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

Report templates

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- Administrator

Use the approximately 28 Report templates to view details about specific aspects of your organization. The variety of reports and the drill-down options within each one enable you to investigate a wide range of topics.

Related documentation:

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

Available reports

The following templates for SpeechMiner UI reports are available. For additional information, see Report parameters.

Recording

- Agent Comparison
- Interactions
- Metadata Frequency
- Usage Tracking

Quality Management (QM)

- Agent Evaluation Comparison
- Auto Fail
- Calibration Score
- Evaluation Summary
- Evaluator Evaluation Comparison
- Interaction Evaluation Summary
- Team Comparison
- Team Evaluation Comparison

Speech Analytics

- Agent Bubble Chart
- Agent Trend
- Category Bubble Chart
- Category Distribution
- Category Trend
- Performance Profile
- Top and Bottom Performers

Before you begin

Before you begin working with reports consider the following:

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

Report template layout

The SpeechMiner report template has a maximum of three parameter rows. Each row deals with different functions in the report. See the descriptions of the first row, second row, and third row, below.

In addition, most report templates have a Data Set filters section on the left side of the screen.

This page explains the general report template layout using the Agent Comparison template as an example. The **Agent Comparison** report represents the most common template layout.

First row

The first row contains:

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

Second row

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

Third row

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

Data Set filters

The left side of numerous report templates contains Data Set filters. These filters specify which data will be included in the report's analyses.

For additional information about the filters and how to configure them, see Report parameters. The current filter settings are displayed on the right side of the template below the first row.

Report parameters

Most report parameters have the same function no matter which template you use. Exceptions are briefly explained in this section, and dealt with in detail in the documentation on individual reports, in the Templates section.

The following parameters are the most common:

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

Template

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

Report Name

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

Report Title

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

Description

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

Version

The output of some reports can be generated in different versions and different sizes or formats.

In this field, select the desired output version from the drop down list.

The available options vary depending on the template.

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

- **Full Report** - a full-size report output optimized for printing (either 11" wide x 8.5" high, or 8.5" wide by 11" high, depending on the template).

  Full reports often contain two parts: a graph or chart followed by a summary table which may also contain additional details.

  In some cases, when a Full report contains items that can be expanded to display more details, the version has two options, Expanded and Collapsed.

  When Full Report (Expanded) is selected, all items are initially expanded when the report is displayed.

  When Full Report (Collapsed) is selected, all items are initially collapsed.
- **Mini** - a small output for display in the Dashboard view (480px wide x 288px high).
- **Wide** - a wide-width output for display in the wider columns of the Dashboard view (768px wide x 288px high).
- **Table Only** - a full-size report output that only includes the summary table. Graphs and diagrams are not printed (either 11" wide x 8.5" high, or 8.5" wide by 11" high, depending on the template).
- **X-Axis Only** - a bubble chart option. Select this option to specify report output in the form of a table, with a bar graph representing the x-axis values. No bubble-chart is produced and y-axis values are not represented (Width: 768px).
- **Y-Axis Only** - a bubble chart option. Select this option to specify report output in the form of a table, with a bar graph representing the y-axis values. No bubble-chart is produced, and x-axis values are not represented (Width: 768px).

Data Set Filters

The Data Set Filter options allow you to narrow down the data from the entire database, so you can base your report on a subset of the available data.

All of the Data Set Filters have an "AND" relationship. This means that each filter further restricts the options available and all interaction events and topics represented in your final data set satisfy all Data Set Filters.

Should you choose options from two different filters that mutually exclude each other (for example, a Date metadata entered for April 2015 and a date range between February and March 2014), you will have zero data in your report.

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

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

The following filter groups are available:

Basic filters

Enables you to filter for interaction types, languages and date range.

> **Important**
>
> A day begins at 0:00 and ends at 23:59.

