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

Specifying search criteria

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  - Administrator

Use the Explore > Search menu to define searches to explore interaction or event data. The Search Filter allows you to specify the types of interactions you want to view.

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

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

- All the interactions in the database are checked for matches with your search criteria.

- The processing limit (defined in the system's database configuration settings) is reached. For example, if the processing limit is 1000 the first 1000 interactions that match the search criteria are retrieved and the search ends.
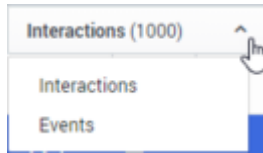
> ## Important
>
> - A search generated from the Trending chart tooltip produces results based on a given time period. The search process from the Trending chart searches for interactions that are relevant to the search request. The process does not search for an exact match.
>
> - A search generated from **Explore > Search** produces results based on the Search filter. This search process searches for interactions that are an exact match to the search request.

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

Create a new search

1. Select **Explore > Search**. A list of interactions associated with the previous search appears.

2. In the left corner of the screen (under the Media Player), select the type of interactions you want to

search for.

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

3. Click the **Search Filters** icon ⚬⚬ . For additional information, see Search filter.

4. Configure the filter options.

5. Click one of the following:

   - **Search:** Update the current search results according to the new filter configuration.

   - **Save As:** Save the filter configuration as a Saved Search. You can run the saved search at a later time.

   - **Clear Filters:** Clear the current filter configuration.

The search is run according to your selection.

Search filter

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

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

When configuring the Filter panel consider the following:

- Only interaction that meet the conditions you set will be retrieved.

- The current search criteria is displayed at the top of the Search Results grid. When you make changes to the filter the display is automatically updated.

- The Add and Remove icons ＋ − enable you to add and remove additional filter selections and/or values.

- Once you save your filter configurations, the configuration is saved as a **Saved Search** and can be run in the future. See Working with saved searches.

- The **Include / Exclude** option enables you to define a negative condition. For example, when you select **Exclude**, the condition is met when none of the selections or values for the specific filter are found in the interaction(s).

- The **View selected only** option, enables you to display only the selected items associated with the specific filter.

The Filter panel is divided into the following groups:

- Date Range
- Terms & Topics
- Categories & Programs
- Agents & Workgroups
- Metadata
- Comments
- User Actions
- Segment
- Tags
- Interaction Properties

Date Range

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

- **All** - The default value that includes all interactions in the database.
- **Yesterday** - Filter interactions recorded on the previous day from 00 -00 until 23 -59.
- **Today** - Filter interactions recorded on the same day from 00 -00 until the exact time the search is performed.
- **Last Work Day** - Filter interactions from the last work day prior to today (at 00:00) until the exact time and date the search is performed.
- **Last 2 Days** - Filter interactions from two days prior to today (at 00:00) until the exact time and date the search is performed.
- **Last 3 Days** - Filter interactions from three days prior to today (at 00:00) until the exact time and date the search is performed.
- **Week to Date** - Filter interactions recorded from the beginning of the current week (the last Sunday at 00 -00) until the exact time and date the search is performed.
- **Last 7 Days** - Filter interactions from seven days prior to today (at 00 -00) until the exact time and date the search is performed.
- **Last Week** - Filter interactions from the beginning through the end of the previous week.
- **Month to Date** - Filter interactions from the first day of the current month at 00 -00 until the exact time and date the search is performed.
- **Last 30 Days** - Filter interactions from thirty days prior to today (at 00 -00) until the exact time and date the search is performed.
- **Last Month** - Filter interactions from 00 -00 on the first day until 23 -59 on the last day of the previous month.
- **Quarter to Date** - Filter interactions from 00 -00 on the first day of the current quarter until the exact time and date the search is performed.
- **Last 90 Days** - Filter interactions from 90 days prior to today (at 00 -00) until the exact time and date

the search is performed.

- **Last Quarter** - Filter interactions from 00 -00 on the first day until 23 -59 on the last day of the previous quarter.

- **Custom** - Filter interactions from any date range selected from the two drop-down windows displayed. You can specify the exact day, month and year of both the beginning and end dates.

Terms & Topics

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

- **Text field** - Enter the term(s) or phrase(s) to search for.
- **Topics** - Select one or more topics from the list to search for.
- **Limit to** - Select one or more Speaker Types from the list.
     Only interactions found in one of the following situations are included in the search results:

  - Interactions with only one audio channel (the system cannot identify who is speaking), where at least one of the selected Speaker Types were involved in the interaction.
       For example, the topic Payments was found at least once in the interaction and one of the participants in the interaction was a speaker of type Agent.

  - Interactions with more than one audio channel (the system identifies who is speaking at every moment in the interaction), where at least one of the selected Speaker Types mentioned the required topics and/or terms at least once in the interaction.For example, the Agent in the interaction talked about the topic Payments.

Categories & Programs

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

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

Agents & Work Groups

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

You can also choose to search for the "current user" rather than a specific agent or work group. In this case, the condition changes depending on which user runs the report.

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

Metadata

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

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

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

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

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

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

The format used in your system is specified in the webserviceparams table, in the *globalDateFormat* parameter.

For additional information, please consult your system administrator.

