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# Genesys Recording, Quality Management, and Speech Analytics User's Guide

[Available report templates](#)

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- Administrator

Use this page to learn about all the report templates that are available for the SpeechMiner UI. Reports allow you to drill down within the report to view additional details about any graphic component (for example, graph bars, line or table headers), by simply clicking the component.

### Related documentation:

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The following templates for SpeechMiner UI reports are available. For ease of reference, this page presents the report templates in alphabetical order. See the Report templates page for lists of the same report templates grouped by area of focus (Recording, Quality Management, or Speech Analytics).

- Agent Bubble Chart
- Agent Comparison
- Agent Evaluation Comparison
- Agent Trend
- Auto Fail
- Calibration Score
- Category Bubble Chart
- Category Distribution
- Category Trend
- Evaluation Summary
- Evaluator Evaluation Comparison
- Interaction Evaluation Summary
- Interactions
- Metadata Frequency
- Performance Profile
- Team Comparison
- Team Evaluation Comparison
- Top and Bottom Performers
- Usage Tracking

## Agent Bubble Chart

The Agent Bubble Chart report compares agents and/or work groups by plotting them on a graph according to the percentage of interactions in the horizontal (x-axis) and vertical (y-axis) Categories. Each Agent is represented on the graph by a bubble. The size of each bubble represents the average interaction duration. The X-Axis Only and Y-Axis Only versions present the data as a histogram indicating percentage of interactions per agent and/or work group, rather than a bubble chart.

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## Common usages

- Plot Agents showing average interaction duration plus two customer-experience categories (for example, Dissatisfaction and Escalation)
- Plot Agents showing average interaction duration plus two agent-efficiency categories (for example, Transfer Rate and Hold Rate)
- Plot Agents showing average interaction duration plus two categories that represent metadata (for example, Customer Satisfaction and Issue Resolution)

## Customizing the report

### General Settings:

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

### Items on Report:


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

### Important

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

For additional information, see Report parameters.

## Actions

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

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## Agent Comparison

The Agent Comparison report consists of a bar graph comparing Agents' performance against each other, as well as against the average value of all the agents that are represented. The numbers in the table and graph represent an interaction count.

## Common usages

- Plot agent performance statistics to see who performs above and below the benchmark (the average of

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a group is determined by the filter selections).

- Drill down on specific agents to play their interactions and find examples about effective agent behavior or areas that need improvement.
- Utilize the data obtained from the report to identify training needs for effective agent evaluations.

## Customizing the report

### General Settings:

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

For additional information, see Report parameters.

### Actions

- Click a bar in the graph or an item in a table to open a list of interactions included in the specific item.
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## Agent Evaluation Comparison

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

### Common usages

Used to compare agent evaluation scores.

### Customizing the report

#### General Settings:

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

### Important

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

- **Agents** - Enables you to select the agents that should be analyzed in the report.
- **Show Form** - Enables you to view the complete form(s) associated with the specific report. To view the form you must select an agent.

For additional information, see Report parameters.

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## Actions

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

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## Agent Trend

The Agent Trend report is a line graph that displays agent performance in relation to one or more selected categories over time. The numbers in the table and graph represent an interaction count.

### Common usages

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

### Customizing the report

#### General Settings:

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

For additional information, see Report parameters.

## Actions

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

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## Auto Fail

The Auto Fail report provides a summary of all the Quality Monitoring evaluation forms that were designated as auto fail for selected evaluations.

### Common usages

Enables you to monitor evaluation with evaluation forms that were designated as auto fail.

### Customizing the report

#### General Settings:

- **Evaluation** - Enables you to select from a list of evaluations that contain forms that were assigned as auto fail.
  - **Form** - Enables you to select from a list of forms that were assigned as auto fail.
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- **Date Range** - Enables you to select the period of time on which to base the report.

## Actions

Click a form name to see a list of all the evaluation session that failed due to the auto fail designation.

From the list that appears, you can click the **Agent Name** to view the specific form that failed.

### Important

If you select a specific form from the **Form** list at the top of the report, you will receive the list of the evaluation sessions that failed for the selected form.

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## Calibration Score

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

### Common usages

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

### Customizing the report

#### General Settings:

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

### Important

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

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

For additional information, see Report parameters.

## Actions

Sort the evaluator names in the Y-axis.

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## Category Bubble Chart

The Category Bubble Chart report compares categories by plotting them on a graph according to the percentage of interactions in the horizontal (x-axis) and vertical (y-axis) categories. Each Bubble category is represented on the graph by a bubble. The size of each bubble represents the average interaction duration.

