Encore™ Report Guide

Encore Workforce Optimization Solution
Version 7.0

LAST UPDATED: November 1, 2018

For Dealer and Customer Use Only

DVSAnalytics, Inc.
17255 N. 82nd Street, Suite 120, Scottsdale, AZ 85255
Phone: (480) 538-2020 • Fax: (480) 538-2021
Email: info@DVSAnalytics.com
Web: www.DVSAnalytics.com

Contents

Information Index

This index displays the information you might be looking for and the best report to view that information. If viewing this table in a PDF reader, click the report name in the table to see a report sample and additional information about that report.

The information I am looking for is...	Best report to view that information
Agent Information	
A list of agent assignments	Assignment List
A list of agents and the team they belong to	Agent List
A list of agents and their extension and email addresses	Agent List
A list of agents and their status	Agent List
A list of evaluations for an agent	Evaluation List
A list of overdue agent assignments	Overdue Assignment List
Agent’s score history for a certain key performance indicator	Agent Scores by Question
Agent's average score	Sales Results
Agent's total idle time	Average Time Between Recordings
Agent's total recording time	Average Time Between Recordings
Agent's total time between recordings	Average Time Between Recordings
Average score earned by agents on an evaluation form with the organization's score on the same form	Agent Score Analysis
How agents average score at the scoring category or question level compares to the organization's average score	Agent Analysis
How agents rank in the number of calls each handles in a time period	Recording Distribution Top 20
How agents score in each category for a recording	Agent Evaluation
How agents score in each scoring category	Evaluation Scores by Category
How agents score on a particular key performance indicator compared to their team	Agent Scores by Question
How agents score on an evaluation form compared to other agents	Agent Score Analysis
How agents score on an evaluation form compared to the call center’s average score	Agent Score Analysis
How agents score on an evaluation form on average over a period of time	Agent Performance Trending
How agents score on average on a particular key performance indicator	Agent Scores by Question
How many calls an agent is answering on average	Recording Distribution Over Time
How to view a list of agents according to specific performance measurements	Evaluation Score Ranking Hold Time Ranking Quiz Score Ranking
The details for a certain evaluation	Evaluation List

The information I am looking for is...	Best report to view that information
The number of sales an agent has made compared to the number of attempts	Sales Results
The number of sales made compared to the number of attempts on a trending basis (by day, week, month, or year)	Sales Trending
Which agents are handling the highest average number of calls	Recording Distribution Over Time
Which agents are handling the most calls	Recording Distribution Top 20
Which agents are my top performers for each KPI	Categorized KPI
Which agents might provide a good example for a particular KPI	Categorized KPI
Which KPI shows the greatest difference between an agent and the team	Agent Scores by Question
Calibration Project Information	
Evaluators' scores for a specific calibration project	Evaluator Calibration
Evaluators' scores for a specific calibration project, form and recording	Evaluator Calibration – Recording
Evaluators' scores for a specific calibration project, form, recording and scoring category	Evaluator Calibration – Category
Evaluators' scores for a specific calibration project, form, recording and scoring category and question	Evaluator Calibration – Question
Contact Information	
How many recordings (audio or screen) are made for a certain time period	Screen Recording Error Summary
How many recordings are made each hour, half hour, or quarter hour for the call center	Call Distribution
How many recordings are received each day of the week for the call center	Peak Period Daily
How many recordings are received each hour for the call center	Peak Period Hourly
Contest Information	
How can I view all reward point transactions	Reward Points Statement
Which reports can be associated with a contest	Evaluation Score Ranking Hold Time Ranking Quiz Score Ranking
eCoaching Information	
A list of all available eLearning lessons (active and inactive).	eLearning Lesson List
A list of all eCoaching modules, active and inactive	eCoaching Module List
A list of all outstanding or completed eCoaching modules assigned to agents	Assignment List

The information I am looking for is...	Best report to view that information
A list of assigned eCoaching modules that are overdue	Overdue Assignment List
Compare the time an agent spends on an assignment to the duration allocated for the assignment	eCoaching Performance Impact Detail v2
How the eCoaching modules are improving performance	eCoaching Performance Impact v2; eCoaching Performance Impact Detail v2
View a list of all eLearning lessons available in Encore, both active and inactive	See eCoaching Quiz Results
View the results of how agents performed on quizzes	eCoaching Quiz Results
View the results of how agents rank, according to their quiz scores	Quiz Score Ranking
View the time an agent spends on an assignment compared to the standard duration allotted for the agent to complete the lesson.	eLearning Lesson Duration
Evaluator Information	
A list of all KPIs currently available on one or more forms	Active KPI List
Evaluations completed for an agent	Agent Evaluation
How an evaluator is scoring a KPI compared to other evaluators	KPI Comparison Report; KPI Comparison Chart
How an evaluator is scoring a KPI compared to the average system score assessed by all evaluators in the system	Evaluator Scores by Question
Number of recordings an evaluator completed	Evaluator Productivity; Evaluator Productivity Per Time Period
Number of recordings an evaluator completed on average each hour	Evaluator Productivity
Number of recordings an evaluator listened to last week	Audit Log Report
Number of times a form is used during a certain time period	Form Usage By Time Period
The average length of recordings evaluated compared to the average length of time spent evaluating the recordings	Evaluator Productivity Evaluator Productivity Per Time Period
The average score an evaluator assigns to a KPI	Evaluator Scores by Question
The average score an evaluator has assigned to recordings during a certain time period	Evaluator Productivity Per Time Period
The suggestions evaluators added for agents when evaluating recordings	Agent Notes
Post Contact Survey Project Information	
Average score for each question on a survey evaluation	Post Contact Survey – Average Score by Question
Schedule Information	
A list of agents currently active in one or more recording schedules	Agents Scheduled
A list of agents currently active in one or more recording schedules that have not been recorded	Agents Scheduled Not Recorded

The information I am looking for is...	Best report to view that information
A list of agents currently active in one or more recording schedules that have not been recorded a minimum number of times	Agents Scheduled Below Target
A list of agents that are not active in any recording schedule	Agents Not Scheduled
Recorded Contact Information	
Data from a dynamic playlist to either print or export	Dynamic Playlist Export
System Information	
Activity performed by a certain user on the system	Audit Log Report
If the screen recording component is logging errors	Screen Recording Error Summary
The time a user logged in or out of the system	Audit Log Report
Team Information	
A list of all evaluations for a team	Evaluation List
How teams are scoring on a particular question compared to the average system score assessed by all teams in the system	Team Scores by Question
How teams are scoring on an evaluation form compared to other teams sorted by evaluation date	Team Analysis
How teams score on an evaluation form compared to other teams	Team Score Analysis
How teams score on an evaluation form compared to the call center's average score	Team Score Analysis
The average score a team assigns to a KPI	Team Scores by Question

Active KPI List

This report lists each active Key Performance Indicators (KPIs); these may also be called "questions" in Encore.

Criteria

The following criteria are unique to this report and are explained below for clarification.

Criteria	Description
Question Type	This criterion enables you to select different question types, such as pick list, scale, text, or yes/no questions. This may be helpful to review certain question types all at one time. For instance, you may want to review all scale questions to verify that these questions are presented in a similar manner.
Scoring Category	Use this criterion to select scoring categories to include on the report. Scoring categories include different types of questions. This may be helpful to review all questions in a certain category to verify they are focused and consistently address the area of service.

Sample

Category	% Of Points	KPI \ Selection
Call Closing and Wrap Up		Closes call properly
	100%	Y
	0%	N
Procedures		Reviews relationship to make good business decisions (offer direct deposit, IDSafeChoice, Balance, SBO, ATM and going into the branch)
	100%	HP(High Performer)
	90%	ME(Meets Expectations)
	80%	F(Fair)
	50%	NI(Needs Improvement)
	0%	U(Unacceptable)
Commitment		Takes ownership, uses resources to resolve concerns and build the relationship:
	100%	S(Superior)
	90%	ME(Meets Expectations)
	80%	F(Fair)
	50%	NI(Needs Improvement)
	0%	U(Unacceptable)
Commitment		Show interest by identifying and offering services that meet the members needs
	100%	Y
	0%	N

Columns

Columns that are unique to this report are explained below:

% Of Points is the percentage of points assigned to each answer available for the question. In the sample, 100% of the points are given to an agent if the evaluator chooses **S(Superior)** for the **Takes ownership...** KPI. If the evaluator chooses **F(Fair)**, the agent only receives 80% of the points.

KPI\Selection is the actual question or KPI entered in the system and the answers available to the evaluator.

Agent Analysis

This report provides the agent's average score at the question or scoring category level compared to the organization's average score. For the agent's average score at the evaluation level compared to the organization's average score, use the Agent Score Analysis report.

CAUTION If you choose to run this report by form rather than by scoring category or question, consider that the **Org. Score** is normalized for each agent which removes all questions marked as N/A from the **Org. Score** total. This normalization causes the **Org. Score** to vary for each agent (see Org. Score below for more information on normalization).

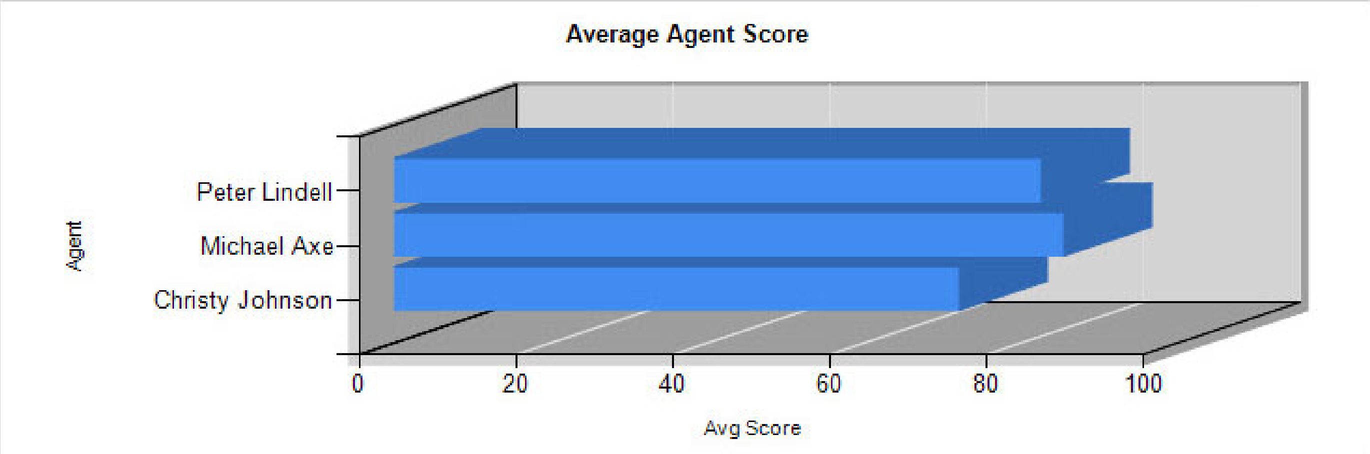
Criteria

The following criteria are unique to this report and are explained below for clarification.

Criteria	Description
Form / Category / Question	This enables the report to include selected evaluation forms, scoring categories, and/or evaluation questions. Select the form and the revision number at the top of the window, and the scoring categories and questions open in the lower portion of the window. Then select the scoring category and/or the questions to include on the report.
Only Show Evaluations	Limits the number of returned evaluations based on whether a recording was evaluated. • **With Recordings** only shows evaluations with recordings; evaluations without recordings are excluded. • **Without Recordings** only shows evaluations without recordings; evaluations based on recordings are excluded.
Report Grouping	This enables you to group the information in various ways, such as by month, form, scoring category, etc. If you select: • **Month**, you can view evaluations grouped by month. • **Site**, you can view evaluations by site. • **Site Then Form**, you can view evaluations by site and then the form used to evaluate the recording. • **Site Then Form Then Scoring Category**, you can view all evaluations by site, the form used to evaluate the recording, and the scoring category for the form. • **Site Then Form Then Question**, you can view all evaluations by site. then the form used to evaluate the recording, and then the question on the form. • **Site Then Form Then Evaluator**, you can view all evaluations by site, then the form used to evaluate the recording, and then the evaluator who assessed the recording.

Sample

Form	Agent	Avg Score	Org. Score	Difference	# Of Evals	Last Evaluation
Customer Service - Main Form (rev.9)	Christy Johnson	73.22	85.18	-11.96	3	1/6/2016 4:03:34 PM
Customer Service - Main Form (rev.9)	Michael Axe	88.00	86.78	1.22	4	12/18/2015 1:33:01 PM
Customer Service - Main Form (rev.9)	Peter Lindell	86.75	86.78	-0.03	4	12/18/2015 1:32:42 PM
Post Contact Survey - Customer Care (rev.3)	Christy Johnson	65.00	61.46	3.54	1	12/10/2015 10:54:01 AM
Post Contact Survey - Customer Care (rev.3)	Michael Axe	63.57	61.46	2.11	1	12/9/2015 3:40:58 PM
Post Contact Survey - Customer Care (rev.3)	Peter Lindell	57.50	61.46	-3.96	1	12/10/2015 11:37:47 AM
		80.71			14.00	1/6/2016 4:03:34 PM



Drill-Down

This report provides drill-down links in the **# of Evals** column to show a list of the evaluations completed for the associated form.

Agent	Score	Form	Evaluator	Date	Team
Michael Axe	78.67	Customer Service - Main Form	vsmith	4/25/2016	Customer Care

If you click a link in the **Form** column, Encore opens the evaluation that was completed.

AgentEvaluation

Agent:	Michael Axe	**ModifiedBy:**	vsmith
Team:	Customer Care	**ModifiedDate:**	4/25/2016 9:24:56 AM
EvaluatedBy:	vsmith	**ContactRecordingDate:**	8/14/2013 11:23:37 AM
EvaluatedDate:	4/25/2016 9:24:56 AM	**FormUsed:**	Customer Service - Main Form (Revision 9)

ScoreByCategories

Accuracy Skills	80.0%	64.0 / 80.0
Effective Communication	80.0%	8.0 / 10.0
Procedures	52.0%	26.0 / 50.0
Strengthen the Relationship	200.0%	20.0 / 10.0
Total:	78.7%	118.0 / 150.0

Agent Performance

Introduction		
Introduces self using full name and company	Yes	10.0 / 10.0
Client was reasonably and accurately verified	2	2.0 / 10.0
Actively listens and clearly defines the call's purpose	G: Good	8.0 / 10.0
Client Experience		
provides correct solution for customers request	ME: Meets Expectation	54.0 / 60.0
Bonus-Demonstrates a genuine desire to ensure customer satisfaction.	Yes	10.0 / 0.0
Adhered to One and Done (took ownership, used resources)	NI: Needs Improvement	10.0 / 20.0
Followed correct process for solution	NI: Needs Improvement	10.0 / 20.0
Call Closing		
Call was closed properly and client is clear on next steps/results.	4	4.0 / 10.0
Asked if anything else the customer needed assistance with?	Yes	10.0 / 10.0

Business Intelligence

NOTE When the report is exported as an Excel, Word or PDF file, all drill-down links are disabled.

Columns

Columns that are unique to this report are explained below:

Avg. Score is the average score earned by the agent for the form noted, in the date range selected. Encore totals all the scores earned by the agent when evaluated with the form during the specified time range, and divides them by the number shown in the **# of Evals**.

Org. Score is the average score earned by all agents that have been evaluated with the form. In the first report sample above, Michael Axe received an average score of 88.00 on the Customer Service - Main Form (rev.9) and the organization's score is 86.78. This means his score is higher than the average score earned by all the agents. **Important:** The Org. Score is normalized to each agent. In the report above, Christy, Peter and Michael may have different questions marked as N/A; the Org. Score is adjusted to remove questions marked as N/A from the score. This means that agents evaluated with the same form may show different Org. Scores, which allows the difference value (Avg. Score minus Org. Score) to only include questions which are NOT marked N/A.

Difference is the **Avg. Score** minus the **Org. Score**. If the **Avg. Score** is less than the **Org. Score**, the difference shows in red.

 # Of Evals shows the number of evaluations completed for the agent using that form, in the date range selected (per the **Evaluation Date** or **Recording Date** criteria).

Last Evaluation shows the last date and time that the agent was evaluated with the form. This may be helpful to understand how long ago the agent was evaluated to determine if training has occurred since the last evaluation, or if the agent is only periodically evaluated with a particular form.

Widget Requirements

This report can only be included in the list of dashboard widgets if it is added to either **Shared Reports** or **My Reports** and follows these rules:

- The **Report Grouping** criterion cannot be used.
- Must have at least one and no more than five agents selected.
- The selected date range for the **Evaluation Date** or **Recording Date** criteria must be less than 400 days.
- The **Ask at Execution** option cannot be selected.

Agent Evaluation

This report lists detailed information for each evaluation that was created during the date range selected. It shows all scores as the actual number of points earned by the agent.

Criteria

The following criteria are unique to this report and are explained below for clarification.

