quality service on affected Recording port server. The DMCC Recording ports are made aware of the DMCC interface when the Aspect Quality service is restarted; otherwise, the DMCC Recording ports associated with the recording board are not functional.

Type	Section (s)
SIP	<p>In the SIP Configuration section of the window:</p> <ul style="list-style-type: none"> • Secure RTP: The Secure Real-Time Transport Protocol (RTP) toggle key is unflagged by default. • Certificate* • Transport Protocol: Select the protocol for SIP signaling (TCP, UDP or TLS) from the drop-down list box. By default, the first listed item, i.e. TCP is selected. <p>Note: Even though you can add multiple recording boards against a single Aspect Quality Recording server, the boards must have the same Local Signaling Port and Transport Protocol. The UI populates the two fields by using the information from the first board when you create more boards. Aspect Quality warning messages open if you attempt to change the information.</p> • Local Signaling Port* <p>Note: An Aspect Quality Recording server can have two Unified IP switches up and running only when the Transport Protocol and the Local Signaling port for both Unified IP versions are the same. Therefore, a single Aspect Quality Recording server cannot accommodate two versions of Unified IP if one of the versions is secure (with Secure Socket Layer [SSL]) and the other is unsecure (non-SSL).</p> • Primary Proxy Server Port* • Primary Proxy Server Address* • Backup Proxy Server Address • Backup Proxy Server Port <p>Note: Backup Proxy Server Address and Backup Proxy Server Port, both are optional fields. But, if any value is entered should be entered either in both the fields or both the fields should be blank.</p> • RFC 2833 DTMF Payload Type*: Enter the Type to carry RFC 2833 DTMF digits. <p>Note: This type must match the value used in the Unified IP Gateway configuration.</p> <p>9. Dial String: In the Dial String text box, type a number used by the Unified IP Numbering Plan for the M3 Service that is running the Aspect Quality Monitor Script. The number overwrites the Dial String value in the Switch Definition window for this particular recording board. If you leave the text box empty, the system uses the switch Dial String instead. <p>Note: For Unified IP, a typical Dial String is 9999.</p> <p>Note: When you have already created any SIP board from any particular server listed in the drop-down list box, the Transport Protocol will automatically be selected as the same, when you again create another SIP board with the same server.</p> </p>

Type	Section (s)
Cisco BIB (Cisco Built-in Bridge)	<p>The Built-in Bridge (BIB) recording feature requires the creation of a new Cisco BIB recording board on each recording server. This board is based on the SIP Protocol and provides an interface between the Cisco Unified Contact Center Enterprise (UCCE) and the Unified Communications Manager (UCM) switch and the recording servers.</p> <p>The number of audio ports on this board is limited by the CPU and memory capacity of the recording server. The results of the load testing provide the specific capacity numbers and limit on provisioning. For the specific capacity numbers and limits on provisioning, see the <i>Alvaria Quality Planning Guide</i>.</p> <p>In the SIP Configuration section of the window, enter the following values in the text boxes:</p> <ul style="list-style-type: none"> • Transport Protocol: Select the protocol for SIP signaling (TCP, UDP or TLS) from the drop-down list box. By default, the first listed item, i.e. TCP is selected. <p>Note: Even though you can add multiple recording boards against a single Aspect Quality Recording server, the boards must have the same Local Signaling Port and Transport Protocol. The UI populates the two fields by using the information from the first board when you create more boards. Aspect Quality warning messages open if you attempt to change the information.</p> <ul style="list-style-type: none"> • Local Signaling Port* • Certificate <p>Note: When you have already created any Cisco BIB board from a particular server listed in the drop-down list box, the Transport Protocol and Local Signaling Port will automatically be updated with the existing same value, when you again create another Cisco BIB board with the same server.</p>

Note: The fields marked (*) are mandatory fields.

Serial Number*

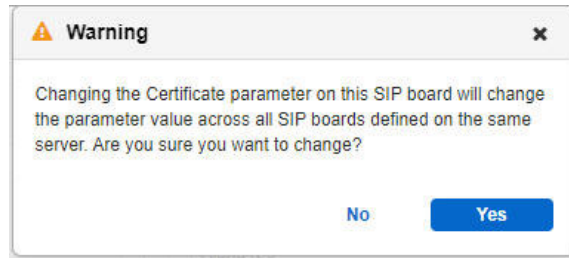
In the **Serial Number** text box, type the **full** master serial number, which is unique for every type of recording board in the system.

Note: To determine the serial number, you can examine the documentation included with the card, or you can access the built-in Web server configured on this card. You can also open SmartWorks on the Recording server and locate the serial number on the Board tab.

Certificate

Enter any value for Certificate.

Note: When a Recording Board is created with a particular Server with either the SIP or Cisco BIB Type, the Certificate field value should remain the same for as many Recording Boards created. If the Certificate value is changed for either SIP or Cisco BIB, a warning message appears that whether the value to be updated across all the Recording Boards with that particular Type, as given below for SIP Type.



Note: You can configure multiple recording boards against a single Aspect Quality server. You can also configure multiple ports against a single board and against an already-created board.

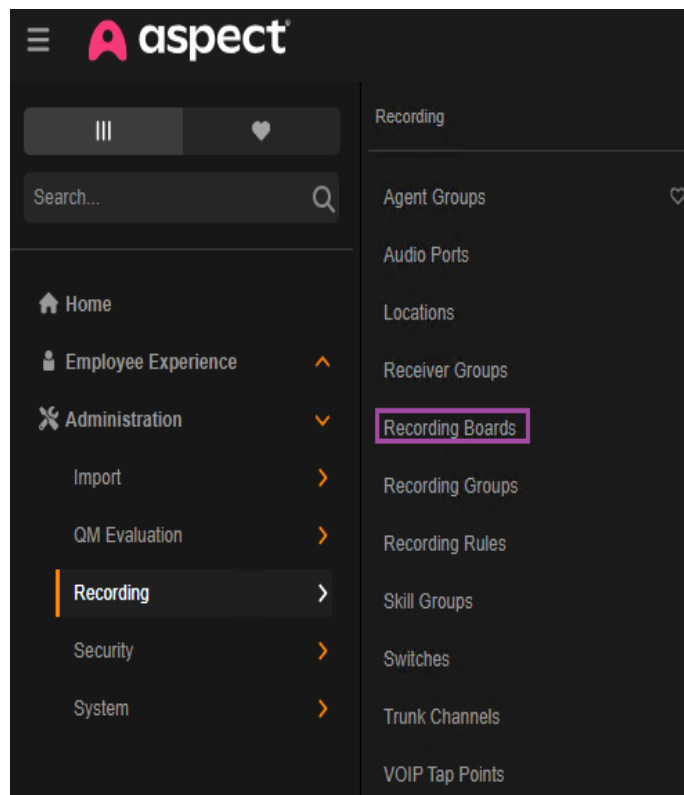
10. Click the **OK** button to create the Recording Board.

Note: By default, the new Recording Board which is created will be listed in the grid and will be Active.

11.5.3 Edit Recording Boards

To edit a Recording Board, perform the following steps.

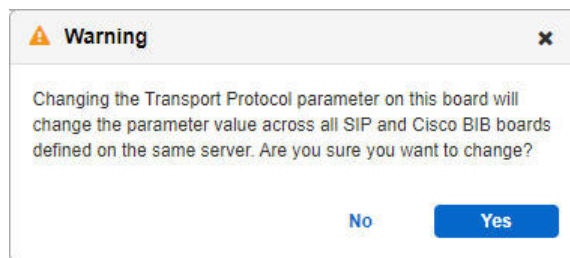
1. Go to the main menu.
2. Click **Administration > Recording > Recording Boards**.



3. The Recording Boards page appears.

- Select the available Recording Board from the grid that needs to be edited and click the **Edit** icon.
- The Edit Recording Board window appears as shown below:

- Edit the field values as per your requirement.
 - Note:** Refer to [Create Recording Boards on page 11-599](#) section, step 5 to 9.
- Click the **OK** button to complete the process.
 - Note:** When you edit the Transport Protocol type for SIP or Cisco BIB Type of Board Configuration, a warning message appears to confirm the changes. If Yes, then this change will be updated in all the existing SIP and Cisco BIB recording boards.



11.5.4 Activate a Recording Board

This feature allows to activate a Recording Board based on the selected parameters. To activate a Recording Board follow the steps given below.


1. Select the Recording Board for which the Active column is **blank**, as shown below:

RECORDING BOARDS

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

Name	Description	Serial Number	Type	Server	Active
Silent Monitor	Recording board for silent monitoring		SIP	QW-AQM18REC-01	<input checked="" type="checkbox"/>
SIP 1 qw-ccaqmrec-01	qw-ccaqmrec-01 SIP channels		SIP	QW-AQM18REC-01	
SmartWorks HPX		23654789	AudioCodes SmartWORKS HPX	AQM19SRV13	<input checked="" type="checkbox"/>
SmartWorks HPX 2		65234158746986	AudioCodes SmartWORKS HPX	AQM19SRV13	<input checked="" type="checkbox"/>
WFO_HPX			AudioCodes HPXMedia	AQM19SRV13	<input checked="" type="checkbox"/>
WFO_HPXMedia			AudioCodes HPXMedia	AQM19SRV13	<input checked="" type="checkbox"/>

1 - 6 of 6 items

2. Click on the **Activate**  button and the checkmark will be shown on the Active column for the selected Recording Board as shown below:

RECORDING BOARDS

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

Name	Description	Serial Number	Type	Server	Active
Silent Monitor	Recording board for silent monitoring		SIP	QW-AQM18REC-01	<input checked="" type="checkbox"/>
SIP 1 qw-ccaqmrec-01	qw-ccaqmrec-01 SIP channels		SIP	QW-AQM18REC-01	<input checked="" type="checkbox"/>
SmartWorks HPX		23654789	AudioCodes SmartWORKS HPX	AQM19SRV13	<input checked="" type="checkbox"/>
SmartWorks HPX 2		65234158746986	AudioCodes SmartWORKS HPX	AQM19SRV13	<input checked="" type="checkbox"/>
WFO_HPX			AudioCodes HPXMedia	AQM19SRV13	<input checked="" type="checkbox"/>
WFO_HPXMedia			AudioCodes HPXMedia	AQM19SRV13	<input checked="" type="checkbox"/>






1 - 6 of 6 items

11.5.5 Deactivate a Recording Board

This feature allows to deactivate a Recording Board. To deactivate a Recording Board follow the steps given below.

1. Select the Recording Board for which the Active column is **checked** as shown below:


RECORDING BOARDS

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

Name	Description	Serial Number	Type	Server	Active
Silent Monitor	Recording board for silent monitoring		SIP	QW-AQM18REC-01	<input checked="" type="checkbox"/>
SIP 1 qw-ccaqmrec-01	qw-ccaqmrec-01 SIP channels		SIP	QW-AQM18REC-01	<input checked="" type="checkbox"/>
SmartWorks HPX		23654789	AudioCodes SmartWORKS HPX	AQM19SRV13	<input checked="" type="checkbox"/>
SmartWorks HPX 2		65234158746986	AudioCodes SmartWORKS HPX	AQM19SRV13	<input checked="" type="checkbox"/>
WFO_HPX			AudioCodes HPXMedia	AQM19SRV13	<input checked="" type="checkbox"/>
WFO_HPXMedia			AudioCodes HPXMedia	AQM19SRV13	<input checked="" type="checkbox"/>

1 - 6 of 6 items

- Click on the **Deactivate**  button and the Active column will be blank for the selected Recording Board as shown below:

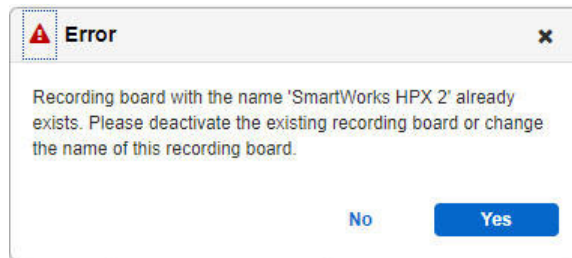
RECORDING BOARDS

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

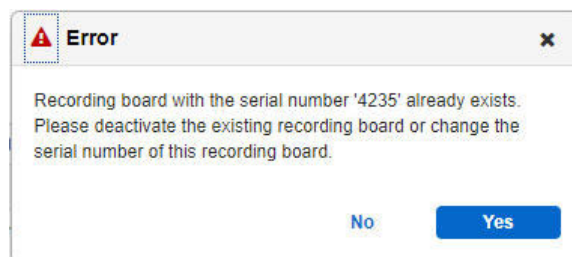
Name	Description	Serial Number	Type	Server	Active
Silent Monitor	Recording board for silent monitoring		SIP	QW-AQM18REC-01	<input checked="" type="checkbox"/>
SIP 1 qw-ccaqrmec-01	qw-ccaqrmec-01 SIP channels		SIP	QW-AQM18REC-01	<input type="checkbox"/>
SmartWorks HPX		23654789	AudioCodes SmartWORKS HPX	AQM19SRV13	<input checked="" type="checkbox"/>
SmartWorks HPX 2		65234158746986	AudioCodes SmartWORKS HPX	AQM19SRV13	<input checked="" type="checkbox"/>
WFO_HPX			AudioCodes HPXMedia	AQM19SRV13	<input checked="" type="checkbox"/>
WFO_HPXMedia			AudioCodes HPXMedia	AQM19SRV13	<input checked="" type="checkbox"/>

1 - 6 of 6 items

Note: When in the Recording Boards grid, there is more than one Recording Board with the same Name, either of the Recording Boards can be set to Active. But both the Recording Boards with the similar name can be inactive. If you try to Activate both the similar named Recording Boards, an Error message appears to deactivate the existing recording board or change the name of the recording board.



Note: When similar Serial Number for different Types of Recording boards, all the Recording Boards can neither be activated nor deactivated. The Serial Number should be unique for different recording boards types for all to be active. This is not applicable for AudioCodes SmartWORKS HPX, as it doesn't need to have unique serial number.



11.6 Recording Groups

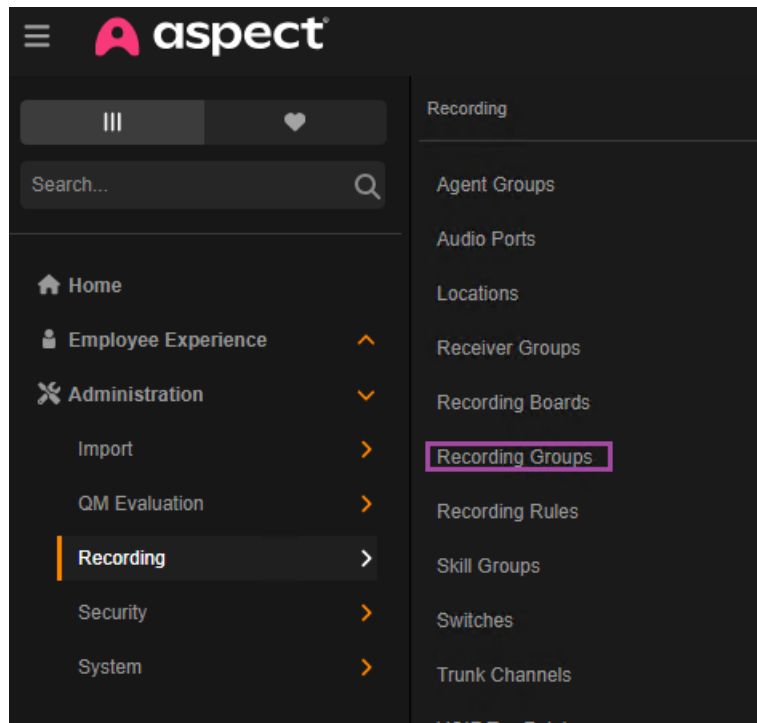
Recording Groups are a collection of one or more Audio ports based on similar criteria (for example, the same switch or the same telephony card). An Administrator can create a Recording Group and give only certain Mentors permission rights to review the calls recorded on the ports in the group(s).

This section discusses about Navigation, Add, Edit, Activate and Deactivate a Recording Group.

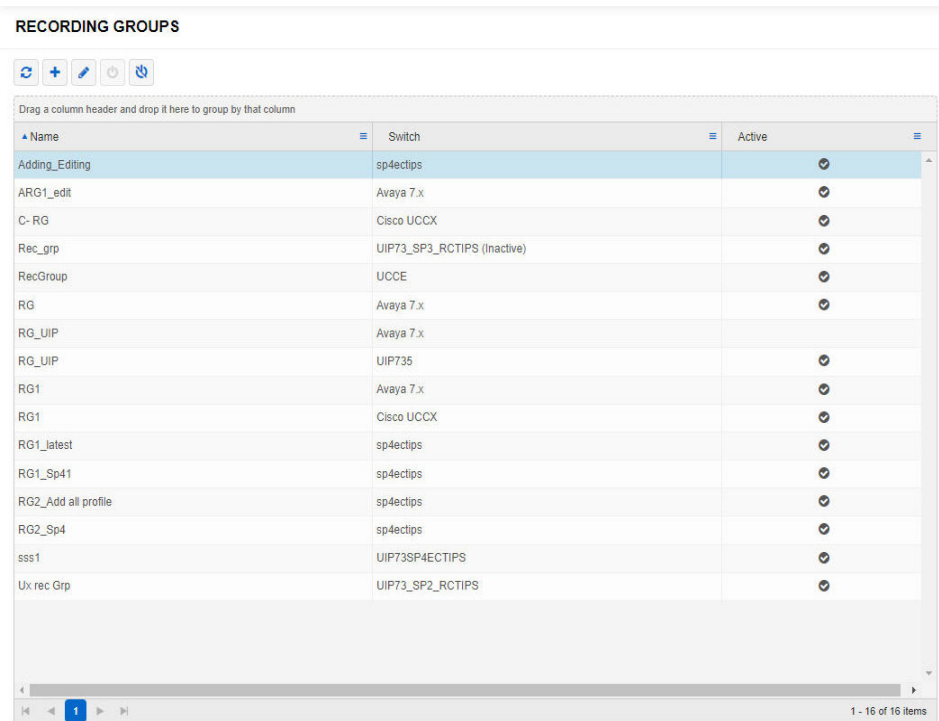
11.6.1 Navigation to Recording Groups


Follow the steps given below to navigate to the Recording Groups page:






1. Go to the main menu.
2. Click **Administration > Recording > Recording Groups**.



3. The Recording Groups page appears as given below:



4. The Menu buttons  on the Recording Groups page are described below:


Icons	Description
Refresh 	Refreshes the recording groups grid with latest recording group changes. Instead of the browser refresh button user can click on this menu button which will refresh only the grid data and not the page.
Add 	Adds the new recording group to the grid.
Edit 	Edits the selected recording group existing in the grid.
Activate 	Activates the existing recording group.
Deactivate 	Deactivates the existing recording group.

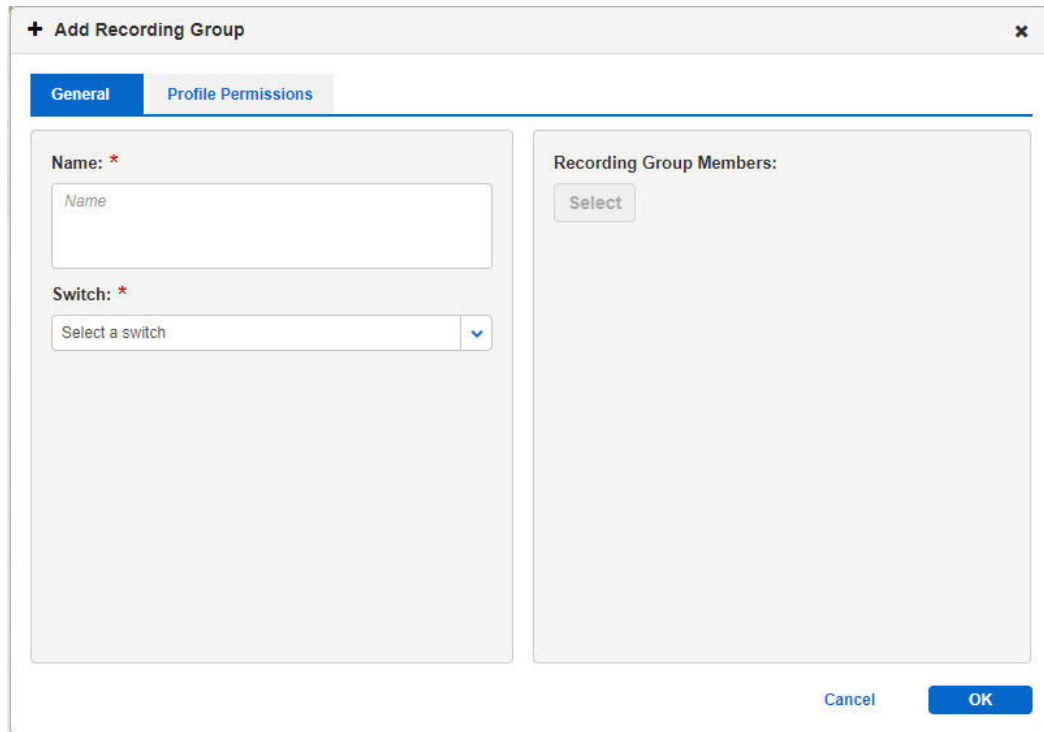
5. The grid columns on the Recording Groups page are described below:

Column	Description
Name	The name of the Recording Group.
Switch	The name of switch to which recording group is associated.
Active	The recording group status is displayed by the icon, whether active or not.

11.6.2 Create Recording Groups

To create a new Recording Group, perform the following steps.

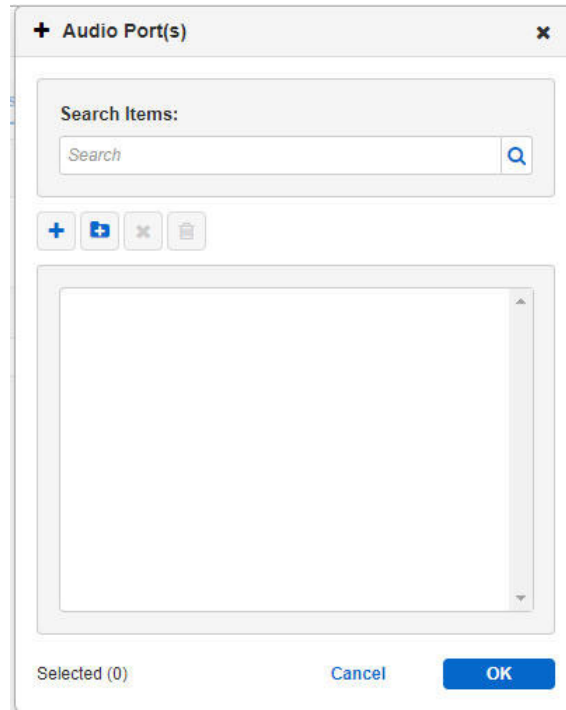
1. Go to the main menu.
2. Click **Administration > Recording > Recording Groups**.
3. The Recording Groups page appears.
4. Click on the  button. The Add Recording Groups window appears with General tab active.







Note: The fields marked (*) are mandatory fields.

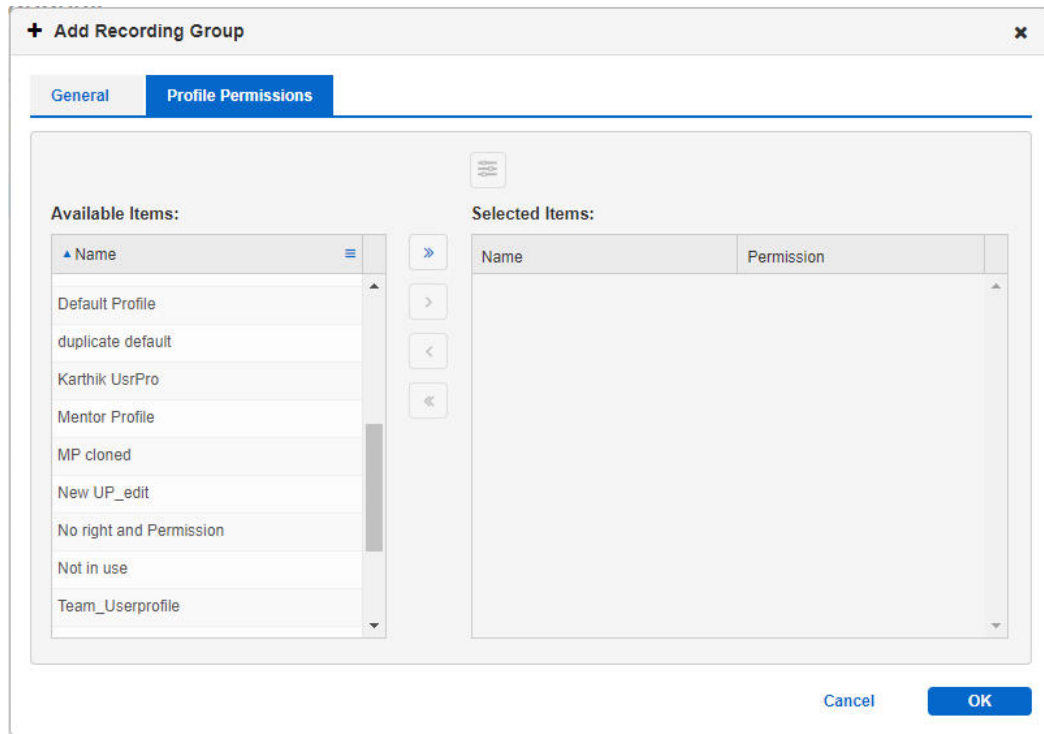
5. In the General tab of the window, in the **Name** text box, type a group name that uniquely identifies a recording group. This field cannot be blank.
6. Select the **Switch** from the drop-down list box.

- Once the Switch is selected the **Recording Group Members** option is enabled. Click the **Select** tab, the Add Audio Port(s) window appears as below:



- Click the **Add**  button on the Audio Port(s) window to add the active audio ports which are associated with the switch that is selected. Click the Shift key to select the multiple audio ports from the list.
Note: Only the active audio ports will be listed by default.
- Click the **Add All**  button to select all the existing audio ports associated with the selected switch.
- Click the **Clear**  button to clear the selected audio ports from the Audio Port(s) grid window.
- Click the **Delete**  button to clear all the existing audio ports at once from the Audio Port(s) grid window.
- Select **OK** to confirm the selected Audio Ports.

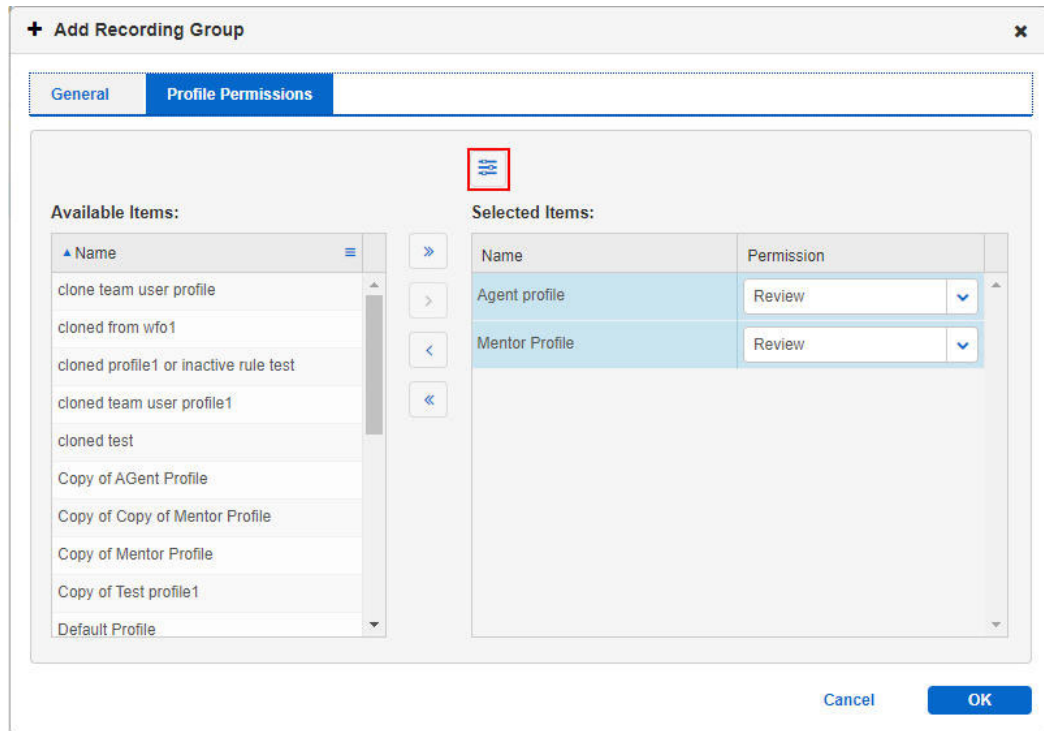
8. Now, select the **Profile Permissions** tab, as shown below:




Note: Here all the user profiles which are active will be displayed, except the Administrator profile.

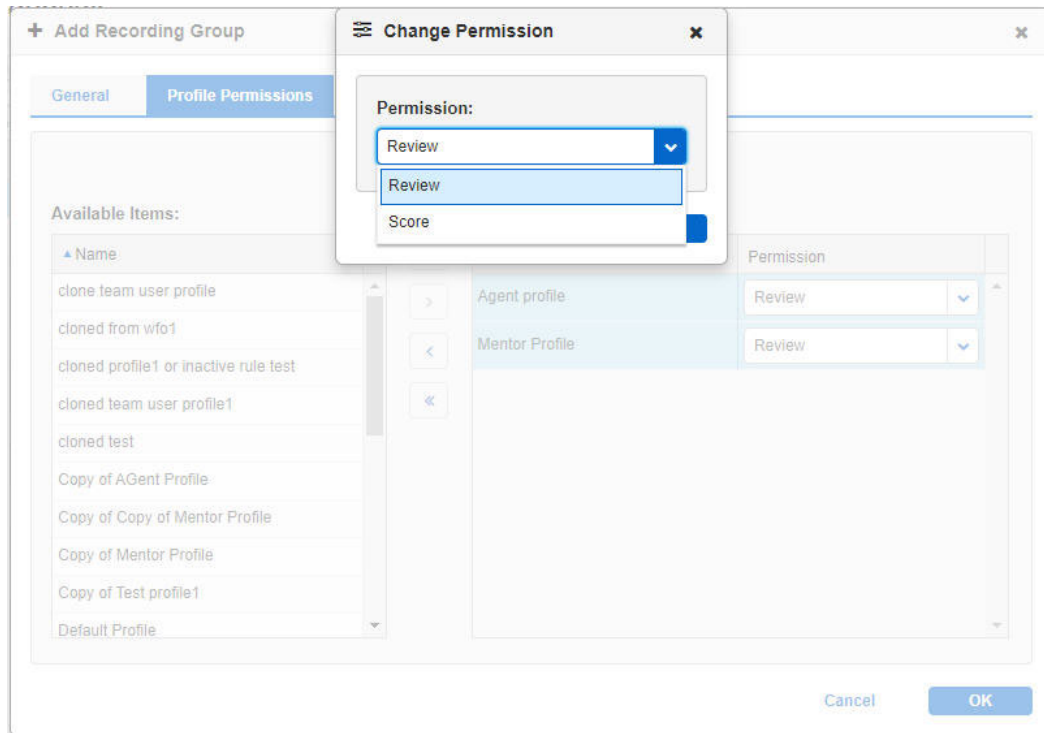
- When you want to provide permissions to the Recording Groups that you are creating, then the user profiles can be added from the Profile Permissions tab.
- To select one or multiple user profiles under the Available Items section, click on the > button.

- Once the user profiles are selected, they are added to the Selected Items grid, as shown below:



- The user profiles permission can be edited by two ways.
By either selecting the adjacent Permission drop-down button for changing individually the user profiles, or by selecting the **Change selected user profiles permission**  button for changing all the user profiles Permission in the Selected Items grid at once.

- The **Change Permission** window appears. Select the desired permission for the user profiles and click **OK**, as shown below:



9. Click the **OK** button to create the Recording Group.

Note: By default, the new Recording Group which is created will be listed in the grid and will be Active.

11.6.3 Edit Recording Groups

To edit a Recording Group, perform the following steps.

1. Go to the main menu.
2. Click **Administration > Recording > Recording Groups**.
3. The Recording Groups page appears.
4. Select the available Recording Group from the grid that needs to be edited and click the **Edit** icon.

- The Edit Recording Group window appears with General tab active as shown below:

- Edit the General and Profile Permissions tab as per your requirement.
Note: Refer to [Create Recording Groups on page 11-612](#) section, step 5 to 8.
- Click the **OK** button to complete the process.

11.6.4 Activate a Recording Group

This feature allows to activate a Recording Group based on the selected parameters. To activate a Recording Group follow the steps given below.


1. Select the Recording Group for which the Active column is **blank**, as shown below:

RECORDING GROUPS

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

Name	Switch	Active
Adding_Editing	sp4ectips	<input checked="" type="checkbox"/>
ARG1_edit	Avaya 7.x	<input checked="" type="checkbox"/>
C- RG	Cisco UCCX	<input checked="" type="checkbox"/>
Live Recording	Avaya 7.x	
Rec_grp	UIP73_SP3_RCTIPS (Inactive)	<input checked="" type="checkbox"/>
RecGroup	UCCE	<input checked="" type="checkbox"/>
RG	Avaya 7.x	<input checked="" type="checkbox"/>
RG_UIP	Avaya 7.x	
RG_UIP	UIP735	<input checked="" type="checkbox"/>
RG1	Avaya 7.x	<input checked="" type="checkbox"/>
RG1	Cisco UCCX	<input checked="" type="checkbox"/>
RG1_latest	sp4ectips	<input checked="" type="checkbox"/>
RG1_Sp41	sp4ectips	<input checked="" type="checkbox"/>
RG2_Add all profile	sp4ectips	<input checked="" type="checkbox"/>
RG2_Sp4	sp4ectips	<input checked="" type="checkbox"/>
sss1	UIP73SP4ECTIPS	<input checked="" type="checkbox"/>
Ux rec Grp	UIP73_SP2_RCTIPS	<input checked="" type="checkbox"/>

1 - 17 of 17 items

2. Click on the **Activate**  button and the checkmark will be shown on the Active column for the selected Recording Group as shown below:

RECORDING GROUPS

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

Name	Switch	Active
Adding_Editing	sp4ectips	<input checked="" type="checkbox"/>
ARG1_edit	Avaya 7.x	<input checked="" type="checkbox"/>
C- RG	Cisco UCCX	<input checked="" type="checkbox"/>
Live Recording	Avaya 7.x	<input checked="" type="checkbox"/>
Rec_grp	UIP73_SP3_RCTIPS (Inactive)	<input checked="" type="checkbox"/>
RecGroup	UCCE	<input checked="" type="checkbox"/>
RG	Avaya 7.x	<input checked="" type="checkbox"/>
RG_UIP	Avaya 7.x	
RG_UIP	UIP735	<input checked="" type="checkbox"/>
RG1	Avaya 7.x	<input checked="" type="checkbox"/>
RG1	Cisco UCCX	<input checked="" type="checkbox"/>
RG1_latest	sp4ectips	<input checked="" type="checkbox"/>
RG1_Sp41	sp4ectips	<input checked="" type="checkbox"/>
RG2_Add all profile	sp4ectips	<input checked="" type="checkbox"/>
RG2_Sp4	sp4ectips	<input checked="" type="checkbox"/>
sss1	UIP73SP4ECTIPS	<input checked="" type="checkbox"/>
Ux rec Grp	UIP73_SP2_RCTIPS	<input checked="" type="checkbox"/>

1 - 17 of 17 items

11.6.5 Deactivate a Recording Group

This feature allows to deactivate a Recording Group. To deactivate a Recording Group follow the steps given below.


1. Select the Recording Group for which the Active column is **checked** as shown below:

RECORDING GROUPS

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

Name	Switch	Active
Adding_Editing	sp4eclips	<input checked="" type="checkbox"/>
ARG1_edit	Avaya 7.x	<input checked="" type="checkbox"/>
C- RG	Cisco UCCX	<input checked="" type="checkbox"/>
Live Recording	Avaya 7.x	<input checked="" type="checkbox"/>
Rec_grp	UIP73_SP3_RCTIPS (Inactive)	<input checked="" type="checkbox"/>
RecGroup	UCCE	<input checked="" type="checkbox"/>
RG	Avaya 7.x	<input checked="" type="checkbox"/>
RG_UIP	Avaya 7.x	<input checked="" type="checkbox"/>
RG_UIP	UIP735	<input checked="" type="checkbox"/>
RG1	Avaya 7.x	<input checked="" type="checkbox"/>
RG1	Cisco UCCX	<input checked="" type="checkbox"/>
RG1_latest	sp4eclips	<input checked="" type="checkbox"/>
RG1_Sp41	sp4eclips	<input checked="" type="checkbox"/>
RG2_Add all profile	sp4eclips	<input checked="" type="checkbox"/>
RG2_Sp4	sp4eclips	<input checked="" type="checkbox"/>
sss1	UIP73SP4ECTIPS	<input checked="" type="checkbox"/>
Ux rec Grp	UIP73_SP2_RCTIPS	<input checked="" type="checkbox"/>

1 - 17 of 17 items

- Click on the **Deactivate**  button and the Active column will be blank for the selected Recording Group as shown below:

RECORDING GROUPS

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

Name	Switch	Active
Adding_Editing	sp4ectips	<input checked="" type="checkbox"/>
ARG1_edit	Avaya 7.x	<input checked="" type="checkbox"/>
C- RG	Cisco UCCX	<input checked="" type="checkbox"/>
Live Recording	Avaya 7.x	
Rec_grp	UIP73_SP3_RCTIPS (Inactive)	<input checked="" type="checkbox"/>
RecGroup	UCCE	<input checked="" type="checkbox"/>
RG	Avaya 7.x	<input checked="" type="checkbox"/>
RG_UIP	Avaya 7.x	<input checked="" type="checkbox"/>
RG_UIP	UIP735	<input checked="" type="checkbox"/>
RG1	Avaya 7.x	<input checked="" type="checkbox"/>
RG1	Cisco UCCX	<input checked="" type="checkbox"/>
RG1_latest	sp4ectips	<input checked="" type="checkbox"/>
RG1_Sp41	sp4ectips	<input checked="" type="checkbox"/>
RG2_Add all profile	sp4ectips	<input checked="" type="checkbox"/>
RG2_Sp4	sp4ectips	<input checked="" type="checkbox"/>
sss1	UIP73SP4ECTIPS	<input checked="" type="checkbox"/>
Ux rec Grp	UIP73_SP2_RCTIPS	<input checked="" type="checkbox"/>

1 - 17 of 17 items

Note: Multiple Recording Groups can be Activated / Deactivated together.

