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

Tools

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- Administrator

Use the SpeechMiner UI Tools to access an array of global SpeechMiner UI functions and management features. For example, manage and assign specific user views, configure names for metadata filter options, export completed Quality Management sessions, and define tags.

### **Related documentation:**

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## Tools menu

The Tools menu in the SpeechMiner UI provides access to the following management features:

- System Admin
- Export Completed QM Sessions
- Define Tags

## System Admin

System Administration tools enable you to manage and assign specific user views and configure names for metadata filter options and columns.

System Administration tools include:

- Preset View - Views designed by administrators and managers and assigned to the View page of a specific user(s).
- Metadata Manager - Used to change the names of metadata filter options and metadata columns in the search results so that the names clearly represent the meaning of the data.

### Preset View

A View is a set of widgets that displays summary information about a specific set of interactions. For more information, see Dashboard.

Preset Views are views designed by administrators and managers and assigned to the View page of one or more specific users.


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The Preset View enables you to create a view that generates information that you think is essential for the user to see.

With the Preset View tool you can:


- Create a new Preset View.
- Publish a Preset View.
- Edit a Preset View.
- Edit the Preset View layout.
- Delete a Preset View.

### Create a new Preset View

1. Select **Tools > System Admin > Preset Views**.
2. Click the **New** icon .
3. In the **Name** field, type the name of the Preset View.

#### Important

Although you can add **Permissions** now, it is recommended that you design the view (add widgets and set the layout) before adding the roles.

4. Click **Save**. A **Dashboard > View** tab (with the name you gave) is opened.
5. Use the **Add Widgets** and **Change Settings** option to create the view as necessary. For more information, see Dashboard.
6. Click **Back to Preset Views**, once you are finished designing the Preset View. The **Preset View** grid is displayed.
7. Click the **Edit** icon  under the **Permissions** column to set the Preset View permissions. The **Edit Preset View** window opens.
8. Configure permissions for the Preset View:
  1. From the **Role Name** column select a user role from the list provided.
  2. Click **Add**. A permission row is added for the selected user role. Check boxes appear in the row for each type of permission.
  3. Select the check box associated with the permission you want to grant the users associated with the selected user role.
9. Repeat step 8 for each role to which you want to publish this Preset View.
10. Click **Publish Preset View** to publish the Preset View. For additional information, see Publish Preset View.


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## Publish a Preset View

After you create a new Preset View or modify an existing Preset View, you must publish the view for it to appear in the intended user's **Dashboard > View**. Published Preset Views appear for users who have the user role permissions set for the specific Preset View.

### Important

When you publish a Preset View that was already published, the new version overrides the existing version. In addition, when you republish a Preset View, all its local changes (made by individual users) are removed. The new version replaces the existing Preset View.

1. Select **Tools > System Admin > Preset Views**.
2. Select the check box associated with the Preset View you want to publish.
3. Click the **Reset** icon . You are prompted to confirm if you want this version of each selected Preset View to override any previous version of the same view.
4. Click **Yes**. The Preset View is published to the View page associated with all the users with the roles selected for the specific Preset View.

## Edit a Preset View

You can edit the name, description and permissions of any Preset View that you created. The changes are implemented as soon as you save them.

### Important

You do not have to republish the Preset View after you change its settings.

1. Select **Tools > System Admin > Preset Views**.
2. Click the **name** of the Preset View you want to edit.
3. Modify the name, description and/or permissions as required.
4. Click **Save**. The changes are saved and published to the user's **Dashboard > View** page.


## Edit a Preset View layout

You can modify the layout and widget set of any Preset View you created.

### Important


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After you modify a Preset View layout, you must publish the view again to implement the changes on the users' Dashboard > View pages. In addition, when you republish a Preset View all its local changes (made by individual users) are removed. The new version replaces the existing Preset View.

1. Select **Tools > System Admin > Preset Views**.
2. Click the **Layout** icon  associated with the Preset View you want to modify. The specific Preset View is displayed.
3. Modify the layout and widget selection as required. For more information, see Working with dashboards.
4. Click **Back to Preset Views** when you finish changing the layout.
5. Click **Publish the Preset View**.

## Delete a Preset View

When you delete a Preset View it is deleted from all the **Dashboard > View** pages in which it currently appears.

1. Select **Tools > System Admin > Preset Views**.
2. Select the check box associated with the Preset View you want to delete.
3. Click the **Delete** icon . You are prompted to confirm that you want to delete the selected Preset View.
4. Click **Yes**. The Preset View is deleted.

## Metadata Manager

Occasionally, the terminology used for search result column names and metadata filter options is not a clear representation of the significance of the metadata (sometimes referred to as Key Value Pair). With Metadata Manager you can change the names of metadata filter options and metadata columns in the search results so that the names clearly represent the meaning of the data.

### Important

To change the names you must have Metadata Manager permissions. In addition, the change occurs for all SpeechMiner users.

## Change a search result column and filter option name

1. Select **Tools > System Admin**.
2. Select **Metadata Manager**. A predefined list of metadata names appears.

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3. In the **UI Term** field, type the name that will appear in the SpeechMiner application; for the **Metadata Key's** name you want to change.
  4. Click **Save**. To undo your changes click **Reset**.

## Export Completed QM Sessions

The Export Completed QM Sessions tool enables you to perform a batch export of QM session data associated with sessions that were completed during a specific date range. The completed QM sessions data is exported in a .zip file that contains a .csv file.

### Export completed QM sessions

1. Click **Tools > Export Completed QM Sessions**.
2. From the **Date Range** list select the date range in which the QM sessions were completed.
3. Click **Export**. The following question appears: Do you want to add a score to the exported evaluation session?

#### Important

The completed QM sessions are exported in an **evaluation Sessions\_username\_time.zip** file that contains a evaluation **Sessions\_username\_time.csv** file. Each row in the .csv file represents one evaluation session. The exported file contains the fields listed under **Exported Fields** in the **Export Completed QM Sessions** page.

4. Click **Yes** to add a score to the exported QM sessions or click **No** to not include the scores. The **Export Completed QM Sessions** dialog box appears.

#### Important

If your system is configured to encrypt exported interactions, an **Export Completed QM Sessions** window appears. In this window, you will be instructed to create a password required when you attempt to unzip the exported interactions. If your system is not configured to encrypt exported interactions, the remaining steps in this procedure are not required. Simply click **Ok**, to complete the process.

5. Enter a password of your choice in the **Create Password** field or, click **Generate Password** to enable the system to generate a password for you in the **Create Password** field.
6. Click **Export** to export the completed QM sessions.
7. Copy and save the password that appears and click **Done**. When you try to unzip the file, you will be prompted for this password.

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## Important

Windows default zip program does not support encrypted zip files. To unzip the file, you must use a different zip program.

## Define Tags

With SpeechMiner you can mark an interaction with a tag to better focus your searches, protect an interaction from deletion, and indicate that an interaction was evaluated as part of a Quality Management evaluation session. That is, a tag labels an interaction as a result of a specific action (Cannot Delete or Evaluated) or a user-defined category.

The Define Tags tool enables you to create and delete interaction tags.

### Define a tag

1. Click **Tools > Define Tags**.
2. Click **Add a new tag**.
3. Enter the tag name in the field provided and click the check-mark button. The new tag is added to the tags list and will now appear as an option in More > Tag. For additional information, see Playback Controls row #13.

## Important

If you decide to delete a tag that is associated with an interaction, the tag will no longer be associated with the specific interaction and it will no longer appear as part of the interaction's details.