Criteria	Description
Form / Category / Question	This enables the report to include selected evaluation forms, scoring categories, and/or evaluation questions. Select the form and the revision number at the top of the window, and the scoring categories and questions open in the lower portion of the window. Then select the scoring category and/or the questions to include on the report.
NA Questions	Questions that are not answered by evaluators may be automatically marked as Not Applicable (NA). These questions have no impact on the score. Selecting **Yes** displays the NA questions on the form and selecting **No** hides them. The default setting is it to display the questions with NA as an answer.
Report Grouping	By default, the report lists each question and does not identify the scoring category of each question. This criterion enables you to group the questions by scoring category and provides a total score for each category.

Sections

This report has four sections:

1. The first section provides the agent information.
2. The second section shows the category scores in a graph.
3. The third section shows the score the agent received on each evaluation question and the total amount of points possible for the question.
4. The fourth section shows any notes the evaluator has given to the agent.

Sample

CSR:	Alejandro Barahona	**Evaluation ID:**	16833715
Team:	Risk Inbound	**Modified By:**	dquinn
Evaluated By:	dquinn	**Modified Date:**	1/3/2011 1:54:00 PM
Recording Date:	1/3/2011 10:57:58 AM	**Form Used:**	Collection Inbound Evaluation Form (rev. 3)
Evaluated Date:	1/3/2011 1:54:00 PM	**Agent avg. score:**	92.79

Agent Evaluation

Question	Answer	Score / Possible
Was the member verified according to policy?	Yes	15.00 / 15.00
Was the home number updated/verified?	Yes	3.00 / 3.00
Was the work number updated/verified?	No	0.00 / 2.00
Was the cell number updated/verified?	No	0.00 / 2.00
Was the address updated/verified?	Yes	2.00 / 2.00
Was the POE updated/verified?	Yes	2.00 / 2.00
Trapped Number was captured	Yes	3.00 / 3.00
Executes proper workflow(s)	Yes	5.00 / 5.00
Correctly processed workflows	F: Fair	8.00 / 10.00
Updating the LKE field with the member's POE information and the appropriate date stamp would have completed this step.		
Executes proper notes	Yes	5.00 / 5.00
Was the reason for delinquency identified?	Yes	10.00 / 10.00
Did the representative offer applicable resolution that addresses the entire delinquency?	S: Superior	17.00 / 17.00
Were arrangements clearly stated in the call including when and how much?	Yes	10.00 / 10.00
Were consequences for broken arrangements (hard close) stated during the call?	Yes	8.00 / 8.00
Offers appropriate referral tools when applicable	Yes	6.00 / 6.00
		94.00/100.00
		94.00 %

Evaluation Comment:

You did a good job reminding the member about their option of setting up an automatic transfer to help avoid future oversight, delinquency and late fees.

Agent Evaluation (Percentages)

This report lists detailed information for each evaluation that was created during the date range selected. It shows all scores as the percentage of points earned by the agent.

Criteria

The following criteria are unique to this report and are explained below for clarification.

Criteria	Description
Form / Category / Question	This enables the report to include selected evaluation forms, scoring categories, and/or evaluation questions. Select the form and the revision number at the top of the window, and the scoring categories and questions open in the lower portion of the window. Then select the scoring category and/or the questions to include on the report.
NA Questions	Questions that are not answered by evaluators may be automatically marked as Not Applicable (NA). These questions have no impact on the score. Selecting **Yes** displays the NA questions on the form and selecting **No** hides them. The default setting is it to display the questions with NA as an answer.
Report Grouping	By default, the report lists each question on the report and does not identify the scoring category of each question. This criterion enables you to group the questions by scoring category and provides a total score for each category.

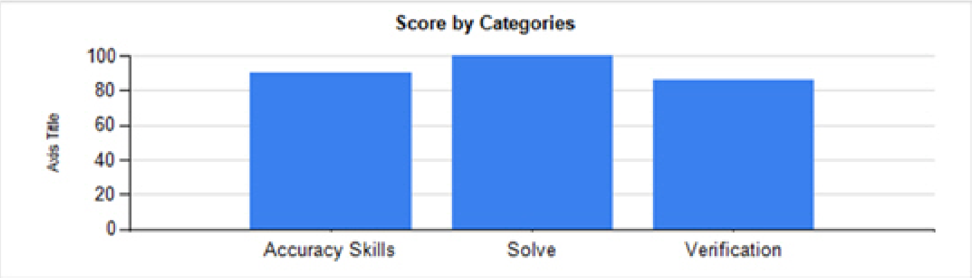
Sections

This report has four sections:

1. The first section provides the agent information.
2. The second section shows the category scores in a graph.
3. The third section shows the percentage of the score that the agent received on each evaluation question.
4. The fourth section shows any notes the evaluator has given to the agent.

Sample

CSR:	Alejandro Barahona	**Evaluation ID:**	16833715
Team:	Risk Inbound	**Modified By:**	dquinn
Evaluated By:	dquinn	**Modified Date:**	1/3/2011 1:54:00 PM
Recording Date:	1/3/2011 10:57:58 AM	**Form Used:**	Collection Inbound Evaluation Form (rev. 3)
Evaluated Date:	1/3/2011 1:54:00 PM	**Agent avg. score:**	92.79



Agent Evaluation (Percentages)

Question	Answer	Score
Was the member verified according to policy?	Yes	100.00 %
Was the home number updated/verified?	Yes	100.00 %
Was the work number updated/verified?	No	0.00 %
Was the cell number updated/verified?	No	0.00 %
Was the address updated/verified?	Yes	100.00 %
Was the POE updated/verified?	Yes	100.00 %
Trapped Number was captured	Yes	100.00 %
Executes proper workflow(s)	Yes	100.00 %
Correctly processed workflows	F: Fair	80.00 %
Updating the LKE field with the member's POE information and the appropriate date stamp would have completed this step.		
Executes proper notes	Yes	100.00 %
Was the reason for delinquency identified?	Yes	100.00 %
Did the representative offer applicable resolution that addresses the entire delinquency?	S: Superior	100.00 %
Were arrangements clearly stated in the call including when and how much?	Yes	100.00 %
Were consequences for broken arrangements (hard close) stated during the call?	Yes	100.00 %
Offers appropriate referral tools when applicable	Yes	100.00 %
		94.00 %

Evaluation Comment:

You did a good job reminding the member about their option of setting up an automatic transfer to help avoid future oversight, delinquency and late fees.

Agent Evaluation Count

This report lists the number of evaluations completed per agent that meet the report criteria.

Criteria

The following criteria are unique to this report and are explained below for clarification.

Criteria	Description
Evaluation Type	Select the type of evaluations you would like to view on the report: either evaluations of interactions (**Evaluation**) or post contact surveys completed by customers (**Surveys**).
Evaluation Date	Select a date range that includes the evaluation dates you need to view.
Forms	Select one or more evaluation forms to view on the report. All revisions of the form are included in the count value.
Number of Evals	Use this criterion to view agents that have a certain number of evaluations completed for them. For instance, if you want to view agents that have less than 10 evaluations completed in a month, select the date range in the **Evaluation Date** criteria, then select **Number of Evals**. Choose the**Less Than** option and enter **10** in the **Less Than** number field near the bottom of the window. Only agents that meet this criteria are included in the report.

Sample

Agent	Team	Evaluation Count
Vic Lowther	GenAgents	6
Ashley Black	GenAgents	2
Tim Adams	GenAgents	1
Luciane Castro	GenAgents	1
Geoffrey Adams	GenAgents	0
Victoria Adams	GenAgents	0

Drill-Down

This report provides a drill-down link in the **Evaluation Count** column (see the sample above). To view the list of evaluations for an agent that meet the report's criteria, click the number in the **Evaluation Count** column. A sample of the drill-down report is shown below.

Agent	Score	Form	Evaluator	Date	Team
Ashley Black	72.50	Customer Service	JWilson	8/29/2017 3:00:49 PM	GenAgents
Ashley Black	91.67	Customer Service Survey	SURVEY_EVALUATOR	2/2/2018 11:29:36 AM	GenAgents

On the second level drill-down, the form name shown in the **Form** column is a link and, when clicked, shows a copy of the evaluation completed for the agent.

NOTE When the report is exported as an Excel, Word or PDF file, all drill-down links are disabled.

Columns

Columns that are unique to this report are explained below:

Evaluation Count is the number of evaluations completed for the agent that also match the report's selected criteria.

Score is the score earned by the agent for that evaluation.

Form is the name of the form without the revision number.

Evaluatoris the name of the person that evaluated the interaction.

Dateis the date the interaction was evaluated.

Agent List

This report displays a list of agents and their statuses.

Criteria

The following criteria are unique to this report and are explained below for clarification.

Criteria	Description
Agent Status	Use this criterion to include active agents, inactive agents, or both.
Report Grouping	This criterion lets you group the agents by teams.

Sample

Agent	Team	Extension	E-Mail	Status
Aaron Oplinger	Collections	1207	aaron.oplinger@ABCCo.com	Inactive
Abigail Urquizo	Loan Underwriting	3246		Active
Adam Ivins	Account Protection	1232	adam.ivins@ABCCo.com	Active
Adam Key	Technical Sales	1358	adam.key@ABCCo.com	Inactive
Adrian Rivas	Teleservices	1969	adrian.rivas@ABCCo.com	Inactive
Adrian Rivas	Eservices	1969	adrian.rivas@ABCCo.com	Inactive
Adriana Gloria	Teleservices	1896	adriana.gloria@ABCCo.com	Inactive
Adrienne Peterson	Loan Services	1518		Inactive
Adrienne Tilly	Teleservices	1168		Inactive
Alane Wachholz	Teleservices	1411	alane.wachholz@ABCCo.com	Inactive
Alejandro Barahona	Risk Inbound	1238		Active
Alex Flores	Teleservices	1836	alejandro.flores@ABCCo.com	Inactive
Alex Manasan	Risk Specialists	1352	alex.manasan@ABCCo.com	Active
Alice Iordanescu	Collections	1378		Inactive
Allison Benedict	Risk Outbound	6100		Active
Alma Chavez	Teleservices	1000		Inactive
Alyssi...	Teleservivces Escalation ...ment	1961	...hnson@ABCCo.com	Inactive

Agent Notes

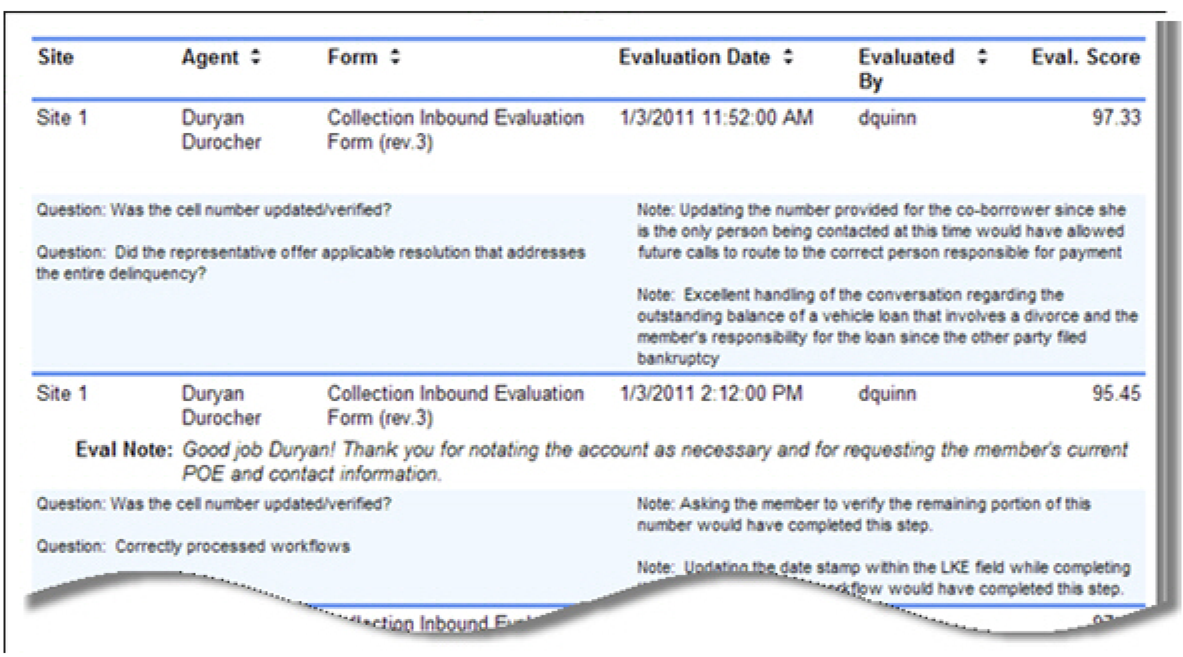
This report lists detailed information regarding the notes entered on evaluation forms. It is most helpful when determining where to focus training for a particular agent, or focus training on certain KPIs that may be more challenging for agents.

Criteria

The following criteria are unique to this report and are explained below for clarification.

Criteria	Description
Date (Evaluation or Recording)	This report can be executed to include evaluations by the date the evaluation was created (**Evaluation Date**) or by the date the recordings were created (**Recording Date**).
Evaluation Score	This criterion enables you to view the notes for evaluations that received a certain overall score. For instance, if you want to see the notes for evaluations with a score below 80%, select **Less Than** and then enter **80** in the **Select Eval Score** field.
Evaluator	Use this criterion to view the notes given by a certain evaluator. This is a good method to review the evaluator's feedback and consider areas for improvement.
Forms	Use this criterion to see the notes given to agents for a certain form. Since forms are generally set up for each department or job function, this may be a good way to target areas for training.
Questions	Use this criterion to view notes given for a certain question.
Report Grouping	By default, the report lists each agent and their notes by the time and date they were created. This criterion enables you to group the agent notes by **Site**, **Site Then Agent**, or **Site Then Agent Then Form**.

Sample



Site	Agent	Form	Evaluation Date	Evaluated By	Eval. Score
Site 1	Duryan Durocher	Collection Inbound Evaluation Form (rev.3)	1/3/2011 11:52:00 AM	dquinn	97.33

Question: Was the cell number updated/verified?

Question: Did the representative offer applicable resolution that addresses the entire delinquency?

Note: Updating the number provided for the co-borrower since she is the only person being contacted at this time would have allowed future calls to route to the correct person responsible for payment

Note: Excellent handling of the conversation regarding the outstanding balance of a vehicle loan that involves a divorce and the member's responsibility for the loan since the other party filed bankruptcy

Site	Agent	Form	Evaluation Date	Evaluated By	Eval. Score
Site 1	Duryan Durocher	Collection Inbound Evaluation Form (rev.3)	1/3/2011 2:12:00 PM	dquinn	95.45

Eval Note: *Good job Duryan! Thank you for notating the account as necessary and for requesting the member's current POE and contact information.*

Question: Was the cell number updated/verified?

Question: Correctly processed workflows

Note: Asking the member to verify the remaining portion of this number would have completed this step.

Note: Updating the date stamp within the LKE field while completing workflow would have completed this step.

Columns

The first row of each entry contains the information about where the note was originally created.

The second row shows the question that includes an evaluator comment. For instance in the sample, the first entry shows two questions on the left and the evaluator's note for each on the right. The second entry also shows two questions with corresponding notes. It also shows an **Eval Note** which is an overall note for the entire evaluation, not just one particular question.

Agent Performance Analysis

This report is no longer supported. The Agent Score Analysis report should be used instead.

This report lists agents' performances on each form in which they are scored and helps to show how the agent is performing compared to the overall organization and other, individual agents. The agents are sorted by form and listed from the lowest to the highest score per form. The **Difference** column lists the change, positive or negative, between the organization's score earned on the form (**Org. Score**) and the agent's average score earned on the form (**Avg. Score**).

Criteria

The following criteria are unique to this report and are explained below for clarification.

Criteria	Description
Average Score	Use this criterion to only view agents that match a certain average score. For instance, if you want to view all agents with an average score of less than 70%, choose **Less Than** and enter **70** in the **Select Average Score** field.
Avg Score Threshold	Use this criterion to highlight agents that match a certain average score. For instance, if you want to view all agents with a score greater than 80%, choose **Greater Than** and enter **80** in the field. All agents are listed on the report but only agents with an average score greater than 80% are highlighted.
Detail Rows	This criterion specifies how the detail rows in the report are grouped. • **Group By Form (Default)** – When this option is selected (or the criterion is not used) the report detail rows are grouped according to **Form**, then **Agent**, showing one row for each unique combination of form/agent. This is the detail row grouping shown in the report example. The **Org Score** that is presented shows the combined score for all agents using that form. The difference is calculated based on that number. This type of detail is useful when different forms have different point structures and you want to compare similar data. • **Group By Agent** – When this option is selected each detail row combines all the agent's evaluations into one row and one score. In addition, the **Org Score** combines the scores of all the different forms that were used, giving a single number for all forms. The difference is calculated based on that number.
Form / Category / Question	This enables the report to include selected evaluation forms, scoring categories, and/or evaluation questions. Select the form and the revision number at the top of the window, and the scoring categories and questions open in the lower portion of the window. Then select the scoring category and/or the questions to include on the report.
Number of Evals	Use this criterion to view agents that have a certain number of evaluations completed for them. For instance, if you want to view agents that have less than 10 evaluations completed in a months time, select the date range in either the **Evaluation Date** or **Recording Date** criteria, then select **Number of Evals**. Choose **Less Than** and enter **10** in the **Select Number of Evals** field.
Report Grouping	This enables you to group the information in various ways, such as by form, scoring category, etc. If you select:

Criteria	Description
	• **Site**, you can view evaluations by site. • **Site Then Form**, you can view evaluations by site and then the form used to evaluate the recording. • **Site Then Form Then Scoring Category**, you can view all evaluations by site, the form used to evaluate the recording, and the scoring category for the form. • **Site Then Form Then Question**, you can view all evaluations by site. then the form used to evaluate the recording, and then the question on the form. • **Site Then Form Then Evaluator**, you can view all evaluations by site, then the form used to evaluate the recording, and then the evaluator who assessed the recording.