11.7 Recording Rules

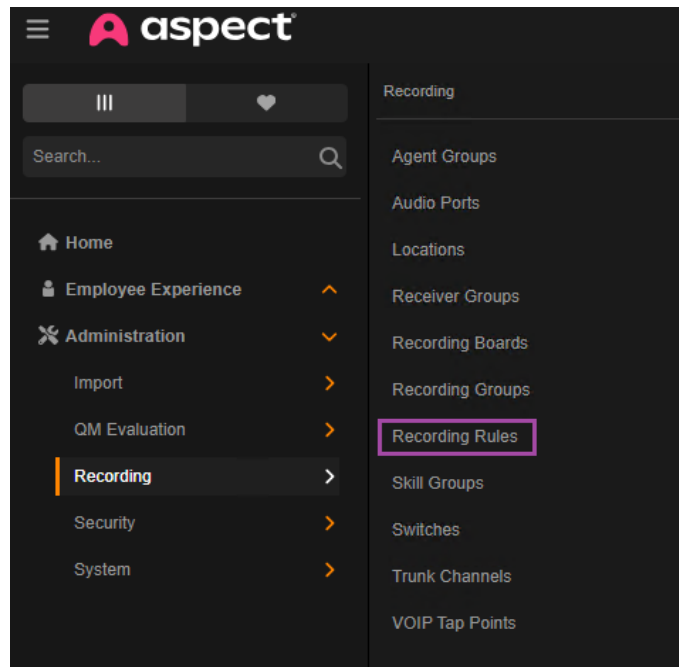
You can base the rules on a wide variety of criteria, so that you can create general rules that apply to the entire contact center or specific rules that apply only to a particular agent or customer.

11.7.1 Recording Permission for Rules

Permissions allow an Administrator to create, edit or view rules. To view the Recording Rules window, perform the following steps.

- Go to the main menu.

2. Click **Administration > Recording > Recording Rules**.



3. The Recording Rules window appears.

RECORDING RULES

🔄 + 🛠️ 📄 🔄 🔄 📄 Date & Time are displayed based on Web Server Time zone.

Name	Interact...	Switch	Schedule	Recor...	S...	E...	A...
Switch: Avaya 7.x							
-7:00	ACD Call	Avaya 7.x	Every Sun, Mon, Tue, Wed, Thu, Fri, Sat from 1:30 AM to 3:00 AM	100%		Pre-Call	☑
\$ - 5:30	ACD Call	Avaya 7.x	Every Sun, Mon, Wed, Fri from 12/1/2021 at 2:30 AM to 2/28/2022 9:00 PM	100%		Pre-Call	☑
\$1	Inbound Direct Call	Avaya 7.x	Every Sun, Mon, Tue, Wed, Thu, Fri, Sat from 12:00 AM to 12/2/2021 11:59 PM	100%		Pre-Call	☑
\$1 - Actual Build	ACD Call	Avaya 7.x	Every Sun, Mon, Tue, Wed, Thu, Fri, Sat from 12/3/2021 at 2:00 AM to 4:00 PM	100%		Pre-Call	☑
\$1 - After Fix	ACD Call	Avaya 7.x	Every Sun, Mon, Tue, Wed, Thu, Fri, Sat from 12/9/2021 at 12:00 AM to 11:59 PM	100%		Pre-Call	☑
\$2	Outbound Queued Call	Avaya 7.x	Every Sun, Mon, Tue, Wed, Thu, Fri, Sat from 12/2/2021 at 2:30 AM to 8:30 PM	100%		Pre-Call	☑
\$2 - 2nd fix - Default Schedule	Outbound Direct Call	Avaya 7.x	Every Tue, Thu, Sat from 12/3/2021 at 2:00 AM to 12/23/2021 5:00 PM	100%		Pre-Call	☑
\$3 - Central America	ACD Call	Avaya 7.x	Every Sun, Mon, Tue, Wed, Thu, Fri, Sat from 12:00 AM to 12/4/2021 11:59 PM	100%		Pre-Call	☑
\$4	Outbound Queued Call	Avaya 7.x	Every Sun, Mon, Tue, Wed, Thu, Fri, Sat from 12/2/2021 at 2:00 AM to 12/10/2021 10:30 PM	100%		Pre-Call	☑
\$5	ACD Call	Avaya 7.x	Every Sun, Mon, Tue, Wed, Thu, Fri, Sat from 12/2/2021 at 12:00 AM to 12/6/2021 11:59 PM	100%		Pre-Call	

1 - 100 of 315 items

The fields that display in the Recording Rules window include:

- **Name** - an arbitrary name that you create to identify the rule.

- **Call Type** - the type of call to record; ACD Calls, Direct Calls, Outbound Calls.
- **Switch** - the specific switch.
- **Schedule** - schedule period for rule.

The schedule date and time will be displayed based on the server (where QWS is running) time zone. The information icon on the rules page will specify the same. The recording will also take place based on the server time zone, irrespective of the machine time.

For example: Let's say the server is in (UTC-06:00) Central Time (US & Canada) time zone, and the WEM is launched from a machine which has (UTC-05:30) Chennai, Kolkata, Mumbai, New Delhi time zone.


The user selects the Start Time as "4:45 PM" which is current time of machine, where you have opened your browser, but the server's current time is "5:15 AM". The calls will get recording only when the server reaches the start time specified in the rule, despite of the machine where you have opened your browser have already reached.

- **Recording Percentage** - the rate at which the system records interactions that satisfy the rule (for example, 50% means one out of every two interactions are recorded that meet the criteria of this rule, 25% means one out of every four interactions are recorded).
- **Screen** – a checkmark under the column indicates whether the system records window activity and voice on the call.
- **Evaluation** – indicates whether the system evaluates the specific rule before or after the call takes place.
- **Status** – use the option to turn rules on and off from the Rules List window. When a rule is Enabled, it triggers recordings appropriately. When a rule is Inactive or Deleted, it does not trigger recordings. You can reset Rules that are Disabled to Active status at any time.


11.7.2 Create a New Rule



To create a new rule, perform the following steps.

1. Go to the main menu.
2. Click **Administration > Recording > Recording Rules**.
3. The Recording Rules window appears.

- Click on the  button. The Add Recording Rule window appears with General tab active.

Note:

- The fields marked (*) are mandatory fields.
- Click on the Info  icon for more details.


- In the General Details section of the window, in the **Name** text box, type a rule name that uniquely identifies a rule. This field cannot be blank.
- In the **Description** text box, type a description that uniquely identifies a rule in the Defined Rules List window.
- Select the **Switch** from the drop-down list box.
- In the Recording Details section of the window, in the **Recording Percentage** field, specify the percentage of the interactions that the system should meet the rule's criteria.
Note: Click on the Info  icon for more details.
- From the **Interaction Type** drop-down list box, select the type of interaction to which the rule applies. This field cannot be blank.
Note: Click on the Info  icon for more details.

Monitor Interaction Type	Description
ACD Call	Calls that the system routes to an agent by an automatic call distributor. A call that comes into an ACD is queued/announced to some application and taken or delivered to an agent.
Inbound Direct Call	Inbound calls that the system places directly to a specific agent. Here, ACD does not queue or announce the call.

Monitor Interaction Type	Description
Outbound Direct Call	Calls placed by an agent to another agent or to a customer.
Outbound Queued Call	This is the outbound call that the dialer initiates if the system eventually connects the call to an agent. This is applicable only for dialer integration.
IVR Call	Any interaction type recorded over the IVR port or IVR trunk channel.
Chat	An interaction that the system routed to an agent through the chat window.
All Types	Apply one rule to all interaction types.

10. In the **Daily Records** field, type the maximum number of interactions that meet the rule’s criteria that the system should record each day. This field cannot be blank.


Business rules are applicable for all Aspect Quality connectors. In the Aspect Quality system, you can define business rules for Quality Monitoring. During Quality Monitoring, the system records every interaction only if it satisfies a predefined business rule.

Note: Click on the Info  icon for more details.

11. Select the **Disqualify Recording** toggle button for a particular business rule defined within Aspect Quality. If you toggled on the button, the flag acts as if no rules apply, even if other rules qualify a particular interaction to record. For example, if the system records an interaction for a reason other than recording rules, such as agent request via the Desktop Client, selecting Disqualify Recording does not alter that, and the system records the interaction.

12. In the Screen Capture section of the window, select the **Enable Screen Capture** toggle button if you want to allow screen captures. Screen capture only occurs if a rule matches when the agent receives a call.

If you toggled on the Enable Screen Capture button, the **After Call work** field becomes active. The Quality uses this option when an agent is in Wrap up mode. If the timeout duration ends before the Wrap mode, the interaction monitor stops the screen capture activity. If the Wrap mode ends before the timeout duration, then the screen capture timeout is not applicable, and the interaction stops.

Note: Click on the Info  icon for more details.

13. In the Override Historical and Archiving section of the window, click on the **Move to Historical** toggle-button if you want to set up different historical results than what the system already creates.

Note: Click on the Info  icon for more details.

- a. In the **After** text box, type the number of days after which you want the system to store the recordings. This field cannot be blank.
- b. Under the Delete Instead of moving to Historical section, toggled-on the **Audio** toggle button if you want the system to delete recordings before moving the recordings to Historical.
- c. Under the Delete Instead of moving to Historical section, toggled-on the **Screen Capture** toggle button if you want the system to delete recordings before moving the recordings to Historical.

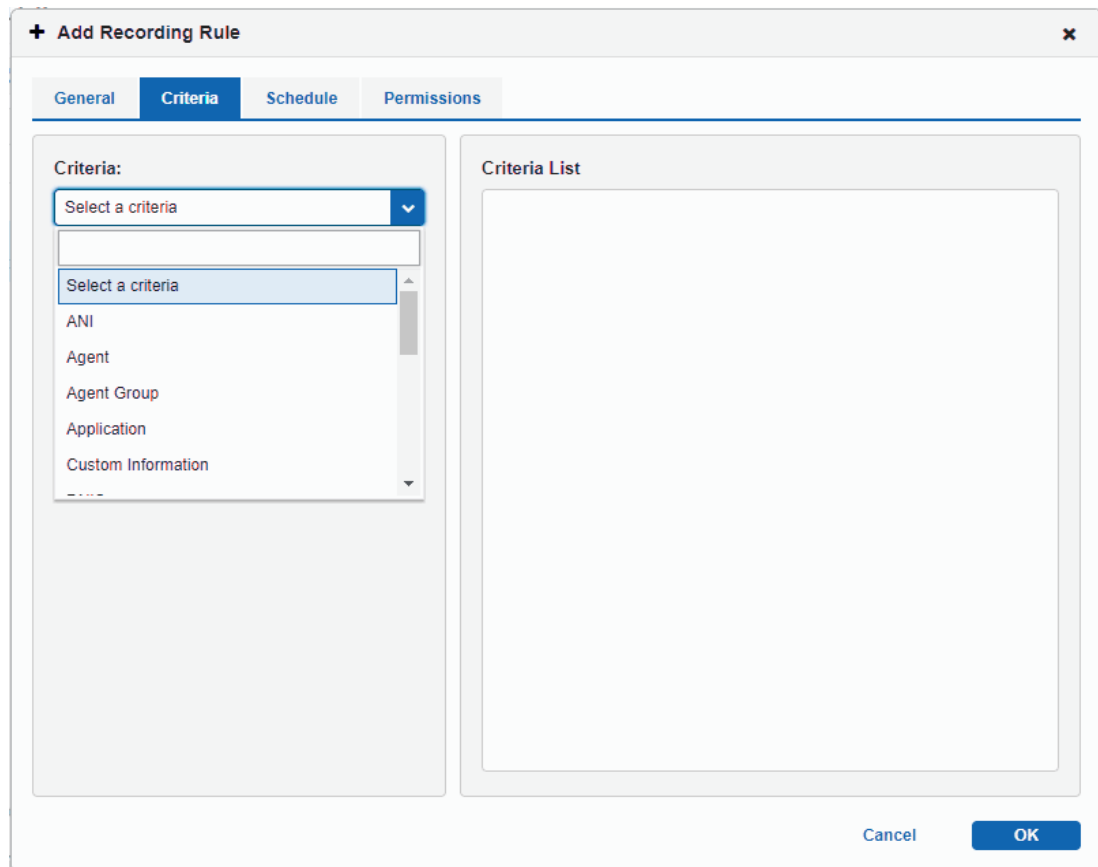
- d. Under the Delete Instead of moving to Historical section, toggled-on the **Chat** toggle button if you want the system to delete chats before moving the chats to Historical.

In the Override Historical and Archiving section of the window, click on the **Move to Archiving** toggle-button if you want to set up different archiving results than what the system already creates.

Note: Click on the Info  icon for more details.

- a. In the **After** text box, type the number of days after which you want the recordings to be archived.
- b. Under the Delete Instead of moving to Archive section, toggled-on the **Audio** toggle button if you want the recordings to delete before moving the recordings to Archive.
- c. Under the Delete Instead of moving to Archive section, toggled-on the **Screen Capture** toggle button if you want the recordings to delete before moving the recordings to Archive.
- d. Under the Delete Instead of moving to Archive section, toggled-on the **Chat** toggle button if you want the chats to delete chats before moving the chats to Archive.

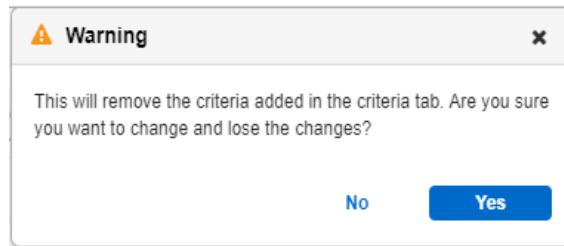
14. Select the **Criteria** tab and click on the Criteria drop-down list.



Note:

- If the switch is not selected in the General tab, the Criteria tab will be disabled.
- Criteria search will show the result specific for the selected switch.

- When the user selects a switch and adds some criteria then, go back to the General tab and changes the Switch, the below warning message pops up.




Note: Clicking on the **Yes** button will remove only the switch specific criteria.

15. In the Criteria drop-down list, select one of the following criteria for the rule.

Criteria	Evaluation Type	Definition
ANI	Pre-Call	Specifies a rule that applies to a specific Automatic Number Identification (ANI). From the Show items with value that is drop-down list box, select <ul style="list-style-type: none"> • Contains • Ends with • Equals • Equals None • Starts with Then, in the Entry text box, type the number by which you want to search.
Agent	Pre-Call	Specify an agent name whose interactions should be considered for this recording rule. On the Search field, type the name of the agent or click on the magnify glass to search and select Yes. Select the Agent and click on OK. It displays the result related to the selected switch in the General tab.
Agent Group	Pre-Call	Specify an agent name whose interactions should be considered for this recording rule. On the Search field, type the name of the agent group or click on the magnify glass to search. It displays the result related to the selected switch in the General tab.
Application	Pre-Call	Specify an agent name whose interactions should be considered for this recording rule. On the Search field, type the name of the application or click on the magnify glass to search. It displays the result related to the selected switch in the General tab.

Criteria	Evaluation Type	Definition
Custom Information	Post-Call	<p>Specifies a (usually) post-call rule that applies to a custom information value associated with the call.</p> <p>From the Key drop-down list, select the Custom Information Name and the Show items with value that appears, select</p> <ul style="list-style-type: none"> • Contains • Ends with • Equals • Starts with <p>Then, in the Entry text box, type the number by which you want to search. It displays the result related to the selected switch in the General tab.</p>
DNIS	Pre-Call	<p>Specifies a rule that applies to a specific Dialed Number Identification Service (DNIS).</p> <p>From the Show items with value that is drop-down list box, select</p> <ul style="list-style-type: none"> • Contains • Ends with • Equals • Starts with <p>Then, in the Entry text box, type the number by which you want to search.</p>
Duration	Post-Call	<p>Specifies a post-call rule that applies to call duration.</p> <p>From the Show items with value that is drop-down list box, select</p> <ul style="list-style-type: none"> • Greater than • Less than <p>Then, in the Entry text box, type the number by which you want to search. The Entry text format is HH:MM:SS.</p>
Hold Count	Post-Call	<p>Specifies a post-call rule that applies to the number of times the agent placed the call on hold.</p> <p>From the Show items with value that is drop-down list box, select</p> <ul style="list-style-type: none"> • Greater than • Less than <p>Then, in the Entry text box, type the number by which you want to search.</p>
Initial Agent Group	Pre-Call	<p>On the Search field, type the name of the agent group or click on the magnify glass to search. It displays the result related to the selected switch in the General tab.</p>
Initial Skill Group	Pre-Call	<p>On the Search field, type the name of the skill group or click on the magnify glass to search. It displays the result related to the selected switch in the General tab.</p>

Criteria	Evaluation Type	Definition
Max Hold Duration	Post-Call	<p>Specifies a post-call rule that applies to the longest single time the agent placed the call on hold.</p> <p>From the Show items with value that is drop-down list box, select</p> <ul style="list-style-type: none"> • Greater than • Less than <p>Then, in the Entry text box, type the number by which you want to search. The Entry text format is HH:MM:SS.</p>
Position	Pre-Call	<p>Specifies a rule that applies to a specific position or a position that Equals, Begins With, Ends With, or Contains a particular string.</p> <p>From the Show items with value that is drop-down list box, select</p> <ul style="list-style-type: none"> • Contains • Ends with • Equals • Starts with <p>Then, in the Entry text box, type the number by which you want to search.</p>
Recording Group	Post-Call	<p>On the Search field, type the name of the recording group or click on the magnify glass to search.</p>
Recording Port	Post-Call	<p>Specifies a rule that applies to a Specific recording port or group of ports.</p> <p>On the Equals drop-down, select the Port.</p>
Skill Group	Pre-Call	<p>A group of Agents called Skill Group. On the Search field, type the name of the skill group or click on the magnify glass to search.</p>
Team	Pre-Call	<p>On the Search field, type the name of the team or click on the magnify glass to search.</p>
Total Hold Duration	Post-Call	<p>Specifies a post-call rule that applies to the total time the agent placed the call on hold.</p> <p>From the Show items with value that is drop-down list box, select</p> <ul style="list-style-type: none"> • Greater than • Less than <p>Then, in the Entry text box, type the number by which you want to search. The time must be hh:mm:ss format.</p>

16. After selecting any of the above criteria, click on the  button to add the criteria under the **Criteria List** section.

Note:

- After adding a criteria into the Criteria List section that criteria will be removed from the Criteria drop-down list.
- If you want to remove the selected criteria from the Criteria List section, click on the Remove button.

17. Select the **Schedule** tab.

The day and time parameters define the period recording takes place with the other criteria that you select.

18. In the Date Options section drop-down list, the **Immediately** option is selected by default.

OR

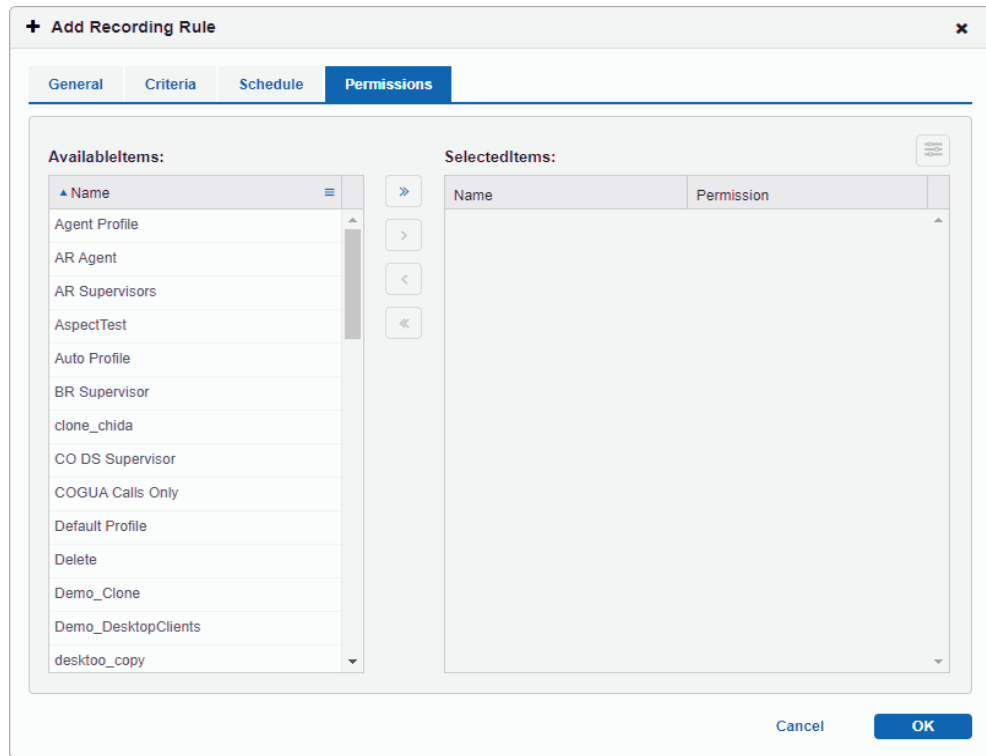
Select the **Begin On** option, and select the specific date on which you want the schedule to begin.

19. Toggle on the **End Date** field if you want to end the schedule. To select the specific date on which you want the schedule to end, click the calendar icon and select the date.

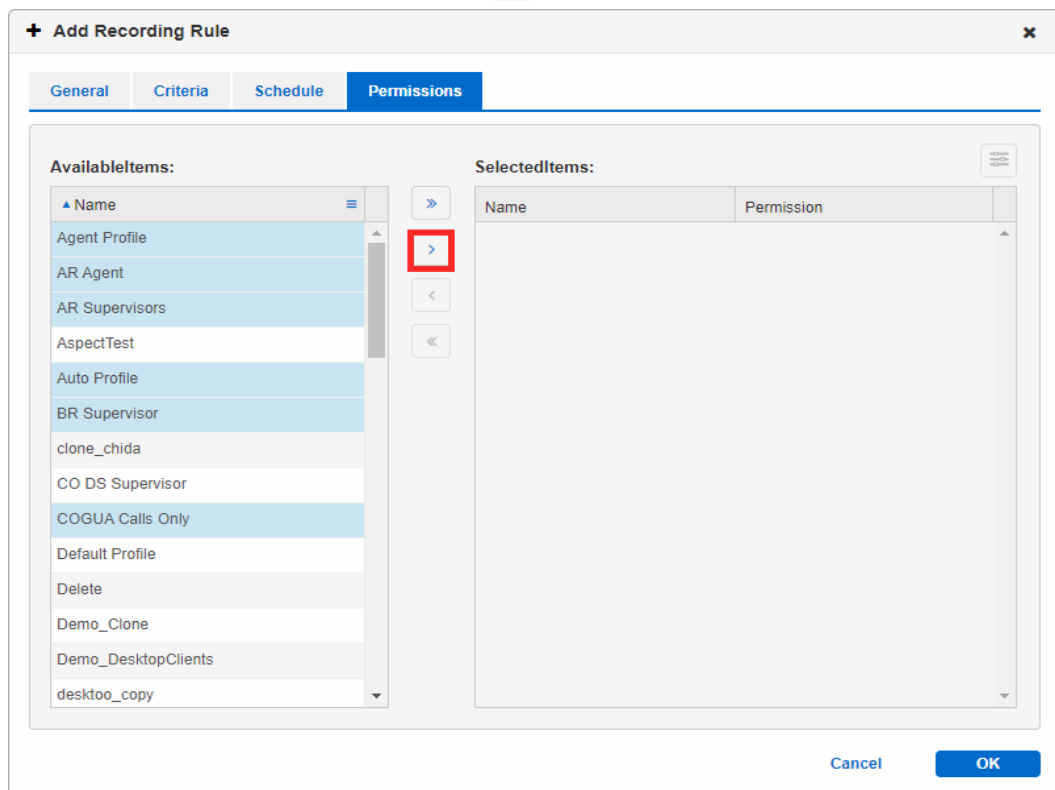
20. In the Days of Week drop-down list, select the check boxes of the day(s) of the week on which you want to apply this rule.

21. In the Start Time of Day field and End Time of Day field, select the time as per your requirement.

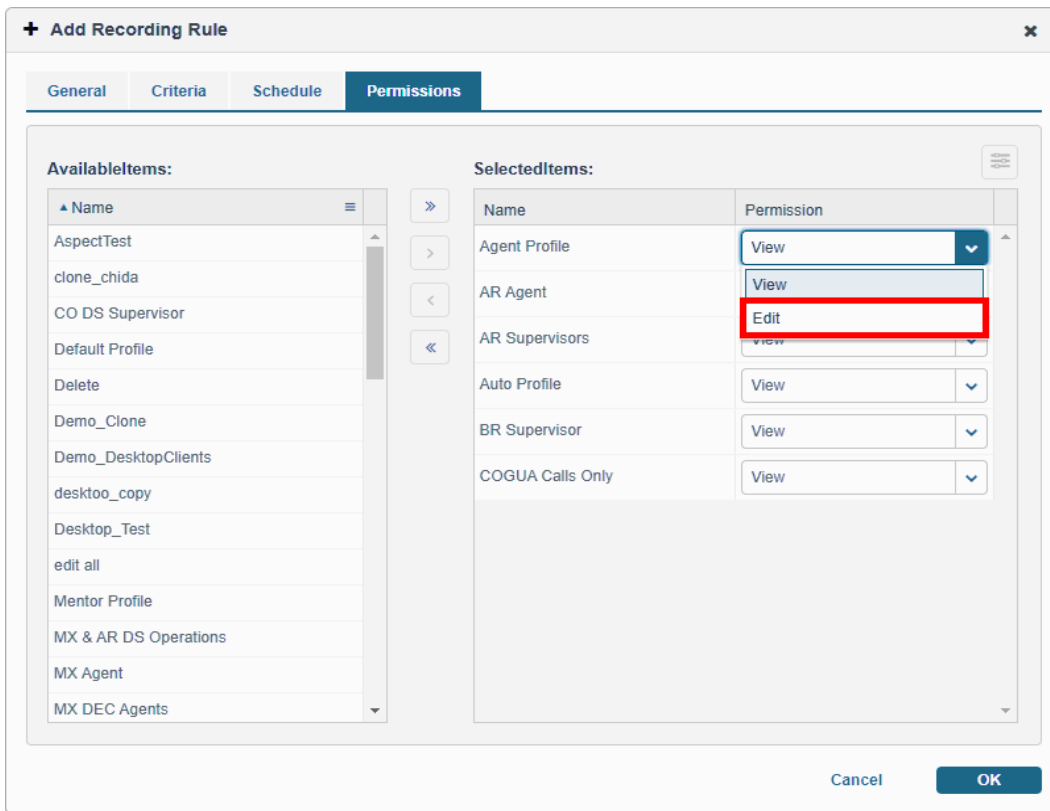
22. Click the **Permissions** tab.



23. To provide permission to view or edit a rule, select one or multiple user profiles under the Available Items section and click on the **>** button.



24. To add more users who can view and modify the rule, click **Edit** under the Permission drop-down field as shown below.



25. If you give a user permission to view a rule, then the rule is available as a search parameter on the Mentor’s Search window.


Permission to edit rule allows a user to enable, disable, and change the rule.

26. Click **OK** to save the rule.






11.7.3 Edit a Rule

To edit a rule, perform the following steps.

1. Go to the main menu.
2. Click **Administration > Recording > Recording Rules**.
3. The Recording Rules window appears.

4. Select the rule and click on  button.

RECORDING RULES

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

Name	Interacti...	Switch	Schedule	Recording P...	Sc...	Ev...	Ac...
11	Inbound Direct Call	Avaya 7.x	Every Sun, Mon, Tue, Wed, Thu, Fri, Sat from 12:00 AM to 11:59 PM	100%		Pre-Call	<input checked="" type="checkbox"/>
111	ACD Call	Avaya 7.x	Every Sun, Mon, Tue, Wed, Thu, Fri, Sat from 12:00 AM to 11:59 PM	100%		Post-Call	<input checked="" type="checkbox"/>
12	Inbound Direct Call	Avaya 7.x	Every Sun, Mon, Tue, Wed, Thu, Fri, Sat from 12:00 AM to 11:59 PM	100%		Pre-Call	<input checked="" type="checkbox"/>
1234l@#\$\$%^	ACD Call	sp4ectips	Every Sun, Mon, Tue, Wed, Thu, Fri, Sat from 12:00 AM to 11:59 PM	100%		Pre-Call	<input checked="" type="checkbox"/>
1234l@#\$\$%^4345645fgh	ACD Call	sp4ectips	Every Sun, Mon, Tue, Wed, Thu, Fri, Sat from 6/16/2021 at 12:00 AM to 11:59 PM	100%		Pre-Call	<input checked="" type="checkbox"/>
70% all types - Combine Agent & Agent Grp-	All Types	UIP73_SP3_RCTIPS (Inactive)	Every Sun, Mon, Tue, Wed, Thu, Fri, Sat from 05:30 AM to 05:29 AM	70%	<input checked="" type="checkbox"/>	Pre-Call	
aa	ACD Call	Avaya 7.x	Every Sun, Mon, Tue, Wed, Thu, Fri, Sat from 05:30 AM to 05:29 AM	100%	<input checked="" type="checkbox"/>	Pre-Call	
aa	ACD Call	Avaya 7.x	Every Sun, Mon, Tue, Wed, Thu, Fri, Sat from 05:30 AM to 05:29 AM	100%		Pre-Call	
AA	ACD Call	Avaya 7.x	Every Sun, Mon, Tue, Wed, Thu, Fri, Sat from 05:30 AM to 05:29 AM	100%		Pre-Call	
AA	ACD Call	Avaya 7.x	Every Sun, Mon, Tue, Wed, Thu, Fri, Sat from 05:30 AM to 05:29 AM	100%		Pre-Call	
ACD 50% - Max daily 50 - Each agent in team1	ACD Call	UIP73_SP3_RCTIPS (Inactive)	Every Sun, Mon, Tue, Wed, Thu, Fri, Sat from 05:30 AM to 05:29 AM	50%	<input checked="" type="checkbox"/>	Pre-Call	

1 - 72 of 72 items

5. The **Edit Recording Rule** window appears.

The screenshot shows the 'Edit Recording Rule' window with the following fields and options:

- Name:** 11
- Description:** (empty)
- Switch:** Avaya 7.x
- Recording Details:**
 - Recording Percentage:** 100 %
 - Interaction Type:** Inbound Direct Call
 - Daily Records:** 0
 - Disqualify Recording
- Enable Screen Capture:**
 - After Call Work:** (empty) Minutes (empty) Seconds
- Override Historical and Archiving:**
 - Move to Historical**
 - After:** (empty) Days
 - Delete Instead of moving to Historical:**
 - Audio Screen Capture Chat
 - Move to Archiving**
 - After:** (empty) Days
 - Delete Instead of moving to Archive:**
 - Audio Screen Capture Chat

Buttons: Cancel, OK

6. Edit the General, Criteria, Schedule and Permissions tab as per your requirement.






Note: Refer to the [Create a New Rule on page 11-622](#) section (for General - step 4 to 12, Criteria - step 13 to 15, Schedule - step 16 to 20 and Permissions - step 21 to 25).

11.7.4 Activate a Recording Rule

This feature allows to activate a Recording Rule based on the selected parameters (Refer [Create a New Rule](#)). To activate a Recording Rule follow the steps below.


1. Select the Recording Rule for which the Status column is **blank**, as shown below.

RECORDING RULES












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

Name	Interacti...	Switch	Schedule	Recordin...	Screen	Evaluation	Status
ACD 50% - Max daily 50 - Each agent in team1	ACD Call	UIP73_SP3_RCTIPS	Every Sun, Mon, Tue, Wed, Thu, Fri, Sat from 05:30 AM to 05:29 AM	50%	<input checked="" type="checkbox"/>	Pre-Call	
Active	ACD Call	Cisco UCCX	Every Sun, Mon, Tue, Wed, Thu, Fri, Sat from 12:00 AM to 11:59 PM	100%		Pre-Call	
active classic	ACD Call	Cisco UCCX	Every Sun, Mon, Tue, Wed, Thu, Fri, Sat from 05:30 AM to 05:29 AM	100%		Pre-Call	
Active_inactive	Chat	Cisco UCCX	Every Sun, Mon, Tue, Wed, Thu, Fri, Sat from 12:00 AM to 11:59 PM	100%		Post-Call	
Active_inactive	Inbound Direct ...	Cisco UCCX	Every Sun, Mon, Tue, Wed, Thu, Fri, Sat from 12:00 AM to 11:59 PM	100%		Pre-Call	<input checked="" type="checkbox"/>
Active_inactive	Inbound Direct ...	Avaya 7.x	Every Sun, Mon, Tue, Wed, Thu, Fri, Sat from 12:00 AM to 11:59 PM	100%		Pre-Call	<input checked="" type="checkbox"/>
Active_inactive	ACD Call	Cisco UCCX	Every Sun, Mon, Tue, Wed, Thu, Fri, Sat from 12:00 AM to 11:59 PM	100%		Pre-Call	

2. Click on the **Activate**  button and the checkmark will be shown on the Status column for the selected Recording Rule as shown below.

RECORDING RULES

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






Name	Interacti...	Switch	Schedule	Recordin...	Screen	Evaluation	Status
ACD 50% - Max daily 50 - Each agent in team1	ACD Call	UIP73_SP3_RCTIPS	Every Sun, Mon, Tue, Wed, Thu, Fri, Sat from 05:30 AM to 05:29 AM	50%	<input checked="" type="checkbox"/>	Pre-Call	
Active	ACD Call	Cisco UCCX	Every Sun, Mon, Tue, Wed, Thu, Fri, Sat from 12:00 AM to 11:59 PM	100%		Pre-Call	<input checked="" type="checkbox"/>
active classic	ACD Call	Cisco UCCX	Every Sun, Mon, Tue, Wed, Thu, Fri, Sat from 05:30 AM to 05:29 AM	100%		Pre-Call	
Active_inactive	Chat	Cisco UCCX	Every Sun, Mon, Tue, Wed, Thu, Fri, Sat from 12:00 AM to 11:59 PM	100%		Post-Call	
Active_inactive	Inbound Direct ...	Cisco UCCX	Every Sun, Mon, Tue, Wed, Thu, Fri, Sat from 12:00 AM to 11:59 PM	100%		Pre-Call	<input checked="" type="checkbox"/>
Active_inactive	Inbound Direct ...	Avaya 7.x	Every Sun, Mon, Tue, Wed, Thu, Fri, Sat from 12:00 AM to 11:59 PM	100%		Pre-Call	<input checked="" type="checkbox"/>
Active_inactive	ACD Call	Cisco UCCX	Every Sun, Mon, Tue, Wed, Thu, Fri, Sat from 12:00 AM to 11:59 PM	100%		Pre-Call	
Active_inactive	ACD Call	Default Import Switch	Every Sun, Mon, Tue, Wed, Thu, Fri, Sat from 05:30 AM to 05:29 AM	100%		Pre-Call	

11.7.5 Deactivate a Recording Rule


This feature allows to deactivate a Recording Rule. To deactivate the Recording Rule follow the steps below.


1. Select the Recording Rule for which the Status column is **checked** as shown below.

RECORDING RULES

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

Name	Interacti...	Switch	Schedule	Recordin...	Screen	Evaluation	Status
ACD 50% - Max daily 50 - Each agent in team1	ACD Call	UIP73_SP3_RCTIPS	Every Sun, Mon, Tue, Wed, Thu, Fri, Sat from 05:30 AM to 05:29 AM	50%		Pre-Call	
Active	ACD Call	Cisco UCCX	Every Sun, Mon, Tue, Wed, Thu, Fri, Sat from 12:00 AM to 11:59 PM	100%		Pre-Call	<input checked="" type="checkbox"/>
active classic	ACD Call	Cisco UCCX	Every Sun, Mon, Tue, Wed, Thu, Fri, Sat from 05:30 AM to 05:29 AM	100%		Pre-Call	
Active_inactive	Chat	Cisco UCCX	Every Sun, Mon, Tue, Wed, Thu, Fri, Sat from 12:00 AM to 11:59 PM	100%		Post-Call	
Active_inactive	Inbound Direct ...	Cisco UCCX	Every Sun, Mon, Tue, Wed, Thu, Fri, Sat from 12:00 AM to 11:59 PM	100%		Pre-Call	<input checked="" type="checkbox"/>
Active_inactive	Inbound Direct ...	Avaya 7.x	Every Sun, Mon, Tue, Wed, Thu, Fri, Sat from 12:00 AM to 11:59 PM	100%		Pre-Call	<input checked="" type="checkbox"/>
Active_inactive	ACD Call	Cisco UCCX	Every Sun, Mon, Tue, Wed, Thu, Fri, Sat from 12:00 AM to 11:59 PM	100%		Pre-Call	
Active_inactive	ACD Call	Default Import Switch	Every Sun, Mon, Tue, Wed, Thu, Fri, Sat from 05:30 AM to 05:29 AM	100%		Pre-Call	
			Every Sun, Mon, Tue, Wed, Thu, Fri, Sat				

- Click on the **Deactivate**  button and the Status column will be blank for the selected Recording Rule as shown below.

RECORDING RULES

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

Name	Interacti...	Switch	Schedule	Recordin...	Screen	Evaluation	Status
ACD 50% - Max daily 50 - Each agent in team1	ACD Call	UIP73_SP3_RCTIPS	Every Sun, Mon, Tue, Wed, Thu, Fri, Sat from 05:30 AM to 05:29 AM	50%	<input checked="" type="checkbox"/>	Pre-Call	
Active	ACD Call	Cisco UCCX	Every Sun, Mon, Tue, Wed, Thu, Fri, Sat from 12:00 AM to 11:59 PM	100%		Pre-Call	
active classic	ACD Call	Cisco UCCX	Every Sun, Mon, Tue, Wed, Thu, Fri, Sat from 05:30 AM to 05:29 AM	100%		Pre-Call	
Active_inactive	Chat	Cisco UCCX	Every Sun, Mon, Tue, Wed, Thu, Fri, Sat from 12:00 AM to 11:59 PM	100%		Post-Call	
Active_inactive	Inbound Direct ...	Cisco UCCX	Every Sun, Mon, Tue, Wed, Thu, Fri, Sat from 12:00 AM to 11:59 PM	100%		Pre-Call	<input checked="" type="checkbox"/>
Active_inactive	Inbound Direct ...	Avaya 7.x	Every Sun, Mon, Tue, Wed, Thu, Fri, Sat from 12:00 AM to 11:59 PM	100%		Pre-Call	<input checked="" type="checkbox"/>
Active_inactive	ACD Call	Cisco UCCX	Every Sun, Mon, Tue, Wed, Thu, Fri, Sat from 12:00 AM to 11:59 PM	100%		Pre-Call	
Active_inactive	ACD Call	Default Import Switch	Every Sun, Mon, Tue, Wed, Thu, Fri, Sat from 05:30 AM to 05:29 AM	100%		Pre-Call	
...	Every Sun, Mon, Tue, Wed, Thu, Fri, Sat	

11.7.6 View a Recording Rule


This feature allows to view a recording rule. To view a recording rule, follow the steps below.