To Date date filters (All, Today, Week to Date, Last 7 Days, Month to Date. Last Month, Quarter to Date, Last 90 Days) include the interactions collected in the system up until the exact time and date the report is generated.

The times given are for the time zone where your Web server is deployed, and therefore are not necessarily the same as the times where you are physically located.

SpeechMiner

Enables you to filter for interaction categories, programs and the topics.

For each option, select one or more values. Only interactions in which at least one of the selected values for each option was identified are included in the data set. For example, if you select three categories and two programs, only interactions belonging to at least one of the categories and one of the programs are included.

You can add lines to the categories and topics. The logical relationship between each line is AND. For example, if one line under Categories specifies one category and another line specifies another category, an interaction must be in both categories to be included.

To add a line, click [+].

To create a negative filter, click the **Not** button Not beside the field. For example, to include all categories except Category A, select Category A and select the **Not** button Not beside the Category field.

For additional information about each option, see Search filter.

Metadata

Enables you to filter according to metadata values.

Metadata is collected by the recording system and is relayed to SpeechMiner.

The types of available metadata vary from system to system. You can select any type of metadata available in your system and, if you wish, you can specify a value for it.

The search results will only include interactions for which the selected type of metadata has an automatic or manually defined value.

User Actions

Enables you to filter interactions according to:

- Specific user comments added to the interaction.
- Interactions that were played back.
- Forms that were filled out.
- Whether or not quality checking was performed.

Under **Interaction Comment Text**, specify the text that must appear in a comment that was added to an interaction. In the other fields, select the users who must have performed the specified actions.

Items

The parameters in this section allow you to select specific information and calculate distributional information on the data in the data set that was selected using the Data Set Filters.

If you make no selections under **Items on Report**, default values will determine how the data will appear in the report.

Since the parameters in Items on Report differ from report to report, this section explains only the most common ones listed alphabetically. Less common parameters are explained in their respective templates.

Agents

You can select the specific agents or work groups to be analyzed and displayed in your report. The default value (Any) includes all agents.

If your Data Set Filters are not set to Any, your selections for Agents must match your selections in the Data Set Filters (for example, the same work groups or agents, belonging to the same interaction types). In other words, the report output will only include agents who were selected here and who were not excluded from the data set in the Data Set Filters.

Categories

You can select specific interaction categories to limit the data set analyzed for your report. Your data set will include interactions belonging to any of the categories selected.

Use the default value (Any) to include all available categories.

> **Important**
>
> If a single interaction belongs to multiple categories it will be counted as one interaction for each category selected under this parameter.

Also, bear in mind that the report output will only include interactions in categories that were selected from the Categories list and were not excluded from the data set in the Data Set Filters.

If you selected specific categories in the Data Set Filters section, only categories that are selected from both the Categories list and the Data Set Filters will appear.

When used with Percentage of Interactions in the Data Type parameter, the report will display the ratio of the following as a percentage:

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

> **Important**
>
> If one or more interactions belong to multiple categories, the sum of the percentages of interactions for all categories may add up to more than 100%.

Data Type or Compare

You can specify the type of data you wish to display in your report.

The most common choices are:

- **Number of Interactions** - Displays the number of interactions per each report item. Data may vary depending on the other filters selected.

- **Percentage of Interactions** - Displays the percentage of interactions per report item in your data set.
- **Average Interaction Duration** - Displays the average length, in minutes, of all interactions for each report item. The entire conversation for the interaction recording session is considered, excluding the wrap time after the interaction.
- **Total Resources** - Displays the total amount of time, in hours, of all the interactions per report item. It is essentially the sum of all interaction durations.

Period Type or Period

This parameter is most commonly seen on reports that show trends. The output of the report will be displayed in increments of the selected Period Type. For each increment, the value of the selected Data Type will be displayed for each particular report item. For example, if the Data Type is "Number of Interactions" and the Period Type is "Day," the number of interactions for each day in the date range included in the report will be shown.

Top or Display

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