Sample

Form	Agent	Avg. Score	Org. Score	Difference	# Of Evals	Last Evaluation	Last Evaluated By
Collection Inbound Evaluation Form (rev.3)	Alejandro Barahona	92.79	89.10	3.69	4	1/5/2011 9:08:00 AM	dquinn
Collection Inbound Evaluation Form (rev.3)	Ameka Phillips	84.42	89.10	- 4.68	4	1/5/2011 9:31:00 AM	dquinn
Collection Inbound Evaluation Form (rev.3)	April Swanson	86.72	89.10	- 2.38	3	1/4/2011 5:37:00 PM	dquinn
Collection Inbound Evaluation Form (rev.3)	Christi Weeks	97.00	89.10	7.90	1	1/4/2011 8:44:00 AM	dquinn
Collection Inbound Evaluation Form (rev.3)	Duryan Durocher	96.68	89.10	7.58	3	1/4/2011 4:05:00 PM	dquinn
Collection Inbound Evaluation Form (rev.3)	Gary Castle	95.00	89.10	5.90	3	1/4/2011 3:27:00 PM	dquinn
Collection Inbound Evaluation Form (rev.3)	Griselda Memushaj	98.58	89.10	9.48	3	1/4/2011 4:37:00 PM	dquinn
Collection Inbound Evaluation Form (rev.3)	Jorge Morales	91.50	89.10	2.40	3	1/5/2011 9:37:00 AM	dquinn
Collection Inbound Evaluation Form (rev.3)	Lisa Ashley	54.81	89.10	- 34.28	3	1/4/2011 2:01:00 PM	dquinn
Collection Inbound Evaluation Form (rev.3)	Matilda Perez	95.18	89.10	6.08	2	1/4/2011 5:09:00 PM	dquinn
Collection Inbound Evaluation Form (rev.3)	Phillip Liebold	89.78	89.10	0.68	3	1/4/2011 4:30:00 PM	dquinn
Collection Inbound Evaluation Form (rev.3)	Renae Geiger	93.97	89.10	4.88	3	1/4/2011 4:15:00 PM	dquinn
Collection Outbound Evaluation Form (rev.3)	Allison Benedict	93.18	84.76	8.43	2	1/4/2011 11:26:00 AM	dquinn
Collection Outbound Evaluation Form (rev.3)	Arthur Won	40.83	84.76	- 43.93	2	1/4/2011 4:04:00 PM	dquinn
Collection Outbound Evaluation Form (rev.3)	Catherine Perez	100.00	84.76	15.24	2	1/4/2011 10:45:00 AM	dquinn
	Christi Weeks	100.00				...17:00 AM	dquinn

Columns

Columns that are unique to this report are explained below:

Avg. Score is the average score earned by the agent on that form for the date range selected. You can group the report by agent if you need to view all the scores received by a certain agent on multiple forms, or you can group it by team, form, site, etc.

Org. Score is the average score earned by all agents that have been evaluated with the form. In the sample above, Alejandro Barahona received an average score of 92.79 and the organization's score is 89.10. This means his score is higher than the average score earned by all the agents. It may be helpful to review

Alejandro's calls and see if there are tips or methods that can be shared with other agents to improve their scores.

This score may vary per agent.

Difference is the **Avg. Score** minus the **Org. Score**. If the **Avg. Score** is less than the **Org. Score**, the agent has an average score that is less than the average score earned by all agents in the organization for that form. These numbers show in red.

 # Of Evals shows the number of evaluations included in the **Avg. Score** for the agent for the evaluation form noted. This number depends on the date range selected in the **Evaluation Date** or **Recording Date**.

Last Evaluation shows the last date and time that the agent was evaluated with the form. This may be helpful to understand how long ago the agent was evaluated to determine if training has occurred since the last evaluation, or if the agent is only periodically evaluated with a particular form.

Last Evaluated By shows which evaluator most recently evaluated the agent.

Agent Performance Trending

This report displays how agents have performed over time on each form.

Criteria

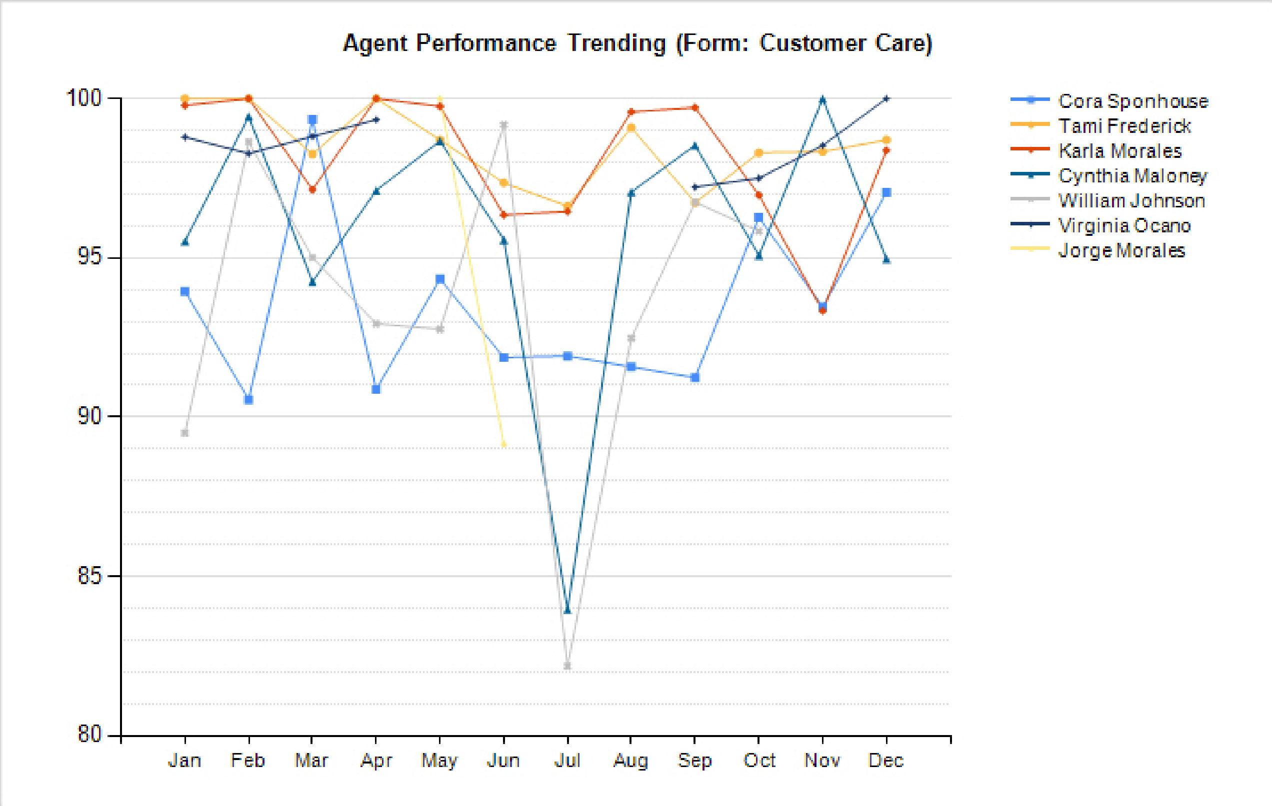
The following criteria are unique to this report and are explained below for clarification.

Criteria	Description
Evaluation Date	Select a date range that includes the evaluation dates you would like to include in the report.
Forms	Select a form to see how an agent has performed over time in certain areas.
Recording Date	Select a date range that includes the recording dates for completed evaluations you would like to include in the report.
Site/Team/Agent	Use this criterion to see how a certain site, team, or agent is performing on a form over time.

Sample

Form: Customer Care

Agent Name	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Average
Cora Sponhouse	93.95	90.55	99.34	90.87	94.34	91.87	91.91	91.58	91.24	96.27	93.46	97.05	93.70
Cynthia Maloney	95.53	99.44	94.25	97.12	98.67	95.57	83.95	97.07	98.54	95.08	100.00	94.97	95.50
Jorge Morales					100.00	89.13							91.85
Karla Morales	99.78	100.00	97.14	100.00	99.76	96.35	96.45	99.58	99.72	96.97	93.33	98.38	98.13
Tami Frederick	100.00	100.00	98.26	100.00	98.70	97.35	96.62	99.09	96.73	98.30	98.33	98.70	98.27
Virginia Ocano	98.79	98.27	98.81	99.33					97.22	97.50	98.53	100.00	98.65
William Johnson	89.50	98.64	95.01	92.93	92.76	99.18	82.18	92.48	96.75	95.83			93.82
Average:	96.45	97.82	97.13	96.33	96.97	95.52	90.22	95.71	96.68	96.61	96.83	97.77	96.10



Graph

The graph illustrates the data shown on the report. It helps to quickly see obvious deviations, either positive or negative.

Widget Requirements

This report can only be included in the list of dashboard widgets if it is added to either **Shared Reports** or **My Reports** and follows these rules:

- Must have at least one and no more than five agents selected.
- The selected date range for the **Evaluation Date** criterion must be less than 400 days.
- The **Ask at Execution** option cannot be selected.

Agent Score Analysis

This report provides the agent's average evaluation score compared to the organization's average score. To view the agent's average score at the question or scoring category level compared to the organization's average score, use the Agent Analysis report.

Criteria

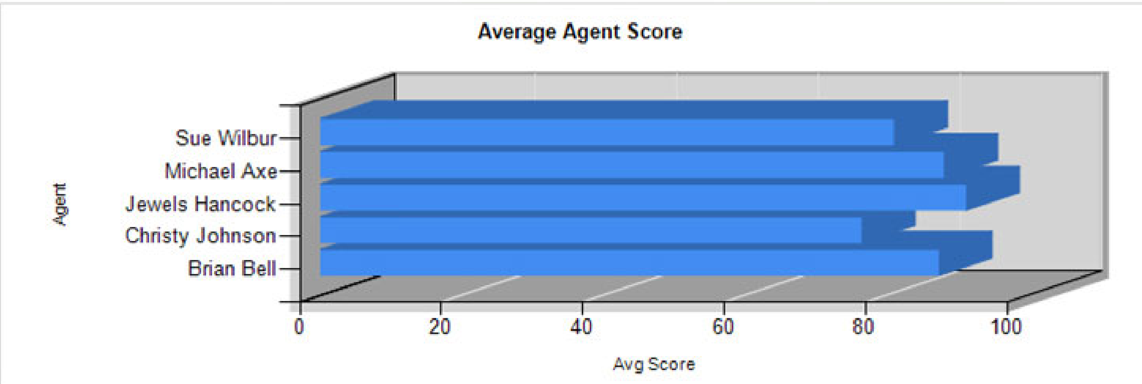
The following criteria are unique to this report and are explained below for clarification.

<table>
<tr><th>Criteria</th><th>Description</th></tr>
<tr><td>Detail Rows</td><td>This criterion specifies how the detail rows in the report are grouped.
Group By Form (Default) – When this option is selected (or the criterion is not used) the report detail rows are grouped according to Form, then Agent, showing one row for each unique combination of form/agent. This is the detail row grouping shown in the report example. The Org Score that is presented shows the combined score for all agents using that form. The difference is calculated based on that number. This type of detail is useful when different forms have different point structures and you want to compare similar data.
Group By Agent – When this option is selected each detail row combines all the agent's evaluations into one row and one score. In addition, the Org Score combines the scores of all the different forms that were used, giving a single number for all forms. The difference is calculated based on that number.</td></tr>
<tr><td>DNIS</td><td>Select the DNIS codes to include in the report. This list is limited to the distinct DNIS numbers used within the last year.</td></tr>
<tr><td>Evaluation Date</td><td>Select a date range that includes the evaluation dates you need to review.</td></tr>
<tr><td>Evaluation Score</td><td>This criterion limits the evaluations included in the report calculations so that only evaluations that match the score criteria are included. For instance, if you need to include all evaluations with an average score of less than 70%, choose Less Than and enter 70 in the field below the comparison options.</td></tr>
<tr><td>Evaluation Type</td><td>Select the type of evaluations you would like to view on the report: either evaluations of recorded conversations or post contact surveys completed by customers.</td></tr>
<tr><td>Number of Evals</td><td>Use this criterion to view agents that have a certain number of evaluations completed for them. For instance, if you want to view agents that have less than 10 evaluations completed in a months time, select the date range in either the Evaluation Date or Recording Date criteria, then select Number of Evals. Choose Less Than and enter 10 in the in the field below the comparison options. Only agents having a number of evaluations that meet this criterion are included in the report.</td></tr>
<tr><td>Only Show Evaluations</td><td>Limits the number of returned evaluations based on whether a recording was evaluated.
With Recordings only shows evaluations with recordings; evaluations without recordings are excluded.
Without Recordings only shows evaluations without recordings; evaluations based on recordings are excluded.</td></tr>
<tr><td>Recording Date</td><td>Select a date range that includes the recording dates for completed evaluations you need to review.</td></tr>
</table>

Sample

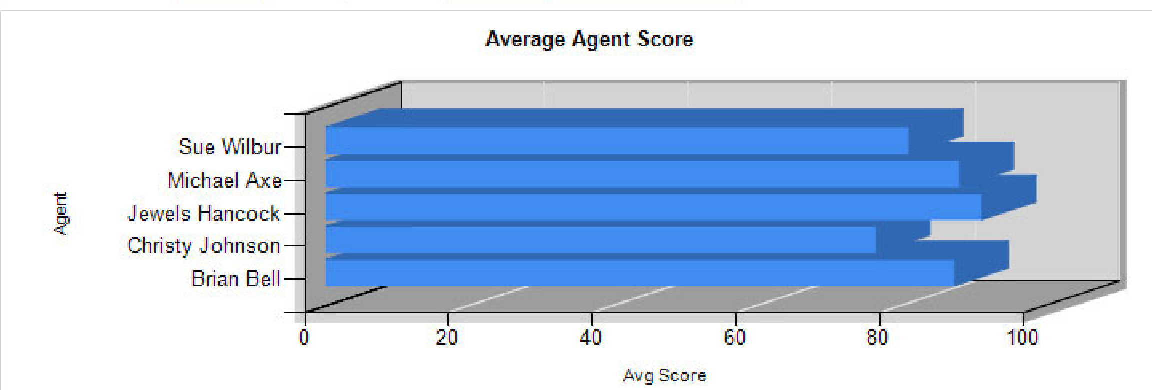
The sample below shows the report with the default **Detail Rows** setting, **Group by Form**, selected:

Form	Agent	Avg Score	Org. Score	Difference	# Of Evals	Last Evaluation
Customer Service - Main Form	Brian Bell	87.50	82.81	4.69	2	4/22/2016 4:28:02 PM
Customer Service - Main Form	Christy Johnson	76.59	82.81	-6.22	7	1/18/2016 2:52:06 PM
Customer Service - Main Form	Jewels Hancock	91.34	82.81	8.53	4	3/29/2016 5:52:39 PM
Sales Performance	Michael Axe	88.25	86.22	2.03	5	12/18/2015 1:33:01 PM
Sales Performance	Sue Wilbur	81.15	86.22	-5.07	2	4/22/2016 4:25:52 PM
		84.00			20.00	4/22/2016 4:28:02 PM



This second sample illustrates how the report looks with the **Detail Rows** criterion set to **Group by Agent**.

Agent	Avg Score	Org. Score	Difference	# Of Evals	Last Evaluation
Brian Bell	87.50	84.00	3.50	2	4/22/2016 4:28:02 PM
Christy Johnson	76.59	84.00	-7.41	7	1/18/2016 2:52:06 PM
Jewels Hancock	91.34	84.00	7.34	4	3/29/2016 5:52:39 PM
Michael Axe	88.25	84.00	4.25	5	12/18/2015 1:33:01 PM
Sue Wilbur	81.15	84.00	-2.85	2	4/22/2016 4:25:52 PM
	84.00			20.00	4/22/2016 4:28:02 PM



Drill-Down

This report provides a drill-down link in the **# of Evals** column (see samples above) to show a list of evaluations completed for the agent that meet this report's criteria (see sample below).