- Select the recording rule which you want to view.

RECORDING RULES

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

Name	Interacti...	Switch	Schedule	Recording P...	Sc...	Ev...	Ac...
Inbound ACD	ACD Call	Quest_Avaya	Every Sun, Mon, Tue, Wed, Thu, Fri, Sat from 12:00 AM to 11:59 PM	100%	<input checked="" type="checkbox"/>	Pre-Call	<input checked="" type="checkbox"/>
Inbound ACD Mentors	ACD Call	Quest_Avaya	Every Sun, Mon, Tue, Wed, Thu, Fri, Sat from 12:00 AM to 11:59 PM	100%	<input checked="" type="checkbox"/>	Pre-Call	
Inbound Direct	Inbound Direct Call	Quest_Avaya	Every Sun, Mon, Tue, Wed, Thu, Fri, Sat from 12:00 AM to 11:59 PM	100%	<input checked="" type="checkbox"/>	Pre-Call	<input checked="" type="checkbox"/>
Inbound Direct Mentors	Inbound Direct Call	Quest_Avaya	Every Sun, Mon, Tue, Wed, Thu, Fri, Sat from 12:00 AM to 11:59 PM	100%	<input checked="" type="checkbox"/>	Pre-Call	
Outbound Automatic	Outbound Queued Call	Quest_Avaya	Every Sun, Mon, Tue, Wed, Thu, Fri, Sat from 12:00 AM to 11:59 PM	100%	<input checked="" type="checkbox"/>	Pre-Call	<input checked="" type="checkbox"/>
Outbound Automatic Mentors	ACD Call	Quest_Avaya	Every Sun, Mon, Tue, Wed, Thu, Fri, Sat from 12:00 AM to 11:59 PM	100%	<input checked="" type="checkbox"/>	Pre-Call	
Outbound Direct	Outbound Direct Call	Quest_Avaya	Every Sun, Mon, Tue, Wed, Thu, Fri, Sat from 12:00 AM to 11:59 PM	100%	<input checked="" type="checkbox"/>	Pre-Call	<input checked="" type="checkbox"/>

- Click on the View  button and the below window appears.

- Go through the General, Criteria, Schedule and Permissions tab.

Note: When an user has only view permission on the recording but not the Edit then this will help the user to view the recording rule in read only mode

11.8 Skill Groups

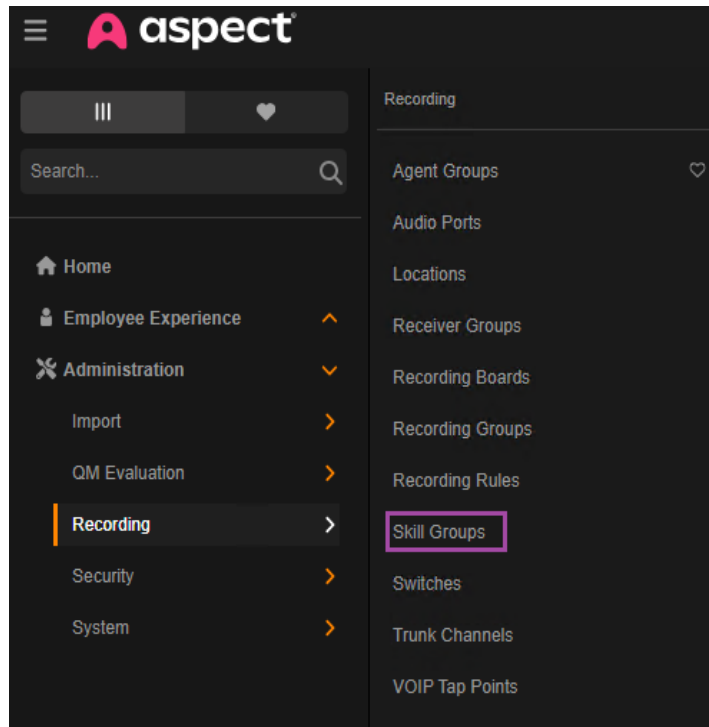
This section describes about the Navigation, Add, Edit, View, Activate and Deactivate Skill Groups.

11.8.1 Navigation to Skill Groups

Follow the steps given below to navigate to the Skill Groups page:

- Go to the main menu.

2. Click **Administration > Recording > Skill Groups**.



3. The Skill Groups page appears as given below:







SKILL GROUPS

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

Name	Switch	Active	Synced
AQMDev_InbSkill1	Cisco UCCX	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
AQMDev_OutbSkill1	Cisco UCCX	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
AQMDev_RG1	Cisco UCCX	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
AQMOA_HPXSkill1	Cisco UCCX	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
AQMOA_OutbSkill1	Cisco UCCX	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
AQMOA_RG_T	Cisco UCCX	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
AQMOA_RG1	Cisco UCCX	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
AQMOA_Skill1	Cisco UCCX	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
CCCCC	UIP73SP4ECTIPS	<input checked="" type="checkbox"/>	<input type="checkbox"/>
ChipTestSkill1	UCCE (Inactive)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Demo Skill_Edited	sp4eclips	<input type="checkbox"/>	<input type="checkbox"/>
Development	Cisco UCCX	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Dummy	UIP73_SP3_RCTIPS (Inactive)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
QASkill2	UCCE (Inactive)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
QualityControl	Cisco UCCX	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
SG	Avaya 7.x	<input checked="" type="checkbox"/>	<input type="checkbox"/>

1 - 32 of 32 items

4. The Menu buttons       on the Skill Groups page are described below:

Icons	Description
Refresh 	Refreshes the skill groups grid with latest skill group changes. Instead of the browser refresh button user can click on this menu button which will refresh only the grid data and not the page.
Add 	Adds the new skill group to the grid.
Edit 	Edits the selected skill group existing in the grid.
View 	Provides the information to view about the selected skill groups from the grid.
Activate 	Activates the existing skill group.
Deactivate 	Deactivates the existing skill group. Note: If the existing Skill Group is synced, the Deactivate button will be disabled, which means the synced skill group will be active by default.

5. The grid columns on the Skill Groups page are described below:

Column	Description
Name	The name of the Skill Groups.
Switch	The name of the switch to which the skill group agent is connected.
Active	The skill group status is displayed by the icon, whether active or not.
Synced	The icon to identify whether the Skill Group agent is synced, as created from WEM.

11.8.2 Create Skill Groups

To create a new Skill Group, perform the following steps.

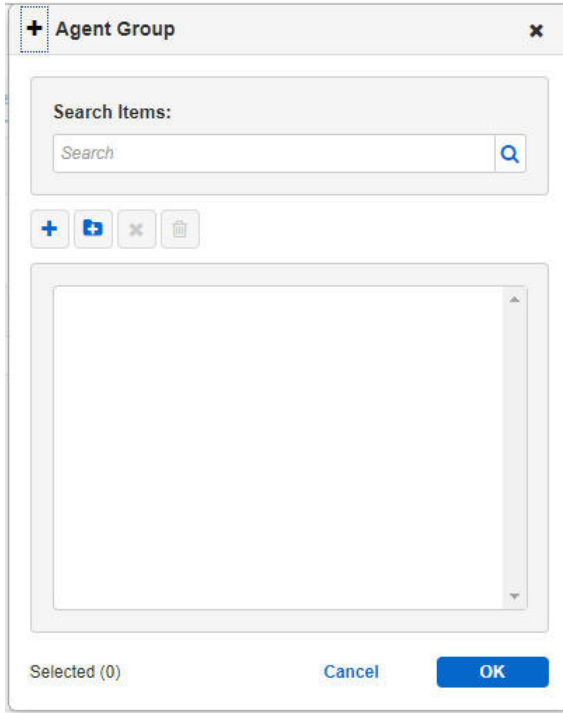
1. Go to the main menu.
2. Click **Administration > Recording > Skill Groups**.
3. The Skill Groups page appears.





- Click on the  button. The Add Skill Groups window appears with General tab active.

Note: The fields marked (*) are mandatory fields.

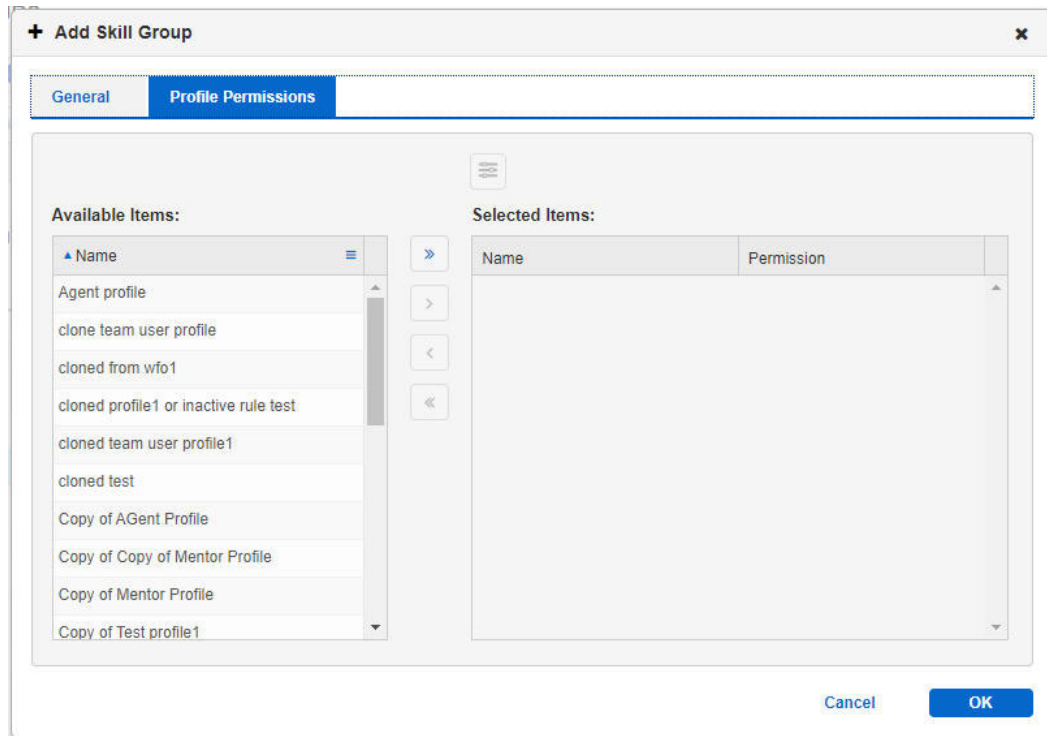
- In the General tab of the window, in the **Name** text box, type a group name that uniquely identifies a skill group. This field cannot be blank.
- Select the **Switch** from the drop-down list box.

- Once the Switch is selected the **Skill Group Members** option is enabled. Click the **Select** tab, the Add Agent Group window appears as below:



- Click the **Add**  button on the Agent Group window to add the active agent groups who are associated with the switch that is selected. Click the Shift key to select the multiple agent groups from the list.
- Click the **Add All**  button to select all the existing agent groups associated with the selected switch.
- Click the **Clear**  button to clear the selected Agent Groups from the Agent Groups grid window.
- Click the **Delete**  button to clear all the existing Agent Groups at once from the Agent Groups grid window.
- Select **OK** to confirm the selected Agent Groups.

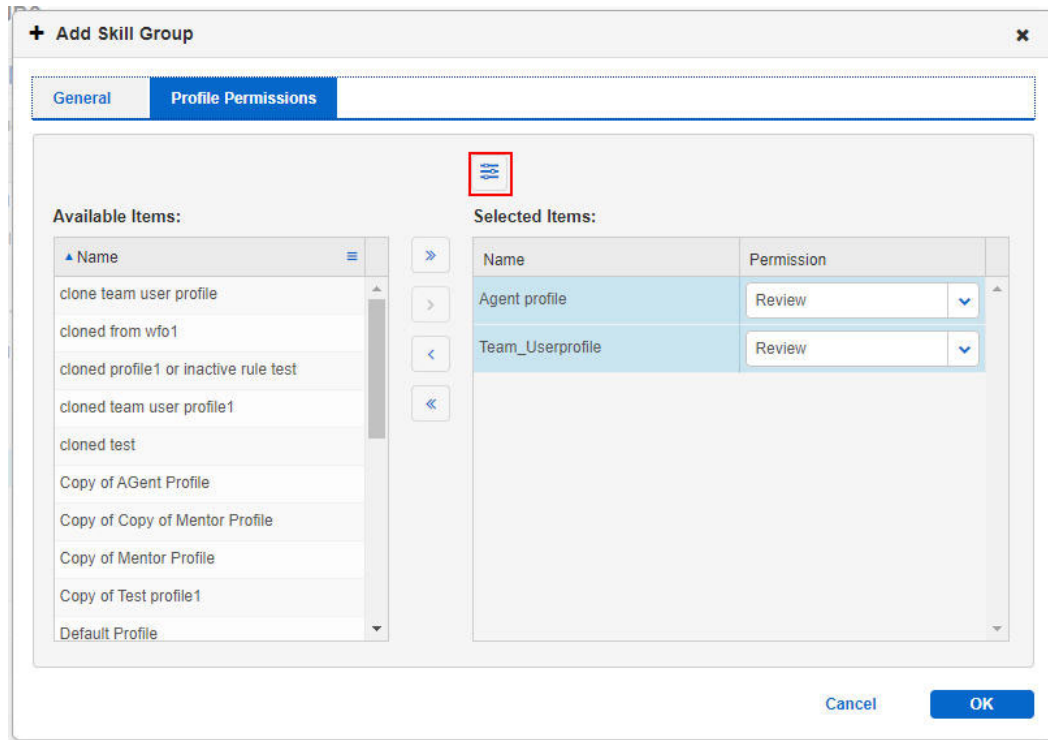
8. Now, select the **Profile Permissions** tab, as shown below:




Note: Here all the user profiles which are active will be displayed, except the Administrator profile.

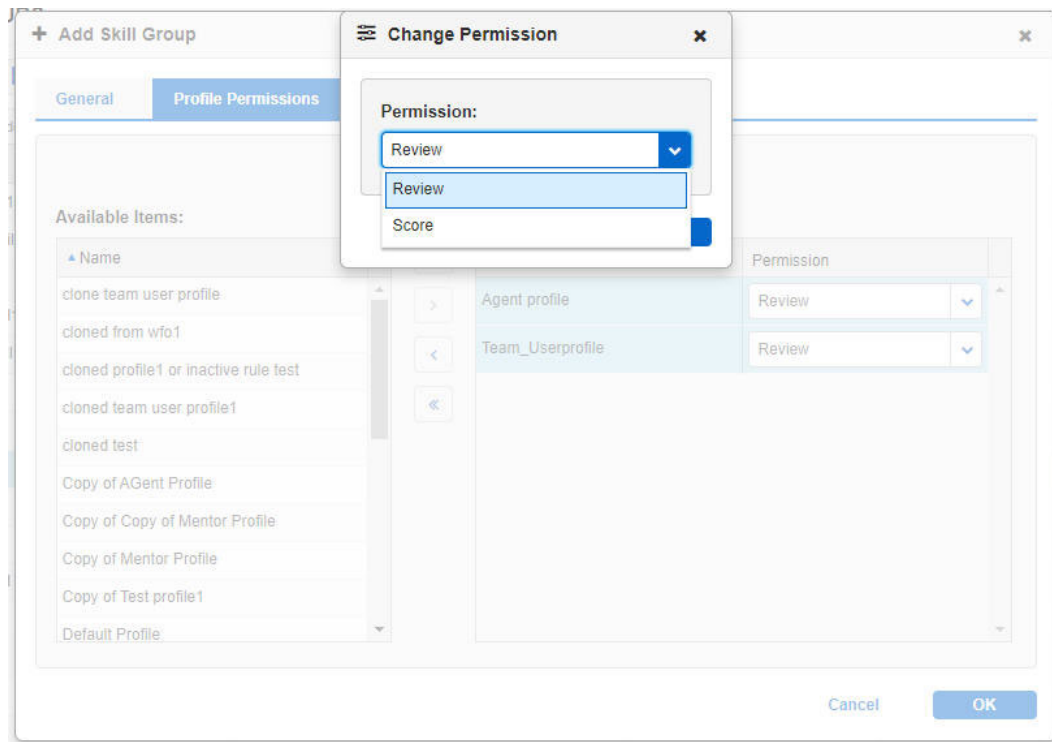
- When you want to provide permissions to the Skill Groups that you are creating, then the user profiles can be added from the profile Permissions tab.
- To select one or multiple user profiles under the Available Items section, click on the button.

- Once the user profiles are selected, they are added to the Selected Items grid, as shown below:



- The user profiles permission can be edited by two ways.
By either selecting the adjacent Permission drop-down button for changing individually the user profiles, or by selecting the **Change selected user profiles permission**  button for changing all the user profiles Permission in the Selected Items grid at once.

- The **Change Permission** window appears. Select the desired permission for the user profiles and click **OK**, as shown below:




9. Click the **OK** button to create the Skill Group.

Note: By default, the new Skill Group which is created will be listed in the grid and will be Active. As it's created from the WEM and not from the Switch, the Synced column will be blank by default.

11.8.3 Edit Skill Groups

To edit a Skill Group, perform the following steps.

1. Go to the main menu.
2. Click **Administration > Recording > Skill Groups**.
3. The Skill Groups page appears.
4. Select the available Skill Group from the grid that needs to be edited and click the **Edit** icon .

- The Edit Skill Group window appears with General tab active as shown below:

- Edit the General and Profile Permissions tab as per your requirement.
Note: Refer to [Create Skill Groups on page 11-639](#) section, step 5 to 8.
- Click the **OK** button to complete the process.

11.8.4 View a Skill Group

This feature allows to view a Skill Group. To view a Skill Group, follow the steps below.


1. Select the existing skill group from the grid, which you want to view.

SKILL GROUPS

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

Name	Switch	Active	Synced
AQMDev_InbSkill1	Cisco UCCX	✓	✓
AQMDev_OutbSkill1	Cisco UCCX	✓	✓
AQMDev_RG1	Cisco UCCX	✓	✓
AQMQA_HPXSkill1	Cisco UCCX	✓	✓
AQMQA_OutbSkill1	Cisco UCCX	✓	✓
AQMQA_RG_T	Cisco UCCX	✓	✓
AQMQA_RG1	Cisco UCCX	✓	✓
AQMQA_Skill1	Cisco UCCX	✓	✓
CCCCC	UIP73SP4ECTIPS	✓	
ChipTestSkill1	UCCE (Inactive)	✓	✓
Demo Skill_Edited	sp4ectips		
Development	Cisco UCCX	✓	✓
Dummy	UIP73_SP3_RCTIPS (Inactive)	✓	
QASkill2	UCCE (Inactive)	✓	✓
QualityControl	Cisco UCCX	✓	✓
SG	Avaya 7.x	✓	

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2. Click on the View  button and the below window appears.

View Skill Group

Name:
Development

Switch:
Cisco UCCX

Skill Group Members:
Dev-Q

Profile Permissions:

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

Name	Permission
Agent profile	Review
Mentor Profile	Review

OK

The user can view the Skill Group details.

3. Click **OK** to close the View window.

11.8.5 Activate a Skill Group

This feature allows to activate a Skill Group based on the selected parameters. To activate a Skill Group follow the steps given below.


1. Select the Skill Group for which the Active column is **blank**, as shown below:

SKILL GROUPS

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

Name	Switch	Active	Synced
CCCCCC	UIP73SP4ECTIPS	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
ChipTestSkill1	UCCE (Inactive)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Demo Skill_Edited	sp4ectips	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Development	Cisco UCCX	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Dummy	UIP73_SP3_RCTIPS (Inactive)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
QASkill2	UCCE (Inactive)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Quality	Cisco UCCX		<input checked="" type="checkbox"/>
QualityControl	Cisco UCCX	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
SG	Avaya 7.x	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
skill group - out	UIP735	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
skill grp other	UIP735	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Skill grp-in	UIP735	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Skill_Demo	Cisco UCCX	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Skill_UIP	UIP73_SP3_RCTIPS (Inactive)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Skill6	UCCE (Inactive)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
SkillGroup1	UCCE (Inactive)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
SkillGroup2	UCCE (Inactive)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

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- Click on the **Activate**  button and the checkmark will be shown on the Active column for the selected Skill Group as shown below:

SKILL GROUPS

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

Name	Switch	Active	Synced
AQMQA_Skill1	Cisco UCCX	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
CCCCC	UIP73SP4ECTIPS	<input checked="" type="checkbox"/>	
ChipTestSkill1	UCCE (Inactive)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Demo Skill_Edited	sp4eclips		
Development	Cisco UCCX	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Dummy	UIP73_SP3_RCTIPS (Inactive)	<input checked="" type="checkbox"/>	
QASkill2	UCCE (Inactive)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Quality	Cisco UCCX	<input checked="" type="checkbox"/>	
QualityControl	Cisco UCCX	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
SG	Avaya 7.x	<input checked="" type="checkbox"/>	
skill_group - out	UIP735	<input checked="" type="checkbox"/>	
skill_grp other	UIP735	<input checked="" type="checkbox"/>	
Skill_grp-in	UIP735	<input checked="" type="checkbox"/>	
Skill_Demo	Cisco UCCX	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Skill_UIP	UIP73_SP3_RCTIPS (Inactive)	<input checked="" type="checkbox"/>	
Skill6	UCCE (Inactive)		<input checked="" type="checkbox"/>
SkillGroup1	UCCE (Inactive)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

1 - 33 of 33 items

11.8.6 Deactivate a Skill Group

This feature allows to deactivate a Skill Group. To deactivate a Skill Group follow the steps given below.


1. Select the Skill Group for which the Active column is **checked** as shown below:

SKILL GROUPS

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

Name	Switch	Active	Synced
AQMQA_Skill1	Cisco UCCX	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
CCCCCC	UIP73SP4ECTIPS	<input checked="" type="checkbox"/>	
ChipTestSkill1	UCCE (Inactive)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Demo Skill_Edited	sp4ectips		
Development	Cisco UCCX	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Dummy	UIP73_SP3_RCTIPS (Inactive)	<input checked="" type="checkbox"/>	
QASkill2	UCCE (Inactive)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Quality	Cisco UCCX	<input checked="" type="checkbox"/>	
QualityControl	Cisco UCCX	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
SG	Avaya 7.x	<input checked="" type="checkbox"/>	
skill group - out	UIP735	<input checked="" type="checkbox"/>	
skill grp other	UIP735	<input checked="" type="checkbox"/>	
Skill grp-in	UIP735	<input checked="" type="checkbox"/>	
Skill_Demo	Cisco UCCX	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Skill_UIP	UIP73_SP3_RCTIPS (Inactive)	<input checked="" type="checkbox"/>	
Skill6	UCCE (Inactive)		<input checked="" type="checkbox"/>
SkillGroup1	UCCE (Inactive)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

1 - 33 of 33 items

2. Click on the **Deactivate**  button and the Active column will be blank for the selected Skill Group as shown below:

SKILL GROUPS

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

Name	Switch	Active	Synced
CCCCCC	UIP73SP4ECTIPS	<input checked="" type="checkbox"/>	
ChipTestSkill1	UCCE (Inactive)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Demo Skill_Edited	sp4ectips		
Development	Cisco UCCX	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Dummy	UIP73_SP3_RCTIPS (Inactive)	<input checked="" type="checkbox"/>	
QASkill2	UCCE (Inactive)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Quality	Cisco UCCX		
QualityControl	Cisco UCCX	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
SG	Avaya 7.x	<input checked="" type="checkbox"/>	
skill group - out	UIP735	<input checked="" type="checkbox"/>	
skill grp other	UIP735	<input checked="" type="checkbox"/>	
Skill grp-in	UIP735	<input checked="" type="checkbox"/>	
Skill_Demo	Cisco UCCX	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Skill_UIP	UIP73_SP3_RCTIPS (Inactive)	<input checked="" type="checkbox"/>	
Skill6	UCCE (Inactive)		<input checked="" type="checkbox"/>
SkillGroup1	UCCE (Inactive)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
SkillGroup2	UCCE (Inactive)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

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Note: Multiple Skill Groups can be Activated / Deactivated together. Synced Skill Groups can neither be Activated, nor Deactivated. The Skill Groups that are created from WEM only can be Activated / Deactivated.

11.9 Switches

Each Aspect Quality system integrates with one or more switches, which is used for the environmental definitions (for example: agents, agent groups and teams) within that integration.

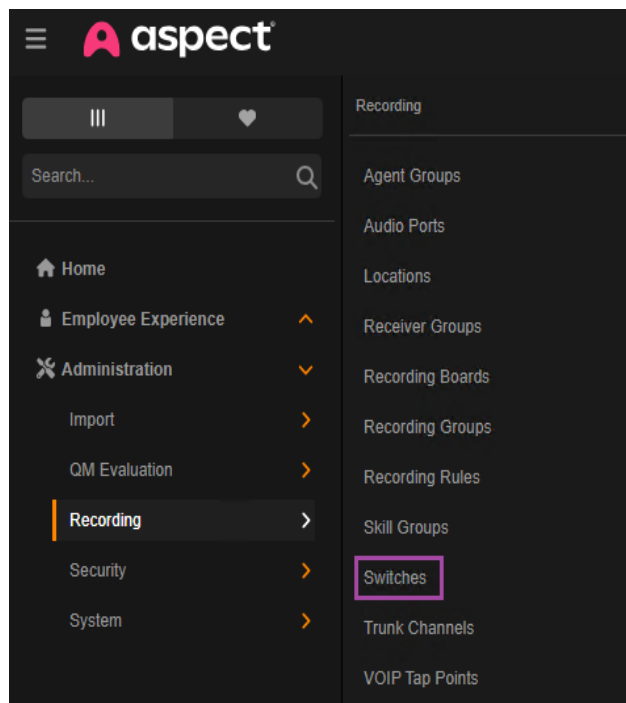
For each of these switches the configuration procedures need to be performed.

This section discusses about the Switches.

11.9.1 Navigation to Switches







Follow the steps given below to navigate to the Switches page:

1. Go to the main menu.
2. Click **Administration > Recording > Switches**.



3. The Switches page appears as given below:

SWITCHES














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

Name	Type	Monitoring ...	Primary Replica	Sync With...	Screen	Active
Avaya 7.x	Avaya	Quality Monitoring	AQM19SRV12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Avaya TSAPI	Avaya	Quality Monitoring	AQM19SRV12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cisco UCCX	Cisco UCCX	Quality Monitoring	AQM19SRV12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cisco UCM	Cisco UCM	Quality Monitoring	AQM19SRV12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Default Import Switch	Custom	Quality Monitoring	AQM19SRV12			<input checked="" type="checkbox"/>
Demo Switch_Edited	Unified IP	Quality Monitoring	AQM19SRV12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
ECTIPS	Unified IP	Quality Monitoring	AQM19SRV12			<input checked="" type="checkbox"/>
ENH_CTIPS_UIP7.3	Unified IP	Quality Monitoring	AQM19SRV12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Lom_Zipwire1	Zipwire	Logging	AQM19SRV12	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
sp4ectips	Unified IP	Quality Monitoring	AQM19SRV12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
UCCE	Cisco UCCE	Quality Monitoring	AQM19SRV12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
UIP ECTIPS1	Unified IP	Quality Monitoring	AQM19SRV12			<input checked="" type="checkbox"/>
UIP35_RCTIPS	Unified IP	Quality Monitoring	AQM19SRV12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
UIP73_CTIPS	Unified IP	Quality Monitoring	AQM19SRV12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
UIP73_SP2_RCTIPS	Unified IP	Quality Monitoring	AQM19SRV12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
UIP73_SP3_RCTIPS	Unified IP	Quality Monitoring	AQM19SRV12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
UIP735	Unified IP	Quality Monitoring	AQM19SRV12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

1 - 21 of 21 items


4. The Menu buttons       on the Switches page are described below:

Icons	Description
Refresh 	Refreshes the switches grid with latest skill group changes. Instead of the browser refresh button user can click on this menu button which will refresh only the grid data and not the page.
Add 	Adds the new switches to the grid.
Edit 	Edits the selected switches existing in the grid.
LDAP/AD Sync 	Allows to sync the LDAP/AD details.
Activate 	Activates the existing switches.
Deactivate 	Deactivates the existing switches.

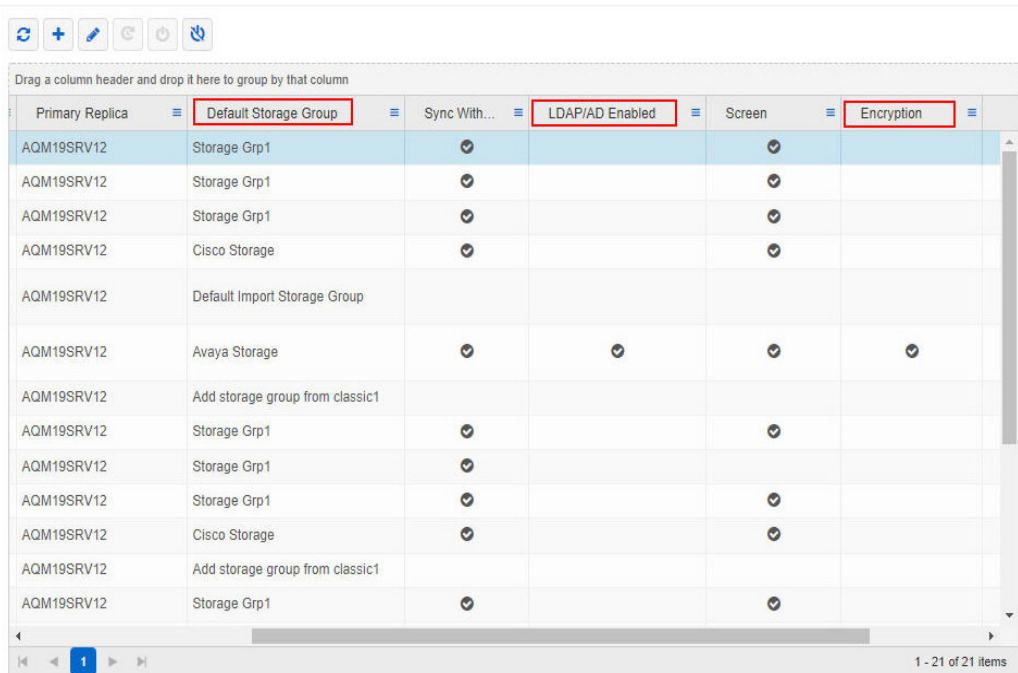
5. The grid columns on the Switches page are described below:

Column	Description
Name	The name of the Switches.
Type	The type of the switch, which is configured. The Type column can be filtered by the user based on the Type of switch.
Monitoring Mode	The option selected for Monitoring Mode is displayed.

Column	Description
Primary Replica	The replica associated with the switch is displayed.
Sync With Quality	The switch is configured to Sync with Quality is displayed in this column with a tick mark icon.
Screen	The switch is configured to enable the screen capture is displayed in this column with a tick mark icon
Active	The switch status is displayed by the icon, whether active or inactive.

6. The hidden columns are also available in the Switches, which can be explored with the help of column settings  menu of grid column. These are given below:

SWITCHES




Primary Replica	Default Storage Group	Sync With...	LDAP/AD Enabled	Screen	Encryption
AQM19SRV12	Storage Grp1	✓		✓	
AQM19SRV12	Storage Grp1	✓		✓	
AQM19SRV12	Storage Grp1	✓		✓	
AQM19SRV12	Cisco Storage	✓		✓	
AQM19SRV12	Default Import Storage Group				
AQM19SRV12	Avaya Storage	✓	✓	✓	✓
AQM19SRV12	Add storage_group from classic1				
AQM19SRV12	Storage Grp1	✓		✓	
AQM19SRV12	Storage Grp1	✓		✓	
AQM19SRV12	Storage Grp1	✓		✓	
AQM19SRV12	Cisco Storage	✓		✓	
AQM19SRV12	Add storage_group from classic1				
AQM19SRV12	Storage Grp1	✓		✓	

Column	Description
Default Storage Group	The storage group which is associated with the switch is displayed.
LDAP/AD Enabled	The LDAP server is configured for the switch is displayed in this column with a tick mark icon.
Encryption	The switch is configured with Encryption is displayed in this column with a tick mark icon.

11.9.2 Create Switches

To create a new Switch, perform the following steps.

1. Go to the main menu icon.
2. Click **Administration > Recording > Switches**.
3. The Switches page appears.
4. Click on the Add  button. The Add Switch window appears with General tab active.

Note:

- a. (*) - These are the Mandatory Fields.
 - b. By default the Database tab is disabled. It will be enabled, when the Type of switch is selected from the General tab.
 - c. When the Type of switch is selected as Custom, the Database tab will be disabled.
5. In the **General Tab**: In the General tab of the window, in the **Name** text box, type a descriptive name that uniquely identifies a switch. This field cannot be blank.
 6. By default **Sync with Aspect EX Quality** and **Send quality scores of agents to WEM** toggle keys are available. The toggle keys selection options varies as per the Type of switch selected, any or all of the below keys are available:
 - a. Select the **Sync with Aspect EX Quality** toggle key, if you want Aspect Quality to read the entity data from the switch and store it in the Aspect Quality database.
 - b. Select the **Send quality scores of agents to WFM** toggle key, if you want to upload scorecards to Aspect Workforce Management for viewing.
 - c. Select the **Communication Over SSL** toggle key, if the Secure Data Transmission is enabled at Unified IP for the Primary or Secondary CTI Portal server, or with the Primary or Secondary Admin Web Service.

- d. Select the **Record within same location only** toggle key, when you define a switch for the location. Flag this option when you want Aspect Quality to search for recording ports only at the location associated with the switch (and not at other locations). This option is available only when the switch type is Aspect Unified IP. When no location is defined and the option is flagged, the DCP's are implicitly treated as separate locations.
7. By default **LDAP Servers** and **Primary Database Replica** fields are available in the **LDAP Servers** section of the window. The fields varies as per the Type of switch selected, any or all of the below fields are available:
- a. From the **LDAP Servers** drop-down list box, select the LDAP or Active Directory server ID or IP address.
 - b. From the **Primary Database Replica** drop-down list box, select the available database replica.
 - c. In the **Dial String** field, type the DN that the audio port dials when attempting to perform agent monitoring. The information is needed only when Silent Monitoring audio ports is used.
 - d. In the **Unique Aspect Quality ID field**, type the unique number to identify this switch definition to the Unified IP system. This number must be a two-digit, positive integer in the range of 10 through 99.
8. Select the **Type** of switch from the drop-down list box. There are several switches in the drop-down list, as shown below:

The screenshot shows the 'Add Switch' configuration window with the 'General' tab selected. The 'Type' dropdown menu is open, displaying a list of switch types: Avaya, Call Center, Cisco UCCE, Cisco UCCX, Cisco UCM, Custom, and Unified IP. The 'Avaya' option is currently selected. Other visible fields include 'Name', 'Primary Address', 'Primary Port', 'Backup Address', 'Backup Port', 'LDAP Servers' (set to 'None'), 'Primary Database Replica' (set to 'AQM19SRV12'), and 'Dial String'. The window has 'Cancel' and 'OK' buttons at the bottom right.

When you select a Type, based on it the Version field appears. And upon selecting the Version from the drop-down menu the Communication section and the LDAP Servers section field varies.

The Type of switches along with the Version, and the Communication section fields are given in the below table.

Type	Version	Description (Communication Section)
Avaya	CMI	Primary Address:* Type the name or IP Address of the Avaya Contact server.
		Primary Port:* Type the port number that you use to connect to the Avaya Contact server. The default is 9011.
		Backup Address: Type the name or IP Address of the failover Avaya Contact server, if used.
		Backup Port: Type the port number of the failover Avaya Contact server, if used. The default is 9011.
	Avaya TSAPI	TLINK:* Type the TLINK service name. Note: This name can be obtained from the AES Management Console by clicking Status > Status and Control > TSAPI Service Summary .
		User Name:* Type the Avaya Application Enablement Service (AES) user name. Note: The user must be a CTI user with the CTI User field set to Yes in the AES Edit User window.
		Password:* Type the Avaya Application Enablement Service (AES) password. Note: The list of AES users can be obtained from the AES Management Console by clicking User Management > User Admin > List All Users .

Type	Version	Description (Communication Section)
Cisco UCCE (Cisco Unified Contact Center Enterprise)	CTI Server	Primary Address:* Type the name or IP Address of the SideA CTI server.
		Primary Port:* Type the port number that you use to connect to the SideA CTI server.
		Backup Address: Type the name or IP Address of the failover SideB CTI server, if used.
		Backup Port: Type the port number of the failover SideB CTI server, if used.
		User Name:* Type the Cisco UCCE Agent login ID.
		Password:* Type the Cisco UCCE Agent login password.
	CTIOS	Primary Address:* Type the name or IP Address of the Primary CTIOS server.
		Primary Port:* Type the port number that you use to connect to the Primary CTIOS server.
		Backup Address: Type the name or IP Address of the Backup CTIOS server, if used.
		Backup Port: Type the port number of the Backup CTIOS server, if used.
Cisco UCCX (Cisco Unified Contact Center Express)	NA	Primary Address:* Type the name or IP Address of the SideA CTI server.
		Primary Port:* Type the port number that you use to connect to the SideA CTI server.
		Backup Address: Type the name or IP Address of the failover SideB CTI server, if used.
		Backup Port: Type the port number of the failover SideB CTI server, if used.
Cisco UCM (Cisco Unified Communications Manager)	NA	Initial Service Provider:* Type the name of the Cisco TSP driver that you got, when configured the Cisco TSP (Phone and Modem settings). Note: If there is only one instance of the Cisco TSP driver installed, the Initial Service Provider and Final Service Provider contain the same name.
		Final Service Provider:* Type the name of the service provider. Note: If there is more than one instance of the Cisco TSP driver installed, the Final Service Provider is the name of the last service provider. If there is only one instance of the Cisco TSP driver installed, set the Final Service Provider to the same value as the Initial Service Provider.
Custom	NA	NA

Type	Version	Description (Communication Section)
Unified IP	ECL (External Call Logger)	Primary Address:* Type the name or IP Address of the Primary CenterCord server.
		Primary Port:* Type the port number that you use to connect to the Primary Call Logger.
		Backup Address: Type the name or IP Address of the failover backup CenterCord, if used.
		Backup Port: Type the port number of the failover backup CenterCord, if used.
		Tenant Name:* Type the short name of the tenant.
	CTIPS (CTI Portal Server) / Enhanced CTIPS	Primary Address:* Type the name or IP Address of the primary CTI portal server machine name.
		Primary Port:* In the Primary CTI Portal Server Port text box, type 8170, which is the port number for the primary CTI portal server with the Secure Data Transmission (SDT) disabled in Unified IP. OR Type 8171, which is the port number for the primary CTI portal server with the Secure Data Transmission (SDT) enabled in Unified IP. Note: Refer to the Unified IP Server Configurator application to identify the exact port number required.
		Backup Address: In the Secondary CTI Portal Server Address text box, type the machine name of the backup CTI portal server. Note: You must use the Secondary CTI Portal Server machine name, not the IP address, for the IMON Unified IP connector to work with CTIPS over the SSL. For integrations with Unified IP 7.3 SP1 or later, use a Fully Qualified Domain Name (FQDN). For example: lom-rec73.cor.ord.labs.aspect.com Where lom-rec73-cor is the machine name, and ord.labs.aspect.com is the FQDN.
		Backup Port: Type the port number of the failover CTI portal server.
		Tenant Name:* Type the short name of the tenant.
		CallBack Server Port:* Type the port number that the CTI Portal Server should use for publishing the events. The value is unique across all Aspect Unified IP switch defined on a particular site.
		User Name:* Type the CTI portal server user name. The user is defined in the Active Directory and in the Server Configurator application of Unified IP.
		Password:* Type the password for the corresponding user.