Define a metadata filter

1. Select to Include/Exclude the metadata.
2. Select the type of metadata from the list provided.
3. Click **Values** to configure the metadata.
4. In the first field, select:
   - **Equals** - to specify a specific value for the metadata type.
   - **Between** - to define a range of values. When you select Between an additional field is added to the box.
5. To add an additional **OR** condition, click the Add icon ➕ to add a line in the box and fill it in as explained above.
6. Click outside the box to close the box.

Comments

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

- **Blank text field** - The text that must appear in one of the interaction comments. Only interactions that contain comments in which this text is found are included in the search results.
- **User** - searches for the user(s) who added a comment to the interaction when playing the interaction. Only interactions that contain comments from the selected users are included in the search results.
- **Good** 🙂 - searches for the user(s) who selected Good when adding a comment to the interaction during playback.

- **Neutral** 💬 **-** searches for the user(s) who selected Neutral when adding a comment to the interaction during playback.

- **Bad** 🙁 - searches for the user(s) who selected Bad when adding a comment to the interaction during playback.

User Actions

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

Segment

Enables you to filter the Search Results grid according to segment ID's. See What is an Interaction > Segment.

Under Segment select the number of segments to include in the search results. In the first field, select either Less Than, Between, or More Than.

In the second text field or fields, fill in the amount of segments within an interaction that you want to search for.

- **Less Than** - Search results include only interactions with a number of segments that is smaller than the value you specified.

- **Between** - Search results include interactions that include a number of segments that is more than the first value and less than the second value.

- **More Than** - Search results include only interactions that contain a number of segments that is more than the value you specified.

Tags

Tags enable you to label an interaction as a result of a specific action or a user defined category. That is, a tag is like a keyword that helps you identify an interaction, and enables you to generate better search results.

Tags can also help you indicate which interactions cannot be deleted and which interactions have been evaluated as part of a Quality Management Evaluation Session.

- **Protect from Deletion / Unprotect from Deletion tag:** The Protect / Unprotect from Deletion tag enables you to search for interactions that cannot be deleted (see, Playback Controls row #13) .

- **Evaluated tag:** The Evaluated tag enables you to search for interactions that have already been part of an evaluation session and subsequently prevents evaluated interactions from being reused (see, Perform an Evaluation Session step #8).

- **Screen Recording tag:** The Screen Recording tag enables you to search for interactions that include a screen recording.

> **Important**
>
> The Tags filter is not available for Event searches.

Interaction Properties

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

- **Types** - Select the type of interaction you are searching for (Calls, Chats, Emails, Facebook, SMS, or Twitter).

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

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

- **Interaction ID** - Search results include only interactions with the value(s) you entered for the ID. In this field, you can enter up to 50 Interaction ID's.

- **External ID** - Search results include only interactions with the value you entered for the ID. External ID is a unique number assigned to the interaction by the external recording storage system.

Saved Searches

A Saved Search represents a group of interactions selected from a list of interactions that resulted from a set of specific filter criteria (created in the Explore > Filter panel). Creating a Saved Search enables you to combine a collection of interactions associated with the same topic. You can run this unique Saved Search whenever the information the query generates is required.

Open a Saved Searches list

Select **Explore > Saved Searches**. The **Saved Search** tab is opened with the following options:

- **Drop down list:** Find and select the user(s) whose saved searches you want to see.

- **Text field:** Type a letter or sequence of letters that appears in the name of the saved search you want to find.

- **Delete** 🗑 **:** Select one or more searches from the list and click **Delete** to remove them from the system.

- **Compare saved searches** 📑 **:** Select two searches to create a report the compares the two search results.

- **Table:** See column descriptions below.

Columns

- **Checkbox** ▢**:** Select the check boxes to delete or compare.

- **Run:** Click the Run icon ⊙ to run the search and display the results in the Search Results grid. If the specific search was a search for screen recordings, the Search Results grid will show a list of interactions with screen recordings.

- **Delete:** Click the Delete icon 🗑 to delete the specific saved search.

- **Name:** The name of the saved search.

- **Creator:** The name of the user who created the saved search.

- **Status:** The status of the saved search.

- **Sharing:** The names of the user groups and users with whom the search is shared. Click the Sharing icon ⌞ to share the saved search with others.

- **Created on:** The date on which the search was created.

- **Permalink:** Click Copy to create a Permalink to the specific saved search. You can copy this link to your clipboard and then paste it elsewhere as necessary. See the Permalink for additional information.

Compare Saved Searches

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

For example, you can compare two customer-service agent teams to learn which team has more interactions with dissatisfied customers.

You can also compare two search results to see whether there are any noticeable differences with regard to the most common terms in the interaction flows.

1. Select **Explore > Search**.

2. Click ⚏ to open the **Filter** panel.

3. Define the search criteria for the data set you want to compare. See Create a New Search for additional information.

4. In the **Filter** panel, click **Save As** to save the new search.

5. Repeat the steps above to define the second data set for the comparison.

6. Select **Explore > Saved Searches**.

7. Select the check boxes associated with the two Saved Searches you want to compare.

8. Click **Compare** in the top right corner of the screen**.**

9. In the **Report Name** field, enter a name for the comparison report.

10. From the **Categories** and **Topic** lists, select the categories and topics you want to compare in relation to the two Saved Searches you selected.

11. Click **Run**. The report will appear in the Saved Reports list and you will receive an email with a direct link to report.