Agent	Score	Form	Evaluator	Date	Team
Karyn Peters	93.33	Customer Service	Administrator	12/14/2016	Customer Support
Karyn Peters	90.00	Customer Service	Administrator	12/14/2016	Customer Support
Karyn Peters	60.00	Customer Service	Administrator	12/14/2016	Customer Support
Karyn Peters	96.67	Customer Service	Administrator	10/13/2016	Customer Support
Karyn Peters	98.33	Customer Service	Administrator	10/13/2016	Customer Support
Karyn Peters	96.67	Customer Service	Administrator	10/13/2016	Customer Support
Karyn Peters	96.67	Customer Service	Administrator	10/13/2016	Customer Support
Karyn Peters	96.67	Customer Service	Administrator	10/13/2016	Customer Support
Karyn Peters	93.33	Customer Service	Administrator	10/13/2016	Customer Support
Karyn Peters	46.67	Customer Service	Administrator	10/13/2016	Customer Support

On the second level drill-down, the form name shown in the **Form** column is a link and, when clicked, shows a copy of the evaluation completed for the agent.

NOTE When the report is exported as an Excel, Word or PDF file, all drill-down links are disabled.

Columns

Columns that are unique to this report are explained below:

Form is the name of the form without the revision number. If the report is grouped by agent, this column does not show.

Avg. Score is the average score earned by the agent. It is different depending on the value selected for the **Detail Rows** criterion:

- If the **Detail Rows** criterion is set to **Group By Agent**, the **Avg. Score** value is calculated by averaging the scores of all evaluations for an agent that meet the report criteria. Only data that meets both the agent and evaluation criteria are shown on the report.
- If the **Detail Rows** criterion is set to **Group By Form**, either by specifically choosing this option or by default, the **Avg. Score** value is calculated by averaging the scores of all evaluations for an agent and a form that meet the report criteria. Only data that meets both the agent and form criteria are shown on the report.

Org. Score is the average score of all evaluations that meet the selected criteria.

- If the **Detail Rows** criterion is set to **Group By Agent**, the **Org. Score** value is calculated by averaging the scores of all evaluations that meet the report criteria. Each agent shows the same **Org. Score** on the report.
- If the **Detail Rows** criterion is set to **Group By Form**, either by specifically choosing this option or by default, the **Org. Score** value is calculated by averaging the scores of all evaluations for a form that meet the report criteria.

Difference is the **Avg. Score** minus the **Org. Score**. If the **Avg. Score** is less than the **Org. Score**, the difference shows in red.

 # Of Evals shows the number of evaluations completed for the agent using that form, in the date range selected (per the **Evaluation Date** or **Recording Date** criteria).

Last Evaluation shows the last date and time that the agent was evaluated with the form. This may be helpful to understand how long ago the agent was evaluated to determine if training has occurred since the last evaluation, or if the agent is only periodically evaluated with a particular form.

Widget Requirements

This report can only be included in the list of dashboard widgets if it is added to either **Shared Reports** or **My Reports** and follows these rules:

- Must have at least one and no more than five agents selected.
- The selected date range for the **Evaluation Date** or **Recording Date** criteria must be less than 400 days.
- The **Ask at Execution** option cannot be selected.

Agent Scores by Question

This report provides a comprehensive list of the agent's accumulated scores for questions answered on evaluations. Only evaluations created during the report's date range are included. It can be used to provide report cards for agents or to evaluate the difficulty and effectiveness of different questions.

Criteria

The following criteria are unique to this report and are explained below for clarification.

Criteria	Description
Average Score	Use this criterion to only view questions that match a certain average score. For instance, if you want to view questions with an average score of less than 70%, choose **Less Than** and enter **70** in the **Select Average Score** field.
Average System Score	Use this criterion to view questions that match a certain average system score. For instance, if you want to view questions with an average system score greater than 80%, choose **Greater Than** and enter **80** in the **Select Average System Score** field.
Form / Category / Question	This enables the report to include selected evaluation forms, scoring categories, and/or evaluation questions. Select the form and the revision number at the top of the window, and the scoring categories and questions open in the lower portion of the window. Then select the scoring category and/or the questions to include on the report.
Number of Evals	Use this criterion to view questions that have a certain number of evaluations completed for them. For instance, if you want to view questions that have less than 10 evaluations completed in a months time, select the date range in the **Recording Date** criterion, then select **Number of Evals**. Choose **Less Than** and enter **10** in the **Select Number of Evals** field.
Report Grouping	This enables you to group the information in various ways, such as by question, scoring category, etc. If you select: • **Site**, you can view question scores grouped by site. • **Agent**, you can view question scores grouped by agent. • **Question**, you can view question scores grouped by question. • **Scoring Category**, you can view question scores grouped by scoring category. • **Site Then Agent**, you can view question scores grouped by site and then agent. • **Site Then Question**, you can view question scores grouped by site and then question.

Sample

Site	Agent Name	Question	# of Evals	Average Agent Score	Average Team Score	Average System Score	Difference (Agent - Team)	Difference Agent System
Site 1	Travis Boontjer	Tone of voice was appropriate and confidence was evident(Rev. 3)	1	100.00	100.00	100.00	0.00	0.00
Site 1	Cathy Mally	Tone of voice was appropriate and confidence was evident(Rev. 3)	1	100.00	100.00	100.00	0.00	0.00
Site 1	Rhonda Federico	Tone of voice was appropriate and confidence was evident(Rev. 3)	1	100.00	100.00	100.00	0.00	0.00
Site 1	Dave Macphail	Tone of voice was appropriate and confidence was evident(Rev. 3)	2	100.00	100.00	100.00	0.00	0.00
Site 1	Tanner Allen	Tone of voice was appropriate and confidence was evident(Rev. 3)	1	100.00	100.00	100.00	0.00	0.00
Site 1	Alex Manasan	Tone of voice was appropriate and confidence was evident(Rev. 3)	2	100.00	100.00	100.00	0.00	0.00
Site 1	Lisa Ashley	Was the address updated/verified?(Rev. 2)	3	33.33	93.94	93.22	-60.61	-59.89
Site 1	Matilda Perez	Was the address updated/verified?(Rev. 2)	2	100.00	93.94	93.22	6.06	6.78
Site 1	Gary Castle	Was the address updated/verified?(Rev. 2)	3	100.00	93.94	93.22	6.06	6.78
Site 1	Griselda Memushaj	Was the address updated/verified?(Rev. 2)	3	100.00	93.94	93.22	6.06	6.78
Site 1	Allison Benedict	Was the address updated/verified?(Rev. 2)	2	100.00	95.83	93.22	4.17	6.78
Site 1	Alejandro Barahona	Was the address updated/verified?(Rev. 2)	4	100.00	93.94	93.22	6.06	6.78
Site 1	Jennifer Garcia	Was the address updated/verified?(Rev. 2)	2	100.00	95.83	93.22	4.17	6.78
Site 1	Phillip Liebold	Was the address updated/verified?(Rev. 2)	3	100.00	93.94	93.22	6.06	6.78
Si		...dress updated/verified?(Rev. 2)				93.22	4.17	6.78

Drill-Down

This report provides drill-down links in the **Agent Name** and **Question** columns to show additional information. If you select the **Gary Castle** link in the **Agent** column, the report lists each evaluation where that question was answered for this agent and the score assessed for the evaluation.

AgentID: Gary Castle

Create Date	Evaluator	Form	Score
1/3/2011 10:31 AM	dquinn	Collection Inbound Evaluation Form (rev.3)	92.00
1/3/2011 3:34 PM	dquinn	Collection Inbound Evaluation Form (rev.3)	95.00
1/4/2011 3:27 PM	dquinn	Collection Inbound Evaluation Form (rev.3)	98.00

If you select the question link in the **Question** column on the first level of the report, it shows the score this question received on each evaluation. This helps to determine if this particular question affected the total evaluation score.

Agent: **Gary Castle**

Question: **Was the address updated/verified?**

Create Date	Evaluator	Form	Question Score	Eval Score
1/3/2011 10:31:00 AM	dquinn	Collection Inbound Evaluation Form	2.00 / 2.00	92.00
1/3/2011 3:34:00 PM	dquinn	Collection Inbound Evaluation Form	2.00 / 2.00	95.00
1/4/2011 3:27:00 PM	dquinn	Collection Inbound Evaluation Form	2.00 / 2.00	98.00

NOTE When the report is exported as an Excel, Word or PDF file, all drill-down links are disabled.

Columns

Columns that are unique to this report are explained below:

# of Evals shows the number of evaluations included to calculate the average scores for questions. This number depends on the date range selected in the **Recording Date**.

Average Agent Score is the average score earned by the agent for a particular question. You can group the report by agent if you need to view all the scores received by a certain agent on multiple questions, or you can group it by team, form, site, etc.

Average Team Score is the average score earned by a team for a particular question.

Average System Score is the average score earned by all agents for a particular question.

Difference (Agent – Team) shows the difference between the average agent score and the average team score for a question. If the agent score is less than the team score, this number shows as red. This calculation shows how the agent is performing compared to his team.

Difference (Agent – System) shows the difference between the average agent score and the average system score for a question. If the agent score is less than the system score, this number shows as red. This calculation shows how the agent is performing compared to all agents in the system.

Agents Not Scheduled

This report is most helpful for customers that use scheduled recording instead of full-time recording. It displays a list of agents that are not currently scheduled.

Notes

When an agent is assigned directly to a schedule, he is explicitly assigned to the schedule. When the agent is not directly assigned to a schedule but his team is assigned, the agent is implicitly assigned to the schedule. Agents that are implicitly or explicitly scheduled are considered to be scheduled and are not displayed on this report.

Criteria

The following criteria are unique to this report and are explained below for clarification.

Criteria	Description
Agent Status	Use this criterion to view agents that are active or those that are inactive.
Report Grouping	This enables you to group the information by team.

Sample

Agent	Active	Team
Arthur Won	Y	Risk Specialist
Barbara Hitchings	Y	Loan Underwriting
Bryan Valdivia	Y	Member Response
Catherine Perez	Y	Risk Outbound
Daria Spane	Y	Teleservices
David DeLuc	Y	Risk Leads
Gary Castle	Y	Risk Inbound
Guadalupe Romero	Y	Risk Outbound
Harmony Stevens	Y	Teleservices
Heather Kindred	Y	Teleservices
Juan Tellez	Y	Teleservices
Julie Frank	Y	Customer Service

Agents Scheduled

This report is most helpful for customers that use scheduled recording instead of full-time recording. It displays a list of agents that are scheduled.

Notes

When an agent is assigned directly to a schedule, he is explicitly assigned to the schedule. When the agent is not directly assigned to a schedule but his team is assigned, the agent is implicitly assigned to the schedule. Agents that are implicitly or explicitly scheduled are considered to be scheduled and are displayed on this report.

Criteria

The following criteria are unique to this report and are explained below for clarification.

Criteria	Description
Agent Status	Use this criterion to view agents that are active or those that are inactive.
Report Grouping	This enables you to group the information by team.

Sample

Agent	Team	Active
Aaron Oplinger	Collections	N
Abigail Urquizo	Loan Underwriting	Y
Adam Ivins	Account Protection	Y
Adam Key	Technical Sales	N
Adrian Rivas	Eservices	N
Adrian Rivas	Teleservices	N
Adriana Gloria	Teleservices	N
Adrienne Peterson	Loan Services	N
Adrienne Tilly	Teleservices	N
Alane Wachholz	Teleservices	N
Alejandro Barahona	Risk Inbound	Y
Alex Flores	Teleservices	N
Alex Manasan	Risk Specialists	Y
Alice Iordanescu	Collections	N
Allison Benedict	Risk Outbound	Y
Alma Chavez	Teleservices	N
Alyssia Johnson	Teleservivces Escalation Magement	N
Amaniel Habte	Teleservices	N
Ameka Phillips	Risk Inbound	Y
Amelia Puente	Collections	N
Am	Teleservices	N

Agents Scheduled Below Target

This report is most helpful for customers that use scheduled recording instead of full-time recording. It displays a list of agents that have handled a number of recordings that is less than the set threshold value. This threshold is set in CenterPlus.

Notes

When an agent is assigned directly to a schedule, he is explicitly assigned to the schedule. When the agent is not directly assigned to a schedule but his team is assigned, the agent is implicitly assigned to the schedule. This report displays a list of agents that are explicitly and implicitly assigned to a schedule, and have handled a number of recordings that is less than the set threshold value.

Criteria

This report includes only three criteria.The **Preferences** and **Recording Date** criteria are easy to use. The **Recordings Count** enables you to enter a threshold amount so that you only see agents that meet the recording count you entered. For instance, if you want to see agents who have had less than 10 recordings created for them, you would select **Less Than** and enter **10** in the **Select Recordings Count** field.

Columns

This report shows information grouped by schedule. For each schedule, the following information is included:

- Active – Shows whether the schedule is active or inactive.
- Recordings – The target number of recordings that each agent assigned to this schedule should generate.
- Screen Capture – Shows if the schedule includes screen captures.
- Screen Recording – Shows the percentage of recordings that include screen capture.

Each schedule then lists agents who have not met the schedule's target. This list includes the agent's name, whether the agent is active or inactive, and the number of recordings created for the agent.

Agents Scheduled Not Recorded

This report is most helpful for customers that use scheduled recording instead of full-time recording. It displays a list of agents that have not handled any recordings.

Notes

When an agent is assigned directly to a schedule, he is explicitly assigned to the schedule. When the agent is not directly assigned to a schedule but his team is assigned, the agent is implicitly assigned to the schedule. Agents that are explicitly and implicitly assigned to a schedule are included on this report.

Sample

Schedule	Recordings	Screen Capture	Screen Recording	Active
ABC Collections	100%	Y	100%	True

Agent	Active
Abigail Urquizo	Y
Brooke Rolph	Y
Cary Shumway	Y

Columns

Columns that are unique to this report are explained below:

The **Recordings** column shows whether full-time or scheduled recording is set for the team.

The **Screen Capture** column shows whether the desktops for this team are recorded.

The **Screen Recording** column shows the percentage of recordings that include screen captures.

The **Active** column notes whether the schedule is active at this time.

The agents listed below the schedule are those that have not handled any recordings during the date range.

Assignment List

This report displays a list of all assignments, at varying stages in their completion.

Criteria

The following criteria are unique to this report and are explained below for clarification.

Criteria	Description
Assignment Date	The date an assignment was created.
Completion Date	The date an assignment is completed.
Due Date	The date an assignment is due.
Site	All assignments created for agents at each site.
Status	The assignment's status: Not Started, In Progress, Completed, or Overdue.

Sample

Status	Priority	Assignment	Due Date	Duration	Comment	Sender	Recipient	Assigned Date	Completed Date
Completed	1	Core Values 1	2/1/2012 9:37:58 PM	3		Rhonda Adams	Krystal Villaverde	1/25/2012 9:37:58 PM	1/25/2012 9:40:13 PM
Completed	1	Core Values 1	2/1/2012 9:38:59 PM	3		Rhonda Adams	Brad Ellison	1/25/2012 9:38:59 PM	1/25/2012 9:39:41 PM
Not Started	1	Core Values 1	2/1/2012 9:43:49 PM	3		Rhonda Adams	Kevin Smith	1/26/2012 9:43:49 PM	
Completed	2	Effective Greetings	1/30/2012 9:36:26 PM	3		Rhonda Adams	Kevin Smith	1/25/2012 9:36:26 PM	1/2/2012 9:40:45 PM
Completed	2	Effective Greetings	1/30/2012 9:37:58 PM	3		Rhonda Adams	Krystal Villaverde	1/25/2012 9:37:58 PM	1/25/2012 9:40:13 PM
Completed	3	Employee Conduct	1/30/2012 9:37:58 PM	3		Rhonda Adams	Krystal Villaverde	1/25/2012 9:37:58 PM	1/25/2012 9:40:13 PM
Completed	3	Employee Conduct	1/30/2012 9:36:26 PM	3		Rhonda Adams	Kevin Smith	1/25/2012 9:36:26 PM	1/30/2012 11:52:21 PM
Overdue	3	Employee Conduct	1/30/2012 9:43:49 PM	3		Rhonda Adams	Kevin Smith	1/26/2012 9:43:49 PM	
Completed	3	Employee Conduct	1/30/2012 9:38:59 PM	3		Rhonda Adams	Brad Ellison	1/25/2012 9:38:59 PM	1/25/2012 9:39:41 PM
Completed	1	How to listen and ask good questions	1/27/2012 9:38:59 PM	1		Rhonda Adams	Brad Ellison	1/25/2012 9:38:59 PM	1/25/2012 9:39:41 PM
Overdue	1	How to listen and ask good questions	1/27/2012 9:43:49 PM	1		Rhonda Adams	Kevin Smith	1/26/2012 9:43:49 PM	
Completed	1	How to listen and ask good questions	1/27/2012 9:36:26 PM	1		Rhonda Adams	Kevin Smith	1/25/2012 9:36:26 PM	1/25/2012 9:40:45 PM
Completed	1	How to listen and ask good questions	1/27/2012 9:37:58 PM	1		Rhonda Adams	Krystal Villaverde	1/25/2012 9:37:58 PM	1/25/2012 9:40:13 PM

Columns

Columns that are unique to this report are explained below:

Priority is the priority level assigned to the eCoaching module.