(*) - These are the Mandatory Fields.

- 9. In the **Database Tab**: Based on the selection of the Type of switch, the Database tab will be enabled. The Database tab will be enabled with the field variables that vary with the Type and Version of the switch.

The screenshot shows a dialog box titled "Add Switch" with a close button (x) in the top right corner. It features three tabs: "General", "Database" (which is selected and highlighted in blue), and "Monitoring".

Under the "Database" tab, there is a section labeled "Sync Database using:" with a dropdown menu currently set to "System Manager".

Below this are two side-by-side panels:

- System Manager User Management Web Service:** This panel contains fields for "SM Server Address:" and "Port:", an "SSL" toggle switch (currently off), "User Name:", and "Password:".
- System Management Service:** This panel contains fields for "AES Server Address: *" and "Port: *", an "SSL" toggle switch (currently off), "User Name: *", and "Password: *".

At the bottom right of the dialog, there are "Cancel" and "OK" buttons.

Below table specifies the various section and fields in the Database tab that are available based on the Type and Version of switches selected in the General tab:

Section	Field	Description
LDAP Configuration	Server Address:*	Type the name or IP address of the server running Microsoft ADAM.
	Port:*	<ul style="list-style-type: none"> Type 389. This port number is the port to connect to Microsoft ADAM. Type 443. This port number is for the System Manager User Management Web Services with the SSL flagged. Type 80 for unsecure and 8443 for secure connection. This port number is for the TCP port used when connecting to the Cisco Call Manager. Type 1433. This port number is to connect to the Cisco UCCE CTI Server. Obtain the port number from the Unified IP Server Configurator entry for the PrimaryDataServer.
	User Name:*	Type the fully qualified name to connect to Microsoft ADAM / Avaya System Manager / Avaya AES / Cisco Call Manager / ODBC data source. For example: <ul style="list-style-type: none"> Microsoft ADAM: CN=aqm,O=dem,DC=lombard,DC=com Avaya AES: CMUser@CMServerIPAddress Cisco Call Manager: This is the Cisco Call Manager user that was created for data-sync. ODBC data source: The default is dta.
	Password:*	Type the password associated with the User Name. <ul style="list-style-type: none"> The default password for the ODBC data source is tjm.
	SSL	By default Secure Socket Layer (SSL) toggle key is unflagged. Select SSL to securely connect to Microsoft ADAM / Avaya System Manager / Avaya AES / Cisco Call Manager. Note: The SSL connection is mandatory to connect to the Cisco Unified Communications Manager and LDAP/AD,.
	Base DN:*	The LDAP Base Distinguished Name (DN) for the switch to which you are integrating.
	Sync Database using	To Sync Database, select the options available of either System Manager or DEM from the drop-down menu.
System Manager User Management Web Service	SM Server Address:*	Type the name or IP address of the server running the Avaya System Manager.
System Management Service	AES Server Address:*	Type the name or IP address of the server running the Avaya Application Enablement Service (AES).

Section	Field	Description
Primary/ Backup Database	Data Source Name:*	Type the name of the ODBC DSN you created to connect to the Switch database. If you used the default name when you set up the ODBC configuration, then enter ACC_DSN.
	Database Name:*	Either Primary or Backup. Primary database name is the name of the database to be connected. Backup database name is the name of the backup database to be connected
Call Manager Database	Call Manager IP/ Host:*	Type the IP address of the Cisco Call Manager. Warning: Do not type the name; type only the IP address.
Notification Service	Endpoint Port:*	Type the port number. Note: The Endpoint port is the port that the Unified IP Notification Services uses to alert Aspect Quality about changes made to entities against which Aspect Quality syncs; for example, if a user logs into UCC Administrator and adds or updates a service, Aspect Quality receives notification of that change through this port. Note: Aspect requires that the port for Aspect Quality is in the range of 5180 and 5189.

(*) - These are the Mandatory Fields.

10. In the **Monitoring Tab**: Based on the configuration in the General tab and the Database tab, the options are enabled in the Monitoring tab.

+ Add Switch

General Database **Monitoring**

Configuration

Monitor Mode:
Quality Monitoring

Invalid Call Duration:
5000 Milliseconds

Screen Capture

Record Inbound Direct Calls

Record Outbound Direct Calls

Record calls if no agent present

Enhanced CTIPS Configuration

Enable Full-Time Recording

Media Storage and Security

Default Storage Group: *
Select a storage group

Enable Media Security

Encryption Key:
Generate

Auto-Generate new key every
Hours

Record Tariff Tone Configuration

Record Tariff Tone Type: *
Select a Record Tariff Tone Type

Record Tariff Tone Interval:
Seconds


Record Tariff Tone Duplex Type: *
Select a Record Tariff Tone Duplex Type

Cancel OK

11. Below table specifies the various section and fields in the Database tab that are available based on the Type and Version of switches selected in the General tab:

Section	Field	Description
Configuration	Monitor Mode:*	From the Monitoring Mode drop-down list box, select one of the following options: <ul style="list-style-type: none"> • Logging • Quality Monitoring • Quality Monitoring with Caching
	Invalid Call Duration:*	<ul style="list-style-type: none"> • Type the minimum time (in milliseconds) of a recorded file. If a recording is shorter than the set time, the file is deleted. • By default it is set to 5000 Milliseconds.
	Screen Capture (Toggle key)	In the Screen Capture section, select the flagged option to allow screen captures when recording calls. OR Select the unflagged option to disallow screen captures when recording calls. Note: Regardless of the recording option that you select, you must define a rule before any screen captures can occur.
	Record Inbound Direct Calls (Toggle key)	If you want to record inbound direct calls to an agent, select the Record Inbound Direct Calls toggle key. Note: If the Monitoring Mode is Quality Monitoring, you must create a rule and enable it before Aspect Quality records any inbound direct calls.
	Record Outbound Direct Calls (Toggle key)	If you want to record outbound direct calls to an agent, select the Record Outbound Direct Calls toggle key. Note: If the Monitoring Mode is Quality Monitoring, you must create a rule and enable it before Aspect Quality records any outbound direct calls.
	Record calls if no agent present (Toggle key)	Select the Record calls if no agent present toggle key, if you want any call (or segment of a call) recorded when there is no agent involved in the call. When deselected, any call (or segment of a call) on which there is no agent involved, is not recorded. Note: This setting does not refer to IVR calls.
	Stereo Recording (Toggle key)	Select the Stereo Recording to record a call as stereo instead of mono. Note: Stereo recordings roughly is double the size of mono recordings of the same duration. So the storage space needs to be planned accordingly.

Section	Field	Description
Media Storage and Security	Default Storage Group:*	<p>From the Default Storage Group drop-down list, select the storage group default that the system should use to store all files associated with interactions recorded for this switch.</p> <p>Note: When the system uses distributed recording storages, the system can override the default storage group for the switch in all of the recording-producing processes (for example, Port Manager, IVR Import, Agent Desktop Client, and Mentor Desktop Client).</p>
	Enable Media Security (Toggle key) a.) Encryption Key b.) Show Key History c.) Auto-Generate new key every (Toggle key)	<p>If you want to secure the media files, select the Enable Media Security toggle key.</p> <p>Note: If you want to secure the media files, and you select the Enable Media Security toggle key, you must set the encryption key to encrypt the media files on network transmission.</p> <ul style="list-style-type: none"> a.) When the Enable Media Security toggle key is flagged, the Generate tab is enabled. Click Generate tab to generate the Encryption Key. b.) Show Key History button shows the history of last ten keys that were generated for encryption. c.) If you want the system to change the encryption key every N hours, select the Auto-Generate new key every toggle button. <p>In the every hours field, type the interval number of hours after which you want the system to change the encryption key. The Interaction Monitor process changes the key for every N hour automatically, and the system starts encrypting the media files using the newly-changed key. The Interaction Monitor process calculates the key change time based on the key creation time.</p> <p>As an example, if you back up the database every 24 hours, and automatically set the encryption key to change every 48 hours, then the potential key loss is the period between the last backup and the database failure.</p>
Cisco BIB Configuration/ Enhanced CTIPS Configuration	Enable Full-Time Recording (Toggle key)	<p>Select the Enable Full-Time Recording toggle key, if you want to continue to record calls when the Recording server is not able to communicate with the Interaction Monitor.</p>

Section	Field	Description
Record Tariff Tone Configuration	Record Tariff Tone Type:*	<p>From the Record Tariff Tone Type drop-down list box, select one of the following options:</p> <ul style="list-style-type: none"> Initiated Tone Periodic Tone No Tone <p>If you select Initiated Tone or Periodic Tone, the agent and caller will hear the tones in the Unified IP call, as well as in the recordings.</p> <p>The info  button pop-up disclaimer is available adjacent to the Record Tariff Tone Type, stating “Please make sure the selected recording tone settings are in compliance with local laws.”</p>
	Record Tariff Tone Interval	<p>If you selected the Record Tariff Tone Type as Periodic Tone, then in the Record Tariff Tone Interval text box will be enabled. Type the number (in seconds) in the text box after which you want the tone to repeat.</p> <p>Note: If you select either Initiated Tone or No Tone from the Record Tariff Tone Type, the Record Tariff Tone Interval will be disabled.</p>
	Record Tariff Tone Duplex Type:*	<p>If you selected the Record Tariff Tone Type Initiated Tone, then from the Record Tariff Tone Duplex Type drop-down list box, select one of the following options:</p> <ul style="list-style-type: none"> Agent Half Duplex Contact Half Duplex Full Duplex <p>OR</p> <p>If you selected the Record Tariff Tone Type Periodic Tone, then from the Record Tariff Tone Duplex drop-down list box, select the following option</p> <ul style="list-style-type: none"> Full Duplex <p>Note: If you select No Tone from the Record Tariff Tone Type, the Record Tariff Tone Duplex Type drop-down list box will be inactive.</p>

(*) - These are the Mandatory Fields.

12. In the Monitoring Configuration section of the window, from the Monitoring Mode drop-down list box, select one of the following options:

Option	Description
Logging	All calls are recorded (displayed as Active).
Quality Monitoring	Calls are recorded based on Aspect Quality rules that are defined.
Quality Monitoring with Caching	All calls are recorded (displayed as Pending). Primarily used when on-demand recording is required.

13. In the Record Tariff Tone Configuration section of the window, from the **Record Tariff Tone Type** drop-down list box, select one of the following options.

Option	Description
No Tone	No tone or beep is heard.
Initiated Tone	A tone or beep sounds when the recording starts.
Periodic Tone	A tone is heard repeatedly at the interval specified in seconds.

Note: If necessary, you can set tone characteristics in the Unified Resource Manager in Unified IP. For more information, see the *Unified IP Resource Manager System Administrator Guide*.

14. If you selected the Record Tariff Tone Type **Initiated Tone**, then from the **Record Tariff Tone Duplex Type** drop-down list box, select one of the following options:

Option	Description
Agent Half Duplex	Only the agent hears the beep or tone.
Contact Half Duplex	Only the contact hears the beep or tone.
Full Duplex	Both the agent and the contact hear the beep or tone.

15. If you selected the Record Tariff Tone Type **Periodic Tone**, then from the Record Tariff Tone Duplex drop-down list box, select the following option:

Option	Description
Full Duplex	The agent and the contact hear the beep or tone at regular intervals.

16. Click **Ok**. The Switches window appears and the created switch displays in the Active list.

11.9.3 Edit Switches

To edit a Switch, perform the following steps.

1. Go to the main menu.
2. Click **Administration > Recording > Switches**.
3. The Switches page appears.
4. Select the available Switch from the grid that needs to be edited and click the **Edit** icon .

5. The Edit Switch window appears with General tab active as shown below:

Note: For the UIP switches, the **Version** drop-down list will be disabled for “ECL” and “Enhanced CTIPS”. Only for the “CTIPS” the Version drop-down list is enabled and it can be updated to only “Enhanced CTIPS”. This means the Version of the UIP switches once created, can only be edited from “CTIPS” to “Enhanced CTIPS”.

6. Edit the General, Database and Monitoring tab as per your requirement.


Note: Refer to [Create Switches on page 11-652](#), step 4 to 16.

7. Click the OK button to complete the process.







11.9.4 LDAP\AD Sync

To Sync a Switch with LDAP, perform the following steps:

1. Go to the main menu icon.
2. Click **Administration > Recording > Switches**.
3. The Switches page appears.

- Select the Switch from the **Name** column that needs to be synced and click on **LDAP/AD Sync**  button.

SWITCHES

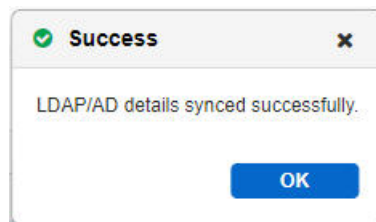
Drag a column header and drop it here to group by that column

Name	Type	Monitoring ...	Primary Replica	Sync With...	Screen	Active
Cisco UCM	Cisco UCM	Quality Monitoring	AQM19SRV12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Default Import Switch	Custom	Quality Monitoring	AQM19SRV12			<input checked="" type="checkbox"/>
Demo Switch_Edited	Unified IP	Quality Monitoring	AQM19SRV12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
ECTIPS	Unified IP	Quality Monitoring	AQM19SRV12			<input checked="" type="checkbox"/>
ENH_CTIPS_UIP...	Unified IP	Quality Monitoring	AQM19SRV12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Lom_Zipwire1	Zipwire	Logging	AQM19SRV12	<input checked="" type="checkbox"/>		
sp4ectips	Unified IP	Quality Monitoring	AQM19SRV12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
UCCE	Cisco UCCE	Quality Monitoring	AQM19SRV12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
UIP ECTIPS1	Unified IP	Quality Monitoring	AQM19SRV12			<input checked="" type="checkbox"/>
UIP35_RCTIPS	Unified IP	Quality Monitoring	AQM19SRV12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
UIP73_CTIPS	Unified IP	Quality Monitoring	AQM19SRV12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
UIP73_SP2_RCT...	Unified IP	Quality Monitoring	AQM19SRV12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
UIP73_SP3_RCT...	Unified IP	Quality Monitoring	AQM19SRV12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
UIP735	Unified IP	Quality Monitoring	AQM19SRV12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
UIP735_1	Unified IP	Quality Monitoring	AQM19SRV12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
UIP73Enhanced	Unified IP	Quality Monitoring	AQM19SRV12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
UIP73SP4ECTIPS	Unified IP	Quality Monitoring	AQM19SRV12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Zip1	Zipwire	Logging	AQM19SRV12	<input checked="" type="checkbox"/>		

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Note: If LDAP/AD is configured for the switch, the LDAP/ AD Sync button will be enabled. If LDAP/AD is not configured for the switch, then the LDAP/AD Sync button will be disabled.

- The LDAP/AD Sync **Success** message window appears, as shown below:



Note: Once the LDAP/ AD sync is successful, the users part of that switch will be updated with the domain and logon details.

- Click the **OK** button to save the changes.

11.9.5 Activate a Switch

This feature allows to activate a Switch based on the selected parameters. To activate a Switch follow the steps given below.


1. Select the Switch for which the Active column is **Unchecked**, as shown below:

SWITCHES






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

Name	Type	Monitoring ...	Primary Replica	Sync With...	Screen	Active
Cisco UCM	Cisco UCM	Quality Monitoring	AQM19SRV12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Default Import Switch	Custom	Quality Monitoring	AQM19SRV12			<input checked="" type="checkbox"/>
Demo Switch_Edited	Unified IP	Quality Monitoring	AQM19SRV12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
ECTIPS	Unified IP	Quality Monitoring	AQM19SRV12			<input checked="" type="checkbox"/>
ENH_CTIPS_UIP...	Unified IP	Quality Monitoring	AQM19SRV12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Lom_Zipwire1	Zipwire	Logging	AQM19SRV12	<input checked="" type="checkbox"/>		
sp4ectips	Unified IP	Quality Monitoring	AQM19SRV12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
UCCE	Cisco UCCE	Quality Monitoring	AQM19SRV12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
UIP ECTIPS1	Unified IP	Quality Monitoring	AQM19SRV12			<input checked="" type="checkbox"/>
UIP35_RCTIPS	Unified IP	Quality Monitoring	AQM19SRV12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
UIP73_CTIPS	Unified IP	Quality Monitoring	AQM19SRV12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
UIP73_SP2_RCT...	Unified IP	Quality Monitoring	AQM19SRV12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
UIP73_SP3_RCT...	Unified IP	Quality Monitoring	AQM19SRV12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
UIP735	Unified IP	Quality Monitoring	AQM19SRV12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
UIP735_1	Unified IP	Quality Monitoring	AQM19SRV12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
UIP73Enhanced	Unified IP	Quality Monitoring	AQM19SRV12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
UIP73SP4ECTIPS	Unified IP	Quality Monitoring	AQM19SRV12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Zip1	Zipwire	Logging	AQM19SRV12	<input checked="" type="checkbox"/>		

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- Click on the **Activate**  button and the checkmark will be shown on the Active column for the selected Switch as shown below:

SWITCHES

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

Name	Type	Monitoring ...	Primary Replica	Sync With...	Screen	Active
Cisco UCM	Cisco UCM	Quality Monitoring	AQM19SRV12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Default Import Switch	Custom	Quality Monitoring	AQM19SRV12			<input checked="" type="checkbox"/>
Demo Switch_Edited	Unified IP	Quality Monitoring	AQM19SRV12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
ECTIPS	Unified IP	Quality Monitoring	AQM19SRV12			<input checked="" type="checkbox"/>
ENH_CTIPS_UIP...	Unified IP	Quality Monitoring	AQM19SRV12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Lom_Zipwire1	Zipwire	Logging	AQM19SRV12	<input checked="" type="checkbox"/>		
sp4ectips	Unified IP	Quality Monitoring	AQM19SRV12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
UCCE	Cisco UCCE	Quality Monitoring	AQM19SRV12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
UIP ECTIPS1	Unified IP	Quality Monitoring	AQM19SRV12			<input checked="" type="checkbox"/>
UIP35_RCTIPS	Unified IP	Quality Monitoring	AQM19SRV12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
UIP73_CTIPS	Unified IP	Quality Monitoring	AQM19SRV12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
UIP73_SP2_RCT...	Unified IP	Quality Monitoring	AQM19SRV12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
UIP73_SP3_RCT...	Unified IP	Quality Monitoring	AQM19SRV12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
UIP735	Unified IP	Quality Monitoring	AQM19SRV12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
UIP735_1	Unified IP	Quality Monitoring	AQM19SRV12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
UIP73Enhanced	Unified IP	Quality Monitoring	AQM19SRV12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
UIP73SP4ECTIPS	Unified IP	Quality Monitoring	AQM19SRV12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Zip1	Zipwire	Logging	AQM19SRV12	<input checked="" type="checkbox"/>		

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11.9.6 Deactivate a Switch

This feature allows to deactivate a Switch. To deactivate a Switch follow the steps given below.

1. Select the Switch for which the Active column is **checked** as shown below:

SWITCHES

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

Name	Type	Monitoring ...	Primary Replica	Sync With...	Screen	Active
Cisco UCM	Cisco UCM	Quality Monitoring	AQM19SRV12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Default Import Switch	Custom	Quality Monitoring	AQM19SRV12			<input checked="" type="checkbox"/>
Demo Switch_Edited	Unified IP	Quality Monitoring	AQM19SRV12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
ECTIPS	Unified IP	Quality Monitoring	AQM19SRV12			<input checked="" type="checkbox"/>
ENH_CTIPS_UIP...	Unified IP	Quality Monitoring	AQM19SRV12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Lom_Zipwire1	Zipwire	Logging	AQM19SRV12	<input checked="" type="checkbox"/>		
sp4ectips	Unified IP	Quality Monitoring	AQM19SRV12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
UCCE	Cisco UCCE	Quality Monitoring	AQM19SRV12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
UIP ECTIPS1	Unified IP	Quality Monitoring	AQM19SRV12			<input checked="" type="checkbox"/>
UIP35_RCTIPS	Unified IP	Quality Monitoring	AQM19SRV12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
UIP73_CTIPS	Unified IP	Quality Monitoring	AQM19SRV12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
UIP73_SP2_RCT...	Unified IP	Quality Monitoring	AQM19SRV12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
UIP73_SP3_RCT...	Unified IP	Quality Monitoring	AQM19SRV12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
UIP735	Unified IP	Quality Monitoring	AQM19SRV12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
UIP735_1	Unified IP	Quality Monitoring	AQM19SRV12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
UIP73Enhanced	Unified IP	Quality Monitoring	AQM19SRV12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
UIP73SP4ECTIPS	Unified IP	Quality Monitoring	AQM19SRV12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Zip1	Zipwire	Logging	AQM19SRV12	<input checked="" type="checkbox"/>		

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2. Click on the **Deactivate** button and the Active column will be blank for the selected Switch as shown below:

SWITCHES

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

Name	Type	Monitoring ...	Primary Replica	Sync With...	Screen	Active
Cisco UCM	Cisco UCM	Quality Monitoring	AQM19SRV12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Default Import Switch	Custom	Quality Monitoring	AQM19SRV12			<input checked="" type="checkbox"/>
Demo Switch_Edited	Unified IP	Quality Monitoring	AQM19SRV12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
ECTIPS	Unified IP	Quality Monitoring	AQM19SRV12			<input checked="" type="checkbox"/>
ENH_CTIPS_UIP...	Unified IP	Quality Monitoring	AQM19SRV12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Lom_Zipwire1	Zipwire	Logging	AQM19SRV12	<input checked="" type="checkbox"/>		
sp4ectips	Unified IP	Quality Monitoring	AQM19SRV12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
UCCE	Cisco UCCE	Quality Monitoring	AQM19SRV12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
UIP ECTIPS1	Unified IP	Quality Monitoring	AQM19SRV12			<input checked="" type="checkbox"/>
UIP35_RCTIPS	Unified IP	Quality Monitoring	AQM19SRV12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
UIP73_CTIPS	Unified IP	Quality Monitoring	AQM19SRV12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
UIP73_SP2_RCT...	Unified IP	Quality Monitoring	AQM19SRV12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
UIP73_SP3_RCT...	Unified IP	Quality Monitoring	AQM19SRV12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
UIP735	Unified IP	Quality Monitoring	AQM19SRV12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
UIP735_1	Unified IP	Quality Monitoring	AQM19SRV12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
UIP73Enhanced	Unified IP	Quality Monitoring	AQM19SRV12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
UIP73SP4ECTIPS	Unified IP	Quality Monitoring	AQM19SRV12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Zip1	Zipwire	Logging	AQM19SRV12	<input checked="" type="checkbox"/>		

1 - 21 of 21 items

11.10 Trunk Channels

When using IVR Recording, you may need to modify existing trunk entities within the Aspect Quality system.

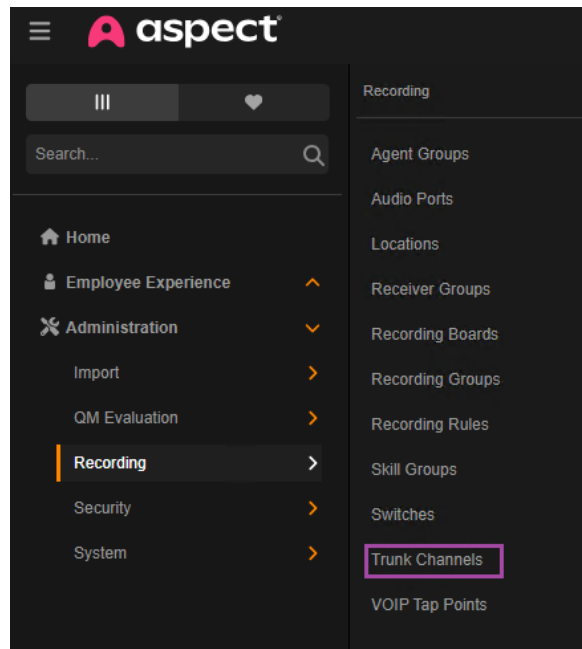
The following procedure describes where existing trunk channel information resides, and how the information displays. You can follow this procedure to examine existing trunk channel definitions and to create new trunk channel definitions.

This section describes about Navigation, Add, Edit, Activate and Deactivate a Trunk Channel.

11.10.1 Navigation to Trunk Channels






Follow the steps given below to navigate to the Trunk Channels page:






1. Go to the main menu.
2. Click **Administration > Recording > Trunk Channels**.



3. The Trunk Channels page appears as given below:

Card Number	Channel Number	Host Id	Switch Name	Source	IVR	Active
20804	13704	208053704	DR_UIP	Aspect UnifiedIP	✓	✓
20804	13708	208053708	DR_UIP	Aspect UnifiedIP	✓	
20804	13713	208053713	DR_UIP	Aspect UnifiedIP		
20804	13715	208053715	DR_UIP	Aspect UnifiedIP		✓
20804	13705	208053705	DR_UIP	Aspect UnifiedIP		
20804	13709	208053709	DR_UIP	Aspect UnifiedIP		
20804	13700	208053700	DR_UIP	Aspect UnifiedIP		
20804	13720	208053720	DR_UIP	Aspect UnifiedIP		
20804	13721	208053721	DR_UIP	Aspect UnifiedIP		
20804	13702	208053702	DR_UIP	Aspect UnifiedIP		
20804	13711	208053711	DR_UIP	Aspect UnifiedIP		
20804	13717	208053717	DR_UIP	Aspect UnifiedIP		
20804	13716	208053716	DR_UIP	Aspect UnifiedIP		
20804	13712	208053712	DR_UIP	Aspect UnifiedIP		
20804	13719	208053719	DR_UIP	Aspect UnifiedIP		
20804	13714	208053714	DR_UIP	Aspect UnifiedIP		
20804	13701	208053701	DR_UIP	Aspect UnifiedIP		

4. The Menu buttons      on the Trunk Channels page are described below:

Icons	Description
Refresh 	Refreshes the Trunk Channels grid with latest trunk channels changes. Instead of the browser refresh button user can click on this menu button which will refresh only the grid data and not the page.
Add 	Adds the new trunk channel to the grid.
Edit 	Edits the selected trunk channel existing in the grid.
Activate 	Activates the existing trunk channel.
Deactivate 	Deactivates the existing trunk channel.

5. The grid columns on the Trunk Channels page are described below:

Column	Description
Card Number	The name of the trunk channel. Can be alpha-numeric. Note: By default, the trunk channels are sorted based on Card Number in ascending order.
Channel Number	The channel number of the trunk channel. Should range between 0 to 999999999.
Host ID	The ID associated with the trunk channel. Should range between 1 to 999999999.

Column	Description
Switch Name	The name of the Switch to which the trunk channel is associated.
Source	The UI from where the respective Trunk Channel is created. For example, Aspect EX Quality, Aspect Unified IP, etc.
IVR	The IVR Channel is displayed by the icon, whether enabled or not.
Active	The trunk channel status is displayed by the icon, whether active or not.

11.10.2 Create Trunk Channels


To create a new Trunk Channel, perform the following steps.

1. Go to the main menu.
2. Click **Administration > Recording > Trunk Channels**.
3. The Trunk Channels page appears.
4. Click on the Add button. The **Add Trunk Channel** definition window appears.

Note: The fields marked (*) are mandatory fields.

5. The **Create Multiple Trunk Channels** toggle key is unflagged by default. Flag the toggle key to create multiple Trunk Channels.
6. Once the Create Multiple Trunk Channels toggle key is flagged, the **Number of Trunk Channels** text box is enabled. Either set the value for number of trunk channels to be created with the help of arrow keys adjacent to the text box, or manually enter the value.

7. From the **Switch** drop-down text box, select the type of switch required for association to the trunk channel.
8. Enter the value in the **Card Number** text box. This is the name of the trunk channel and can be, alphabets, numbers, or alpha-numeric.
9. Enter the value in the **Host ID** text box.


The information  button pop-up is available adjacent to the Host ID, stating, “Host ID should be in the range between 1 to 999999999.”

An error message displays, if the port number exceeds 999999999.

Manually enter the value in the Host ID text box.

Host ID field cannot be blank.

10. Enter the value in the **Channel Number** text box.

The information  button pop-up is available adjacent to the Channel Number, stating, “Channel Number should be in the range between 0 to 999999999.”

An error message displays, if the port number exceeds 999999999.

Either select the value by clicking the up-down arrow keys or manually enter it in the Channel Number text box.

Channel Number field cannot be blank.

11. The **IVR Channel** toggle key is unflagged by default. Flag the toggle key to enable IVR Channel. The IVR column will be marked with a check mark icon, to show IVR Channel enabled for the trunk channel.
12. Click **OK** to create the Trunk Channel.

By default, the new Trunk Channel which is created will be listed in the grid and will be Active.

11.10.3 Edit Trunk Channel

To edit a Trunk Channel, perform the following steps.

1. Go to the main menu.
2. Click **Administration > Recording > Trunk Channels**.
3. The Trunk Channels page appears.
4. Select the available Trunk Channel from the grid that needs to be edited and click the **Edit** icon.

5. The Edit Trunk Channel window appears, as shown below:

Note: For Synced Trunk Channels, only IVR Channel toggle key will be enabled to edit.

6. Edit the field values as per your requirement.

Note: Refer to [Create Trunk Channels on page 11-673](#) section, step 4 to 12.

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

Note: Unflag the IVR Channel toggle key for an existing enabled IVR trunk channel turns the IVR trunk channel to a regular trunk channel.

11.10.4 Activate a Trunk Channel

This feature allows to activate a Trunk Channel based on the selected parameters. To activate a Trunk Channel follow the steps given below.


1. Select the Trunk Channel for which the Active column is **blank**, as shown below:

TRUNK CHANNELS

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

Card Number	Channel Number	Host Id	Switch Name	Source	IVR	Active
5555	5	5	QA UIP ECTIPS	Alvaria™ EX Quality		<input checked="" type="checkbox"/>
5678	0	7	Avaya TSAPI	Alvaria™ EX Quality		
Test	6	6	QA UIP ECTIPS	Alvaria™ EX Quality		<input checked="" type="checkbox"/>
Test 5	0	1	QA UIP ECTIPS	Alvaria™ EX Quality		<input checked="" type="checkbox"/>
OUTSIDE CALL	101	1	Avaya TSAPI	Avaya	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
TrunkToLomProxy	102	2	Avaya TSAPI	Avaya	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
17201	2115	172012115	QA UIP ECTIPS	Aspect UnifiedP		
17201	2100	172012100	2014-02/26/2019 (inactive)	Aspect UnifiedP		<input checked="" type="checkbox"/>
17201	2102	172012102	2014-02/26/2019 (inactive)	Aspect UnifiedP		<input checked="" type="checkbox"/>
17201	2113	172012113	QA UIP ECTIPS	Aspect UnifiedP		
17201	2118	172012118	2014-02/26/2019 (inactive)	Aspect UnifiedP		<input checked="" type="checkbox"/>
17201	2122	172012122	QA UIP ECTIPS	Aspect UnifiedP		
17201	2106	172012106	2014-02/26/2019 (inactive)	Aspect UnifiedP		<input checked="" type="checkbox"/>

1 - 100 of 592 items

2. Click on the **Activate**  button and the checkmark will be shown on the Active column for the selected Trunk Channel as shown below:

TRUNK CHANNELS

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

Card Number	Channel Number	Host Id	Switch Name	Source	IVR	Active
5555	5	5	QA UIP ECTIPS	Alvaria™ EX Quality		<input checked="" type="checkbox"/>
5678	0	7	Avaya TSAPI	Alvaria™ EX Quality		<input checked="" type="checkbox"/>
Test	6	6	QA UIP ECTIPS	Alvaria™ EX Quality		<input checked="" type="checkbox"/>
Test 5	0	1	QA UIP ECTIPS	Alvaria™ EX Quality		<input checked="" type="checkbox"/>
OUTSIDE CALL	101	1	Avaya TSAPI	Avaya	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
TrunkToLomProxy	102	2	Avaya TSAPI	Avaya	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
17201	2115	172012115	QA UIP ECTIPS	Aspect UnifiedP		
17201	2100	172012100	2014-02/26/2019 (inactive)	Aspect UnifiedP		<input checked="" type="checkbox"/>
17201	2102	172012102	2014-02/26/2019 (inactive)	Aspect UnifiedP		<input checked="" type="checkbox"/>
17201	2113	172012113	QA UIP ECTIPS	Aspect UnifiedP		
17201	2118	172012118	2014-02/26/2019 (inactive)	Aspect UnifiedP		<input checked="" type="checkbox"/>
17201	2122	172012122	QA UIP ECTIPS	Aspect UnifiedP		
17201	2106	172012106	2014-02/26/2019 (inactive)	Aspect UnifiedP		<input checked="" type="checkbox"/>

1 - 100 of 592 items

11.10.5 Deactivate a Trunk Channel

This feature allows to deactivate a Trunk Channel. To deactivate a Trunk Channel follow the steps given below.

1. Select the Trunk Channel for which the Active column is **checked** as shown below:

TRUNK CHANNELS

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

Card Number	Channel Number	Host Id	Switch Name	Source	IVR	Active
5555	5	5	QA UIP ECTIPS	Alvaria™ EX Quality		<input checked="" type="checkbox"/>
5678	0	7	Avaya TSAPI	Alvaria™ EX Quality		<input checked="" type="checkbox"/>
Test	6	6	QA UIP ECTIPS	Alvaria™ EX Quality		<input checked="" type="checkbox"/>
Test 5	0	1	QA UIP ECTIPS	Alvaria™ EX Quality		<input checked="" type="checkbox"/>
OUTSIDE CALL	101	1	Avaya TSAPI	Avaya	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
TrunkToLomProxy	102	2	Avaya TSAPI	Avaya	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
17201	2115	172012115	QA UIP ECTIPS	Aspect UnifiedIP		<input checked="" type="checkbox"/>
17201	2100	172012100	2014-02/26/2019 (Inactive)	Aspect UnifiedIP		<input checked="" type="checkbox"/>
17201	2102	172012102	2014-02/26/2019 (Inactive)	Aspect UnifiedIP		<input checked="" type="checkbox"/>
17201	2113	172012113	QA UIP ECTIPS	Aspect UnifiedIP		<input checked="" type="checkbox"/>
17201	2118	172012118	2014-02/26/2019 (Inactive)	Aspect UnifiedIP		<input checked="" type="checkbox"/>
17201	2122	172012122	QA UIP ECTIPS	Aspect UnifiedIP		<input checked="" type="checkbox"/>
17201	2106	172012106	2014-02/26/2019 (Inactive)	Aspect UnifiedIP		<input checked="" type="checkbox"/>

1 - 100 of 592 items

2. Click on the **Deactivate** button and the Active column will be blank for the selected Trunk Channel as shown below:

TRUNK CHANNELS

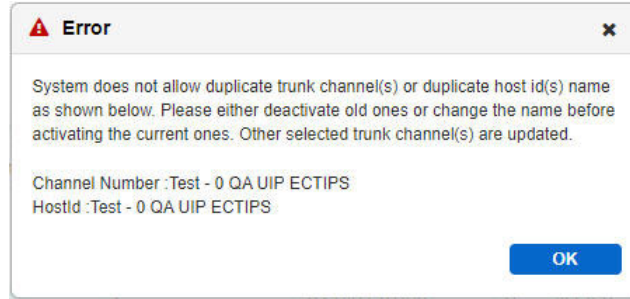
Drag a column header and drop it here to group by that column

Card Number	Channel Number	Host Id	Switch Name	Source	IVR	Active
5555	5	5	QA UIP ECTIPS	Alvaria™ EX Quality		<input checked="" type="checkbox"/>
5678	0	7	Avaya TSAPI	Alvaria™ EX Quality		
Test	6	6	QA UIP ECTIPS	Alvaria™ EX Quality		<input checked="" type="checkbox"/>
Test 5	0	1	QA UIP ECTIPS	Alvaria™ EX Quality		<input checked="" type="checkbox"/>
OUTSIDE CALL	101	1	Avaya TSAPI	Avaya	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
TrunkToLomProxy	102	2	Avaya TSAPI	Avaya	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
17201	2115	172012115	QA UIP ECTIPS	Aspect UnifiedIP		<input checked="" type="checkbox"/>
17201	2100	172012100	2014-02/26/2019 (Inactive)	Aspect UnifiedIP		<input checked="" type="checkbox"/>
17201	2102	172012102	2014-02/26/2019 (Inactive)	Aspect UnifiedIP		<input checked="" type="checkbox"/>
17201	2113	172012113	QA UIP ECTIPS	Aspect UnifiedIP		<input checked="" type="checkbox"/>
17201	2118	172012118	2014-02/26/2019 (Inactive)	Aspect UnifiedIP		<input checked="" type="checkbox"/>
17201	2122	172012122	QA UIP ECTIPS	Aspect UnifiedIP		<input checked="" type="checkbox"/>
17201	2106	172012106	2014-02/26/2019 (Inactive)	Aspect UnifiedIP		<input checked="" type="checkbox"/>

1 - 100 of 592 items

Note: When in the Trunk Channels grid, there is more than one Trunk Channel with the same Card Number(name), either of the Trunk Channels can be set to Active. But both the Trunk Channels with the same Card Number(name) can be inactive. If you try to

Activate both the similar named Trunk Channel, an Error message appears to deactivate the existing Trunk Channel or change the name of the Trunk Channel.



Note: Multiple Trunk Channels can be Activated / Deactivated together.

11.11 VOIP Tap Points

In [Recording Boards](#), you configured one or more recording boards. Now, create the VOIP tap points that utilize these recording boards.

This section applies to Avaya, Aspect Unified IP, and Cisco integrations.