- The x-axis value indicates the percentage of interactions that were in both the Bubble Category and any of the selected x-axis categories.
- The y-axis value indicates the percentage of interactions that were in both the Bubble Category and any of the selected y-axis categories.
- The X-Axis Only and Y-Axis Only versions present the data as a bar graph indicating percentage of interactions per category, rather than a bubble chart.

### Common usages

- Plot interaction - Categories show the average interaction duration plus two customer-experience categories (for example, Dissatisfaction and Escalation).
- Plot interaction - Categories show the average interaction duration plus two agent-efficiency categories (for example, Transfer Rate and Hold Rate).
- Plot interaction - Categories showing average interaction duration plus two categories that represent metadata (for example, Customer Satisfaction and Issue Resolution).

### Customizing the report

#### General Settings:

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

#### Items on Report:

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

### Important

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

For additional information, see Report parameters.

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## Actions

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

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

### Common usages

- Plot the proportion of interactions in specified categories to analyze business trends and customer issues.
- Compare the distribution of multiple categories (such as, interaction or cancellation reasons, product popularity, or competitor mentions), across your body of interactions.
- Utilize the comparative data obtained from the report to identify the optimal ways to target customer issues.

### Customizing the report

#### General Settings:

- **Version** - Available in Full Report (standard size), Mini, Wide, Columns, and Summary versions. Full Report, Mini, Wide are bar graphs that list the selected categories and showing their proportion in the data set.
- **Columns** - A chart that shows the average interaction duration for each category. These values are displayed above the total number of interactions in the category.
- **Summary (Pie)** - A pie chart indicating the proportion of interactions or resources in the entire data set that are associated with the selected categories. You can select to base the calculations on the number of interactions or on the total resources selected under Distributed By.

#### Items on Report:

- **Distributed By** - Select whether the distribution should be calculated based on percentage of interactions (the total number of interactions) or percentage of resources (the total duration of all interactions).


For all other parameters, see Report parameters.

## Actions

- In Full, Mini, Wide, or Columns versions, click a category or bar to open a list of interactions in the
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category.

- In the Full version, click **Trend**  to drill down to the category's interaction distribution. If the distribution of the items in the report (see Items on Report above) is the percentage of interactions, the distribution of interactions is presented according to the percentage of interactions. If the distribution is the percentage of resources, the distribution of interactions is presented according to the average interaction duration.
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## Category Trend

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

### Common usages

- Plot the trends in a particular category or multiple categories chronologically.
- Identify peak periods to make informed scheduling and staffing decisions.
- Measure the response to new product releases.
- Evaluate the effectiveness of recent business changes and agent training.

### Customizing the report

#### General Settings:

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

For additional information, see Report parameters.

### Actions

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

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## Evaluation Summary

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

### Common usages

Enables you to monitor evaluator performance.

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## Customizing the report

### General Settings

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

For additional information, see Report parameters.

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## Evaluator Evaluation Comparison

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

### Common usages

Enables you to compare evaluator evaluation scores.

### Customizing the report

#### General Settings

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

#### Important

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

- **Evaluators** - Use to select the specific evaluators to be analyzed and displayed in your report.

For additional settings, see Report parameters.

### Actions

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

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## Interaction Evaluation Summary

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The Interaction Evaluation Summary report shows the evaluation score for the last evaluation session, associated with a specific evaluator and interaction.

### Common usages

Enables you to monitor evaluation session scores for a specific evaluator.

### Customizing the report

#### General Settings

- **Form** - Enables you to select the specific form to be analyzed and displayed in the report.

#### Important

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

- **Interaction ID** - Enables you to select the specific internal interaction ID to be analyzed and displayed in the report.
- **Evaluator** - Use to select the specific evaluator to be analyzed and displayed in your report.

For additional information, see Report parameters.

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## Interactions

The Interactions report provides a list of all interactions that were recorded.

### Common usages

- Validate recorded interactions.

### Customizing the report

#### Items on Report

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

#### Important

The field selected must be within the range selected in the Data Set Filters. If it is not within the range, the report will be empty.

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- **Pattern to Include** - Enter a series of one or more characters that must be found in the field value in order for it to be included in the report (optional; leave the field blank to include all patterns).
  - **Values to Exclude** - Enter one or more field values to exclude from the report. If you enter more than one value, separate the multiple values with commas and do not leave a space after the comma (optional; leave the field blank to include all values).

For additional information, see Report parameters.

## Actions

- Click a row in the table to listen to the selected interaction.
  - Click the metadata summary to see and playback a list of interactions with the same metadata value.
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## Metadata Frequency

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

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

## Common usages

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

## Customizing the report

### General Settings:

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

### Items on Report:

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

The field selected must be within the range selected in the Data Set Filters. If it is not within the range, the report will be empty.