Duration is the number of hours it takes to complete the eCoaching module.

Audit Log Report

This report lists the actions that each user has taken while working with recordings and evaluations. If you need this information also logged in the Windows Application Event Log, open web.config in C:\dvs\encore and set the appropriate configuration.

Criteria

The following criteria are unique to this report and are explained below for clarification.

Criteria	Description
Date Range	Use this criterion to select the dates you need to include in the report. This is the date the user completed an action, not a recording or evaluation date.
Event Types	This criterion enables you to view certain event types only. For example, if you need to view the users that have deleted a recording from a library or when certain users have logged into the system, choose the corresponding event type.
Recording Identifier	If you want to view all the events that have occurred for a particular recording, choose **Equal To** and enter the recording's call index number in the blank field.
Users	If you want to view all the events performed by a certain user, select the user name. When the report executes, all the events this user has performed in the selected date range are listed on it.

Sample

Log Date Time	Site ID	User ID	Event Type	Log Detail
3/31/2011 5:56:12 PM	0	AdrienneM	UserLoggedOut	<isApplicationExit=False>
3/31/2011 5:39:25 PM	1	AdrienneM	RecordingRequested	<Library=System><PlayListName=Longer Minutes><PlayListOwner=AdrienneM><P
3/31/2011 5:39:24 PM	1	AdrienneM	DynamicPlayListAdd	<PlayList=Longer - 20 Minutes><PlayLi
3/31/2011 5:39:02 PM	1	AdrienneM	RecordingRequested	<Library=System><PlayListName=En Applied><PlayListOwner=AdrienneM
3/31/2011 5:39:00 PM	1	AdrienneM	DynamicPlayListAdd	<PlayList=Encryption Applied><Play
3/31/2011 5:38:39 PM	1	AdrienneM	RecordingRequested	<Library=System><PlayListName=A Sue><PlayListOwner=AdrienneM><P
3/31/2011 5:38:36 PM	1	AdrienneM	DynamicPlayListAdd	<PlayList=Agent - Sue><PlayListType
3/31/2011 5:38:15 PM	1	AdrienneM	RecordingRequested	<Library=System><PlayListName=Agen Brad><PlayListOwner=AdrienneM><Play
3/31/2011 5:38:12 PM	1	AdrienneM	DynamicPlayListAdd	<PlayList=Agent - Brad><PlayListType=A
3/31/2011 5:37:52 PM	1	AdrienneM	RecordingRequested	<Library=System>
3/31/2011 5:37:49 PM	1	AdrienneM	UserLoggedIn	
3/31/2011 5:37:36 PM	1	CynthiaT	UserLoggedOut	<isApplicationExit=False>
3/31/2011 5:37:30 PM	1	CynthiaT	RecordingRequested	<Library=System><PlayListName=Lo Minutes><PlayListOwner=CynthiaT>
3/31/2011 5:37:29 PM	1	CynthiaT	DynamicPlayListAdd	<PlayList=Longer - 20 Minutes><Pla
3/31/2011 5:36:56 PM	1	CynthiaT	RecordingRequested	<Library=System><PlayListName=E Applied><PlayListOwner=CynthiaT><
[illegible]	1	CynthiaT	Dynamic	ist=Encryption Applied><PlayLi

Columns

Columns that are unique to this report are explained below:

Event Type lists the type of event that occurred for that audit log entry.

Log Detail displays more detail about the user's actions. It may be helpful to troubleshoot a user's actions.

Average Time Between Recordings

This report displays the idle time between recordings. It helps with:

- Identifying the amount of possible downtime between calls which may be considered wrap-up or idle time.
- Providing a total amount of non-recorded time for each agent as an indication of the agent's productivity.

Notes

- This report is best used in a full-time recording environment.
- Lunch time or break time periods will affect the total or average idle times. To minimize the impact of lunch and break time periods, run the report for periods that do not include the breaks. For instance, if the work day is from 8:00 AM to 5:00 PM and lunch is at 12:00 PM, run the report for a time period of 8:00 AM to 12:00 PM. Then run the report again from 1:00 PM to 5:00 PM.

Criteria

The following criteria are unique to this report and are explained below for clarification.

Criteria	Description
Average Idle Time	Use this criterion to view agents who have been idle for a certain number of minutes. Calculated as: <total idle minutes> / <number of idle periods between recordings>.
Recordings Time Filter	With this criterion, you can select a certain time of the day to include in the report. Since it is best to eliminate lunch or break periods from the report, it is recommended that you set this criterion for the most productive times of the day. As an example, if the time filter is set from 8:00 am to 12:00 pm and the report includes multiple days, the report lists recordings that occurred during that time period only for each day requested in the **Recording Date** criterion.
Report Grouping	This enables you to group the information in various ways, such as by agent, extension, or date. If you select: • **Agents**, you can view recordings by agent. • **Agent Then Extension**, you can view recordings by agent, including all extensions the agent has used. • **Date Then Agent**, you can view all recordings for each day and then each agent on that day.
Thresholds: - Recordings Count Threshold - Total Time Threshold - Average Idle Threshold	When selected, these threshold settings highlight information on the report that meets the criteria. For instance, if you want to highlight agents that have an average idle time over 5 minutes, choose **Greater than** and enter **300** (5 minutes in seconds) in the blank field. When the report is run, all agents are listed but those whose average idle time exceeds 5 minutes are highlighted in red.
Total Time	This is the total amount of recording time for the recordings included on this report.

Sample

Date	Agent Login ID	Extension	Recordings	Total Time	Total Idle	Average Idle
1/3/2011	11034	1896	79	06:56:32	02:07:18	00:01:38
1/3/2011	10364	1839	118	06:36:53	02:25:20	00:01:15
1/3/2011	11120	1845	82	06:26:01	03:33:23	00:02:38
1/3/2011	11852	1821	97	06:03:50	02:29:10	00:01:33
1/3/2011	11096	1890	148	03:16:29	06:46:38	00:02:46
1/3/2011	806	1597	150	03:15:04	05:30:56	00:02:13
1/3/2011	10716	1008	113	02:44:27	06:13:52	00:03:20
1/3/2011	11879	1989	109	02:35:23	06:18:29	00:03:30
1/3/2011	917	1257	104	02:20:10	07:48:46	00:04:33
1/3/2011	804	1578	97	02:19:51	06:48:09	00:04:15
1/3/2011	828	1667	106	02:15:56	07:05:59	00:04:03
1/3/2011	10100	1719	99	02:13:07	06:42:18	00:04:06
1/3/2011	808	1592	98	02:11:25	05:09:39	00:03:12
1/3/2011	11906	1846	92	02:06:09	06:26:27	00:04:15
1/3/2011	10210	1806	96	02:06:03	06:53:54	00:04:21
1/3/2011	821	1579	86	02:05:34	06:54:16	00:04:52
1/3/2011	11032	1956	86	02:02:52	07:02:17	00:04:58
[illegible]	10331	1842	[illegible]	[illegible]	06:44:23	00:04:10
[illegible]	[illegible]	1868	[illegible]	[illegible]	[illegible]	[illegible]

Drill-Down

This report provides drill-down links in the **Recordings** column to show additional information. When you click a number in the **Recordings** column, the report shows a list of recordings for that agent. In the sample above, **82** was clicked in the third line to view recordings for agent 11120 for all days included on the report (see below).

Agent: 11120

Date	Agent Login ID	Extension	Recordings	Total Time	Total Idl
1/3/2011	11120	1845	92	07:59:01	02:00:23
1/4/2011	11120	1845	90	07:25:07	02:30:27
1/5/2011	11120	1845	9	01:17:19	00:04:4

When you click **92** in the **Recordings** column, you can view all recordings created only on 1/3/2011 for agent 1120.

Agent Login ID: 11120

Date	Start	End	Elapse	Idle
1/3/2011	8:05:20	08:14:13	00:08:53	00:00:00
1/3/2011	8:14:22	08:15:57	00:01:35	00:00:09
1/3/2011	8:16:09	08:26:07	00:09:58	00:00:12
1/3/2011	8:26:19	08:26:42	00:00:23	00:00:12
1/3/2011	8:26:57	08:30:12	00:03:15	00:00:15

To return to the previous drill-down level of the report, click the **Back** arrow button in the report toolbar.

NOTE When the report is exported as an Excel, Word or PDF file, all drill-down links are disabled.

Columns

Columns that are unique to this report are explained below:

Total Time is the total amount of recorded time for an agent.

Total Idle is the total amount of non-recorded time for an agent. This may include other tasks, such as wrap-up time after a recording or other tasks performed by an agent.

Average Idle is the average amount of non-recorded time for an agent. Calculated as: <total amount of idle minutes> / <number of idle periods>.

On the second level of the drill-down, the **Start** and **End** times show the time the recording started and the time it stopped. The **Elapse** time shows the total duration of the recording. The **Idle** time shows the amount of time before the agent took the next call for that day.

Business Intelligence Results

This report helps to identify the results of business intelligence questions.

Criteria

The following criteria are unique to this report and are explained below for clarification.

Criteria	Description
Evaluation Type	Enables you to include **Calibration**, **Evaluation** or **Survey** types on the report.
Exclude Failed Evaluations	To exclude failed evaluations from this report, select **Yes**.
Form / Category / Question	This enables the report to include selected evaluation forms, scoring categories, and/or evaluation questions. Select the form and the revision number at the top of the window, and the scoring categories and questions open in the lower portion of the window. Then select the scoring category and/or the questions to include on the report.

Sample

Index	Rev.	BI Indicator	Results	Percentage	Occurrences
316	1	*Has the patient recently visited our web site?*			
			Yes	93 %	154
			No	7 %	11
315	1	*Patient refered by:*			
			FM: Family Member	49 %	81
			WS: Web Site	34 %	56
			SC: Specialist	9 %	15
			PC: Primary Care Provider	7 %	11
			OT: Other	1 %	2
317	1	*Suggestions that would improve the web experience.*			
			Functional on multiple devices	36 %	83
			List of available providers	24 %	57
			Bill pay	22 %	51
			Health tips	4 %	9
			Covered Services	3 %	8

Columns

Columns that are unique to this report are explained below:

Index shows the index number assigned to the question.

Rev. shows the question's revision number.

BI Indicator shows the actual business intelligence question or indicator.

Results show the possible answers available for the business intelligence question.

Percentage shows the percentage of users that selected a certain answer for a question.

Occurrences shows the number of times a certain answer was selected for a question.

Call Count Ranking

This report ranks agents in order of the number of calls they handled, according to the criteria selected. It displays the agents' ranking and can also show the agents' scores. It may be used as a widget and as the basis for a contest.

Criteria

The following criteria are unique to this report and are explained below for clarification.

Criteria	Description
Recording Date	Use this criterion to define the period during which the call counts are collected and compared.
Call Direction	Use this criterion to select incoming or outgoing call direction.
User Image	Use this criterion to either hide or show the user image associated with the user record on the report and contest widget.
Ranking Options	Use this criterion to rank agents by the highest or lowest call count. The default setting is to rank agents using the highest call count.
Recordings Time Filter	Use this criterion to define the time of day you need to count the calls on this report.
Duration	Use this criterion to define the duration of the calls you need to count on this report.
DNIS	Use this criterion to select the DNIS associated with the calls you need to include on this report.
Call Type	Use this criterion to include either internal or external calls on this report.

Sample

	Name	Calls	Rank
	Won,Arthur	6561	1
	Herman,Angelica	6499	2
	Phillips,Ameka	6487	3

Sections

The **Calls** column shows the number of calls handled by the agent according to the criteria selected for the report.

The **Rank** column shows how the agent ranks among the other agents according to the criteria selected.

Widget Requirements

This report can only be included in the list of dashboard widgets if it is added to either **Shared Reports** or **My Reports** and follows these rules:

- The selected date range for the **Recording Date** criterion must be less than 187 days.
- The **Ask at Execution** option cannot be selected.

The widget displays the top ranked agents in the report, up to a maximum of five agents.

CAUTION If the report is linked to a contest, you cannot display it as a widget.

Contest Requirements

A contest must have a report associated with it in order to set the details for the contest, such as the date of the contest, the agents that can earn rewards, etc. This report can only be associated with a contest if it is added to **My Reports** and follows these rules:

- The selected date range for the **Recording Date** criterion must be less than 187 days.
- The end date selected for the **Recording Date** criterion must be in the future.
- At least one team or agent must be selected for the **Team** or **Agent** criteria. If the **Me** option is selected, it will be ignored.
- A ranking method must be selected for **Ranking Options**.
- The **Ask at Execution** option cannot be selected for any criteria.

CAUTION If the report is displayed as a widget, you cannot link it to a contest.

Call Distribution

This report helps to identify peak periods of call activity for each hour.

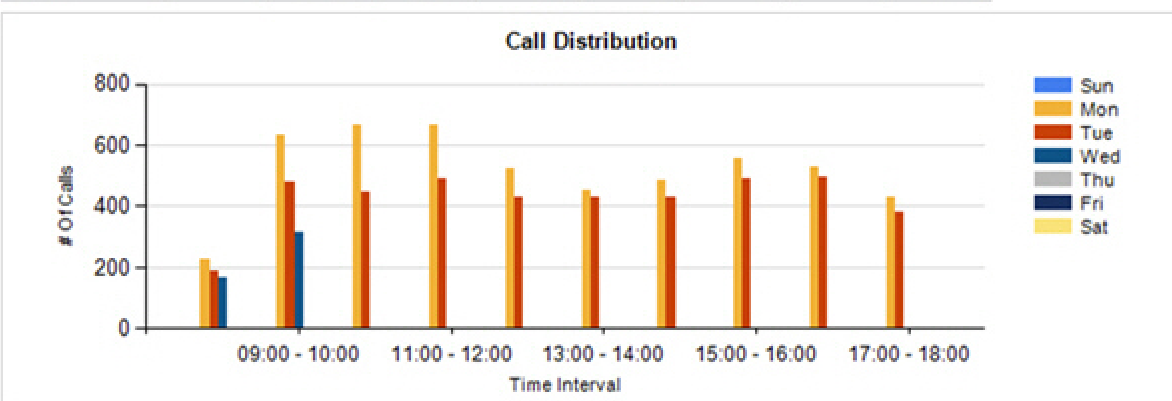
Criteria

The following criteria are unique to this report and are explained below for clarification.

Criteria	Description
Recordings Time Filter	This enables you to set the time period for the report. For instance, if you want to view calls made between 8:00 AM and 5:00 PM move the slider to include these times. Any calls created outside of this time period are not included in the report. If no time period is selected, the report includes all 24 hours.
Time Period	This criterion sets the time intervals shown in the left column of the report. The number of recordings can be shown in 15 minute, 30 minute, or 1 hour intervals.

Sample

	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Total
08:00 - 09:00	0	229	186	167	0	0	0	582
09:00 - 10:00	0	634	477	312	0	0	0	1,423
10:00 - 11:00	0	667	447	0	0	0	0	1,114
11:00 - 12:00	0	665	492	0	0	0	0	1,157
12:00 - 13:00	0	522	432	0	0	0	0	954
13:00 - 14:00	0	451	432	0	0	0	0	883
14:00 - 15:00	0	485	427	0	0	0	0	912
15:00 - 16:00	0	555	488	0	0	0	0	1,043
16:00 - 17:00	0	528	498	0	0	0	0	1,026
17:00 - 18:00	0	431	380	0	0	0	0	811
Total:	0	5,167	4,259	479	0	0	0	9,905



Categorized KPI

This report helps to identify the agents' mastery of Key Performance Indicators (KPIs). It also helps to identify the top performers in a category or for a specific KPI. This is helpful if you want to locate a best practice example to train other agents or to reward those agents who are demonstrating a mastery of key skills.