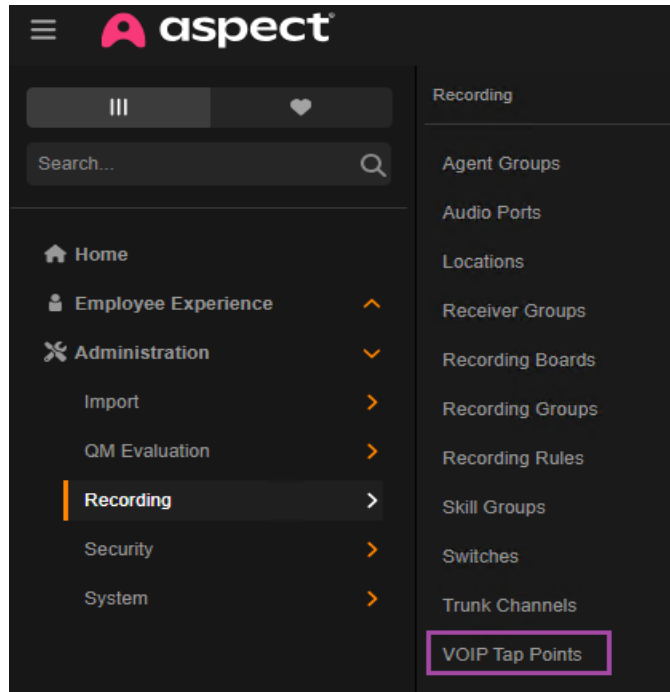
This section describes about Navigation, Add, Edit, Activate and Deactivate a VOIP Tap Point.

11.11.1 Navigation to VOIP Tap Points

Follow the steps given below to navigate to the VOIP Tap Points page:

1. Go to the main menu.

2. Click **Administration > Recording > VOIP Tap Points**.








3. The VOIP Tap Points page appears as given below:

The screenshot shows the 'VOIP TAP POINTS' page. It features a table with the following data:

Name	Server	Recording Board	Active
Tap Point1	AQMQA5	HPX1	<input checked="" type="checkbox"/>
WQE5	AQMQA5	HPX1	<input type="checkbox"/>

4. The Menu buttons      on the VOIP Tap Point page are described below:

Icons	Description
Refresh 	Refreshes the VOIP tap points grid with latest VOIP tap point changes. Instead of the browser refresh button user can click on this menu button which will refresh only the grid data and not the page.
Add 	Adds the new VOIP tap point to the grid.
Edit 	Edits the selected VOIP tap point existing in the grid.
Activate 	Activates the existing VOIP tap point.
Deactivate 	Deactivates the existing VOIP tap point.

5. The grid columns on the VOIP Tap Points page are described below:

Column	Description
Name	The name of the VOIP Tap Point.
Server	The name of the server to which VOIP tap point is associated.
Recording Board	Displays the name of the recording board associated with the VOIP tap point.
Active	The VOIP tap point status is displayed by the check mark icon, whether active or not.

11.11.2 Create VOIP Tap Points

To create a new VOIP Tap Point, perform the following steps.

Note: Use this section only if you are using an AudioCodes HPXMedia board.

1. Go to the main menu.
2. Click **Administration > Recording > VOIP Tap Points**.
3. The VOIP Tap Points page appears.

4. Click on the Add  button. The **Add VOIP Tap Point** definition window appears, with the General tab active, by default.

Note: The fields marked (*) are mandatory fields..

5. On the **General** tab:
 - a. In the **Name** text box, type a VOIP Tap Point name that identifies a VOIP tap point. This field cannot be blank.
 - b. In the **Description** text box, type a short description for the VOIP Tap Point.
 - c. Select the **Server** from the drop-down list box that hosts the VOIP Tap Point.
 - d. In the **Tap Board** drop-down list box, select the type of board that the Tap Point uses.
 - e. In the **Maximum Forwarding Sessions** text box, type the number of media sessions that are available for use on the selected HPX Board.
6. On the **Tapped Protocols** tab:

Flag any or more of the below VOIP protocols toggle key to enable them and use them to monitor on the tapped local area network, based on the ACD/PBX with which Aspect Quality is integrated:

 - a. Cisco Skinny Call Control Protocol: Cisco (HPX)
 - b. Session Initiation Protocol: Aspect Unified IP (HPX), and Cisco (HPX)

c. Avaya H.323: Avaya (HPX only)

The screenshot shows a dialog box titled '+ Add VOIP Tap Point' with three tabs: 'General', 'Tapped Protocols', and 'Forwarding'. The 'Tapped Protocols' tab is active. It contains three protocol configuration sections:

- Cisco Skinny Call Control Protocol:** Includes fields for 'Port: *' (2000), 'Port Protocol:' (TCP), and 'Switch: *' (Select a switch).
- Session Initiation Protocol:** Includes fields for 'Port: *', 'Port Protocol:' (TCP), 'Session Initiation Protocol: *', and 'Switch: *' (Select a switch).
- Avaya H.323:** Includes fields for 'CS Port: *' (1720), 'Port Protocol:' (TCP), 'RAS Port: *' (1719), 'RAS Port Protocol:' (UDP), and 'Switch: *' (Select a switch).

At the bottom right of the dialog are 'Cancel' and 'OK' buttons.

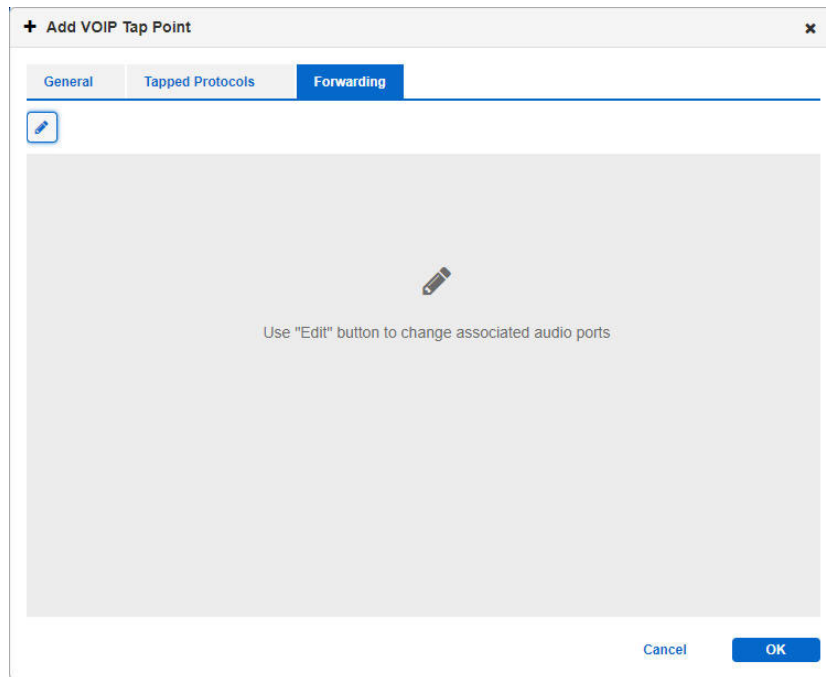
The above protocols options are explained below in the table:

Protocols	Description
Cisco Skinny Call Control Protocol	<p>Port*: In the Port text box, type the port number over which Cisco Skinny Call Control Protocol communication will occur. By default, this is port 2000.</p> <p>Port Protocol: From the Port Protocol drop-down list box, select the transport protocol that delivers Cisco Skinny Call Control Protocol messaging. The typical transport protocol is TCP.</p> <p>Switch*: From the Switch drop-down list box, select the Aspect Quality switch with which to associate monitored Cisco Skinny Call Control Protocol VoIP traffic.</p>
Session Initiation Protocol	<p>Port*: In the Port text box, type the port number over which session initiation protocol communication occurs.</p> <p>Port Protocol: From the Port Protocol drop-down list box, select the transport protocol that delivers session initiation protocol messaging. The typical selection is UDP.</p> <p>Session Initiation Protocol*: In the Session Initiation Protocol text box, type the value over which session initiation protocol communication occurs.</p> <p>Switch*: From the Switch drop-down list box, select the Aspect Quality switch with which to associate monitored session initiation protocol VoIP traffic.</p>
Avaya H.323	<p>C S Port*: In the CS Port text box, type the H.323 Call Signaling (CS) port number. By default, the CS port number is 1720.</p> <p>Port Protocol: From the Port Protocol drop-down list box, select the transport protocol that delivers H.323 Call Signaling (CS) messaging. The typical transport protocol is TCP.</p> <p>RAS Port*: In the RAS Port text box, type H323 registration, Admission, and Status (RAS) port number. By default, the RAS port number is 1719.</p> <p>RAS Port Protocol*: From the RAS Port Protocol drop-down list box, select the transport protocol that delivers H.323 Registration, Admission, and Status (RAS) messaging. The typical RAS transport protocol is UDP.</p> <p>Switch*: From the Switch drop-down list box, select the Aspect Quality switch with which to associate monitored Avaya H.323 VoIP traffic.</p>

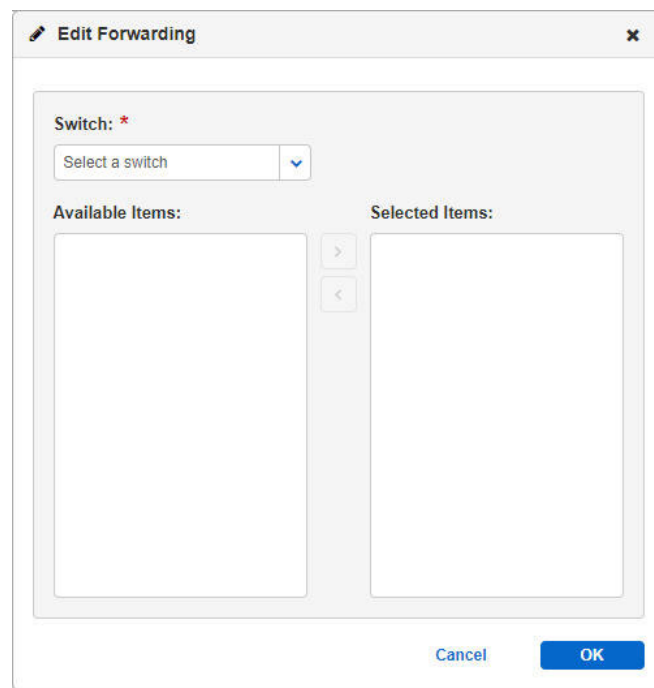
Note: The fields marked (*) are mandatory fields.

7. On the **Forwarding** tab:

Select the **Edit** button to change the associated audio ports.



The Edit Forwarding window appears.



Note: The fields marked (*) are mandatory fields.

Select a **Switch** from the drop-down list box. The VoIP audio ports associated with the selected switch will appear in the **Available Items** list.

Select one or more of the VoIP audio ports that you want to associate with this VoIP tap point, with the help of **Add** button, and move the audio ports to the **Selected Items** list.

Note: You can select any VoIP audio port and assign it to this VoIP tap point. Aspect Software recommends that you select a group of ports that are sequentially numbered. Then, it is easier to track which group of audio ports that you assigned to which tap point.

If you want the VoIP audio port to be able to receive audio that needs to be recorded from multiple tapped locations on the local area network, you can also assign the same VoIP audio ports to multiple VoIP tap points.

Click **OK** to complete the process and close the Edit Forwarding window.

8. Click **OK** to create the VOIP Tap Point.

Note: By default, the new VOIP Tap Point which is created will be listed in the grid and will be Active.

11.11.3 Edit VOIP Tap Point

To edit a VOIP Tap Point, perform the following steps.

1. Go to the main menu.
2. Click **Administration > Recording > VOIP Tap Points**.
3. The VOIP Tap Point page appears.
4. Select the available VOIP Tap Point from the grid that needs to be edited and click the **Edit** icon.
5. The Edit VOIP Tap Point window appears, with General tab active, by default, as shown below:

6. Edit the field values as per your requirement.

Note: Refer to [Create VOIP Tap Points on page 11-680](#) section, step 4 to 8.

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

11.11.4 Activate a VOIP Tap Point


This feature allows to activate a VOIP Tap Point based on the selected parameters. To activate a VOIP Tap Point follow the steps given below.

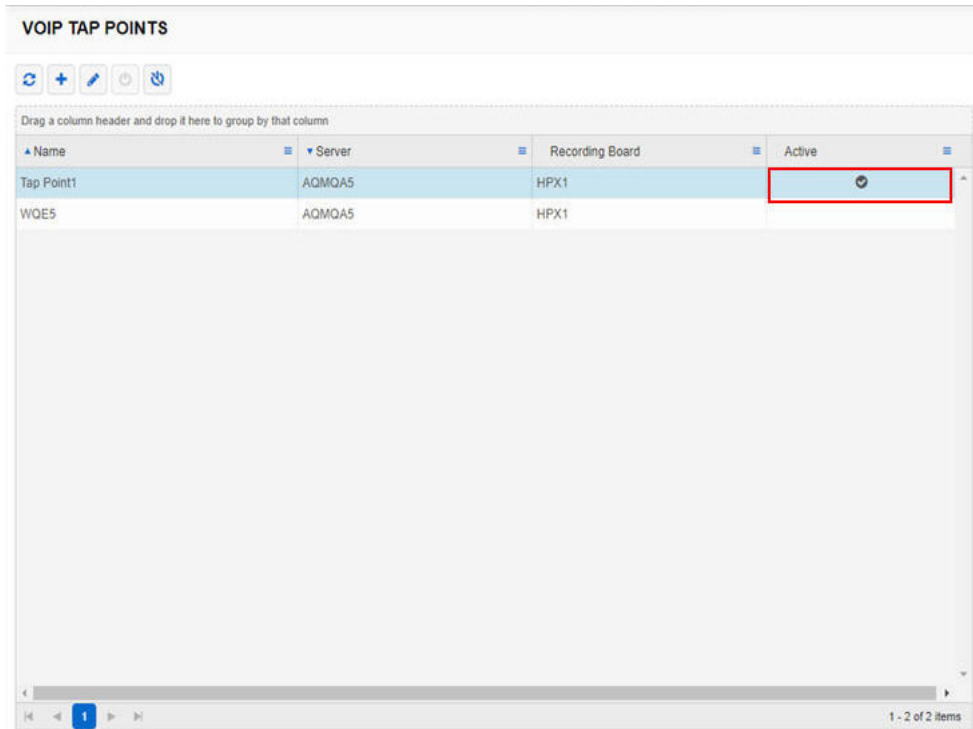
1. Select the VOIP Tap Point for which the Active column is **blank**, as shown below:

The screenshot shows a web interface titled "VOIP TAP POINTS". Below the title are several icons: a refresh icon, a plus sign, a pencil, a power icon, and a trash icon. Below these icons is a table with the following columns: Name, Server, Recording Board, and Active. The table contains two rows of data:

Name	Server	Recording Board	Active
Tap Point1	AQMQA5	HPX1	
WQE5	AQMQA5	HPX1	

The "Active" cell for the first row ("Tap Point1") is highlighted with a red rectangular border. At the bottom of the table, there is a pagination bar showing "1 - 2 of 2 items".

- Click on the **Activate**  button and the checkmark will be shown on the Active column for the selected VOIP Tap Point as shown below:








11.11.5 Deactivate a VOIP Tap Point

This feature allows to deactivate a VOIP Tap Point. To deactivate a VOIP Tap Point follow the steps given below.

1. Select the VOIP Tap Point for which the Active column is **checked** as shown below:


VOIP TAP POINTS






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

Name	Server	Recording Board	Active
Tap Point1	AQMQA5	HPX1	<input checked="" type="checkbox"/>
WQE5	AQMQA5	HPX1	<input type="checkbox"/>

1 - 2 of 2 items

2. Click on the **Deactivate**  button and the Active column will be blank for the selected VOIP Tap Point as shown below:

VOIP TAP POINTS

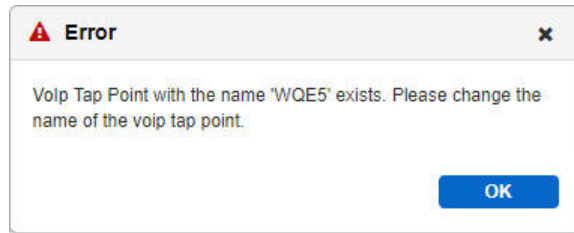
Drag a column header and drop it here to group by that column

Name	Server	Recording Board	Active
Tap Point1	AQMQA5	HPX1	
WQE5	AQMQA5	HPX1	<input type="checkbox"/>

1 - 2 of 2 items

Note: When in the VOIP Tap Point grid, there is more than one VOIP Tap Point with the same Name, either of the VOIP Tap Point can be set to Active. But both the VOIP Tap Point

with the same name can be inactive. If you try to Activate both the similar named VOIP Tap Points, an Error message appears to change the name of the VOIP tap point.



Note: When similar Recording Board for different VOIP Tap Points, all the VOIP Tap Point cannot be activated. The Recording Board should be unique for different VOIP Tap Points for all to be active.



12. Security

The chapter introduces the major Security components that are the part of the Aspect Quality. As an Administrator, knowing the components helps you to be more productive while using the Aspect Quality.

The Security features are listed below:

- [API Users](#)
- [Teams](#)
- [User Profiles](#)
- [Users](#)

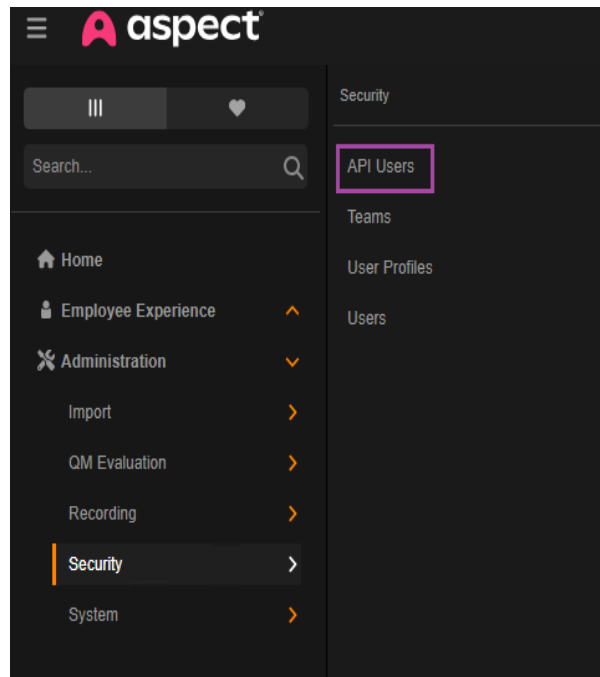
12.1 API Users

This section describes how to view the existing API Users and how to Add, Edit and Delete the API Users in the system.

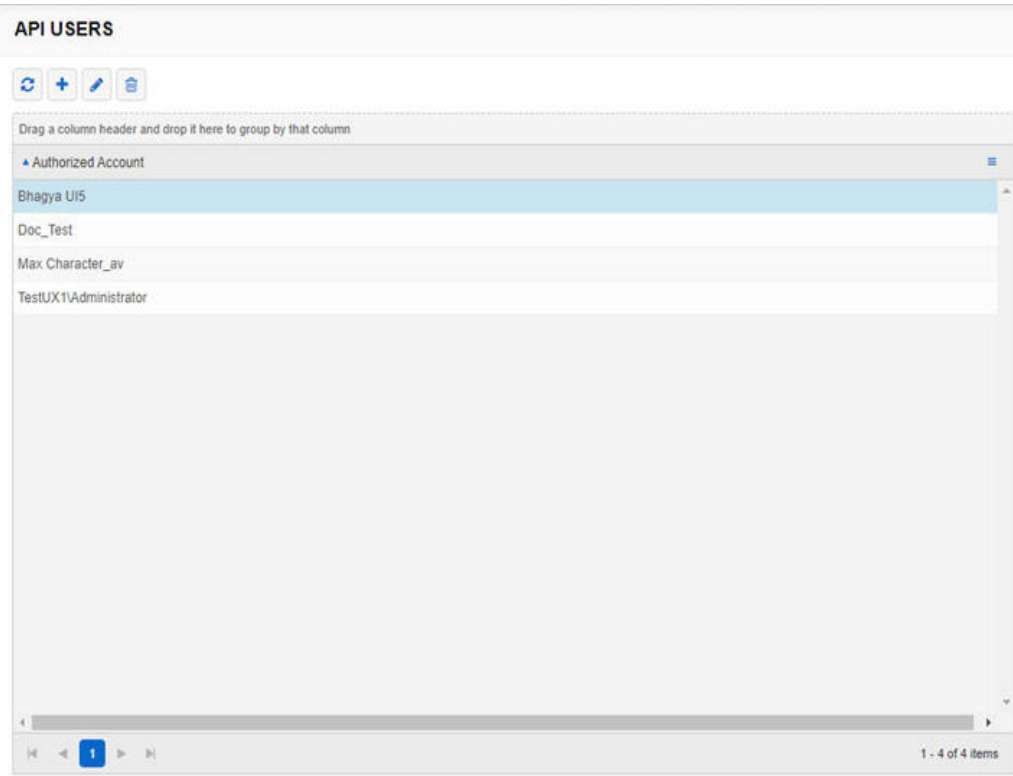
12.1.1 Navigation to API Users





Follow the steps given below to navigate to the API Users page:





1. Go to the main menu icon.
2. Click **Administration > Security > API Users**.



3. The API Users page appears, as given below:



4. The Menu buttons     on the API Users page are described below:

Icons	Description
Refresh 	Refreshes the API Users grid with latest API users changes. Instead of the browser refresh button user can click on this menu button which will refresh only the grid data and not the page.
Add 	Adds the new API user to the grid.
Edit 	Edits the existing API user listed in the grid.
Delete 	Deletes the existing API user listed in the grid.

5. The grid column on the API Users page is described below:

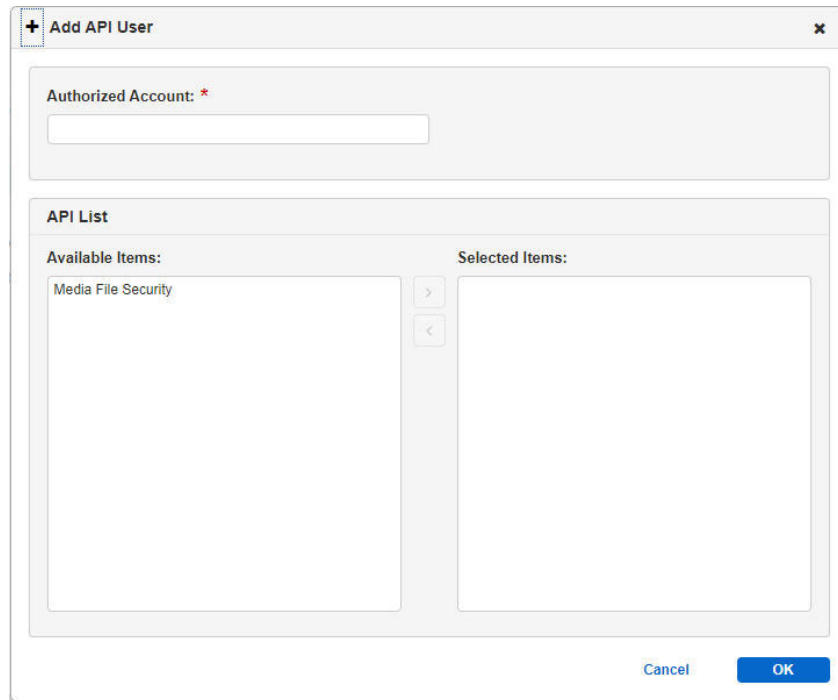
Column	Description
Authorized Account	The name of the API User account.

12.1.2 Create API User

To create a new API User, perform the following steps.

1. Go to the main menu icon.

2. Click **Administration > Security > API Users**.
3. The API Users page appears.
4. Click on the Add button. The Add API User definition window appears.



Note: The fields marked (*) are mandatory fields.

5. Enter the user name in the **Authorized Account** text box.
6. In the **API List**, select the Media File Security from the Available Items window. With the help of Add button, move it to the Selected Items window. To move the items from Selected Items to Available Items window, use the Remove button.
7. Click **OK** to create the API User.

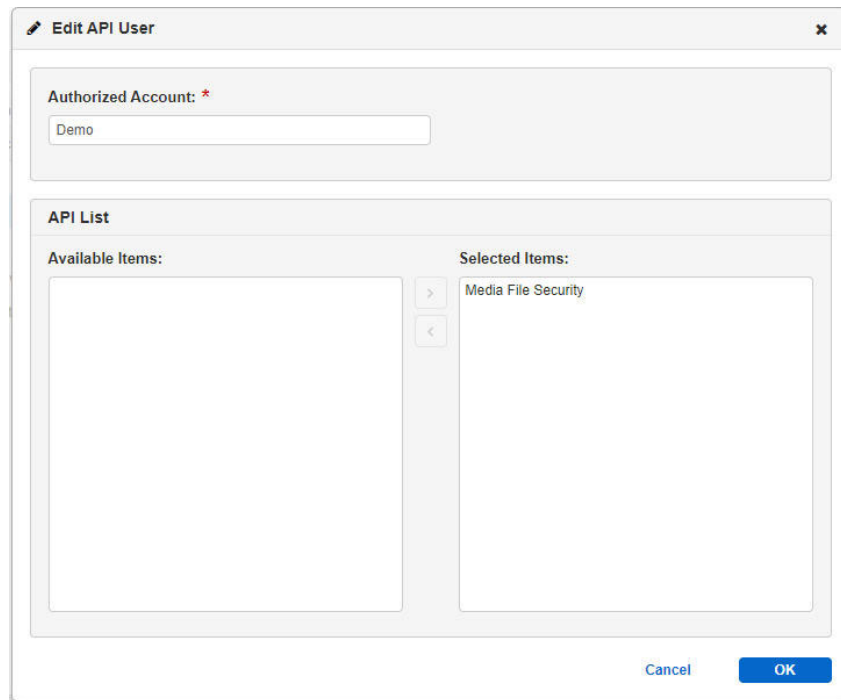
By default, the new API User which is created will be listed in the grid.

12.1.3 Edit API User

To edit an API User, perform the following steps.

1. Go to the main menu icon.
2. Click **Administration > Security > API Users**.
3. The API Users page appears.
4. Select the available API User from the grid that needs to be edited and click the **Edit** icon.

5. The Edit API User window appears, as shown below.



6. Edit the field values as per your requirement.

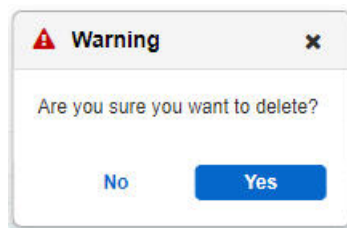
Note: Refer to [Create API User on page 12-692](#) section, step 4 to 7.

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

12.1.4 Delete API User

To delete an API User, perform the following steps.

1. Go to the main menu icon.
2. Click **Administration > Security > API Users**.
3. The API Users page appears.
4. Select the available API User from the grid that needs to be deleted and click the **Delete** icon.
5. A warning message appears, if you want to delete or not, as shown below.



6. Select the **Yes** option to delete the listed API User.

12.2 Teams

A team is a collection of one or more agents, based on equivalent skills or a specific contact center need (predominantly for reporting). Through the data-sync process, Aspect Quality imports any teams (or equivalent entity) from the switch. You can also define Teams on the Aspect Quality system, but you cannot edit teams that the data-sync process has imported.

Use Teams on the Aspect Quality system for the following purposes:

- Reviewing and Scoring interactions
- Live Monitoring
- Reporting

In this section, you can

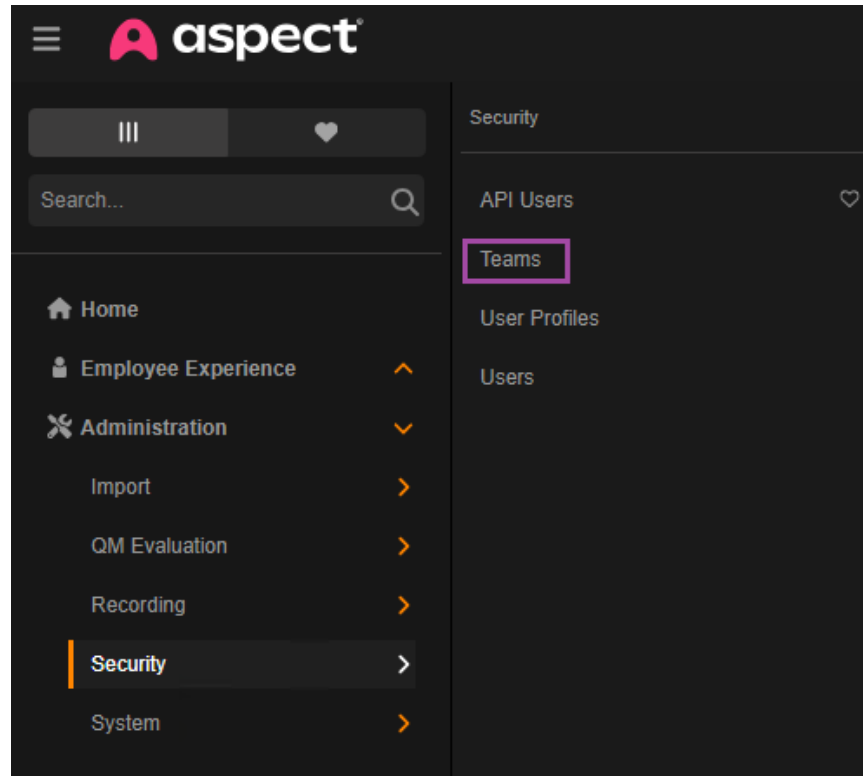
- View Available Teams
- Create a New Team
- Add Members to a Team
- Edit a Team
- View Team Details
- Activate a Team
- Deactivate a Team

12.2.1 View Available Teams

This section describes how to see the available teams in the system.

1. Login to Workforce Engagement Management.

- Go to Main Menu and click on **Administration** and under **Security**, click **Teams** as shown below.



The Teams window opens with the list of teams displayed in the table.

TEAMS

Synced teams cannot be activated/deactivated.

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







Name	Switch	Active	Synced
<Default>	PROD_UIP	✓	✓
<Default>	DR_UIP	✓	✓
<Expert>	PROD_UIP	✓	✓
<Expert>	DR_UIP	✓	✓
AlbertTestEntWorkgroup	PROD_UIP		✓
AlbertTestEntWorkgroup	PROD_UIP		✓
AMEGUA Inactive Users	PROD_UIP	✓	✓
AMEGUA Inactive Users	DR_UIP	✓	✓
AMEGUA SPN OB DEDICADO	PROD_UIP	✓	✓
AMEGUA SPN OB DEDICADO	DR_UIP	✓	✓
ARGUA Inactive Users	PROD_UIP	✓	✓
ARGUA Inactive Users	DR_UIP	✓	✓
ARGUA Inactive Users	DR_UIP		✓
ARGUA Support	PROD_UIP	✓	✓
ARGUA Support	DR_UIP	✓	✓
BAGUA Support	DR_UIP		✓
baseAgentWorgroup1	DR_UIP	✓	✓
baseAgentWorgroup1	PROD_UIP	✓	✓
baseAgentWorgroup1	DR_UIP		✓

1 - 100 of 671 items

Note:

- A maximum of 100 teams display on each page. Pagination options display at the bottom of the table.
- An information icon displays above the table, stating **Synced teams cannot be activated/deactivated**.

The following table describes the buttons available on the Teams window.

Button	Name	Description
	Refresh	When you click Refresh, the system refreshes the Teams table.
	Add	When you click Add, you can create a new team.
	Edit	When you click Edit, you can modify a team.
	View	When you click View, you can see existing team details.
	Activate	When you click Activate, you make a team active.
	Deactivate	When you click Deactivate, you make a team inactive.

The following table contains descriptions of the columns in the Teams table.

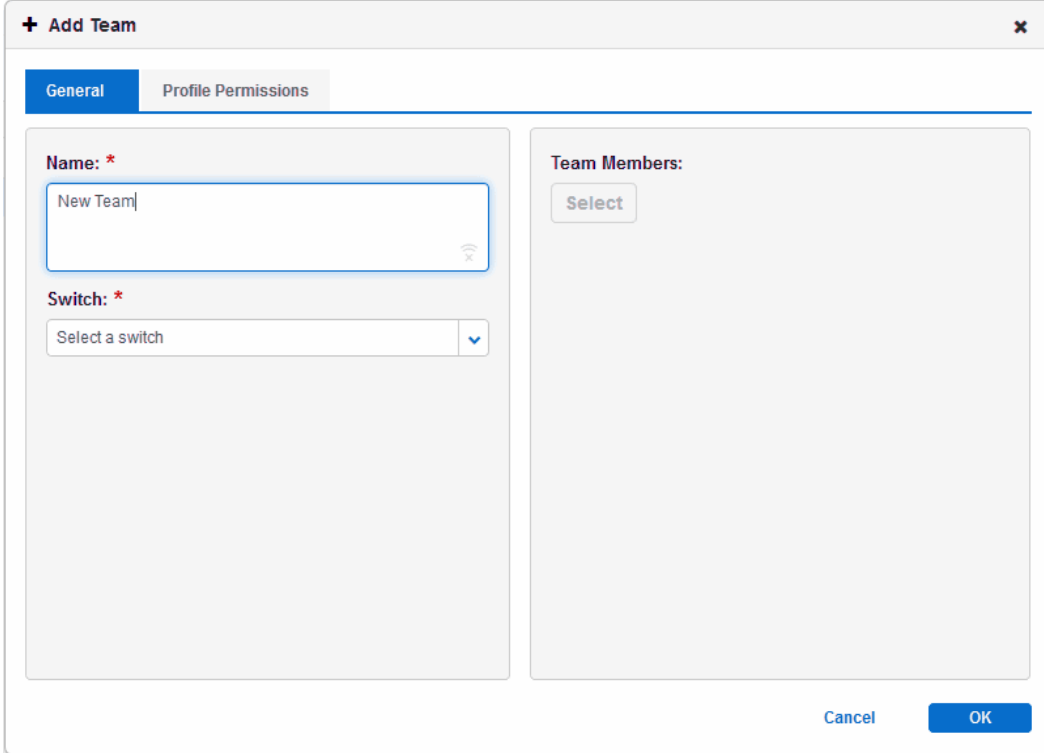
Column Name	Description
Name	The name of the team.
Switch	The switch that is associated with the Team.
Active	If the team is active, then a check mark displays. If the team is inactive, no icon displays.
Synced	If the team is synced from the ACD, a check mark displays.

12.2.2 Create a New Team

Through the data-sync process, Quality imports any teams (or equivalent entity) from the switch. However, you cannot edit teams that the data-sync process has imported.

You can also create a team in Workforce Engagement Management. To create a team, perform the following steps.

1. On the Teams window, click **Add**. The Add Team window opens.

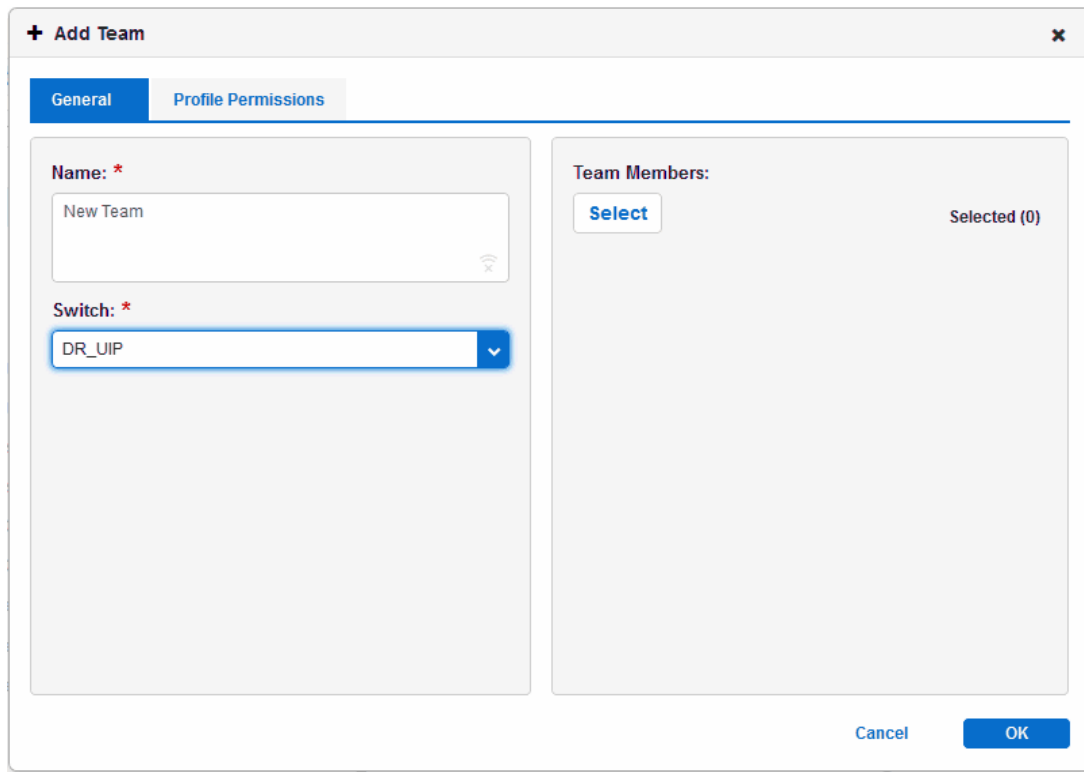


Note: The fields marked (*) are mandatory fields.

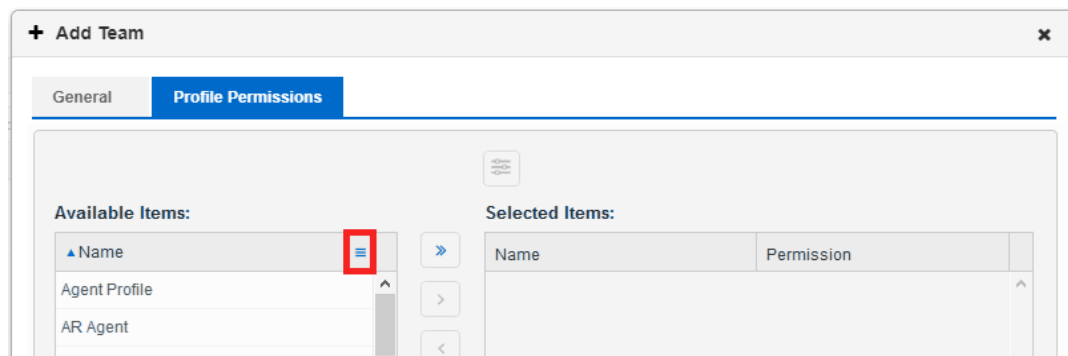
2. In the **Name** text box under the General tab, type a name for the team.

The maximum number of characters allowed is 128. The Team name must be unique, and you can use special characters.

- From the **Switch** drop-down list box, select the switch that you want to associate with the team. In the Team Members section of the window, the Select button is enabled, and displays Selected (0).



- Click on the **Select** button under the Team Members section to Add Members to a Team.
- Go to **Profile Permissions** tab to provide the review or score permission for the user profile. The main menu, under the Available Items section, contains features such as Sorting, Filtering, Reset Layout and Clear All filters.

