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

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- Administrator

Use the Trending filter options to refine the data in the Trending page.

Related documentation:

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You can refine your Trending filter with the options available in the **Explore > Trending** page.

Once you select the type of Trending filter you want to create, you can refine your Trending filter using the options in the following areas:

- Chart tools
- Basic filter
- Advanced filter

Trending filter

- **Top terms intra-day:** Displays the most frequently used terms and phrases included in all of the interactions in the system 3 hours prior to the current time.
- **Top terms today compared to yesterday:** Displays the most frequently used terms and phrases included in all of the interactions in the system 24 hours prior to the current time.
- **Top terms today compared to the past week:** Displays the most frequently used terms and phrases included in all of the interactions in the system 7 days prior to the current day.
- **Top terms today compared to the same day a week ago:** Displays the most frequently used terms and phrases included in all of the interactions in the system exactly one week from today. For example, if you are creating the Trending filter on Monday, September 26th, 2016, the filter will search for terms and phrases on Monday, September 20th, 2016.
- **Custom:** Displays the most frequently used terms and phrases included in all of the interactions in the system according to the selected **Basic** and/or **Advanced** filter options.

Chart tools

- : Opens the Saved Trending Filters page. This option enables you to abort a session at any time. A prompt enables you to confirm or cancel your decision.

-  : Manually refreshes the chart view. This fetches the latest data generated by the system in the back end, and influences the time stamp of the visualization currently being viewed.
-  : Opens the Blacklist. The blacklist is used to manage a permanent set of excluded terms/phrases in the Trending data. Users with permissions are able to add and delete items from the list as necessary. For additional information, refer to Manage the Blacklist.
- **Run:** Applies the configured filter to the data set to produce the Trending chart.
- **Chart tabs:** Displays three views of the data that visualize trending information for the selected time period.
 - **Comparison:** Shows the entire data set for both Period 1 and Period 2.
 - **Period 1:** Shows the data set for the dates selected for Period 1.
 - **Period 2:** Shows the data set for the dates selected for Period 2.
- **Ignore Blacklist:** Allows the terms and phrases in the Blacklist to be included in the Trending chart. For additional information, refer to Manage the Blacklist. When this option is turned on, the phrases appear in the Trending view with a dark border
- **Layout:** Allows you to control how data is viewed in the Trending view. You can select one of three layouts:
 - **Combination:** Shows both the chart and the chart tables. When the Combination layout is selected, the user can use the resize bar to change the size of each area.
 - **Chart:** Only shows the Trending chart.
 - **Table:** Only shows the Top# Terms and Top Movers tables.

Important

The Layout chart tool is only available in a Azure environment.

- **Trending Report last referenced on:** Displays chart details that tell you when the specific report was created and last changed.
- **Show chart data:** Shows/hides a panel underneath the Trending chart. The panel shows in-depth information about the visualization at hand, and changes accordingly based on the user's selections and activities. For additional information, refer to Trending Filter chart data description.
- **Save:** Enables you to save (or save and rename) the current Trending filter. For additional information, see Working with saved Trending filters.
- **Search Term:** Enables you to search for a specific term and/or phrase within the Trending chart results.

Basic filter

- **Time Period - Relative:**
 - **Monitor:** Select an amount and time period (for example, 3 days) for which you want to analyze terms and phrases. Monitor results appear in the Period 1 tab.

- **Compare:** Select one of the following options. Results of your selection will be compared to the Monitor selection you made and will appear in the Period 2 tab.
 - **Same period as before:** Analyze all the terms and phrases in the period before the monitor period. For example, if you selected 3 minutes in the Monitor option at 22:00, the Compare period will be 21:57-22:00.
 - **Same period as yesterday:** Analyze all the terms and phrases 24 hours before the monitor period. For example, if you selected 3 hours in the Monitor option at 22:00 on Thursday 29, 2016, the Compare period will be from 19:00-22:00 on Thursday 28, 2016.
 - **Same period last week:** Analyze all the terms and phrases during the same day exactly a week before the monitor period. For example, if you selected 3 hours in the Monitor option at 10 pm on Thursday 29, 2016, the Compare period will be from 7 pm-10 pm on Thursday 22, 2016.
 - **Previous week including yesterday:** Analyze all the terms and phrases for 7 days prior to the monitor period. For example, if you select 1 day in the Monitor option on Thursday 29, 2016, the Compare period will be the entire data set during the last week, plus one day.
 - **Specific date range:** Analyze all the terms and phrases in a specific time period. For example, if you select 7 hours in the Monitor option on Thursday 29, 2016, the system will compare the terms and phrases in those 7 hours to all the terms and phrases that appear during the entire specific date range.
- **Time Period - Fixed:** In the fields provided select the date ranges for which you want to compare terms and phrases. Results for Period 1 and Period 2, will appear in their respective tabs at the top of the chart.

Important

The Comparison tab includes all the terms and phrases from both periods.

- **Speakers:**
 - **Agent:** Show terms and phrases spoken only by the agent.
 - **Customer:** Show Terms and phrases spoken only by the customer.
 - **All Speakers:** Show terms and phrases spoken by the agent and/or the customer.
- **Interaction Properties:**
 - **Types:** Select the type of interaction whose terms and phrases you want to analyze (Calls, Chats, Emails, Facebook, SMS, or Twitter).
 - **Languages:** Select the language of the interactions whose terms and phrases you want to analyze.
 - **Duration:** Select the duration range of the interactions 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.
 - **Max terms per period:** The maximum number of terms/phrases visible (that is, the number of chart bubbles) in each Period 1 and Period 2 tabs. The Comparison tab contains the terms/phrases that appear in Period 1 and Period 2 tab.

Advanced filter

- **Metadata:** Enables you to filter the results for selected metadata and metadata values. The results will only include terms and phrases associated with interactions for which the selected types of metadata have defined values and when you specify values that match the specified conditions.
- **Terms & Topics:** Enables you to filter for interactions according to one or more terms or phrases that must either be part of the interaction and topic, or excluded from both.
 - **Text field:** Enter the term(s) or phrase(s) to search for.
 - **Topics:** Select one or more topics from the list to search for.
 - **Include:** Select if the term and phrase must be included or excluded from the interaction set.
- **Categories & Programs:** Enables you to filter the interaction set according to categories and/or programs. Only interactions in which at least one category/program term and/or phrase is identified are included in the results.
 - **Categories:** Select one or more categories that should be associated with the term and/or phrase you are searching for.
 - **Programs:** Select one or more programs that should be associated with the term and/or phrase you are searching for.
- **Agents & Workgroups:** From the lists provided select any combination of agents and workgroups whose terms and phrases you want to include/exclude in your results. If you select a workgroup, all the agents in the workgroup are included in the search condition.