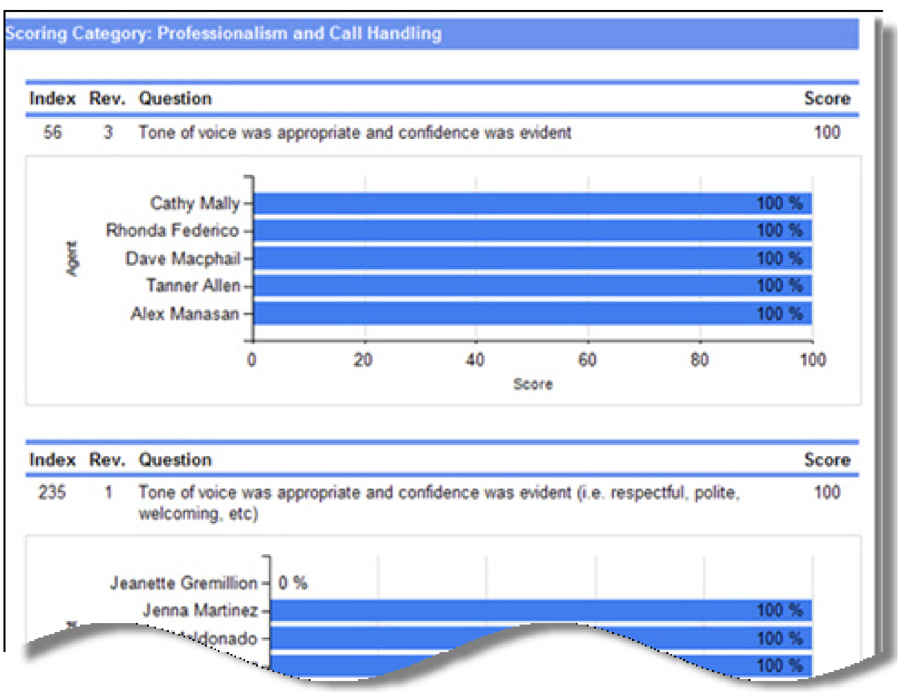
Notes

- Questions that are answered with text entries are not included in this report.
- If a question is answered for a recording created during the specified date range, it is included in this report. If you see a question missing from the report, it has likely not been answered for a recording created during the date range.
- Questions that are not answered by evaluators may be automatically marked as Not Applicable (N/A). These zero point questions are not included in the calculations for this report.
- If an evaluation is marked as a Manual Fail, all questions on the form are assessed a zero score. These scores are included when calculating the question score. They are *not* included when calculating the agent score.

Sections

This report is grouped into scoring categories and lists all the questions for each category. Then it displays the five highest scoring agents for each question.

Sample



Dynamic Playlist Export

This report displays the results of a dynamic playlist in report format. It may also be run by selecting the playlist and clicking the **Export Dynamic Playlist** button. However, clicking this button does not allow you to select the columns to display on the report; instead, every column shown on the **Recorded Contacts** page is included on the report. To specify which columns you want to show on the report, run it from the **Analytics** page.

Criteria

The following criteria are unique to this report and are explained below for clarification.

Criteria	Description
Columns	Use this criterion to select the columns you would like to view in the report.
Playlist	Use this criterion to select the dynamic playlist you would like to run in report format. Only playlists created in **My Playlists** are available in this criterion.
Sort By	Use this criterion to determine how the playlist results should be sorted in the report.

Sample

Date	Duration	Agent Name	Team Name	Comment	Call Name	Total duration	Audio location index
11/17/14 4:08:49 PM	00:00:07	Langston,Barbara	Customer Service		CBXZBYV5.vx8	7	1
11/17/14 4:08:48 PM	00:00:08	Perry,Janikka	Customer Service		CBXZBYV4.vx8	8	1
11/17/14 4:08:48 PM	00:00:08	Seabolt,Jessica	Customer Service		CBXZBYV3.vx8	8	1
11/17/14 4:08:46 PM	00:00:10	Battles,Spencer	Customer Service		CBXZBYV2.vx8	10	1
11/17/14 4:08:46 PM	00:00:10	Thibodeau,Jon	Customer Service		CBXZBYV1.vx8	10	1
11/17/14 4:08:46 PM	00:00:10	Gordon,Jared	Customer Service		CBXZBYV0.vx8	10	1
11/17/14 4:08:45 PM	00:00:10	Bell,Kelly	Customer Service		CBXZBYUZ.vx8	10	1
11/17/14 4:08:44 PM	00:00:11	Messer,Jennifer	Customer Service		CBXZBYUY.vx8	11	1
11/17/14 4:08:44 PM	00:00:12	Cunningham,Kristal	Customer Service		CBXZBYUX.vx8	12	1
11/17/14 4:08:42 PM	00:00:13	Rozumalski,Nathan	Customer Service		CBXZBYUW.vx8	13	1
11/17/14 4:08:41 PM	00:00:15	Huff,Natika	Customer Service		CBXZBYUV.vx8	15	1
11/17/14 4:08:40 PM	00:00:16	Cubbage,Rosa	Customer Service		CBXZBYUU.vx8	16	1

Columns

If this report is run by clicking the **Export Dynamic Playlist** button, the same columns shown on the **Recorded Contacts** page are also shown on the report. If this report is run from the **Analytics** page, you may select the columns that you would like shown on the report.

eCoaching Module List

This report displays a list of eCoaching modules and details about each.

Criteria

The following criteria are unique to this report and are explained below for clarification.

Criteria	Description
Forms	Use this to view all the eCoaching modules assigned to questions listed on a certain form.
Module	Use this criterion to select one or more eCoaching modules to show on the report.
Module Category	Use this criterion to select one or more eCoaching module categories to show on the report, such as Sales, Process, Product Info, etc.

Columns

Columns that are unique to this report are explained below:

Active shows if the eCoaching module is active or inactive.

Category lists the eCoaching category in which the module is assigned.

Link shows the actual location of the eCoaching material.

Quiz shows the name of the quiz that is associated with the eCoaching module. If no quiz is associated, this column is blank.

Sample

Active	Name	Category	Description	Link	Quiz	Modified By	Modified Date	Created By	Created Date
True	Buy Now Encore Training	Product Info		https://youtu.be/3eTyFIDJj9U	Phil at Buy Now Inc	Paul (admin) Buckley	3/26/2015 4:02:29 PM	Paul (admin) Buckley	3/26/2015 4:02:29 PM
True	Buy Now Encore Training	Product Info		https://youtu.be/3eTyFIDJj9U	Phil at Buy Now Inc	Paul (admin) Buckley	3/26/2015 4:02:29 PM	Paul (admin) Buckley	3/26/2015 4:02:29 PM
True	How to listen and ask good questions	Process Standards	The art of listening	http://powertochange.com/students/people/listen/		Jennifer Waters	1/11/2012 3:56:02 PM	Rhonda Adams	1/5/2012 5:55:41 AM
True	Inventory and Order Basics	Sales Tutorials	Module for Quiz Called Inventory and Order Bascis (Gregg)	https://docs.google.com/document/d/1VKjn-aczYUeqhCwgGuxIDXGQfnFwcc0UFs5ublnkO1I/pub	Inventory and Order Basics Quiz	Lumberg Bill	3/2/2015 1:47:19 PM	Lumberg Bill	3/2/2015 1:47:19 PM
False	Product Training	Product Info	New Product Training for Product X	https://youtu.be/ynlgqCaGQJc		A Administrator	4/7/2015 10:54:44 AM	A Administrator	4/7/2015 10:45:43 AM
True	Proper Greetings	Process Standards		http://www.dvsanalytics.com		Rhonda Adams	11/14/2013 2:26:09 PM	Rhonda Adams	11/14/2013 2:26:09 PM

eCoaching Performance Impact v2

This report displays a summary of how an agent's performance has improved after completing an eCoaching module.

Notes

This report provides links to additional report levels. Click an agent's name to see all the eCoaching modules assigned to the agent and how he has performed before and after completing each module. On the second level of the report, click a score to see the completed evaluation where the agent earned the score. To move back to a previous level, click the Back arrow in the report toolbar (located next to the zoom selection field).

If you would like to move directly to the second level of this report, showing all the eCoaching modules assigned to agents and how they performed before and after completing the module, run the eCoaching Performance Impact Detail v2 report.

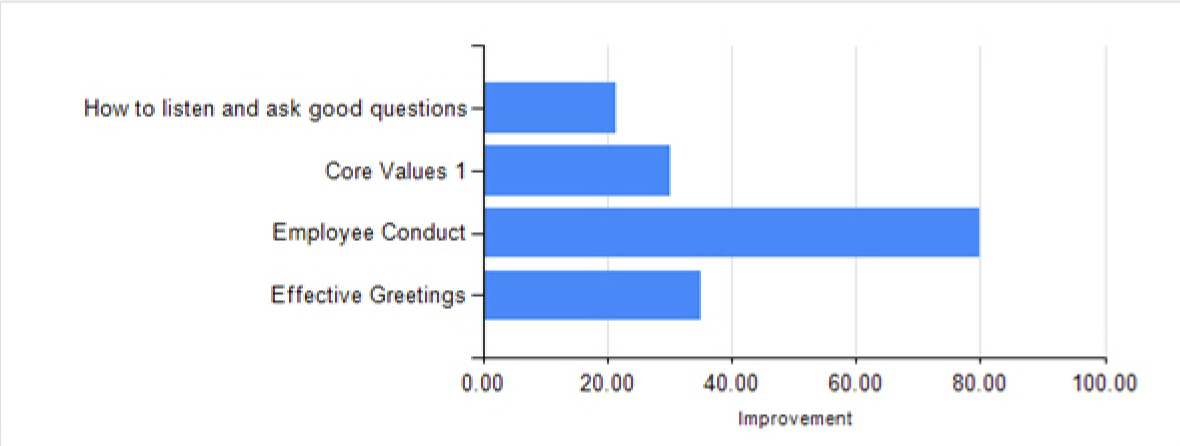
Criteria

The following criteria are unique to this report and are explained below for clarification.

Criteria	Description
Completion Date	Use this criterion to see the performance impact by the date the modules are completed.
Module	Use this criterion to see the impact on performance for a specific module.
Module Category	Use this criterion to see the impact on performance for a specific module category.
Sender	Use this criterion to see the performance impact by the user who has sent the modules.
Site/Team/Agent	Use this criterion to see the performance impact for a certain site, team, or agent.

Sample

Module	Agent	PriorScore	SubsequentScore	Improvement
Effective Greetings	Krystal Villaverde	0.00	70.00	70.00
Employee Conduct	Krystal Villaverde	0.00	100.00	100.00
Core Values 1	Krystal Villaverde	40.00	70.00	30.00
How to listen and ask good questions	Krystal Villaverde	40.00	64.00	24.00
Effective Greetings	Kevin Smith	40.00	40.00	0.00
How to listen and ask good questions	Kevin Smith	52.00	56.00	4.00
Employee Conduct	Brad Ellison	40.00	100.00	60.00
Core Values 1	Brad Ellison	40.00	70.00	30.00
How to listen and ask good questions	Brad Ellison	40.00	76.00	36.00
Average:		39.05	68.10	29.05



Columns

Columns that are unique to this report are explained below:

Agent shows the name of the agent who has been assigned the eCoaching module. Click the link to see all the eCoaching modules assigned to an agent and how his performance has improved after completing each module. From that window, click the score link to view the evaluation form where the agent earned that particular score for the question.

Prior Score is the score earned by the agent on the question prior to completing the eCoaching module.

Subsequent Score is the score earned by the agent on the question after completing the module.

Improvement shows how the agent's performance has improved after completing the eCoaching module.

eCoaching Performance Impact Detail v2

This report lists details about how an agent's performance has improved after completing an eCoaching module.

Notes

This report provides a link to an additional report level. Click a score to see the completed evaluation where the agent earned the score. To move back to the previous level, click the Back arrow in the report toolbar (located next to the zoom selection field).

If you would like to see an overall list of agents and how they performed before and after completing an eCoaching module, see the eCoaching Performance Impact v2 report.

Criteria

The following criteria are unique to this report and are explained below for clarification.

Criteria	Description
Completion Date	Use this criterion to see the performance impact by the date the modules are completed.
Module	Use this criterion to see the impact on performance for a specific module.
Module Category	Use this criterion to see the impact on performance for a specific module category.
Sender	Use this criterion to see the performance impact by the user who has sent the modules.
Site/Team/Agent	Use this criterion to see the performance impact for a certain site, team, or agent.

Sample

Module: How to listen and ask good questions			
Agent: Krystal Villaverde			
Question	Prior Score	Subsequent Score	Improvement
Did the agent fully understand request (0 - not understand)?	40.00	70.00	30.00
Did the agent listen carefully, i.e. customer did not need to repeat information?	40.00	40.00	0.00
Average:	**40.00**	**55.00**	**15.00**
Agent: Kevin Smith			
Question	Prior Score	Subsequent Score	Improvement
Did the agent fully understand request (0 - not understand)?	40.00	60.00	20.00
Did the agent listen carefully, i.e. customer did not need to repeat information?	100.00	40.00	-60.00
Average:	**70.00**	**50.00**	**-20.00**
Agent: Brad Ellison			
Question	Prior Score	Subsequent Score	Improvement
Did the agent fully understand request (0 - not understand)?	40.00	70.00	30.00
Did the agent listen carefully, i.e. customer did not need to repeat information?	40.00	100.00	60.00
Average:	**40.00**	**85.00**	**45.00**

Columns

Columns that are unique to this report are explained below:

Agent shows the name of the agent who has been assigned the eCoaching module. Click the score link to view the evaluation form where the agent earned that particular score for the question.

Question shows the question on the form that triggered the eCoaching module.

Prior Score is the score earned by the agent on the question prior to completing the eCoaching module.

Subsequent Score is the score earned by the agent on the question after completing the module.

Improvement shows how the agent's performance has improved after completing the eCoaching module.

eCoaching Quiz Results

This report displays the results from completed quizzes.

Criteria

The following criteria are unique to this report and are explained below for clarification.

Criteria	Description
Module	Use this criterion to select one or more eCoaching modules that have associated quizzes to show on the report.
Quiz	Use this criterion to select one or more quizzes to show on the report.

Sample

Module Name	Module Category	Quiz	Completions	Average Score
Inventory and Order Basics	Sales Tutorials	Inventory and Order Basics Quiz	3	68.3%
Support Process	Problem Solving	Technical Support Quiz	2	80.0%
March 30 Coaching Module	Values and Conduct	March 30th Quiz	1	50.0%
Upselling	Sales Tutorials	Upselling Quiz	2	75.0%
Product X Training	Product Info	Product Training Quiz	5	75.0%

Drill-Down

This report provides drill-down links in the **Completions** column to show a list of agents who have completed the quiz.

Module Name:	Inventory and Order Basics	**Module Category:**	Sales Tutorials
Quiz:	Inventory and Order Basics Quiz	**Average Score:**	68.3%

Agent	Completed Date	Score
Brad Azimov	3/2/2015	70.0%
Linda Roberts	3/2/2015	70.0%
Courtney Hamilton	3/2/2015	65.0%

Click the drill-down link in the **Score** column to view the agent's actual quiz.

NOTE When the report is exported as an Excel, Word or PDF file, all drill-down links are disabled.

Columns

Columns that are unique to this report are explained below:

Module Category lists the eCoaching category in which the module is assigned.

Quiz shows the name of the quiz that was completed.

Completions shows the number of times this quiz has been completed.

Average Score shows the average score earned on the quiz according to the criteria selected for the report. For instance, if the report only includes one agent, this would be the average score earned on a quiz for just the one agent.

eLearning Lesson Duration

This report provides the time an agent spends on an assignment compared to the standard duration allotted for the agent to complete the lesson. This information helps to analyze how quickly agents are completing assignments compared to management's estimate of how long the lesson should take to complete. Only completed lessons are included on this report; assignments that are open but not yet completed do not show on this report.

Criteria

The following criteria are unique to this report and are explained below for clarification.

Criteria	Description
Completed Date	Select the dates of the completed lessons to include on the report.
Lesson	Select the lesson(s) to show on the report.
Lesson Category	Select one or more eLearning lesson categories to show on the report, such as Customer Service, Product Details, etc.

Sample

Lesson	Recipient	Completed Date	Time Spent	Avg Time Spent	Assignment Duration
Customer Service Skills	Brad Ellison	12/12/2016 3:28 PM	00:13:29	00:08:31	00:10:00
Customer Service Skills	Mary Fodge	12/12/2016 1:24 PM	00:04:13	00:08:31	00:10:00
Customer Service Skills	Karyn Peters	12/12/2016 3:34 PM	00:06:55	00:08:31	00:10:00
Customer Service Skills	Todd Schwartz	12/12/2016 1:23 PM	00:08:37	00:08:31	00:10:00

Columns

Columns that are unique to this report are explained below:

Lesson shows the name of the eLearning lesson.

Recipient shows the agent that received the lesson.

Completed Date shows the date and time the agent complete the lesson. Lessons that have not yet been completed are not included on this report.

Time Spent shows the time the total time the agent spent to complete the lesson. If the agent logged in multiple times to complete the assignment, this column shows the sum of the total time spent on the assignment. If the **Time Spent** value exceeds the **Assignment Duration**, the **Time Spent** value is displayed in red.

Avg Time Spent shows the average time all agents have spent completing the lesson.

Assignment Duration shows the expected time it should take an agent to complete the lesson.

eLearning Lesson List

This report provides a summary of eLearning lessons that exist in Encore, both active and inactive.

Criteria

The following criteria are unique to this report and are explained below for clarification.