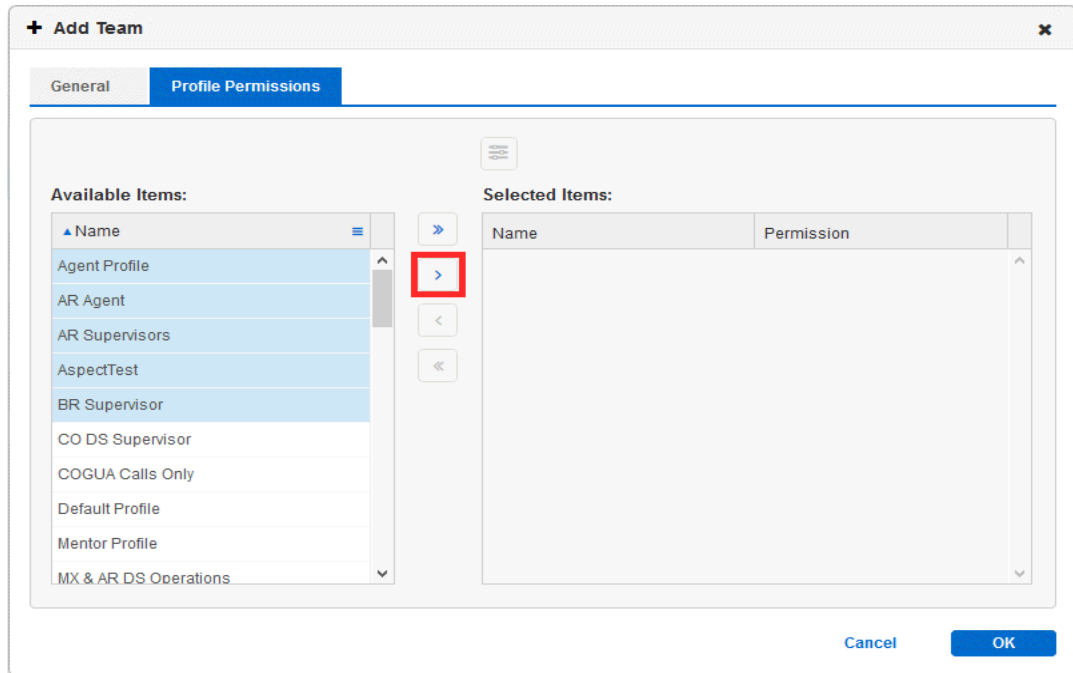


The following table describes the available option under the main menu.



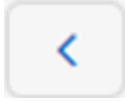
Button Name	Description
Sort Ascending	Refer Sort Columns section
Sort Descending	Refer Sort Columns section
Filter	Refer Filter Criteria section


Button Name	Description
Reset Layout	Refer Reset Layout section
Clear All Filters	Refer Clear All Filters section

6. Select the Available Items based on your requirement and click on the **Add items** button as shown below.

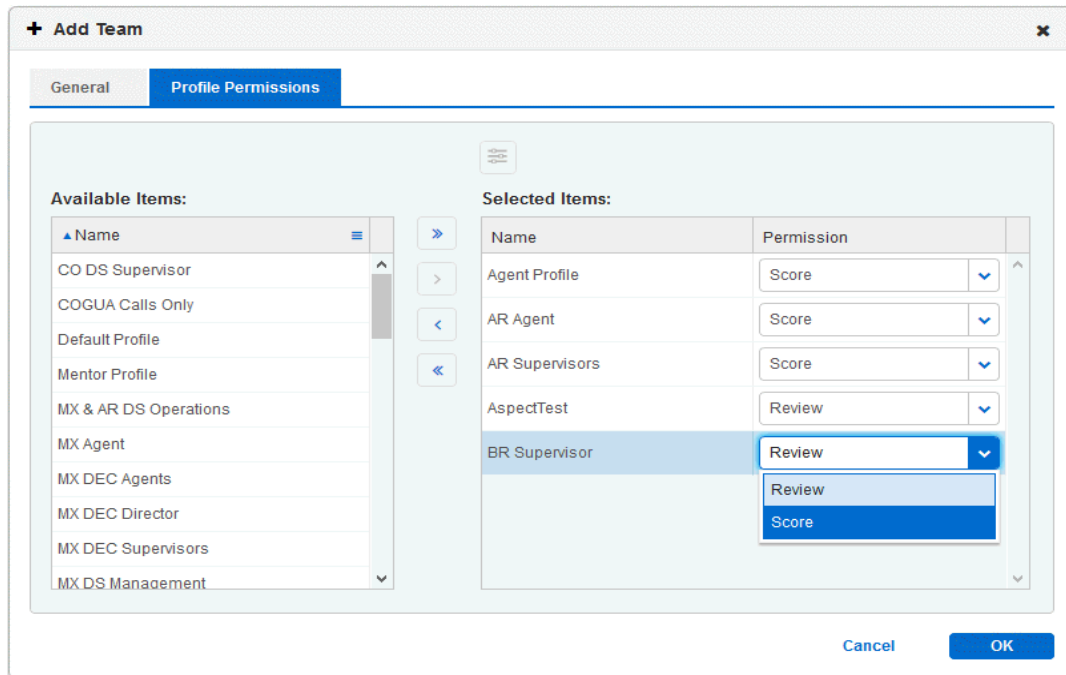


The following table describes the arrow buttons on the Profile Permissions tab.

Arrow Button	Button Name	Description
	Add All Items	Moves all the Available Items table to the Selected Items table. Note: If no items are available in the Available Items table, the Add All Items button is disabled.
	Add Items	Moves only the selected items from the Available Items table to the Selected Items table. Note: If you select at least one item in the Available Items table, the Add Items button is enabled.
	Remove Items	Moves only the selected items from the Selected Items table to the Available Items table. Note: If you select at least one item in the Selected Items table, the Add Items button is enabled.

Arrow Button	Button Name	Description
	Remove All Items	Moves all the selected items from the Selected Items table to the Available Items table. Note: If no items are available in the Selected Items table, the Remove All Items button is disabled.

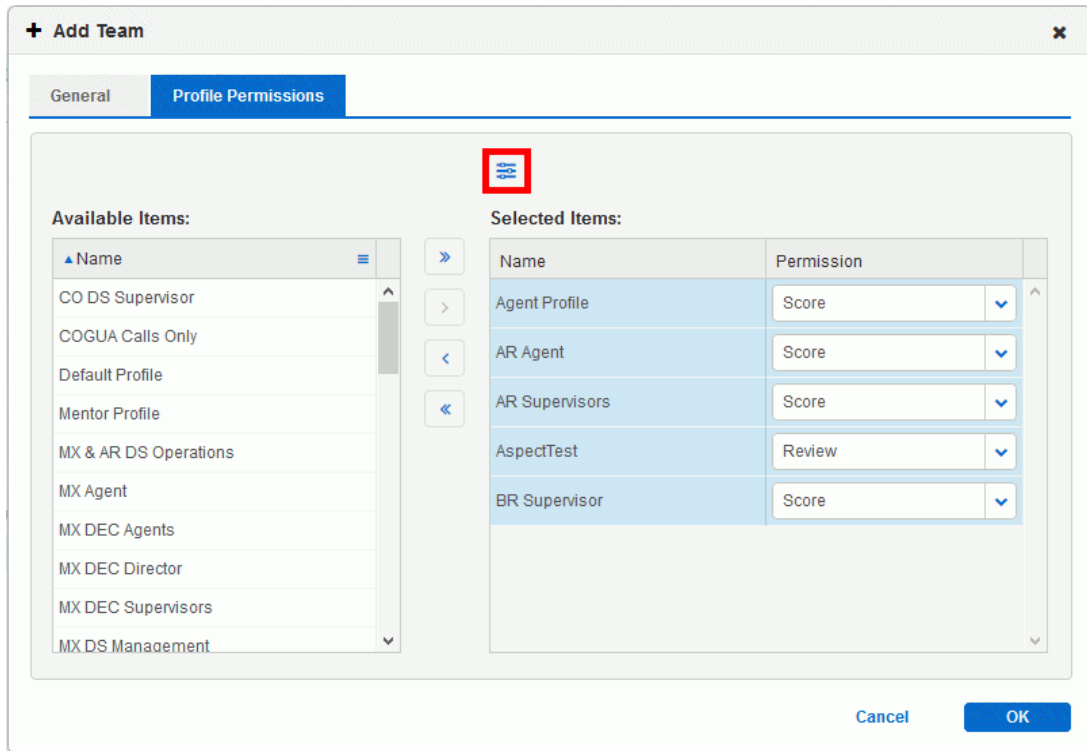
7. Select either **Review** or **Score** from the drop-down list as shown below.



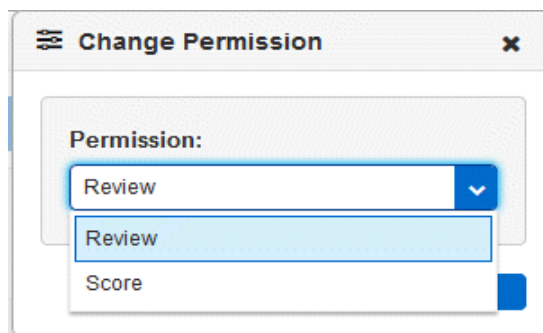
Note: To apply the same permission such as Review or Score for the selected user profiles under the Selected Items, follow the steps below.

- a. Select all of the user profiles and click on the **Change selected user profiles permission** button as shown below.

Note: By default, the Change selected user profiles permission button is disabled. When you select two or more user profiles, the button will be enabled.









- b. Click on the **Permission** drop-down list and select Review or Score based on your requirement.



- c. Click **OK** to complete the process.

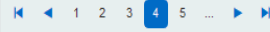
8. Click **OK** button. The Add Team window closes and the Teams window is active as shown below.

TEAMS







Synced teams cannot be activated/deactivated.

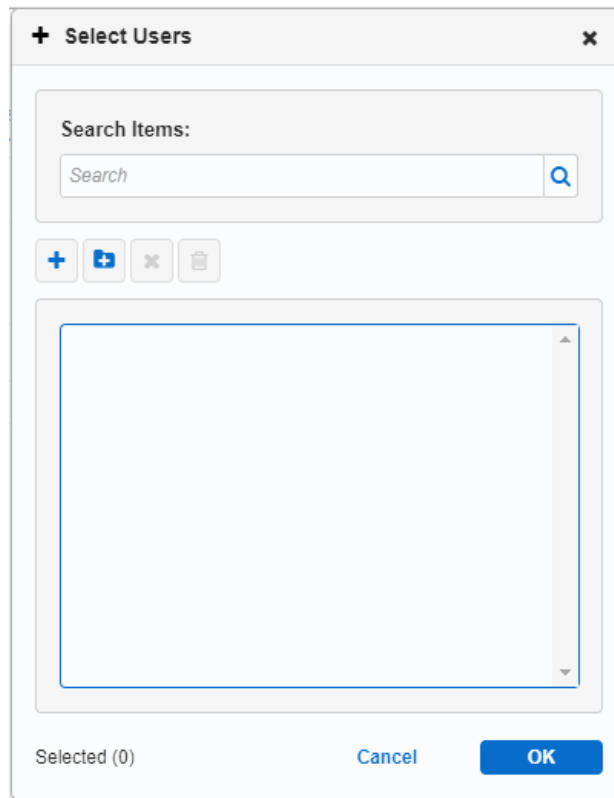
Drag a column header and drop it here to group by that column

Name	Switch	Active	Synced
MXGUA_Requal	PROD_UIP		✓
MXGUA_Requal	DR_UIP	✓	✓
MXGUA_Unassigned	DR_UIP	✓	✓
MXGUA_Unassigned	PROD_UIP	✓	✓
MXGUA_Unassigned	DR_UIP		✓
MXGUAMiguelRamirez	PROD_UIP		✓
New Team	DR_UIP	✓	
PEGUA Inactive Users	DR_UIP	✓	✓
PEGUA Inactive Users	DR_UIP		✓
PEGUA Inactive Users	PROD_UIP	✓	✓
PEGUA Support	PROD_UIP	✓	✓
PEGUA Support	DR_UIP	✓	✓
PEGUA Support	DR_UIP		✓
PYGUA Inactive users	PROD_UIP	✓	✓
PYGUA Inactive users	DR_UIP	✓	✓
PYGUA Support	DR_UIP	✓	✓
PYGUA Support	PROD_UIP	✓	✓
test	PROD_UIP		✓
test	PROD_UIP		✓


301 - 400 of 672 items



12.2.3 Add Members to a Team

1. On the Add Team window, in the Team Members section, click **Select**. The Select Users window opens.



The buttons on the Select Users window are described in the following table.

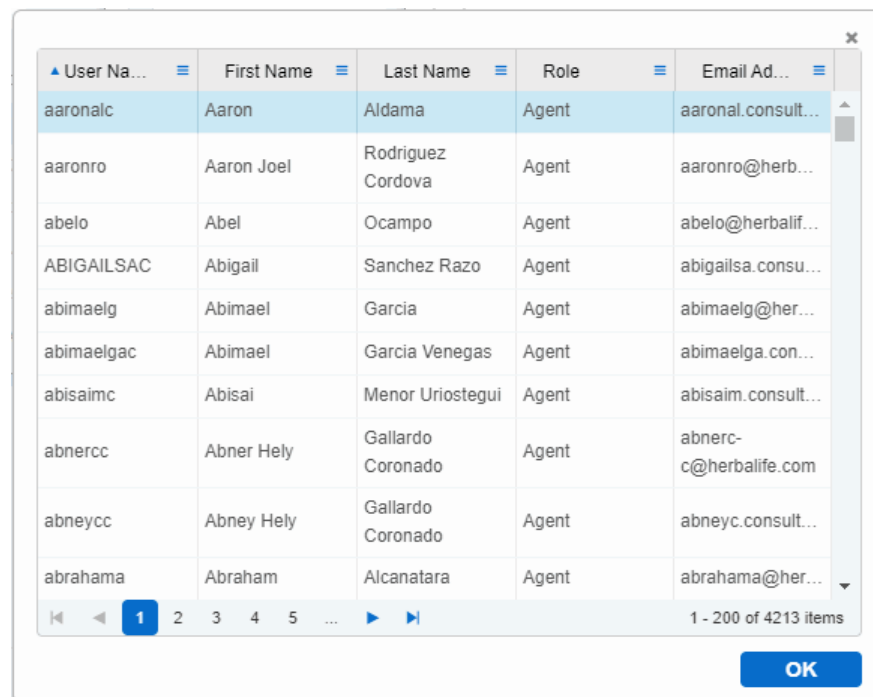
Button	Name	Description
	Search	Click to search for the matched user and to open the User table. Note: Only active users are displayed.
	Add	Click to open the Users table, where you can add users to the team. Note: Only active users are displayed.
	Add All	Add all members associated with the switch to the team.

Button	Name	Description
	Remove	Remove the selected member from the team.
	Delete All	Remove all members from the team.

2. In the Search Items text box, you can type the name of the member that you want to add to the team.

OR

Click the **Search** icon. A window opens with a list of users from the selected switch.



3. Select the members that you want to associate with the team.

Note: You can select more than one member at a time by pressing CTRL key and clicking the member row with the mouse.

4. Click **OK**. The member list closes, the Select Users window is active, the users display in the lower half of the window.

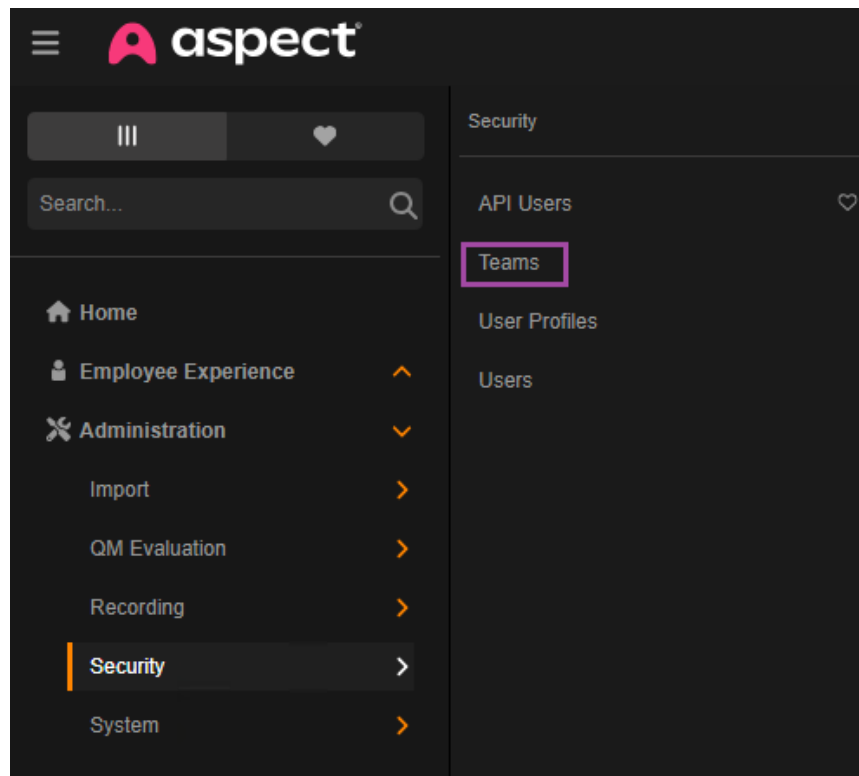
5. Click **OK**. The Select Users window closes, the Add Team window is active, and the Selected (X) label displays the number [in parentheses ()] of members that you selected.

6. Click **OK**. The Add Team window closes, and the team that you created displays in the table on the Teams window.

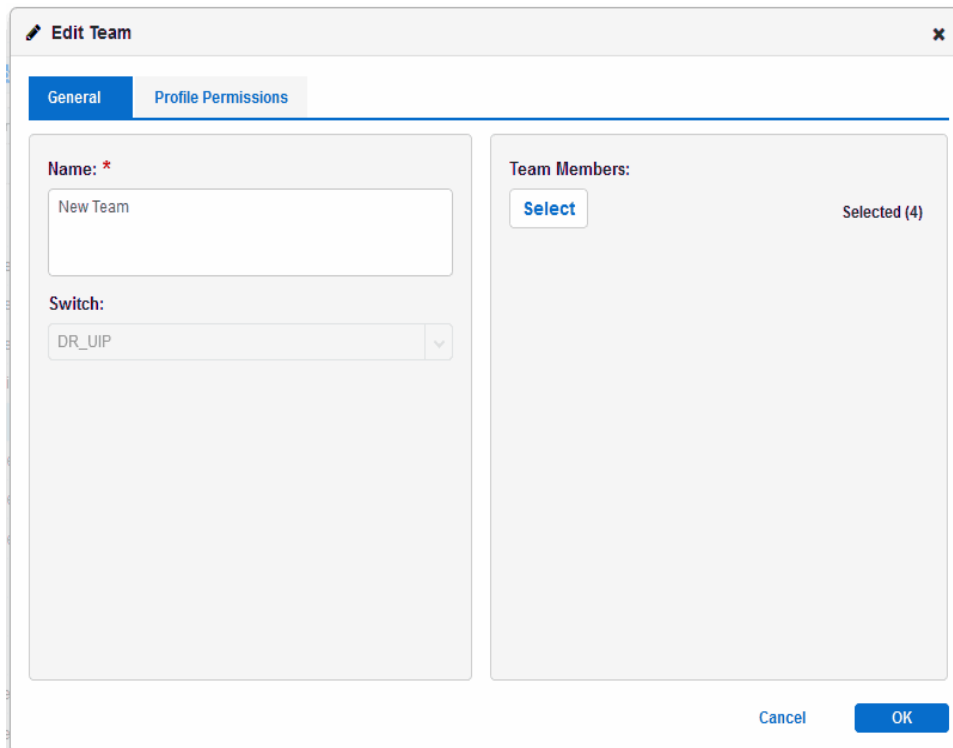
12.2.4 Edit a Team

This section describes how to edit a team that you created in Workforce Engagement Management. Use the Edit feature to modify the Team Name, and add users to, or remove associated users from, the team.

1. Log in to Workforce Engagement Management as an Administrator.
2. Go to Main Menu and click on **Administration** and under **Security**, click **Teams** as shown below.



3. From the Teams table, select the row of the team that needs to edit, and click **Edit**. The Edit Team window opens.



Note: The Edit button is disabled for teams that are synced in the system.

4. If you want, you can change the team name in the **Name** text box.

AND

If you want to change the team members, perform the following steps.

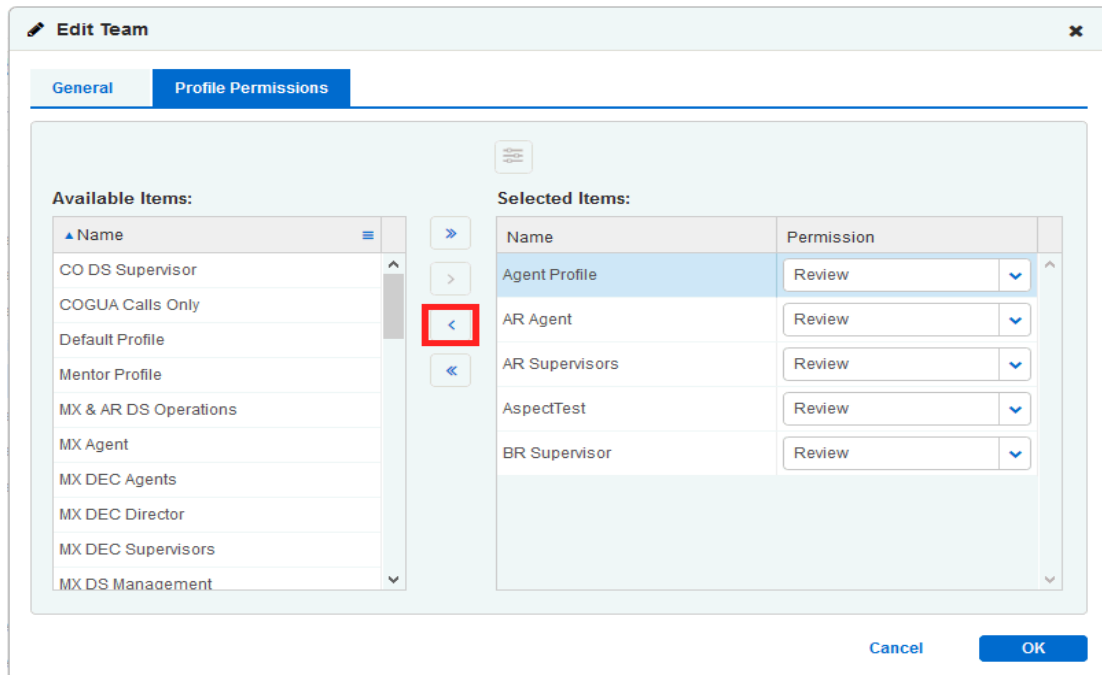
- a. Click **Select**. The Select Users window opens.
- b. To delete a member, select the member from the list, and click **Remove**.



- c. To add a member, click **Add**. A window opens with a list of members associated with the selected switch.
- d. Select the members that you want to associate with the team.
- e. Click **OK**. The window with the list of members closes, and the Select Users window is active.
- f. Click **OK**. The Select Users window closes and the Edit Team window is active.

- Go to the **Profile Permissions** tab (refer [Arrow Button](#) table) and select the options based on your requirement. Refer step 6 and 7 from [Create a New Team](#).

Note: To remove one item from the Selected Items list, select the item and click on **Remove items** button.



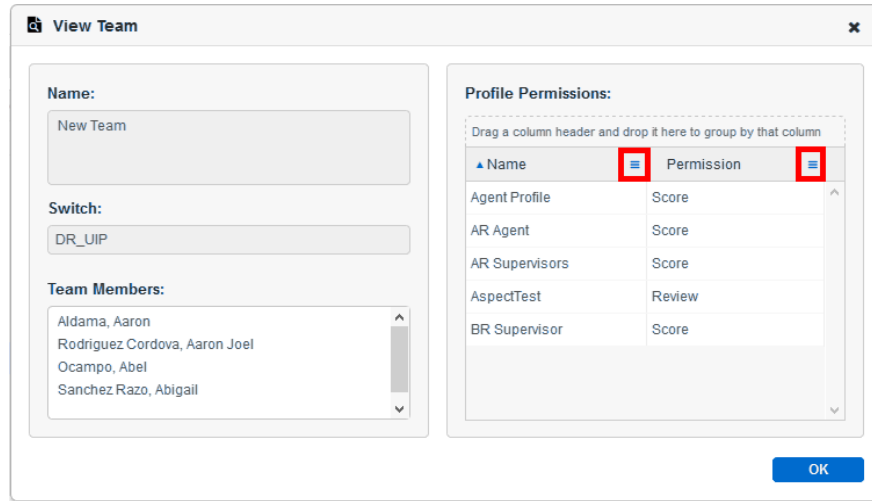
- Click **OK**. The Edit team window closes and the Teams window is active. The system saves the changes that you made.

12.2.5 View Team Details

You can view the details of a team - the switch name, team members and user profiles associated with the team.

- Log in to Workforce Engagement Management as an Administrator.
- Go to Main Menu and click on **Administration** and under **Security**, click **Teams** as shown below.

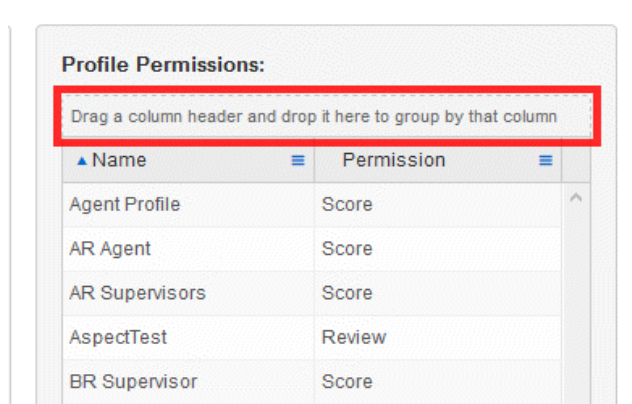
- From the Teams, select the row of the team which needs to view, and click on the **View** button. The View Team window opens.



The following table describes the available option under the triple-bar menu as shown above.

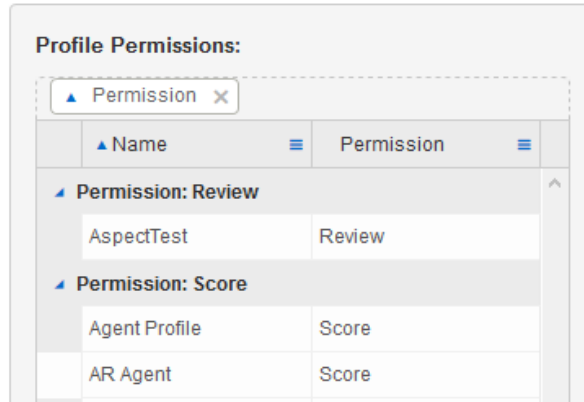
Button Name	Description
Sort Ascending	Refer Sort Columns section
Sort Descending	Refer Sort Columns section
Filter	Refer Filter Criteria section
Columns	Click on the Name and Permission check boxes to add or remove the columns under the Profile Permission section
Reset Layout	Refer Reset Layout section
Clear All Filters	Refer Clear All Filters section

Note: 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**. Refer the below screenshot.



Example: Based on the above scenario, if the Permission column is drag-and-drop

on the “Drag a column header and drop it here to group by that column” field. Then the Profile Permissions section will be grouped, as shown below.

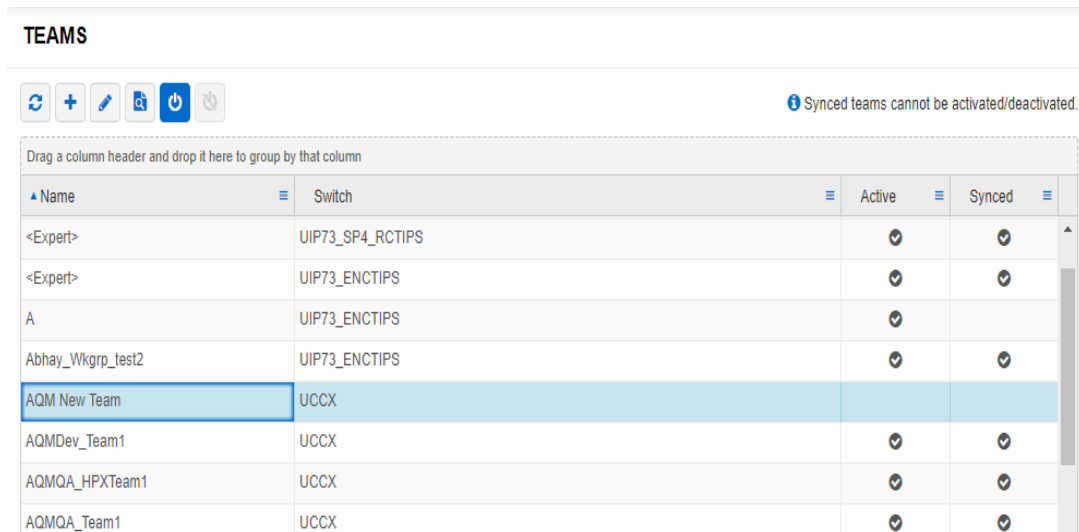


4. When you are finished viewing the team details, click **OK** to close the window.

12.2.6 Activate a Team

To activate a team, perform the following steps.

1. Log in to Workforce Engagement Management as an Administrator.
2. Go to Main Menu and click on **Administration** and under **Security**, click **Teams** as shown below.
3. From the Teams table, select the row of the team which needs to activate, and click **Activate**.



Note: The Activate button is enabled *only* for an inactive team.







The system activates the team and refreshes the table on the Teams window.

12.2.7 Deactivate a Team

To deactivate a team, perform the following steps.

1. Log in to Workforce Engagement Management as an Administrator.
2. Go to Main Menu and click on **Administration** and under **Security**, click **Teams** as shown below.
3. From the Teams table, select the row of the team which needs to deactivate and click **Deactivate**.

TEAMS







Synced teams cannot be activated/deactivated.

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

Name	Switch	Active	Synced
<Expert>	UIP73_SP4_RCTIPS	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<Expert>	UIP73_ENCTIPS	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
A	UIP73_ENCTIPS	<input checked="" type="checkbox"/>	
Abhay_Wkgrp_test2	UIP73_ENCTIPS	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
AQM New Team	UCCX	<input checked="" type="checkbox"/>	
AQMDev_Team1	UCCX	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
AQMQA_HPXTTeam1	UCCX	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
AQMQA_Team1	UCCX	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Avaya Team 1	Avaya TSAPI 7.1	<input checked="" type="checkbox"/>	

Note: The Deactivate button is enabled *only* for an active team.

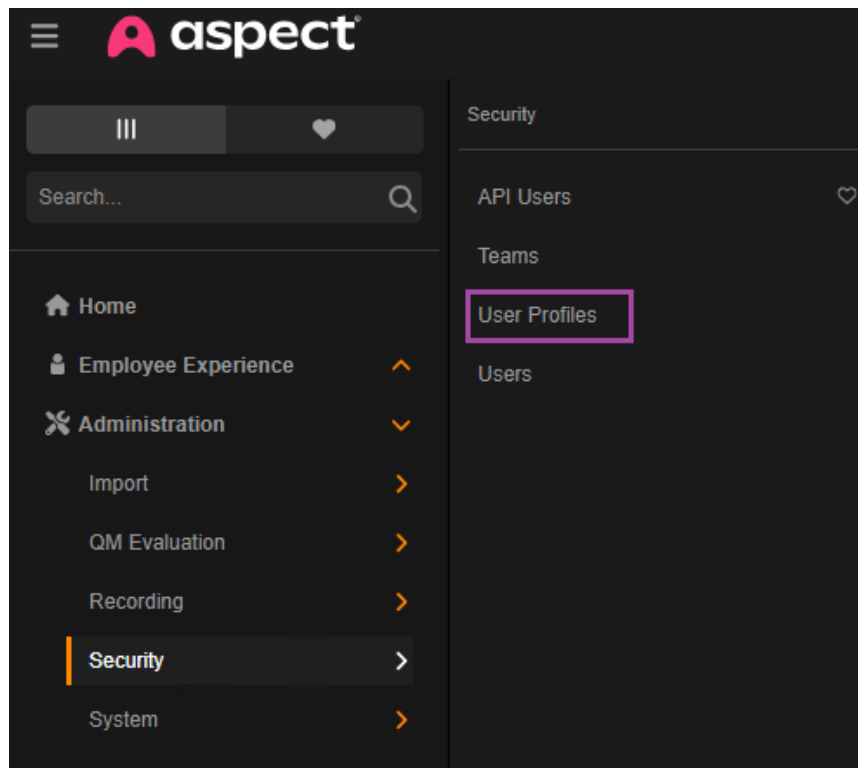
The system activates the team and refreshes the table on the Teams window.

12.3 User Profiles

To grant permissions or rights to a user, you should create a user profile. Using profiles, an Administrator can assign permissions and rights for multiple users at the same time. You can assign a user permission to perform specific tasks; for example, creating or viewing templates and reports.

To launch the User Profiles window, perform the following steps.

1. Login to Workforce Engagement Management.
2. Go to Main Menu and click on **Administration > Security > User Profiles**.



The User Profiles window opens with a table listing all the user profiles available in the system.

USER PROFILES








↺
+
✎
🔄
🗑️
🔌
👤

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

Name	Description
Admin Profile	Admin Profile
Default Profile	Default Profile
Mentor Profile	

Note: A maximum of 100 user profiles can display on the page.

The following table describes the buttons on the User Profiles window.

Button	Name	Description
	Refresh	Refreshes the User Profiles table.
	Add	Creates a new user profile.
	Edit	Edits an existing user profile.
	Duplicate	Copies an existing user profile. Note: You cannot duplicate the Admin profile.
	Delete	Deletes an existing user profile.
	Activate	If a user profile is inactive, click to activate the user profile. Note: If the user profile is inactive, the Active button is enabled.
	Deactivate	Deactivates the user profile. Note: If the user profile is active, the Deactivate button is enabled.

The following table describes the columns in the User Profiles table.

Column	Description
Name	The name of the user profile.
Description	The description of the user profile.
Active	If the user profile is active, then a check mark icon displays.

Note: The default for the column sorting is by Name.

12.3.1 Rights and Permissions

12.3.1.1 User Rights

User rights are privileges that you give to users to access Aspect Quality entities (for example, Interactions, Reports, Rules). If a user has a Right on an entity, then the user can create objects of that entity.

Rights	Definition
Manage Recordings	
Self Review	The user can review their own calls.
Download Recordings	The user can download a recording to review when the user disconnects from the Aspect Quality system. Aspect recommends that you give only Mentors and Administrators permission to download.
Export Recordings	The user can export an audio or video recording for future viewing.
Assign Interactions	The user can assign the interaction(s) to other users temporarily. Note: This right exposes all user profiles and the users for each profile.
Delete Interactions	The user can delete the interaction(s). Note: This right exposes all user profiles and the users for each profile.
Manage Evaluations	
Self Evaluate	The user can score their own calls.
Create Evaluation Template	The user can create evaluation templates.
View Peer Review	Agent: All Agents, Mentors, and Administrators can view the evaluations marked for Peer review by Agent. Mentor: All the Mentor and Administrators can view the evaluations marked for Peer review by Mentor. Administrator: All Administrators can view the evaluations marked for Peer review by Administrator.
Grant Peer Review	The user can flag an evaluation for peer review for the accessible interactions. Users who have the View Peer Review right can have the Grant Peer Review right.
View All Evaluations	The user can view all evaluations for the accessible interactions.
Edit All Evaluations	The user can edit an evaluations. Note: This feature works if the View All Evaluations button is enabled.
Assign Evaluations	The user can assign an evaluation (created by the user) to other users.

Rights	Definition
Create Task	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.
Hide/Show Interactions	The user is able to reserve interactions for Hide/Show interactions as well as release interactions from Hide/Show interactions. The user is able to search and access interactions that are currently reserved for Hide/Show interactions given that the interaction falls within the scope of the user's permissions. Users who do not have this permission cannot search or access any interactions that are currently reserved for Hide/Show interactions.
Manage Calibrations	
View Calibration Events	The user can access all the calibration events.
Assign Calibration Events	The user can assign the interaction to other users to calibrate the score. Note: This right exposes all the users for the selected templates.
Manage Reports	
View Reports	The user can review all reports.
Create Reports	The user can create new reports.
Other Configurations	
Create Recording Rule	The user can create business rules that determine how Aspect Quality records a call.
Protect Interaction	User can request to keep an interaction available for playback after the historical or archive processes run.

12.3.1.2 User Permissions

To grant permissions to a user, you should create a user profile. Using profiles, an Administrator can assign permissions and rights for multiple users at the same time. You can assign a user permission to perform specific tasks; for example, creating or viewing templates and reports.

The calls you can see when you search in Aspect Quality are the union of calls between any Teams, Agent Groups, and Recording Groups you have permission to review or score. You can review a call:

- If any agent in one of the Team handles the call.
- If an Agent Group takes the call.
- If a port in one of the Recording Groups records the call.

To access calls, you must determine if you should have access to calls based on a set of Agents, a set of Agent Groups, a set of Recording Ports, or a combination of these sets. Once you determine the access, define the groups you need and grant access.

In addition to which groups a user can access, you can set each group for review-only, edit, or score permission. The following are permission options:

Permission	Definition
Teams	<p>Review – Permission allows the Mentor to listen to calls handled by Agents in the Teams.</p> <p>Score – Permission allows the Mentor to score these interactions.</p>
Evaluation Templates	<p>View – Permission allows the Mentor to use a specific evaluation template without modification.</p> <p>Edit – Permission allows the Mentor to make changes to the specific evaluation template.</p>
Rules	<p>View – Permission allows the Mentor to use a specific rule in searches and to open the rule definition without modifying it.</p> <p>Edit – Permission allows the Mentor to make changes to the specific rule within the bounds of the Mentor’s other assigned access.</p>
Recording Groups	<p>Review – Permission allows the Mentor to listen to any call recorded by a physical port in the assigned recording group.</p> <p>Score – Permission allows the mentor to score these interactions.</p>
Reports	<p>View – Permission allows the Mentor to view existing report results and the report template without modifying it.</p> <p>Edit – Permission also allows the Mentor to make changes to the specific report within the bounds of the Mentor’s other assigned access.</p>
Skill Groups	<p>Review – Permission allows the Mentor to listen to calls handled by Agent Groups associated with the Skill Group.</p> <p>Score – Permission allows the Mentor to score these interactions.</p>

12.3.2 Create a User Profile

To create a user profile, perform the following steps.

1. Login to Workforce Engagement Management.
2. Go to Main Menu and click on **Administration > Security > User Profiles**.