- **Pattern to Include** - Enter a series of one or more characters that must be found in the field value in order for it to be included in the report (optional; leave the field blank to include all patterns).
- **Values to Exclude** - Enter one or more field values to exclude from the report. If you enter more than one value, separate the multiple values with commas and do not leave a space after the comma (optional; leave the field blank to include all values).
- **Minimum Interaction Count** - The minimum number of interactions that must be found for a value, in order for the value to be included in the report.

For additional information, see Report parameters.

### Actions

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

At the bottom of the graph:

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

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## Performance Profile

The Performance Profile report is a bar graph and table that compares work group or agent performance for a specified category or a group of categories to the benchmark (the work group or agent's average). You can choose to analyze performance based on the number of interactions, the percentage of interactions, average interaction duration, or total resources. The table includes data about the number of interactions, the difference from the benchmark, and the percentage above or below the benchmark.

### Common usages

- Visualize and compare agent performance for training and feedback.
- Utilize the data obtained from the report to increase the efficiency of team and operations management.
- Assess the efficacy of training programs by plotting performance before and after the program's implementation.

### Customizing the report

#### General Settings


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

Items on Report:

- **Profile** - Select the agents or work groups you would like to compare to the average (the benchmark) of specific categories. Your selection must match the Benchmark Type, but it does not have to match the work group or agent parameters in the Data Set Filters.
- **Benchmark Type** - Select the type of benchmark to use: Agent or Team (work group). The selection here must correspond with those in the Data Set Filters. If you selected work groups in the Data Set Filters (rather than individual agents in the expanded work groups), you must select Team for the Benchmark Type in order to return results. The Benchmark Type must also match the Profile selected. That is, if agent is selected as the benchmark type, agents must also be selected in the Profile parameter.
- **Compare** - Select the data type you want to compare.
- **Categories** - Select specific interaction categories to limit the data set analyzed for your report.
- **Threshold** - Specify the minimum percent deviation from the benchmark required for an item to be included in the report. For example, "40" means only values that are greater or less than the benchmark by at least 40% are included in the report.

For additional information, see Report parameters.

Actions

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

The Team Comparison report is a bar graph that compares performance between teams and against the average value of all teams represented. The numbers in the table and graph represent an interaction count.

Common usages

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

Customizing the report

General Settings

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

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

For additional information, see Report parameters.

## Actions

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

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# Team Evaluation Comparison

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

## Common usages

To compare team evaluation scores.

## Customizing the report

### General Settings

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

### Important

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

- **Teams** - Use to select the specific teams to be analyzed and displayed in your report.
- **Show Form** - Enables you to view the complete form(s) associated with the specific report. To view the form you must select a team.

For all other settings, see Report parameters.

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## Actions

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

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## Top and Bottom Performers

The Top and Bottom Performers report is a bar graph that indicates values for three groups (top performers, bottom performers, and average performers) across multiple categories. Use this report, to identify what top performers do differently from the rest, and thereby spread the knowledge of best practices. This report is only useful if you know ahead of time who your top, bottom, and average agents or teams are. It is purely a graphical representation of a comparison and it will NOT tell you who the top and bottom agents are. Instead, it will tell you how they compare in specific areas of performance.

### Common usages

- Compare the behavior of top and bottom performers to identify best practices.
- Utilize the data obtained from the report to optimize agent training and improve business processes.

### Customizing the report

#### General Settings

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

#### Items on Report

- **Top Agents** - Specify the top agents (based on prior assessment) to be displayed for each category. The percentage of interactions handled by the selected top agents will be displayed for each category. Selections here must be the same as those made in the work group and agent filters in the Data Set Filters.
- **Bottom Agents** - Specify the bottom agents (based on prior assessment) to be displayed for each category. The percentage of interactions handled by the selected bottom agents will be displayed for each category. Selections here must be the same as those made in the work group and agent filters in the Data Set Filters.
- **Average** - Specify the average-performing agents (based on prior assessment) to be displayed for each category. The percentage of interactions handled by the selected average-performing agents will be displayed for each category. Selections here must be the same as those made in the work group and agent filters in the Data Set Filters.
- **Categories** - Select specific interaction categories to limit the data set analyzed for your report.

For additional information, see Report parameters.

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## Actions

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

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## Usage Tracking

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

### Common usages

- Monitor the activity of SpeechMiner UI users.
- See which interactions have been listened to.

### Customizing the report

For additional information, see Report parameters.

## Actions

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