Criteria	Description
Active Status	Use this criterion to view all eLearning lessons according to their active statuses.
Created By	Use this criterion to list eLearning lessons on the report according to the user(s) that created them.
Created Date	Use this criterion to list eLearning lessons on the report according to the date the lesson was created.
Lesson	Select one or more eLearning lessons to show on the report.
Lesson Category	Select one or more eLearning lesson categories to show on the report, such as General Skills, Sales Skills, etc.

Sample

Active	Name	Description	Type	Modified By	Modified Date	Created By	Created Date
True	Best Upsell	Review for a good example of upselling interested customers	Recording	A Administrator	12/12/2016 5:29:16 PM	A Administrator	12/12/2016 5:29:16 PM
True	Customer Service Skills	Helps to improve general customer service skills	PDF	A Administrator	12/12/2016 11:40:01 AM	A Administrator	12/12/2016 11:40:01 AM

Columns

Columns that are unique to this report are explained below:

Active shows *True* if the eLearning lesson is active and *False* if the lesson is inactive.

Type shows whether the eLearning lesson is a URL, PDF, Encore recording, or video.

Modified By and **Modified Date** show the last user that modified the lesson and the date of that modification.

Created By and **Created Date** show the user that originally created the lesson and the date it was created.

Evaluation Form Export

This report displays the details of a selected evaluation form including:

- Questions
- Possible Answers
- Scores
- Categories

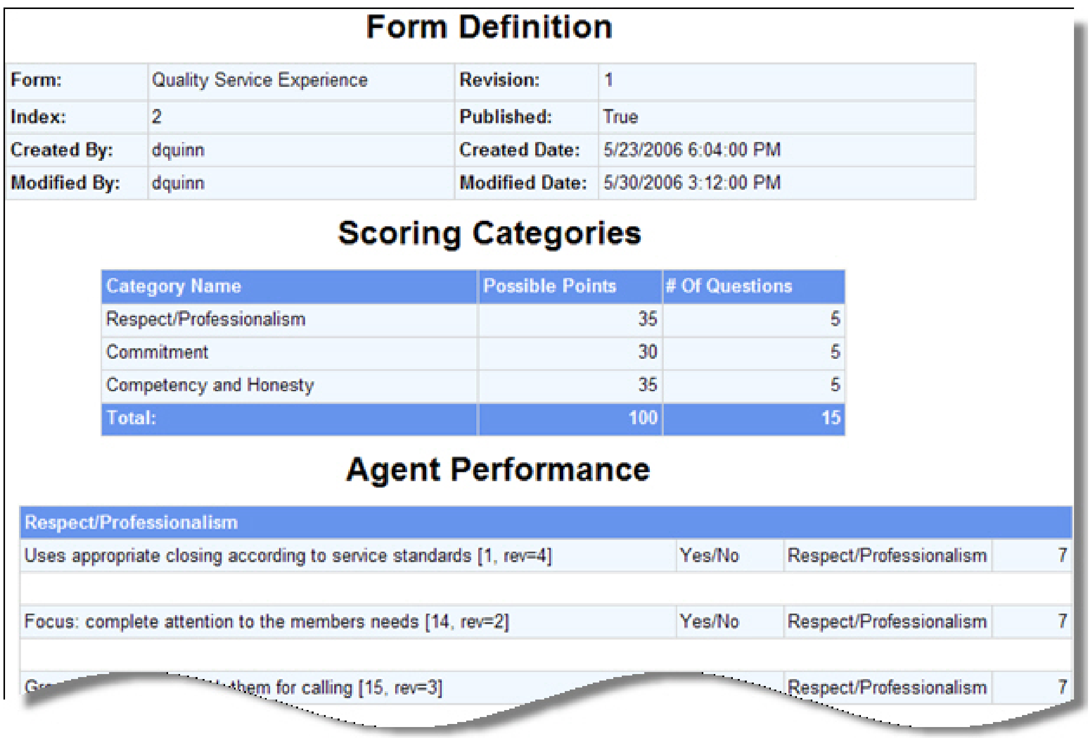
It is typically used to evaluate the details of a form since it provides all of them in one place. It's also helpful if you need to submit the form to another individual for approval.

Criteria

The following criteria are unique to this report and are explained below for clarification.

Criteria	Description
Select One Form	Select one form that you need to view details about.

Sample



Form Definition

Form:	Quality Service Experience	**Revision:**	1
Index:	2	**Published:**	True
Created By:	dquinn	**Created Date:**	5/23/2006 6:04:00 PM
Modified By:	dquinn	**Modified Date:**	5/30/2006 3:12:00 PM

Scoring Categories

Category Name	Possible Points	# Of Questions
Respect/Professionalism	35	5
Commitment	30	5
Competency and Honesty	35	5
Total:	100	15

Agent Performance

Respect/Professionalism			
Uses appropriate closing according to service standards [1, rev=4]	Yes/No	Respect/Professionalism	7
Focus: complete attention to the members needs [14, rev=2]	Yes/No	Respect/Professionalism	7
G... them for calling [15, rev=3]		Respect/Professionalism	7

Sections

the **Agent Performance** section lists the questions for both the Agent Performance and Business Intelligence (if used) tabs. Then it shows the possible answers for each question, the scoring category they are assigned to, and the maximum points available for each question.

Evaluation List

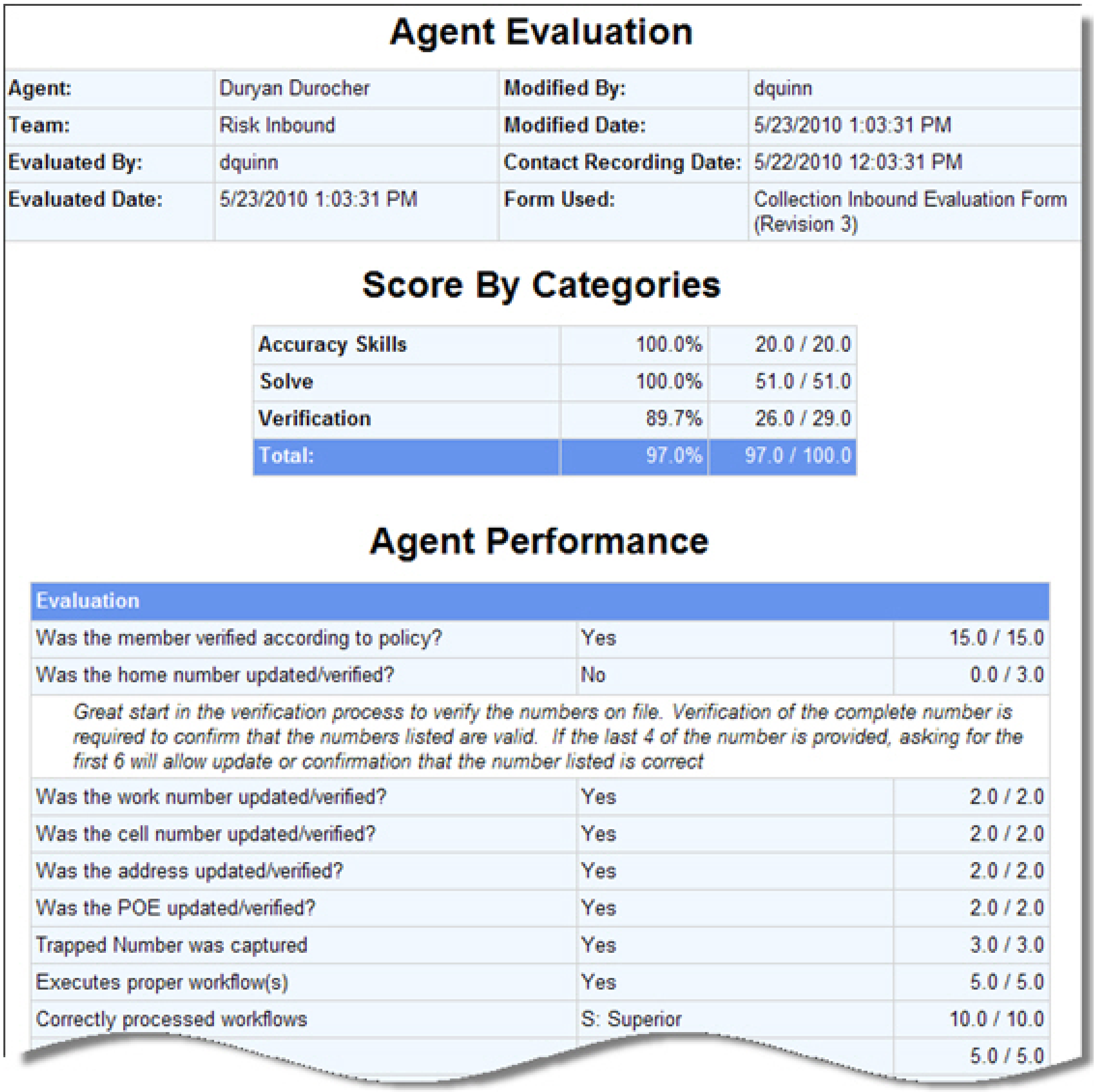
This report displays a list of evaluations with a drill-down to view details about each evaluation. It includes a signature line for both a supervisor and an agent at the end of the evaluation details in case you need to review the evaluation with the agent and obtain signatures.

Sample

The first level of the report is shown below.

Agent	Score	Form	Created By	Created Date	Team
Karin Maldonado	100.00	Teleservices Main Form (1)	dquinn	5/23/2010	Risk Leads
Duryan Durocher	97.00	Collection Inbound Evaluation Form (3)	dquinn	5/23/2010	Risk Inbound
Renae Geiger	100.00	Collection Inbound Evaluation Form (3)	dquinn	5/23/2010	Risk Inbound
Renae Geiger	89.00	Collection Inbound Evaluation Form (3)	dquinn	5/24/2010	Risk Inbound
Matilda Perez	93.33	Collection Inbound Evaluation Form (3)	dquinn	5/24/2010	Risk Inbound
Lisa Ashley	88.16	Collection Inbound Evaluation Form (3)	dquinn	5/25/2010	Risk Inbound
Phillip Liebold	90.26	Collection Inbound Evaluation Form (3)	dquinn	5/25/2010	Risk Inbound
April Swanson	89.13	Collection Inbound Evaluation Form (3)	dquinn	5/27/2010	Risk Inbound
Dave Macphail	100.00	Collection: Vendor Evaluation (1)	dquinn	5/27/2010	Risk Specialists
Rashad Gresham	100.00	Collection Outbound Evaluation Form (3)	dquinn	5/28/2010	Risk Outbound
Griselda Memushaj	100.00	Collection Inbound Evaluation Form (3)	dquinn	5/28/2010	Risk Inbound
Griselda Memushaj	97.42	Collection Inbound Evaluation Form (3)	dquinn	5/29/2010	Risk Inbound
Griselda Memushaj	97.87	Collection Inbound Evaluation Form (3)	dquinn	5/30/2010	Risk Inbound
Kevin Key	94.26	Collection Outbound Evaluation Form (3)	dquinn	5/30/2010	Risk Outbound
Christi Weeks	100.00	Collection Outbound Evaluation Form (3)	dquinn	5/31/2010	Risk Outbound
Bruce Alldredge	100.00	Technical Support Evaluation (1)	vjohnson	5/31/2010	Teleservices
Arthur Won	100.00	Collection Outbound Evaluation Form (3)	dquinn	5/31/2010	Risk Specialists
		llection Inbound Evaluation For		2010	Risk Inbound

If the link in the third column is clicked the information below opens.



Agent Evaluation

Agent:	Duryan Durocher	**Modified By:**	dquinn
Team:	Risk Inbound	**Modified Date:**	5/23/2010 1:03:31 PM
Evaluated By:	dquinn	**Contact Recording Date:**	5/22/2010 12:03:31 PM
Evaluated Date:	5/23/2010 1:03:31 PM	**Form Used:**	Collection Inbound Evaluation Form (Revision 3)

Score By Categories

Accuracy Skills	100.0%	20.0 / 20.0
Solve	100.0%	51.0 / 51.0
Verification	89.7%	26.0 / 29.0
Total:	97.0%	97.0 / 100.0

Agent Performance

Evaluation		
Was the member verified according to policy?	Yes	15.0 / 15.0
Was the home number updated/verified?	No	0.0 / 3.0
Great start in the verification process to verify the numbers on file. Verification of the complete number is required to confirm that the numbers listed are valid. If the last 4 of the number is provided, asking for the first 6 will allow update or confirmation that the number listed is correct		
Was the work number updated/verified?	Yes	2.0 / 2.0
Was the cell number updated/verified?	Yes	2.0 / 2.0
Was the address updated/verified?	Yes	2.0 / 2.0
Was the POE updated/verified?	Yes	2.0 / 2.0
Trapped Number was captured	Yes	3.0 / 3.0
Executes proper workflow(s)	Yes	5.0 / 5.0
Correctly processed workflows	S: Superior	10.0 / 10.0
		5.0 / 5.0

Sections

The **Agent Performance** section on the second level of the report shows the questions for both the Agent Performance and Business Intelligence (if used) tabs. Then it shows the answers assigned to each question, the points awarded the agent, and any comments added to a question or the overall evaluation.

The **Contact Data** section on the second level of the report (not shown in the example above) shows the details for the recording, such as the date, duration, call type, call direction, etc.

Evaluation Score Ranking

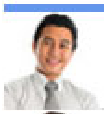
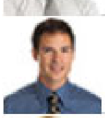
This report ranks agents in order of their evaluation scores, according to the criteria selected. It displays the agents' ranking and can also show the agents' scores. It may be used when setting up a contest.

Criteria

The following criteria are unique to this report and are explained below for clarification.

Criteria	Description
Forms	Use this criterion to select one or more forms. This helps to further define the score data to compare.
Only Show Evaluations	Use this criterion to narrow the data to only include evaluations with recordings or evaluations without recordings.
Qualify Manual Fails	Use this criterion to determine how to factor manual fails in the evaluation score totals. • **The agent is disqualified** - Any agent who received at least one manual fail on an evaluation (for the evaluation criteria selected) is not included in the report. • **The evaluation score counts as zero** - Any agent who received a manual fail receives a score of 0 for the evaluation. • **The evaluation is ignored** - Any evaluation that received a manual fail is ignored in the calculation of the agent's score.
Ranking Options	Use this criterion to rank agents by the average score (highest first or lowest first), or by highest single score, or by lowest single score. The default setting is the highest average score.
Score Column	Use this criterion to either hide or show the score column on the report and contest widget.
User Image	Use this criterion to either hide or show the user image associated with the user record on the report and contest widget.

Sample

	Name	Score	Rank	Points
	Brian Bell	82	1	425
	Michael Axe	78.7	2	
	Sue Wilbur	72	3	250
	Teresa Ramirez	62	4	

NOTE This report calculates rankings using evaluations produced from an evaluation session or from a customer survey. The ranking number does not include evaluations completed as part of a calibration project or from a quiz score.

Sections

The **Score** column shows the evaluation scores for the agents according to the criteria selected, and may either be the highest average score, the lowest average score, the highest single score, or the lowest single score (according to the **Ranking Options** criterion). This column can be omitted from the report by selecting **No** for the **Score Column** criterion.

If two agents earn the same score, they also share the same rank. For instance, if two agents tie for second place, both will be listed with a rank of 2 in alphabetical order. The next agent on the list will receive a rank of 3.

The **Rank** column shows how the agent ranks among the other agents according to the criteria selected.

The **Points** column shows the number of reward points awarded to the agents for the evaluation criteria selected, if the report is linked to a contest. If there is no linked contest, the **Points** column is not shown. The point value is blank if the agent's score does not qualify the agent for reward points.

Widget Requirements

This report can only be included in the list of dashboard widgets if it is added to either **Shared Reports** or **My Reports** and follows these rules:

- The selected date range for the **Evaluation Date** criterion must be less than 400 days.
- The **Ask at Execution** option cannot be selected.

The widget displays the top ranked agents in the report, up to a maximum of five agents.

CAUTION If the report is linked to a contest, you cannot display it as a widget.

Contest Requirements

A contest must have a report associated with it in order to set the details for the contest, such as the date of the contest, the agents that can earn rewards, etc. This report can only be associated with a contest if it is added to **My Reports** and follows these rules:

- The selected date range for the **Evaluation Date** criterion must be less than 400 days.
- The end date selected for the **Evaluation Date** criterion must be in the future.
- At least one agent must be selected for **Site/Team/Agent**. If the **Me** option is selected, it will be ignored.
- A ranking method must be selected for **Ranking Options**.
- The **Ask at Execution** option cannot be selected.

CAUTION If the report is displayed as a widget, you cannot link it to a contest.

Evaluation Scores by Category

This report displays a list of evaluations with a drill-down to view details about each evaluation, specifically the score earned in each scoring category. It includes a signature line for both a supervisor and an agent at the end of the evaluation details in case you need to review the evaluation with the agent and obtain signatures.

Criteria

The following criteria are unique to this report and are explained below for clarification.

Criteria	Description
Scoring Category	Use this criterion to determine which scoring categories, such as Process Adherence, Product Knowledge, etc., show on the report.
Show Employee ID Column	Use this criterion to determine whether the employee ID column shows on the report.