The User Profiles window opens with a table listing all the user profiles available in the system.

USER PROFILES

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

Name	Description
Admin Profile	Admin Profile
Default Profile	Default Profile
Mentor Profile	



3. Click **Add**. The Create User Profile window opens with the Rights tab active as shown below.

CREATE USER PROFILE

Name: * Description:

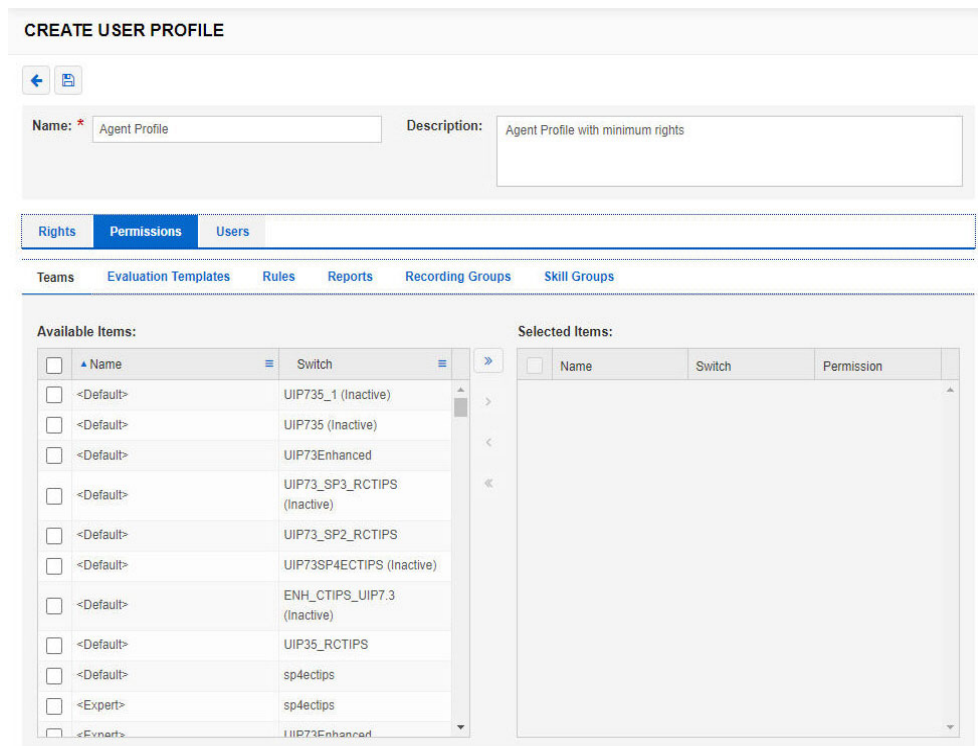
<p>Manage Recordings</p> <p><input type="checkbox"/> Self Review</p> <p><input type="checkbox"/> Download Recordings</p> <p><input type="checkbox"/> Export Recordings</p> <p><input type="checkbox"/> Assign Interactions</p> <p><input type="checkbox"/> Delete Interactions</p> <p>Other Configurations</p> <p><input type="checkbox"/> Create Recording Rule</p> <p><input type="checkbox"/> Protect Interaction</p>	<p>Manage Evaluations</p> <p><input type="checkbox"/> Self Evaluate</p> <p><input type="checkbox"/> Create Evaluation Template</p> <p><input type="checkbox"/> View Peer Review</p> <p><input type="checkbox"/> Grant Peer Review</p> <p><input type="checkbox"/> View All Evaluations</p> <p><input type="checkbox"/> Edit All Evaluations</p> <p><input checked="" type="checkbox"/> Assign Evaluations</p> <p><input checked="" type="checkbox"/> Create Task</p> <p><input type="checkbox"/> Hide/Show Interactions</p>	<p>Manage Calibrations</p> <p><input type="checkbox"/> View Calibration Events</p> <p><input type="checkbox"/> Assign Calibration Event</p> <p>Manage Reports</p> <p><input checked="" type="checkbox"/> View Reports</p> <p><input type="checkbox"/> Create Report</p>
--	--	---

The following table describes the buttons on the Create User Profile window.

Button	Name	Description
	Back	Click to redirect to the User Profiles window.
	Save	Click to save the user profile.

Note: The fields marked (*) are mandatory fields.

- In the **Name** text box, type a name for the user profile.
- In the **Description** text box, type a description for the user profile.
- On the Rights tab, using the Rights table (see User Rights on page 12-714), select the options that you want to assign to the user profile.
- Select the **Permissions** tab.



Note: The Item Type displays below the tabs. For information about each Item Type, see User Permissions on page 12-715.

In the preceding screen shot, the Item Type selected is *Teams*.


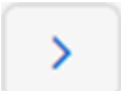

The following table describes the columns in the Available Items table.


Column	Description
Name	The entity name.
Switch	The switch name. Note: The Switch column does not display Entity types such as Evaluation Template or Reports.

The following table describes the columns in the Selected Items table.

Column	Description
Name	The entity name.
Switch	The switch name. Note: The Switch column does not display Entity types such as Evaluation Template or Reports.
Permission	Depending on the type of Entity, displays a drop-down list box from which you can select the following permissions. <ul style="list-style-type: none"> Review or Score - if you select <i>Score</i>, the entity item can both Review and Score. Edit or View Note: See User Permissions on page 12-715 for more information on which permission to select.

The following table describes the arrow buttons on the Permissions tab.

Arrow Button	Button Name	Description
	Add All Items	Moves all the Available Items table to the Selected Items table. Note: If no items are available in the Available Items table, the Add All Items button is disabled. You need not select any check boxes if you intend to click this button.
	Add Item	Moves only the selected items from the Available Items table to the Selected Items table. Note: If you select at least one item in the Available Items table, the Add Items button is enabled.
	Remove Item	Moves only the selected items from the Selected Items table to the Available Items table. Note: If you select at least one item in the Selected Items table, the Add Items button is enabled.

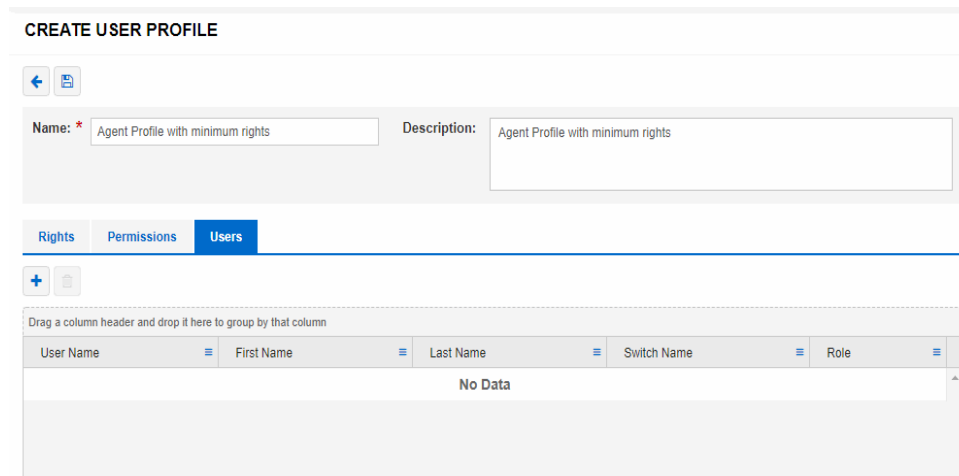
Arrow Button	Button Name	Description
	Remove All Items	Moves all the selected items from the Selected Items table to the Available Items table. Note: If no items are available in the Selected Items table, the Remove All Items button is disabled. You need not select any check boxes if you intend to click this button.

8. To move an Available Item type, in the left pane, select the check boxes next to the items that you want to move, and click the appropriate arrow button. The Available Items that you selected move to the Selected Items table in the right pane.



Note: To select all Available Items or all Selected Items, click the first check box in the header row, next to **Name**.

9. In the Selected Items table, from the drop-down list box next to each entity item, select the **Permission** for that entity.

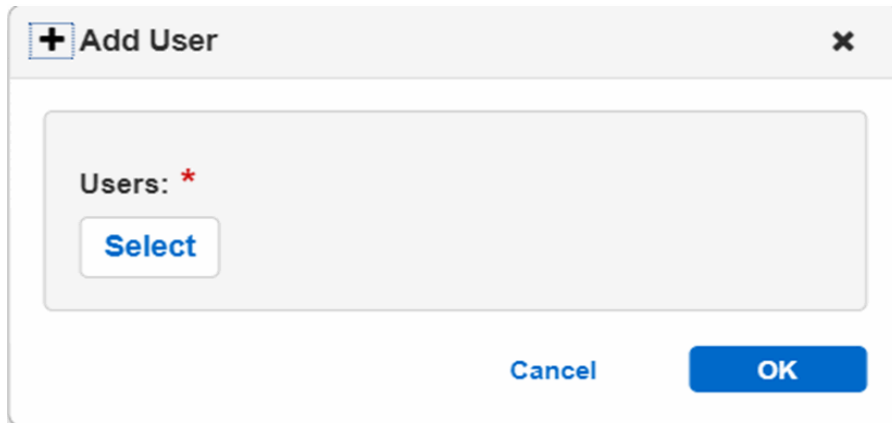
10. Select the **Users** tab.



The following table describes the buttons on the Users tab.

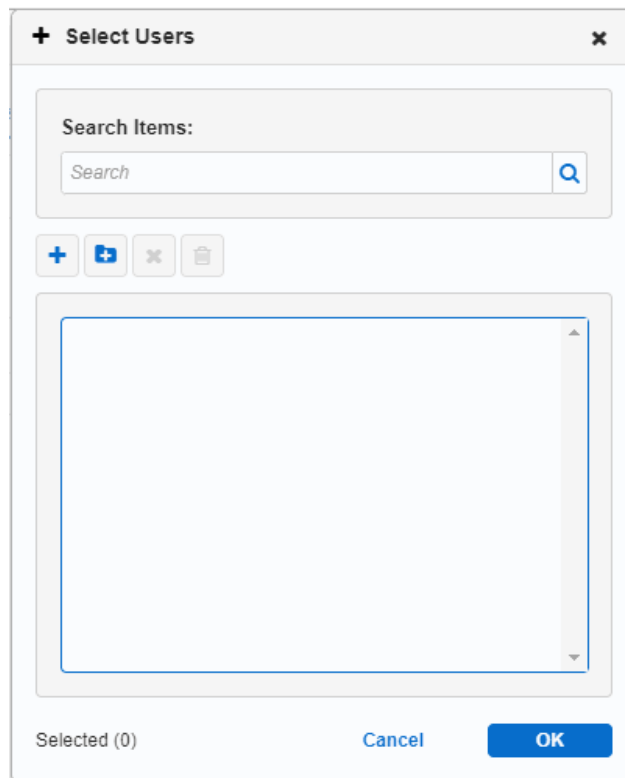
Button	Button Name	Description
	Add	Click to add users.
	Remove	Click to remove users. Note: By default, the Remove button is disabled. When you select at least one item from the table, the Remove button is enabled.

11. Click **Add**. The Add User window opens.








Note: The fields marked (*) are mandatory fields.

12. Click **Select**. The Select Users window opens.



The buttons on the Select Users window are described in the following table.

Button	Name	Description
	Search	Click to search for the matched user and to open the Users table. Note: Only active users are displayed.
	Add	Click to open the Users table, where you can add users to the list. Note: Only active users are displayed.
	Add All	Add all active users to the list.
	Remove	Remove the selected users from the list.
	Delete All	Remove all users from the list.

13. Click **Add**. The Users list opens.

User Nam	First Nam	Last Name	Switch Name	Role
#	&	\$	None	Agent
@bhagya	Bhagya1	Godihuggi1	UIP73_SP3_RCTIPS	Agent
1004	Cisco 7931	SCCP 1004	Cisco UCM (Inactive)	Agent
1007	Cisco 7941	SEP001F9E253...	Cisco UCM (Inactive)	Agent
1008	Cisco 7931	SCCP 1008	Cisco UCM (Inactive)	Mentor
1009	Cisco 7931	SCCP 1009	Cisco UCM (Inactive)	Agent
1016	Cisco 7940	1016	Cisco UCM (Inactive)	Agent
1017	Cisco 7940	1017	Cisco UCM (Inactive)	Agent
1022	Cisco 7941	SIP 1022	Cisco UCM (Inactive)	Agent
1024	Cisco 7960	1024	Cisco UCM (Inactive)	Agent
1025	Cisco IP Communicator	Surya 1025	Cisco UCM (Inactive)	Agent
1026	Cisco 7941	SIP 1026	Cisco UCM (Inactive)	Agent

EM Device Profile

1 - 100 of 2046 items

OK

The following table describes the columns in the User list table.

Column Name	Description
User Name	The user's name.
First Name	The first name of the user.
Last Name	The last name of the user.
Switch Name	The switch associated with the user. Note: If the user is not associated with any switch name, then No Switch is displayed.
Role	The user's role or persona.

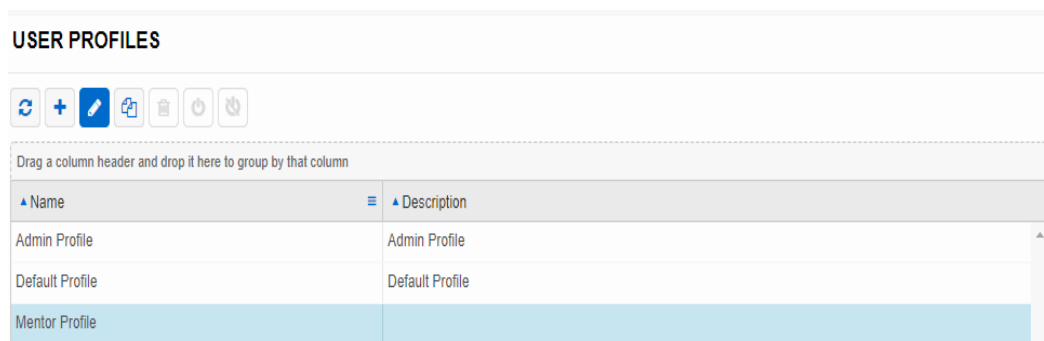
14. Select the users to which you want to apply the user profile you have just created.
Note: You can select more than one user at a time by pressing the CTRL key and clicking the user row with the mouse.
15. Click **OK**. The User list table closes, the Select Users window is active, and the users you selected displays in the lower half of the window.
16. Click **OK**. The Select Users window closes and the Add User window is active.
17. Click **OK**. The Add User window closes, the Create User Profile window is active, and the new user profile displays in the table.
18. Click **Save**.

12.3.3 Edit a User Profile

To edit a user profile, perform the following steps.

1. Login to Workforce Engagement Management.
2. Go to Main Menu and click on **Administration** and under **Security**, click **User Profiles** as shown below.

The User Profiles window opens with a table listing all the user profiles available in the system.



3. From the User Profiles table, select the user profile which needs to modify.

4. Click **Edit**.



The Edit User Profile window opens with the Rights tab active.

EDIT USER PROFILE

[←](#) [📄](#)

Name: * Description:

Rights | Permissions | Users

Manage Recordings <ul style="list-style-type: none"><input checked="" type="checkbox"/> Self Review<input checked="" type="checkbox"/> Download Recordings<input checked="" type="checkbox"/> Export Recordings<input checked="" type="checkbox"/> Assign Interactions<input checked="" type="checkbox"/> Delete Interactions Other Configurations <ul style="list-style-type: none"><input checked="" type="checkbox"/> Create Recording Rule<input type="checkbox"/> Protect Interaction	Manage Evaluations <ul style="list-style-type: none"><input checked="" type="checkbox"/> Self Evaluate<input checked="" type="checkbox"/> Create Evaluation Template<input checked="" type="checkbox"/> View Peer Review<input checked="" type="checkbox"/> Grant Peer Review<input type="checkbox"/> View All Evaluations<input type="checkbox"/> Edit All Evaluations<input checked="" type="checkbox"/> Assign Evaluations<input checked="" type="checkbox"/> Create Task<input checked="" type="checkbox"/> Hide/Show Interactions	Manage Calibrations <ul style="list-style-type: none"><input checked="" type="checkbox"/> View Calibration Events<input checked="" type="checkbox"/> Assign Calibration Event Manage Reports <ul style="list-style-type: none"><input checked="" type="checkbox"/> View Reports<input checked="" type="checkbox"/> Create Report
---	---	--

5. Make the changes you want, on any of the tabs, to the user profile.

- Click on **Users** tab, the users associate with the User Profile listed in the grid as shown below.

EDIT USER PROFILE

← 📄

Name: * Description:

Rights Permissions **Users**

+ 🗑️ ⓘ Only users marked as 'Not Saved' Can be deleted from the list.

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

Not Saved	User Name	First Name	Last Name	Switch Name	Role
	2112	Abhay	Dwivedy	UIP73_SP4_RCTIPS	Mentor
	2117	Tara	Pissay	UIP73_SP4_RCTIPS	Agent

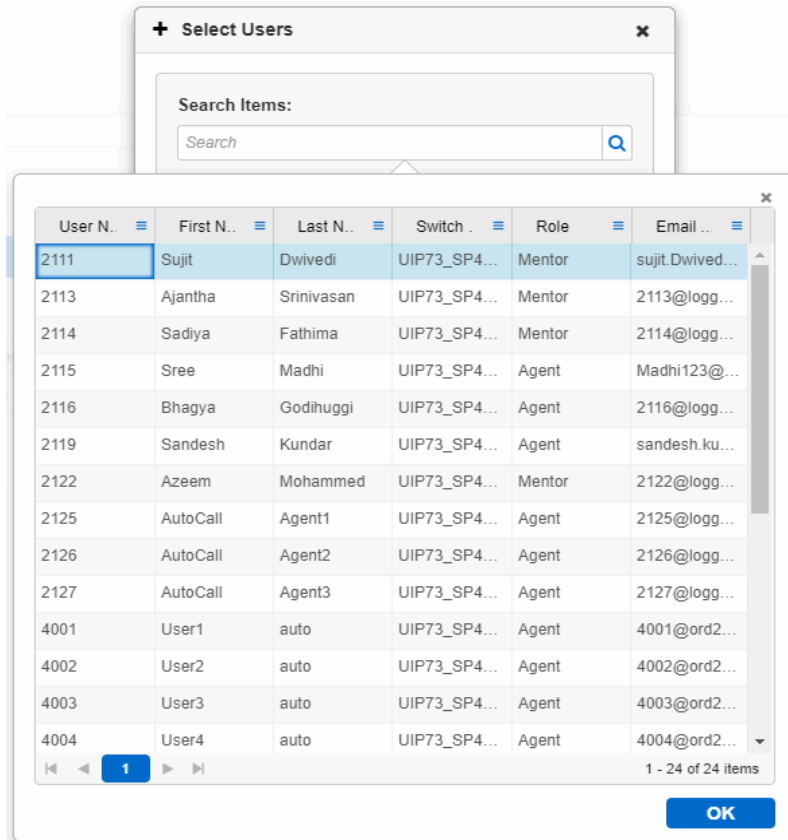
Example: 2112 and 2117 users are associated with the User Profile.

- Click on the **Add** button to add more users.
- Click on **Select** button and the Select Users window appears as shown below.

- Type the username on the Search Items field or click on the magnifying glass and click **Yes** as shown below.

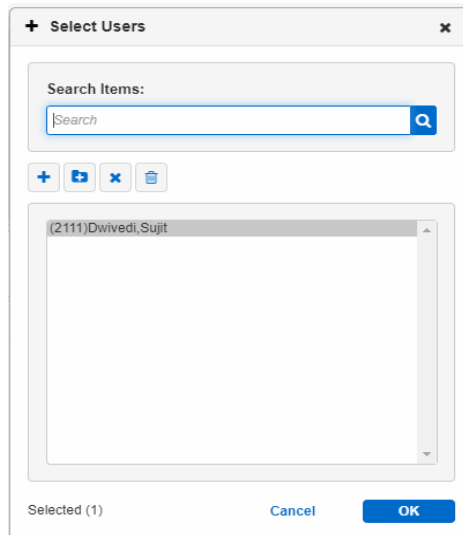
10. Select the user which you want to add and click on **OK** button.

Example: 2111 is selected from the grid as shown below.



Note: 2112 and 2117 are not listed under the User Name column as both are already added to the Users tab.

11. Click on **OK** button as shown below.



12.The user 2111 is added to the grid. Refer the below screenshot.

EDIT USER PROFILE

← 📄

Name: * Mentor Profile Description: Description

Rights Permissions **Users**

+ 📄 ⓘ Only users marked as 'Not Saved' Can be deleted from the list.

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

Not Saved	User Name	First Name	Last Name	Switch Name	Role
🔴	2111	Sujit	Dwivedi	UIP73_SP4_RCTIPS	Mentor
	2112	Abhay	Dwivedy	UIP73_SP4_RCTIPS	Mentor
	2117	Tara	Pissay	UIP73_SP4_RCTIPS	Agent

Note: The grid will be sorted by Not Saved column and always adding a new user to user profile will be shown at the top.

13.Click **Save**.

12.3.4 Remove a New User from a User Profile

To remove a user from a user profile, perform the following steps.

Note: You can only remove an existing user from a user profile if you *first* add that user to another user profile.

1. Login to Workforce Engagement Management.
2. Go to Main Menu and click on **Administration** and under **Security**, click **User Profiles** as shown below.

The User Profiles window opens with a table listing all the user profiles available in the system.

USER PROFILES

🔄 + 📄 🗑️ ⏪ ⏩

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

Name	Description
Admin Profile	Admin Profile
Default Profile	Default Profile
Mentor Profile	

3. From the User Profiles table, select the user profile from which needs to remove a user(s).

4. Click **Edit**.



The Edit User Profile window opens with the Rights tab active.

EDIT USER PROFILE

[←](#) [📄](#)

Name: * **Description:**

Rights | **Permissions** | **Users**

Manage Recordings <ul style="list-style-type: none"><input checked="" type="checkbox"/> Self Review<input checked="" type="checkbox"/> Download Recordings<input checked="" type="checkbox"/> Export Recordings<input checked="" type="checkbox"/> Assign Interactions<input checked="" type="checkbox"/> Delete Interactions Other Configurations <ul style="list-style-type: none"><input checked="" type="checkbox"/> Create Recording Rule<input type="checkbox"/> Protect Interaction	Manage Evaluations <ul style="list-style-type: none"><input checked="" type="checkbox"/> Self Evaluate<input checked="" type="checkbox"/> Create Evaluation Template<input checked="" type="checkbox"/> View Peer Review<input checked="" type="checkbox"/> Grant Peer Review<input type="checkbox"/> View All Evaluations<input type="checkbox"/> Edit All Evaluations<input checked="" type="checkbox"/> Assign Evaluations<input checked="" type="checkbox"/> Create Task<input checked="" type="checkbox"/> Hide/Show Interactions	Manage Calibrations <ul style="list-style-type: none"><input checked="" type="checkbox"/> View Calibration Events<input checked="" type="checkbox"/> Assign Calibration Event Manage Reports <ul style="list-style-type: none"><input checked="" type="checkbox"/> View Reports<input checked="" type="checkbox"/> Create Report
---	---	--

5. Select the **Users** tab.

EDIT USER PROFILE

Name: * Agent Profile Description: Description

Rights Permissions **Users**

Only users marked as 'New' Can be deleted from the list.

Not Saved	User Name	First Name	Last Name	Switch Name	Role
<input checked="" type="checkbox"/>	1_Classic Edit	1	1	None	None
<input type="checkbox"/>	Just like that		1	UCCX	Agent
<input type="checkbox"/>	Test User 3	3	3	UIP73_ENCTIPS	Agent
<input type="checkbox"/>	2115	Bhagyashree	Godihuggi	UIP73_ENCTIPS	Agent
<input type="checkbox"/>	2116	Tara	Pissay	UIP73_ENCTIPS	Agent
<input type="checkbox"/>	MX PWD		PWD	UCCX	Agent
<input type="checkbox"/>	S	S	S	UCCX	Agent

1 - 7 of 7 items

Note: The new user is flagged with a check mark icon in the Not Saved column. The information message on the right reminds you that Only users marked as 'Not Saved' can be deleted from the list.

6. Select the row of the new users and click on **Delete**.

12.3.5 Duplicate a User Profile

You may want to duplicate a user profile if you want to create a profile with similar (but not exact) options.








Note: Users cannot be duplicated during this procedure, so you must select the users that you want to associate with this user profile.

To duplicate a user profile, perform the following steps.

1. Login to Workforce Engagement Management.
2. Go to Main Menu and click on **Administration** and under **Security**, click **User Profiles** as shown below.

The User Profiles window opens with a table listing all the user profiles available in the system.

USER PROFILES

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



Name	Description
Admin Profile	Admin Profile
Default Profile	Default Profile
Mentor Profile	

- From the list of user profiles, select the user profile which needs to duplicate.
- Click **Duplicate**.



The Duplicate User Profile window opens with the Rights tab active.

DUPLICATE USER PROFILE



Name: * Description:

Rights
Permissions
Users

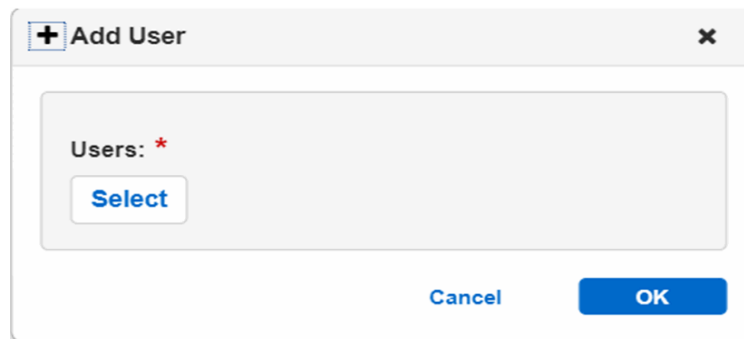
<p>Manage Recordings</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Self Review <input checked="" type="checkbox"/> Download Recordings <input checked="" type="checkbox"/> Export Recordings <input checked="" type="checkbox"/> Assign Interactions <input checked="" type="checkbox"/> Delete Interactions <p>Other Configurations</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Create Recording Rule <input type="checkbox"/> Protect Interaction 	<p>Manage Evaluations</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Self Evaluate <input checked="" type="checkbox"/> Create Evaluation Template <input checked="" type="checkbox"/> View Peer Review <input checked="" type="checkbox"/> Grant Peer Review <input type="checkbox"/> View All Evaluations <input type="checkbox"/> Edit All Evaluations <input checked="" type="checkbox"/> Assign Evaluations <input checked="" type="checkbox"/> Create Task <input checked="" type="checkbox"/> Hide/Show Interactions 	<p>Manage Calibrations</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> View Calibration Events <input checked="" type="checkbox"/> Assign Calibration Event <p>Manage Reports</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> View Reports <input checked="" type="checkbox"/> Create Report
--	--	--

- In the **Name** text box, type a name for the duplicated user profile.
- In the **Description** text box, type a description for the duplicated user profile.

7. Make the edits to the user profile Rights and Permissions with the options that you want.
8. Select the **Users** tab. The following table describes the buttons on the Users tab.

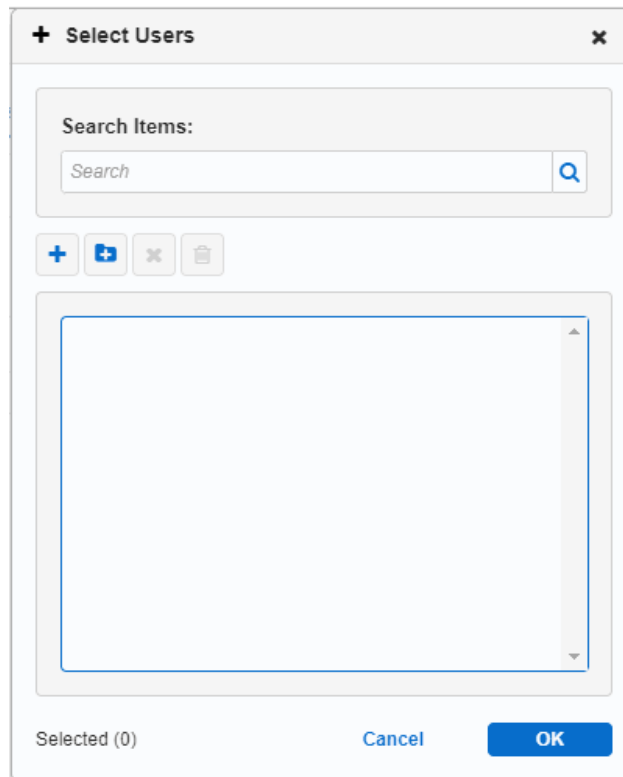
Button	Button Name	Description
	Add	Click to add users.
	Remove	Click to remove users. Note: By default, the Remove button is disabled. When you select at least one item from the table, the Remove button is enabled.

9. Click **Add**. The Add User window opens.








Note: The fields marked (*) are mandatory fields.

10. Click **Select**. The Select Users window opens.

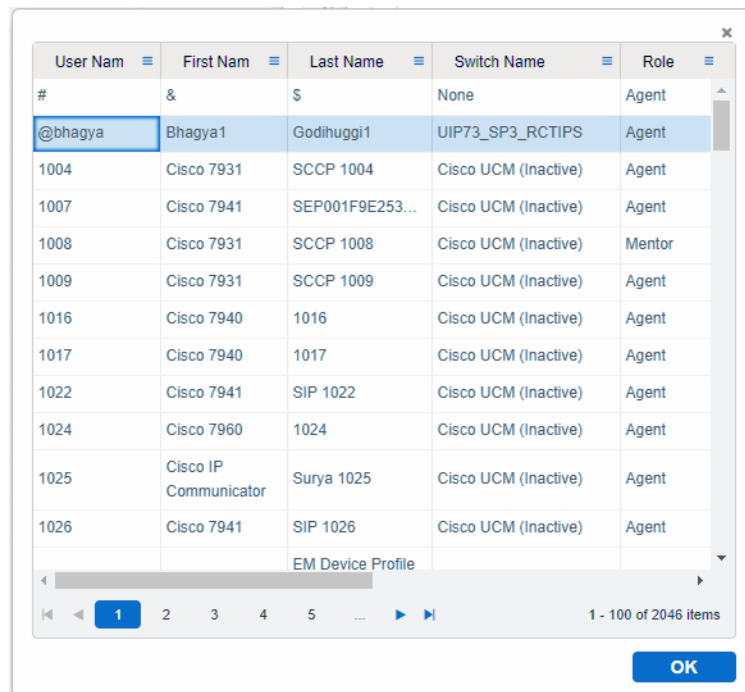


The buttons on the Select Users window are described in the following table.

Button	Name	Description
	Search	Click to search for the matched user and to open the Users table. Note: Only active users are displayed.
	Add	Click to open the Users table, where you can add users to the list. Note: Only active users are displayed.
	Add All	Add all active users to the list.

Button	Name	Description
	Remove	Remove the selected users from the list.
	Delete All	Remove all users from the list.

11. Click **Add**. The Users list opens.



User Nam	First Nam	Last Name	Switch Name	Role
#	&	\$	None	Agent
@bhagya	Bhagya1	Godihuggi1	UIP73_SP3_RCTIPS	Agent
1004	Cisco 7931	SCCP 1004	Cisco UCM (Inactive)	Agent
1007	Cisco 7941	SEP001F9E253...	Cisco UCM (Inactive)	Agent
1008	Cisco 7931	SCCP 1008	Cisco UCM (Inactive)	Mentor
1009	Cisco 7931	SCCP 1009	Cisco UCM (Inactive)	Agent
1016	Cisco 7940	1016	Cisco UCM (Inactive)	Agent
1017	Cisco 7940	1017	Cisco UCM (Inactive)	Agent
1022	Cisco 7941	SIP 1022	Cisco UCM (Inactive)	Agent
1024	Cisco 7960	1024	Cisco UCM (Inactive)	Agent
1025	Cisco IP Communicator	Surya 1025	Cisco UCM (Inactive)	Agent
1026	Cisco 7941	SIP 1026	Cisco UCM (Inactive)	Agent
EM Device Profile				

1 - 100 of 2046 items

OK

The following table describes the columns in the User list table.

Column Name	Description
User Name	The user's name.
First Name	The first name of the user.
Last Name	The last name of the user.
Switch Name	The switch associated with the user. Note: If the user is not associated with any switch name, then No Switch is displayed.
Role	The user's role or persona.

12. Select the users to which you want to apply the user profile you have just duplicated.
Note: You can select more than one user at a time by pressing the CTRL key and clicking the user row with the mouse.
13. Click **OK**. The User list table closes, the Select Users window is active, and the users you selected displays in the lower half of the window.
14. Click **OK**. The Select Users window closes and the Add User window is active.
15. Click **OK**. The Add User window closes, the Duplicate User Profile window is active, and the new (duplicated) user profile is listed in the table.
16. Click **Save**.

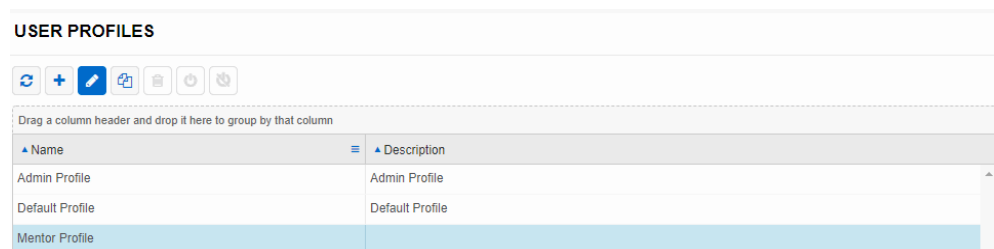
12.3.6 Delete a User Profile

To delete a user profile, perform the following steps.

Note: If at least one user exists in the user profile, you cannot delete the user profile.

1. Login to Workforce Engagement Management.
2. Go to Main Menu and click on **Administration** and under **Security**, click **User Profiles** as shown below.

The User Profiles window opens with a table listing all the user profiles available in the system.



3. From the list of user profiles, select the user profile which needs to delete.

4. Click **Delete**.

Note: If at least one user exists in the user profile, the Delete button is disabled.

12.3.7 Activate a User Profile

To activate a user profile, perform the following steps.

1. Login to Workforce Engagement Management.
2. Go to Main Menu and click on **Administration** and under **Security**, click **User Profiles** as shown below.

The User Profiles window opens with a table listing all the user profiles available in the system.

USER PROFILES

Drag a column header and drop it here to group by that column	
Name	Description
Admin Profile	Admin Profile
Default Profile	Default Profile
Mentor Profile	

3. From the list of user profiles, select the user profile which needs to activate.
4. Click **Activate**.

12.3.8 Deactivate a User Profile

To deactivate a user profile, perform the following steps.

Note: If even one user exists in the user profile, you cannot deactivate the user profile.

1. Login to Workforce Engagement Management.
2. Go to Main Menu and click on **Administration** and under **Administration**, click **User Profiles** as shown below.

The User Profiles window opens with a table listing all the user profiles available in the system.

USER PROFILES

Drag a column header and drop it here to group by that column	
Name	Description
Admin Profile	Admin Profile
Default Profile	Default Profile
Mentor Profile	

3. From the list of user profiles, select the user profile that you want to deactivate.
4. Click **Deactivate**.

If even one user exists in the user profile, the Deactivate button is disabled.

12.4 Users

User Management is a feature from the Aspect Quality component of Workforce Engagement Management that an Administrator uses to add a user, activate and deactivate a user, and so on.

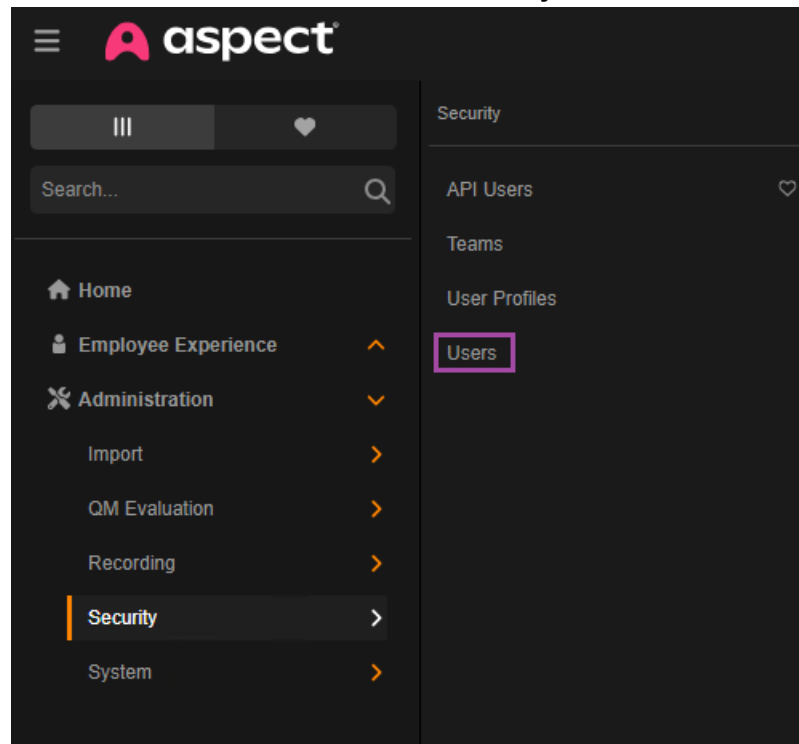
This chapter describes the below features about Users.

- [Listing Users on page 12-738](#)
- [Creating Users on page 12-743](#)
- [Editing User on page 12-755](#)
- [Filtering Users on page 12-758](#)
- [Activate and Deactivate Users on page 12-762](#)
- [Monitoring Permissions on page 12-763](#)
- [Team Information on page 12-765](#)

12.4.1 Listing Users

Users navigation menu is displayed under “Administration” section.

1. Go to main menu and select **Administration > Security > Users**.



2. The **Users** screen which will list all the active users in the system by default as shown below.

USERS



Include Inactive Users: No

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

First Name	Last Name	User Name	Switch	Role	Email Add...	User Profile ...	Active	Monitoring				
								Audio	Screen	Chat	Login	LDAP/AD Syn...
diaguser1	diaguser1	diaguser1	Diag6	Agent		Default Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
diaguser1	diaguser1	diaguser1	Diag2	Agent		Default Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
diaguser1	diaguser1	diaguser1	Diag3	Agent		Default Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
diaguser1	diaguser1	diaguser1	Diag5	Agent		Default Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
diaguser1	diaguser1	diaguser1	Diag	Agent		Default Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
diaguser1	diaguser1	diaguser1	Diag4	Agent		Default Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
diaguser10	diaguser10	diaguser10	Diag4	Agent		Default Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
diaguser10	diaguser10	diaguser10	Diag	Agent		Default Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
diaguser10	diaguser10	diaguser10	Diag6	Agent		Default Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
diaguser10	diaguser10	diaguser10	Diag2	Agent		Default Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
diaguser10	diaguser10	diaguser10	Diag3	Agent		Default Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	

The header bar icons function as follows:

Icons	Description
Refresh	Refreshes the users grid with latest user changes. Instead of user click on the browser refresh button user can click on this which will refresh only the grid data and not the page
Filter	Allows to <ul style="list-style-type: none"> Filter users by team User status (active and inactive)
Add	Creates a new user
Edit	Updates the details of existing user
Information	Provides the team information of the selected user
Activate	Allows to activate more than one user who are in inactive state
Deactivate	Allows to deactivate more than one user who are in active state
Monitoring Permissions	Change the monitoring permissions (audio and screen) for more than one user

Users grid contains information as mentioned in the below table.


Users Grid Attributes Details:

Column Name	Description	Default Column	Optional Column
First Name	Displays first name of the user	✓	
Last Name	Displays last name of the user	✓	
User Name	Displays user name of the user	✓	
Switch	<ul style="list-style-type: none"> Switch name to which the user is associated. If the user is not associated with any switch, then "None" will be displayed 	✓	
Switch Type	<ul style="list-style-type: none"> Type of the switch the user is associated.E.g., Unified IP, Avaya If the user is not associated with any switch, then "None" will be displayed 		✓

Users Grid Attributes Details:

Column Name	Description	Default Column	Optional Column
Role	Displays Role of the user from the below list <ul style="list-style-type: none"> • None • Agent • Mentor • Administrator • Silent Monitor • IVR 	✓	
Windows Logon Name	<ul style="list-style-type: none"> • If windows account is available for the user, then displays the windows logon domain and user name in below format <domain/username> • If windows account is not available, then blank will be displayed. 	✓	
Email Address	<ul style="list-style-type: none"> • Displays Email address of the user • If email address does not exist, then blank will be displayed 	✓	
User Profile Name	<ul style="list-style-type: none"> • Displays Profile name for which the user is associated. • For user with Role “Silent Monitor” and “IVR” blank will be displayed as the users will not be assigned to any profile. 	✓	
Agent Position	Displays Position ID of the user		✓
Active	Indicates the user is active or inactive <ul style="list-style-type: none"> • Checked (✓) - user is active • Unchecked () - user is inactive 	✓	
Synced	Indicates the user is synced from Switch OR created from other source like (WEM UI, Importer, and so on.) <ul style="list-style-type: none"> • Checked (✓) – Synced User from ACD • Unchecked () – Non-Synced User 	✓	

Users Grid Attributes Details:

Column Name	Description	Default Column	Optional Column
Monitoring <ul style="list-style-type: none"> • Audio • Screen • Chat • Login 	Indicates what monitoring permissions available for the user <ul style="list-style-type: none"> • If audio monitoring is available for the user a tick mark will be displayed under “Audio” column • If screen monitoring is available for the user a tick mark will be displayed under “Screen” column • If chat monitoring is available for the user a tick mark will be displayed under “Chat” column • If the user is allowed to log in, a check mark will be displayed under the “Login” column 	✓	
LDAP/AD Synced	Indicates the user having LDAP/AD synced account <ul style="list-style-type: none"> • Checked (✓) – LDAP/AD account is synced • Unchecked () – LDAP/AD account is not synced • Info Icon  - Duplicate LDAP User account found for the same user. If an icon like this is found the Administrator must Edit the user and choose the right LDAP User account (Refer Editing a user section for more details) 	✓	

Note:

- Displays all the active users available in the system.
- Users associated with inactive switch will not be displayed.
- Grid will be sorted on Last Name by default.
The grid is customizable till the user signs out from the WEM or reset the grid layout.
- Per page 100 users will be displayed.
- Use the filter option of each column (available top of the column) based on the requirements.

12.4.2 Creating Users

Create user will add a new non-synced ACD user into the Users list page and by default it will be in active state. To add a new user, follow the steps below.

1. Click on **Add** button to add a new user.

2. Add User dialog will be displayed as shown in below **Add User** screen.

Add Users Attribute Details:

Field Name	Description
User Name (Mandatory and unique)	<ul style="list-style-type: none"> • Provide username • Username is mandatory to create a user and it should be unique within the switch (If you are associating this user to a switch else the user name should be unique within the list of users who are not associated with any switch).
First Name	<ul style="list-style-type: none"> • Provide the user's first name • This is an optional field.
Last Name	<ul style="list-style-type: none"> • Provide the user's last name • This is a mandatory field.
Switch	<ul style="list-style-type: none"> • Select switch for which the user should be associated • All the active switches available in the system will be displayed in the Switch drop-down list • By default, None will be selected as switch option. Select None when the user is not associated with any switch.


Add Users Attribute Details:

Field Name	Description
LDAP/AD Sync	<ul style="list-style-type: none"> LDAP/AD Sync button will be enabled if the selected switch is configured with LDAP/AD server. The LDAP/AD Sync will be enabled when None is selected in the Switch drop-down list and the LDAP/AD server is configured in the system. Clicking on this button will sync the LDAP/AD account for the user based on the first name and last name entered. e.g., enter user first name as “Joe” and last name as “Fernald” and the same user will be existing in the LDAP/AD server configured, then the LDAP/AD account for the user will be synced. Below details will be synced from LDAP/AD based on the configuration of the LDAP/AD in Workforce Engagement Management UI: <ul style="list-style-type: none"> Windows Logon User Name Windows Logon Domain Email Address
Windows Logon User Name	<ul style="list-style-type: none"> This is a drop-down list and textbox. User can enter the “Windows Logon User Name” or Select the logon name synced from the LDAP/AD. <ul style="list-style-type: none"> If you don’t want to click on the Sync button to connect to the LDAP/AD and sync the data and if you are sure what the windows logon account and domain then you can enter it and either if you are not sure or you want to sync that from LDAP/AD instead of typing you can Click on the SYNC LDAP button and pick the value from the drop-down list. After the LDAP/AD account is synced, the logon name for the user will be displayed in “Windows Logon User Name” drop-down list. User can select the name as shown in the below screen shot. <div data-bbox="846 1241 1206 1392" style="text-align: center; border: 1px solid #ccc; padding: 5px; margin: 10px 0;"> <p>Windows Logon User Name:</p> <div style="border: 1px solid #add8e6; padding: 2px; display: inline-block;">Type or select from list ▼</div> <div style="border: 1px solid #add8e6; padding: 2px; display: inline-block; margin-top: 2px;">2255</div> </div> All the logon accounts will be displayed in the drop-down list when more than one logon are available for same user in the LDAP/AD. The user will select the account which need to be synced. If the user wants to provide an account details without syncing from LDAP/AD, then user can enter the user name. <p>Note:</p> <ul style="list-style-type: none"> Windows Logon User Name must be configured for a user to log in for WEM (If WEM is deployed in Premise or if its hosted in Rackspace) When “Windows Logon User Name” is entered/synced for a user, then “Windows Logon Domain” must be provided and vice-versa. Both the fields are dependent.

Add Users Attribute Details:

Field Name	Description
Windows Logon Domain	<ul style="list-style-type: none"> Domain synced from the LDAP for the user. After LDAP/AD sync the domain name will be displayed as shown in the below screenshot. <div data-bbox="808 390 1243 520" style="border: 1px solid #ccc; padding: 5px; margin: 10px auto; width: fit-content;"> <p>Windows Logon Domain:</p> <input type="text" value="ord2012"/> </div> <ul style="list-style-type: none"> User can also enter the domain manually. <p>Note: Windows Logon Domain must be configured for a user to log in for WEM (If WEM is deployed in Premise or if its hosted in Rackspace).</p>
Email Address	<ul style="list-style-type: none"> Provide the valid email address for the user. Email Address can also be synced from the LDAP. Email Address should be in format of <text@a.com> <p>Note: To sync email address from LDAP “Sync emails” should be configured when creating LDAP server from Workforce Engagement Management UI.</p> <p>Note: Some SMTP Servers support case-sensitive email addresses. (Example: John.Smith@company.com and john.smith@company.com are different email addresses for case-sensitive SMTP Servers). If entering manually, verify the letter case is correct.</p>
Role	<ul style="list-style-type: none"> Select the role for the user Below roles will be displayed in the Role dropdown list <ul style="list-style-type: none"> None Agent Mentor Administrator Silent Monitor IVR By default, “None” will be selected. Refer Section C to view the changes for adding a user with different roles.
Agent Position ID	<ul style="list-style-type: none"> Enter the position ID for the user. Enabled only for the users with role IVR. For all other user roles, it will be read-only field. Agent Position ID can also be synced from switch.
User Profile	<ul style="list-style-type: none"> Select a user profile for which the user should be assigned. By default, the user profile will be blank. Saving the user without selecting any user profile will assign the user to “Default Profile”. For users with “Administrator” role the “Admin Profile” will be displayed by default. To select a user profile, follow the steps provided in Section A

Add Users Attribute Details:

Field Name	Description
Legacy Password	<ul style="list-style-type: none"> Provide the password for the user to log in to Workforce Engagement Management UI. As the name specifies this password will be helpful only when the user wants to log in to Classic UI (Legacy application).
Monitoring Capabilities	<ul style="list-style-type: none"> Set “Audio Monitoring”, “Screen Monitoring”, “Chat Monitoring”, and Login for the user. <ul style="list-style-type: none"> Audio Monitoring, Screen Monitoring and Chat Monitoring – ON – audio, screen and chat can be recorded for the user. Audio Monitoring, Screen Monitoring and Chat Monitoring – OFF – audio, screen and chat can cannot be recorded for the user. Login ON – login is enabled for the user for a particular site. Login OFF -- login is disabled for the user for a particular site
Teams	<ul style="list-style-type: none"> Select a team for which the user should be member of. If a switch is selected Select button will be enabled. <ul style="list-style-type: none"> Only if a user is associated to switch, team can be assigned. User can be assigned to a team or not as its optional. If you don’t want the user should not be assigned to any team, then do not select any team. To assign a user for team, follow the steps provided in Section B. <p>Note:</p> <ul style="list-style-type: none"> Teams which are not synced from switch will be displayed. The information about which teams will be displayed will be provided in the Information popover when the user clicks on the Info () icon.

Note: Maximum characters allowed for the text fields are as mentioned in the below table.

Character limitation in Add User dialog

Text Field Name	Maximum Characters Allowed
User Name	256
First Name	64
Last Name	64
Windows Logon User Name	50
Windows Logon Domain	50
Email Address	256
Agent Position ID	10
Password	64

- After entering data in all the fields (refer the below screen shot), click on OK button to save the user.

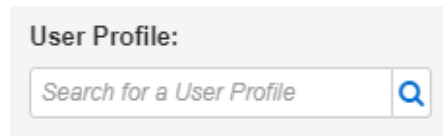
- The User is added to the grid as shown in the below screenshots.

First Name	Last Name	User Name	Switch	Role	Email Add...	User Profile ...	Active	Monitoring				LDAP/AD Syn...
								Audio	Screen	Chat	Login	
Agent	One	Agent1	UIP Switch	Agent	agent1@ord2022...	Default Profile	☑	☑	☑	☑	☑	☑

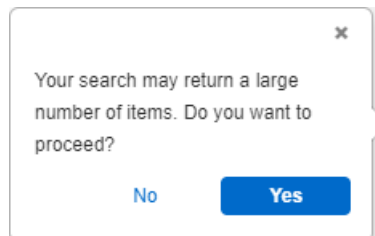
12.4.3 Select a User Profile

Follow the steps below to select a user from the directory.

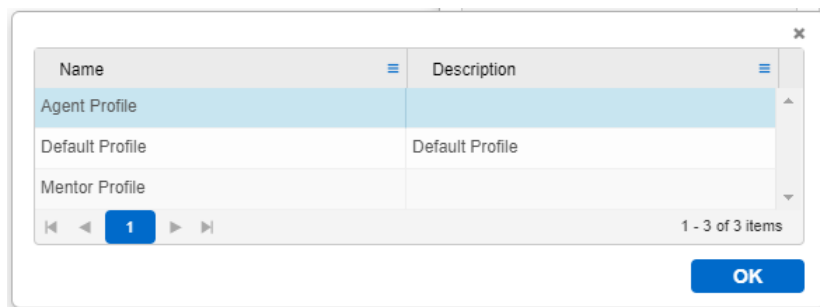
1. Click on the **Users Profile** text box then type a **Users Profile** name or without typing any text, click on the **Search** button.



Note: The below screen shot pops up when the User Profile text box field is empty or without any text.



2. Click on **Yes** button to view all the active user profiles except the *Admin Profile* available in the system or **No** button to cancel the search.
3. Select the User Profile and click on OK button or double click on the User Profile row. Refer the below screenshot.



Note: Select only one profile for a user.

4. Selected user profile will be displayed in the **User Profile** text box as shown in the below screenshot.



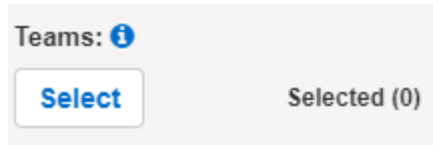
Note:

- All the profiles matching the search text entered will be listed.
- In case only one profile exists with the entered text, then the profile will get added directly to the User Profile text box.
- To remove or re-assign the user profile selected, click on **x** button on the **User Profile** text box.

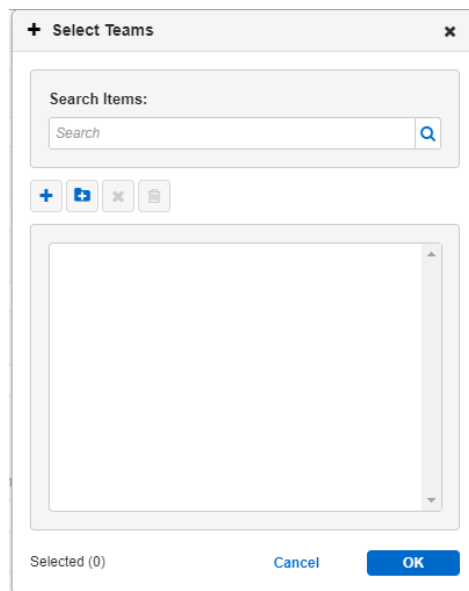
12.4.4 Select one or more Teams

To select one or more teams follow the steps below.

1. Select a switch.
2. Click on **Select** button for Teams. Refer the below screen shot.

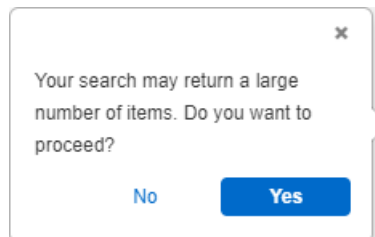


3. **Select Teams** dialog will be displayed as shown in the below screenshot.



4. Click on the **Search Items** text box then type any text or without typing any text, click on the **Search** button.

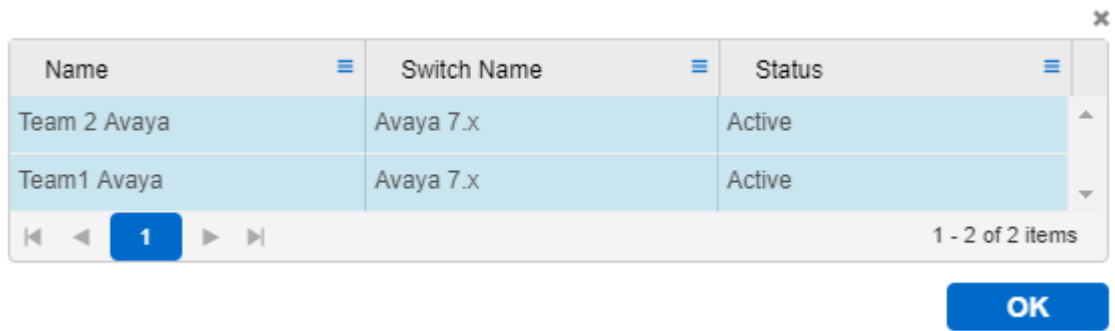
Note: The below screenshot pops up when the Search Items text box field is empty or without any text.



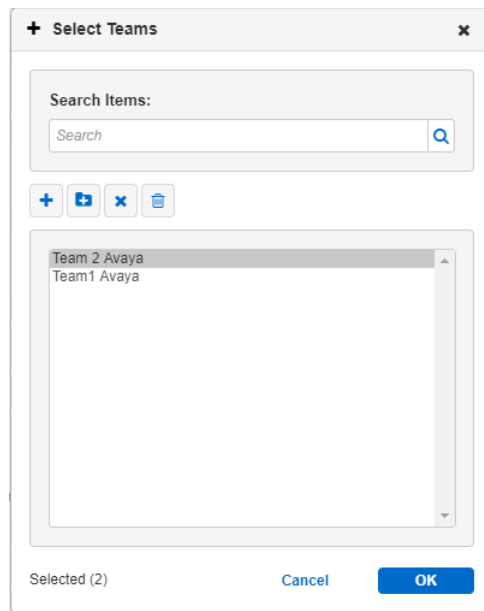
5. Click on **Yes** button to view all the active non-synced teams for the selected switch or **No** button to cancel the search.

6. Select one or more teams and click on OK button.

Note: To select multiple teams, use the CTRL key and left key on the mouse.



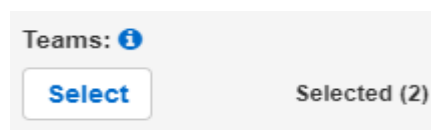
7. Selected teams will be displayed in the search list box. Refer the screen shot below.



Note:

- Teams can be searched by clicking on button (adds one or more selected teams)
- Click on button to add all the teams to the search list.
- Click on button to remove selected teams.
- Click on to remove all the selected teams.

8. Click on OK button. Selected teams count will be displayed as shown in the below screen shot.



12.4.5 Saving a User with Different User Roles

Based on the user role selected, the input to be provided for the user will differ.

Note: Mandatory fields are marked with red asterisk on the screen shots.

1. Role: None/Agent/Mentor

- When **None/Agent/Mentor** role is selected, below data will not be applicable. Hence, those fields will be disabled.
- Agent Position ID

The screenshot shows the 'Add User' dialog box with the following fields and options:

- User Information:**
 - User Name: * (text input)
 - First Name: (text input)
 - Last Name: * (text input)
 - Switch: (dropdown menu, currently set to 'None')
 - LDAP/AD Sync: (checkbox)
 - Windows Logon User Name: (text input with dropdown)
 - Windows Logon Domain: (text input)
- Email and Role:**
 - Email Address: (text input)
 - Role: (dropdown menu, currently set to 'Agent')
 - Agent Position ID: (disabled text input)
 - Legacy Password: (text input)
- Monitoring Capabilities:**
 - Audio Monitoring: (disabled toggle)
 - Screen Monitoring: (disabled toggle)
 - Chat Monitoring: (disabled toggle)
 - Login: (disabled toggle)
 - Associated Teams: (dropdown menu with 'Select' button)
 - User Profile: (search input with magnifying glass icon)

Buttons at the bottom right: Cancel, OK

2. Role: Administrator

- When **Administrator** role is selected, below data will not be applicable. Hence, those fields will be disabled.
 - Agent Position ID
 - Teams
 - User Profile
- User with **Administrator** role will be assigned to Admin Profile by default.

The 'Add User' dialog box is divided into three columns:

- Column 1 (Left):**
 - User Name: * (Text input)
 - First Name: (Text input)
 - Last Name: * (Text input)
 - Switch: (Dropdown menu, currently 'None')
 - LDAP/AD Sync (Toggle button)
 - Windows Logon User Name: (Text input with dropdown)
 - Windows Logon Domain: (Text input)
- Column 2 (Middle):**
 - Email Address: (Text input)
 - Role: (Dropdown menu, currently 'Administrator')
 - Agent Position ID: (Text input)
 - Legacy Password: (Text input)
- Column 3 (Right):**
 - Monitoring Capabilities:
 - Audio Monitoring (Toggle)
 - Screen Monitoring (Toggle)
 - Chat Monitoring (Toggle)
 - Login (Toggle)
 - Associated Teams: ⓘ (Text input with 'Select' button)
 - User Profile: (Text input with search icon, currently 'Admin Profile')

Buttons: Cancel, OK


3. Role: Silent Monitor

- When the **Silent Monitor** role is selected, the data below will not be applicable and these fields will be disabled.
 - Agent Position ID
 - Teams
 - User Profile
 - Monitoring Capabilities – Audio Monitoring, Screen Monitoring and Chat Monitoring

4. Role: IVR

- When the **IVR** role is selected, the following fields are not applicable and are disabled:
 - LDAP/AD Sync – Windows Logon User Name and Windows Logon Domain
 - Email Address
 - Teams
 - User Profile
 - Monitoring Capabilities – Screen Monitoring
 - Legacy Password
- Switch and Agent Position ID are mandatory fields for an IVR user and are marked with a red asterisk.

12.4.6 Editing User

- Edit button will be enabled when one user is selected in the users grid.
- Click on  button to update the user details.

12.4.6.1 Edit ACD Synced User

Follow the steps below to edit an ACD synced user.

1. Select a synced user from the users' grid and click on **Edit** button.
2. **Edit User** dialog displays as shown in the below screen shot.

Note:

- The fields below do not allow updates for a synced user. The fields will be displayed in read only mode:
 - User Name
 - First Name
 - Last Name
 - Switch
- All other fields can be updated.
- The Selected user count will not be displayed when the user is assigned to a synced team.

3. Click OK.

12.4.6.2 Edit ACD Non-Synced User

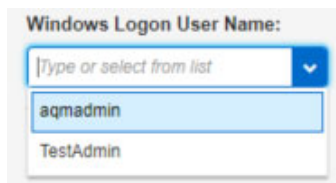
Follow the steps below to edit an ACD non-synced user.

1. Select a non-synced user from the users' grid and click on **Edit** button.

2. **Edit User** dialog displays as shown in the below screen shot.

Note:

- All the fields are enabled. Any field can be updated and the updated fields saved for the chosen user.
 - For information on each field, refer to the [Table \(Add Users Attribute Details\)](#). When editing the data for each field, all the information mentioned in the table will be applicable.
 - If a Password is provided for the user regardless of the characters entered for the password, 6 bullets will be displayed to indicate that the user was saved with a password.
 - Editing the Last Name, First Name or the Switch for the LDAP/AD synced user will reset the “Windows Logon User Name” and “Windows Logon Domain”. This allows a sync of the data based on the latest modifications.
 - Under Monitoring Capabilities, use the Login toggle to indicate whether the user is enabled for login (ON) or disabled for login (OFF).
3. When a duplicate icon is found for the LDAP/AD sync, select the correct LDAP/AD account for the user and save the LDAP/AD account for the user as shown below.



Note: When editing a user, both active and inactive teams will be displayed for the user.

4. Click on OK to save the updated details and displays in the users grid.

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

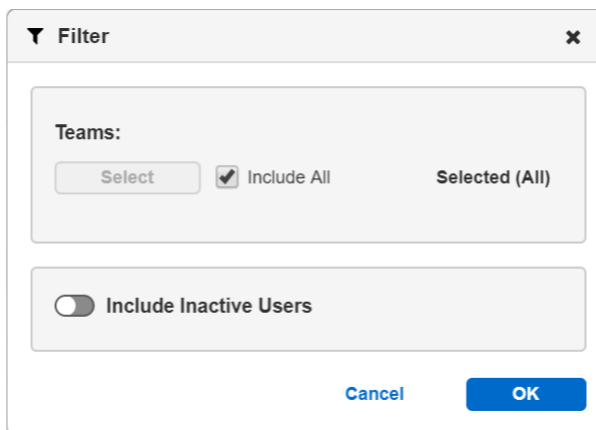
First Name	Last Name	User Name	Switch	Role	Windows Logon Name	Email Address	User Profile Na...	Synced	Active	Monitoring			
										Audio	Screen	Chat	LDAP/AD Sy...
wfoaqm2	user2	wfoaqm2	UIP73Enhanced	Mentor	wfo/bq		Mentor Profile		<input type="checkbox"/>				<input type="checkbox"/>

Note: Users Created and Updated will be audited in Audit Activity Detail Report.

12.4.7 Filtering Users

Follow the steps below to filter users.

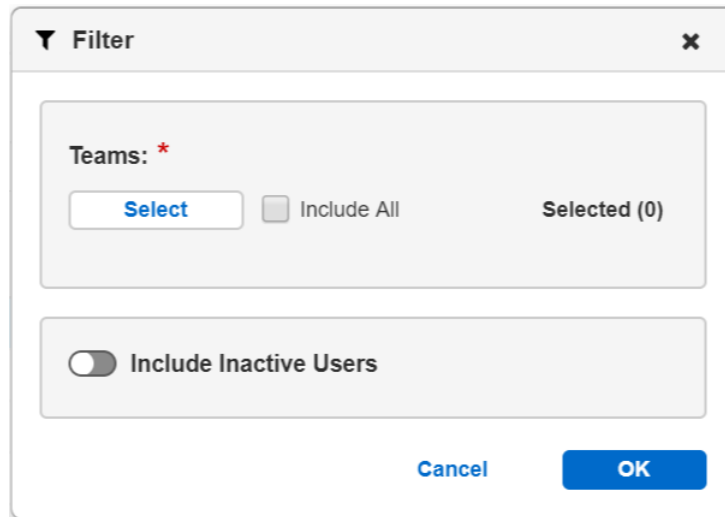
1. Click on Filter button to filter users by
 - Active or inactive users
 - Teams
2. Filter dialogue will be displayed as shown in below screen shot.



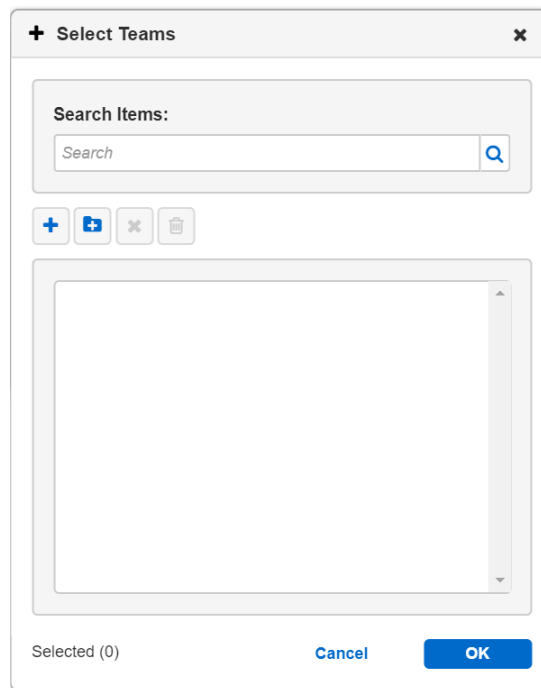
12.4.7.1 Filtering by Team

1. By default, Include All will be flagged. Select (All) will be displayed which indicates all the teams present in the system will be selected.

2. Select button will get enabled when Include All is un-flagged as shown in below screen shots.



3. Click on **Select** button and **Select Teams** Dialogue appears as shown in the below screen shot.



- Click on **Add** button and displays all active teams present in system.

Name	Switch Name	Status
Team1 Avaya	Avaya 7.x	Active
AQMDev_Team1	Cisco UCCX	Active
AQMQA_HPXTeam1	Cisco UCCX	Active
AQMQA_Team1	Cisco UCCX	Active
Default	Cisco UCCX	Active
Development	Cisco UCCX	Active
QualityControl	Cisco UCCX	Active
Team_Demo	Cisco UCCX	Active
No Team	None	Active
Team testh	Test switch1	Active
<Default>	UIP 6.7	Active
<Expert>	UIP 6.7	Active
baseAgentWorgroup1	UIP 6.7	Active
for CQ	UIP 6.7	Active

1 - 29 of 29 items

OK

- Select one or more teams and click on **OK** button. The total number of teams appear as shown in the below screen shot.

Filter

Teams: *

Select Include All Selected (2)

Include Inactive Users

Cancel OK

- Click on **OK** button and all the active users associated with the selected team(s) will be displayed in the Users Grid as shown below.

USERS

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

First Name	Last Name	User Name	Switch	Role	Windows Logon Name	Email Address	User Profile Name	Synced	Active	Monitoring	Audio
Agent20	QA_UCCX	Agent20	Cisco UCCX	Agent			Default Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Agent21	QA_UCCX	Agent21	Cisco UCCX	Agent			Default Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Agent22	QA_UCCX	Agent22	Cisco UCCX	Agent			Default Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Agent23	QA_UCCX	Agent23	Cisco UCCX	Mentor			Default Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Agent24	QA_UCCX	Agent24	Cisco UCCX	Agent			Default Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Agent25	QA_UCCX	Agent25	Cisco UCCX	Agent			Default Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Note: Refer [Team Information on page 12-765](#) to view the team information of the users displayed in the grid,

12.4.7.2 Filtering to include Inactive Users

- Include Inactive Users will be un-flagged which indicates all the active users present in the system only will be displayed by default.

The image shows a 'Filter' dialog box with a close button (X) in the top right corner. Inside the dialog, there is a 'Teams:' section with a 'Select' button, a checked checkbox for 'Include All', and the text 'Selected (All)'. Below this is a section with a toggle switch for 'Include Inactive Users', which is currently turned off (grey). At the bottom of the dialog are 'Cancel' and 'OK' buttons.

- Flag Include Inactive Users and click on OK button in below Filter screen shot.

The image shows the same 'Filter' dialog box as above, but the 'Include Inactive Users' toggle switch is now turned on (green with a checkmark). The 'Cancel' and 'OK' buttons remain at the bottom.

- All the active and inactive users based on the selected Teams will be displayed in Users Grid as shown in below screen shot.

USERS

Include Inactive Users: Yes

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



First Na...	Last Na...	User Name	Switch	Role	Windows Logon ...	Email Address	User Profi...	Synced	Active	Monitoring		
										Au...	Sc...	LDAP/...
	Support6030	6030	Avaya 7.x	Agent			Default Profile	<input checked="" type="checkbox"/>				
Support6030	Support6030	6030	Avaya 7.x	Agent			Default Profile	<input checked="" type="checkbox"/>				
	Support6029	6029	Avaya 7.x	Agent			Default Profile	<input checked="" type="checkbox"/>				
Support6029	Support6029	6029	Avaya 7.x	Agent			Default Profile	<input checked="" type="checkbox"/>				
	Support6028	6028	Avaya 7.x	Agent			Default Profile	<input checked="" type="checkbox"/>				
Support6028	Support6028	6028	Avaya 7.x	Agent			Default Profile	<input checked="" type="checkbox"/>				
	Support6027	6027	Avaya 7.x	Agent			Default Profile	<input checked="" type="checkbox"/>				
Support6027	Support6027	6027	Avaya 7.x	Agent			Default Profile	<input checked="" type="checkbox"/>				
	Support6026	6026	Avaya 7.x	Agent			Default Profile	<input checked="" type="checkbox"/>				
Support6026	Support6026	6026	Avaya 7.x	Agent			Default Profile	<input checked="" type="checkbox"/>				
SIP 4003	SIP 4003	4003	Avaya 7.x	Agent			Default Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
SIP 4003	SIP 4003	4003	Avaya 7.x	Agent			Default Profile	<input checked="" type="checkbox"/>				
SIP 4002	SIP 4002	4002	Avaya 7.x	Agent			Default Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
SIP 4002	SIP 4002	4002	Avaya 7.x	Agent			Default Profile	<input checked="" type="checkbox"/>				

1 - 100 of 8252 items

Note: Include Inactive Users label appears top right corner on the Users page.

- When **Include Inactive Users** is flagged in Filter dialogue, then “Yes” will appear in Users page which indicates inactive users included
- When **Include Inactive Users** is Un-flagged in Filter dialogue, then “No” will appear in Users page which indicates inactive users excluded.

12.4.8 Activate and Deactivate Users

The user is allowed to activate or deactivate one or more users from the users list page by clicking **Activate**  and **Deactivate**  button.

- Activate** and **Deactivate** button will disable when only one synced user is selected in the Users Grid because system does not allow a ACD Synced user to be deactivated.
- Activate button will be enabled when one deactivated non-ACD synced user is selected in the Users Grid.

Note:

- Click on **Activate** button to activate the selected non-ACD synced user’s status to active.
- Check mark will be displayed under **Active** column for corresponding user as shown in the below screen shot.

USERS

Include Inactive Users: Yes

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

First Name	Last Name	User Name	Switch	Role	Windows Logon Name	Email Address	User Profile Na...	Synced	Active	Monitoring		
										Audio	Screen	LDAP/AD S...
shagya	shree	user1	Cisco UCCX	Agent			Default Profile		<input checked="" type="checkbox"/>			

- Deactivate button will be enabled when one active non-ACD synced user is selected in the Users grid.

Note:

- Click on **Deactivate** button to deactivate the selected non-ACD synced user status to inactive.
- Check mark will not be displayed a under **Active** column for corresponding user as shown in below screen shot.

USERS

Include Inactive Users: Yes

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

First Name	Last Name	User Name	Switch	Role	Windows Logon Name	Email Address	User Profile Na...	Synced	Active	Monitoring	Audio	Screen	LDAP/AD S...
bhagya	shree	user1	Cisco UCXC	Agent			Default Profile		<input type="checkbox"/>				

4. **Activate** and **Deactivate** button will be enabled when more than one ACD synced or non-ACD synced user is selected in the Users grid regardless of the user is in active or inactive state.

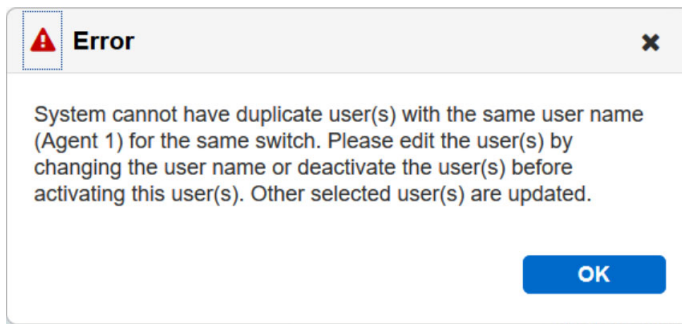
Note:

- Click on **Activate** button will update the user’s status to active for only inactive non-synced user.
- Click on **Deactivate** button will update the user’s status to Inactive for only active non-synced user.
- Click on **Activate** or **Deactivate** button for selected Synced users, the status will not update to active or inactive.

5. **Activate** and **Deactivate** both the buttons will be enabled when combination of synced and non-synced users are selected.

Note: Only non-synced users status will be get updated based on users active or inactive status.

6. Selecting two or more users with the same user name with different active status and clicking on **Activate** button will display error message as shown in below screen.



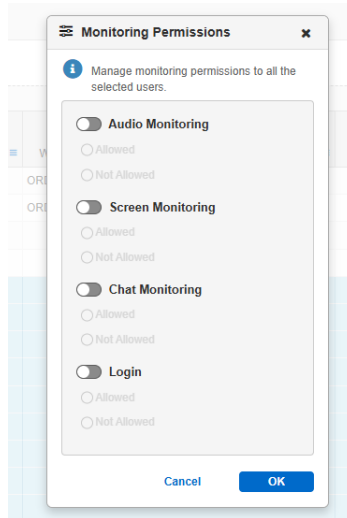
Note: Updated user status will be audited in Audit Activity.

12.4.9 Monitoring Permissions


You can click on the **Monitoring Permissions**  button to update Audio, Screen, Chat Monitoring, and Login status.

1. **Monitoring permissions** allows to update Audio, Screen, and Chat monitoring for multiple users as well as enabling and disabling logins for those selected users.


- Click on the **Monitoring Permissions**  button and the **Monitoring Permissions** dialogue appears as shown below.



Note:

- By default, **Audio Monitoring**, **Screen Monitoring**, **Chat Monitoring** and **Login** toggle buttons are in the OFF state.
 - Clicking on the OK button in Monitoring Permissions dialogue, will not update any changes to selected users.
3. Toggling to ON for Audio Monitoring, Screen Monitoring, Chat Monitoring, and Login enables these settings and sets the choice to **Allowed** by default.
 4. Clicking the **OK** button in the Monitoring Permissions dialogue displays a check mark  under the Audio, Screen, Chat and/or Login columns as shown below.

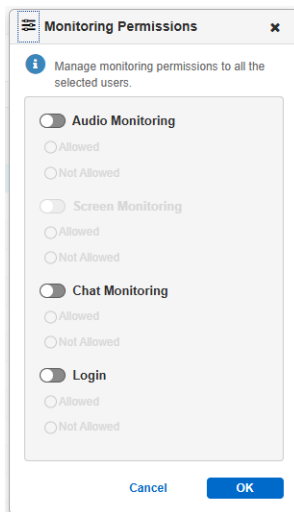
First Name	Last Name	User Name	Switch	Role	Windows Logon Name	Email Address	User Profile Name	Synced	Active	Monitoring				LDAP/AD Synced
										Audio	Screen	Chat	Login	
Agent	One	Agent1	UIP Switch	Agent	ORD2022Agent1	agent1@ord2022.com	Default Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

5. If any Monitoring Permissions are set to **Not Allowed**, check marks  for the selected users in the Users grid under the Audio, Screen, Chat, and/or Login columns will not be displayed as shown below.

First Name	Last Name	User Name	Switch	Role	Windows Logon Name	Email Address	User Profile Name	Synced	Active	Monitoring				LDAP/AD Synced
										Audio	Screen	Chat	Login	
Agent	One	Agent1	UIP Switch	Agent	ORD2022Agent1	agent1@ord2022.com	Default Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

6. The Monitoring Permissions button will be disabled when the **Silent Monitoring** role user is selected in the user's grid.


- When selecting a user defined with the IVR user role, the Monitoring Permissions option is disabled. The Audio Monitoring, Chat Monitoring, and Login options are available for modification.

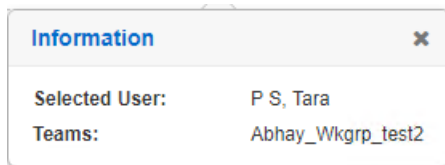


Note: After updating monitoring permissions, only permissions changed for the user will be updated in Audit Activity.

12.4.10 Team Information

Information button will be enabled when only one user is selected in users' grid.

- Select a user and click on Information  button. A pop-up appears as shown in the below screen shot.

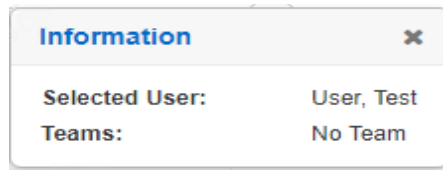


Note:

- All the teams will be displayed when the user is assigned to multiple teams as shown in the below screen shot.



- **No Team** will be displayed as team name when the user is not assigned to any team.



Note:

- If a user is assigned to an inactive team, then team name with (Inactive) suffix will be displayed.
- If a user is selected as Administrator, IVR and Silent Monitor then N/A will be displayed for Teams as they cannot be member of any team.

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-driven WEM software designed to foster work-life balance while maximizing ROI for businesses. For more details, visit www.aspect.com