Sample

The first level of the report is shown below.

Agent	Score	Form	Created By	Created Date	Team
	71.67	Sales (1)	adm	10/10/2014	
Kadrica Yearby	63.75	Customer Service (1)	MSmith	10/30/2014	Customer Service
Brandy Martin	13.33	Customer Service (1)	MSmith	10/30/2014	Customer Service
Jessica Griffeth	64.29	Customer Service (1)	MSmith	10/30/2014	Customer Service
Jonathan Lane	73.33	Customer Service (1)	MSmith	10/30/2014	Customer Service
Thomas Vaccina	72.92	Customer Service (1)	adm	11/3/2014	Customer Service
Thomas Vaccina	66.67	Customer Service (1)	adm	11/3/2014	Customer Service
Thomas Vaccina	71.25	Customer Service (1)	adm	11/3/2014	Customer Service
Thomas Vaccina	89.17	Customer Service (1)	adm	11/3/2014	Customer Service
Thomas Vaccina	86.25	Customer Service (1)	adm	11/3/2014	Customer Service
Thomas Vaccina	86.25	Customer Service (1)	jaustin	11/3/2014	Customer Service
Thomas Vaccina	85.42	Customer Service (1)	jaustin	11/3/2014	Customer Service
Thomas Vaccina	80.42	Customer Service (1)	jaustin	11/3/2014	Customer Service
Thomas Vaccina	88.75	Customer Service (1)	jaustin	11/3/2014	Customer Service
Thomas Vaccina	85.42	Customer Service (1)	jaustin	11/3/2014	Customer Service

If the link in the **Form** column is clicked the information below opens.

Agent Evaluation

Agent:	Jonathan Lane	**Modified By:**	MSmith
Team:	Customer Service	**Modified Date:**	10/30/2014 2:48:18 PM
Evaluated By:	MSmith	**Contact Recording Date:**	10/30/2014 6:58:27 AM
Evaluated Date:	10/30/2014 2:48:18 PM	**Form Used:**	Customer Service (Revision 1)

Score By Categories

Company Advocate	100.0%	10.0 / 10.0
Customer Advocate	50.0%	10.0 / 20.0
Knowledge/Expertise	0.0%	0.0 / 0.0
Process Adherence	100.0%	10.0 / 10.0
Respect/Professionalism	70.0%	14.0 / 20.0
Total:	73.3%	44.0 / 60.0

Agent Performance

Introduction		
Did the agent effectively identify self and the company?	V: Very Effectively	10.0 / 10.0
Did the agent properly verify customer?	Y: Yes	10.0 / 10.0
Did the agent listen carefully, i.e. customer did not need to repeat information?	N: No	0.0 / 10.0
Did the agent let the customer complete request without interruptions?	V: Very Effectively	10.0 / 10.0
Did the agent fully understand request (0 - not understand)?	10	10.0 / 10.0
If the agent needed clarification, was clarification asked respectfully?	N: Not Respectfully	4.0 / 10.0
Request Fulfillment		
Did the agent identify what was being done so there were no awkward silences?	<N/A>	0.0 / 10.0
If ... were hold procedures effectively		0.0 / 10.0

Sections

The **Score By Categories** section on the second level of the report (shown above) lists each scoring category and the total points awarded in each category to the agent on this evaluation .

The **Agent Performance** section on the second level of the report (shown above) lists the questions for both the Agent Performance and Business Intelligence (if used) tabs. Then it shows the score given to each question, the points awarded the agent, and any comments added to a question or the overall evaluation.

Evaluator Calibration

This report displays the evaluators' scores for a specific calibration project and compares each score to the average and the selected baseline evaluation.

Criteria

The following criteria are unique to this report and are explained below for clarification.

Criteria	Description
NA Questions	Use this criterion to determine how to display questions marked as Not Applicable (NA). If this criterion is not defined, then the default is to ignore a question that was scored as NA by at least one person.
Project Name	Use this criterion to view evaluator's scores per project.

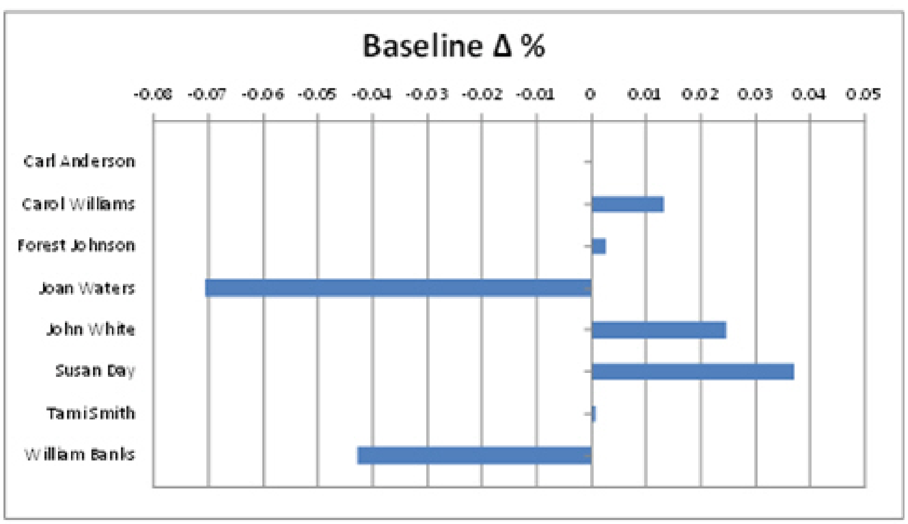
Sample

Evaluator Calibration Report

Project: John Adams Sales Call   Report Date: 11/11/2011 08:42:08

Baseline Evaluator: Carl Anderson

Evaluators	Score	Baseline Δ	Baseline Δ %	Average Δ	Average Δ %
Carl Anderson	79.45	0.00	0.00%	0.27	0.34%
Carol Williams	80.51	1.06	1.32%	1.33	1.65%
Forest Johnson	79.65	0.20	0.25%	0.47	0.59%
Joan Waters	74.20	-5.25	-7.08%	-4.98	-6.72%
John White	81.45	2.00	2.46%	2.27	2.78%
Susan Day	82.51	3.06	3.71%	3.33	4.03%
Tami Smith	79.50	0.05	0.06%	0.32	0.40%
William Banks	76.20	-3.25	-4.27%	-2.98	-3.92%
Average:	79.18	-0.27	-0.44%	0.00	-0.11%



Drill-Down

The **Project** name shown in the report header is a drill-down link that opens the Evaluator Calibration – Recording report. To return to the Evaluator Calibration report, click the **Back** arrow button in the report toolbar.

NOTE When the report is exported as an Excel, Word or PDF file, all drill-down links are disabled.

Header Details

Header details that are unique to this report are explained below:

Project shows the name of the project and links to the drill-down report, Evaluator Calibration – Recording.

Report Date shows the timestamp when the report is run.

Baseline Evaluator shows the evaluator selected in the project as the baseline.

Columns

Columns that are unique to this report are explained below:

Evaluators shows all evaluators assigned to this project.

Score shows the average score assessed by the evaluator. This is noted as the **Evaluator's Score** in the descriptions below.

Baseline Δ is calculated using this formula: Baseline Evaluator's Score – Evaluator's Score.

Baseline Δ% is calculated using this formula: (Baseline Evaluator's Score – Evaluator's Score)/Evaluator's Score.

Average Δ is calculated using this formula: Average Score – Evaluator's Score.

Average Δ% is calculated using this formula: (Average Score – Evaluator's Score)/Evaluator's Score.

Evaluator Calibration – Category

This report displays the evaluators' scores for a specific form, recording and scoring category. It compares each score to the average and the selected baseline evaluator.

Notes

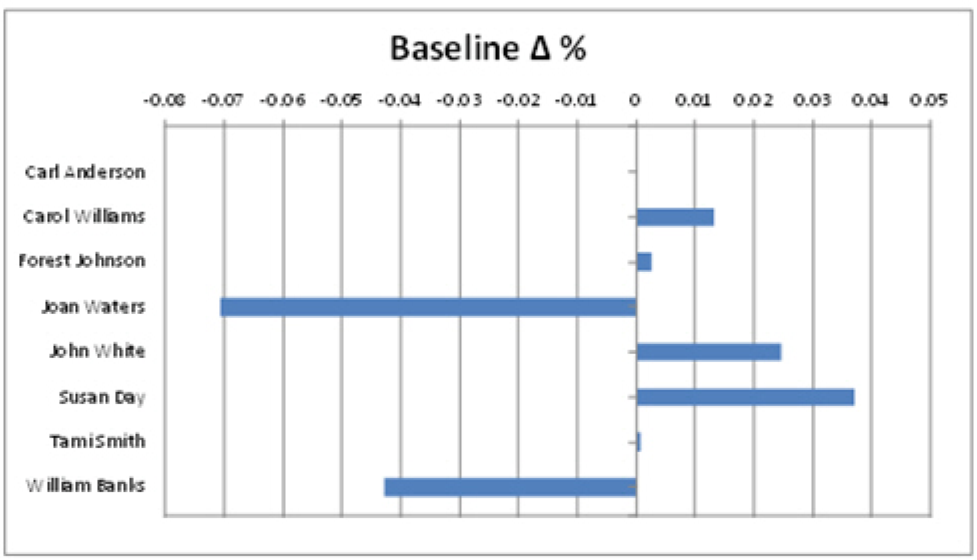
- Only available as a drill-down by clicking the **Form** name on the Evaluator Calibration – Recording report.
- No criteria buttons are available for this report since it is only available as a drill-down report.

Sample

Evaluator Calibration Report

Project: John Adams Sales Call — Report Date: 11/11/2011 08:42:08
Form: Customer Service — Recording: 01Z15ZSF
Scoring Category: Introduction
Baseline Evaluator: Carl Anderson — Agent: John Adams

Evaluators	Score	Baseline Δ	Baseline Δ %	Average Δ	Average Δ %
Carl Anderson	79.45	0.00	0.00%	0.27	0.34%
Carol Williams	80.51	1.06	1.32%	1.33	1.65%
Forest Johnson	79.65	0.20	0.25%	0.47	0.59%
Joan Waters	74.20	-5.25	-7.08%	-4.98	-6.72%
John White	81.45	2.00	2.46%	2.27	2.78%
Susan Day	82.51	3.06	3.71%	3.33	4.03%
Tami Smith	79.50	0.05	0.06%	0.32	0.40%
William Banks	76.20	-3.25	-4.27%	-2.98	-3.92%
Average:	79.18	-0.27	-0.44%	0.00	-0.11%



Drill-Down

The **Scoring Category** name shown in the report header is a drill-down link that opens the Evaluator Calibration – Question report. To return to the Evaluator Calibration − Category report, click the **Back** arrow button in the report toolbar.

NOTE When the report is exported as an Excel, Word or PDF file, all drill-down links are disabled.

Header Details

One header detail is unique to this report:

Scoring Category shows the name of the scoring category with a drill-down link to Evaluator Calibration – Question.

Columns

The columns on this report are identical to those on the Evaluator Calibration report.

Evaluator Calibration – Question

This report displays the evaluators' scores for a specific form, recording, category and question. It compares each score to the average and the selected baseline evaluator.

Notes

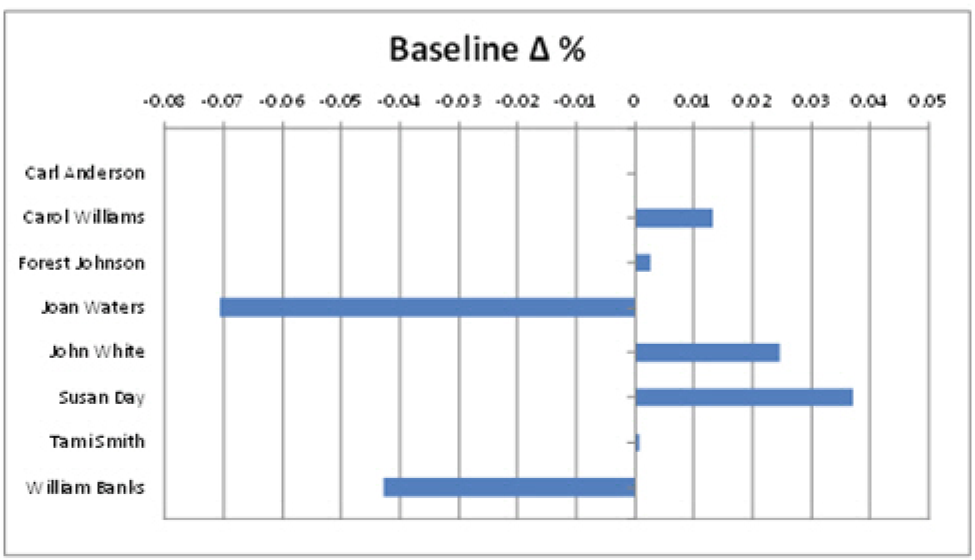
- Only available as a drill-down by clicking the **Scoring Category** name on the Evaluator Calibration – Category report.
- No criteria buttons are available for this report since it is only available as a drill-down report.

Sample

Evaluator Calibration Report

Project: John Adams Sales Call | Report Date: 11/11/2011 08:42:08
Form: Customer Service | Recording: 01Z15ZSF
Scoring Category: Introduction
Question: Did agent verify customer's information correctly?
Baseline Evaluator: Carl Anderson | Agent: John Adams

Evaluators	Score	Baseline Δ	Baseline Δ %	Average Δ	Average Δ %
Carl Anderson	79.45	0.00	0.00%	0.27	0.34%
Carol Williams	80.51	1.06	1.32%	1.33	1.65%
Forest Johnson	79.65	0.20	0.25%	0.47	0.59%
Joan Waters	74.20	-5.25	-7.08%	-4.98	-6.72%
John White	81.45	2.00	2.46%	2.27	2.78%
Susan Day	82.51	3.06	3.71%	3.33	4.03%
Tami Smith	79.50	0.05	0.06%	0.32	0.40%
William Banks	76.20	-3.25	-4.27%	-2.98	-3.92%
Average:	79.18	-0.27	-0.44%	0.00	-0.11%



Header Details

One header detail is unique to this report:

Question shows the text for the question.

Columns

The columns on this report are identical to those on the Evaluator Calibration report.

Evaluator Calibration – Recording

This report displays the evaluators' scores for a specific form and recording. It compares each score to the average and the selected baseline evaluator.

Notes

- Only available as a drill-down by clicking the **Project** name on the Evaluator Calibration report.
- No criteria buttons are available for this report since it is only available as a drill-down report.

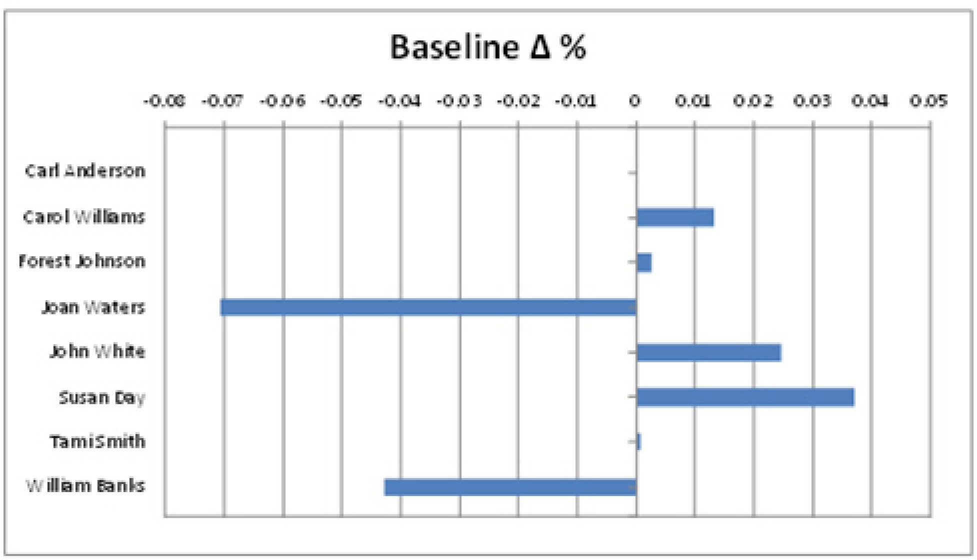
Sample

Evaluator Calibration Report

Project: John Adams Sales Call
Form: Customer Service
Baseline Evaluator: Carl Anderson

Report Date: 11/11/2011 08:42:08
Recording: 01Z15ZSF
Agent: John Adams

Evaluators	Score	Baseline Δ	Baseline Δ %	Average Δ	Average Δ %
Carl Anderson	79.45	0.00	0.00%	0.27	0.34%
Carol Williams	80.51	1.06	1.32%	1.33	1.65%
Forest Johnson	79.65	0.20	0.25%	0.47	0.59%
Joan Waters	74.20	-5.25	-7.08%	-4.98	-6.72%
John White	81.45	2.00	2.46%	2.27	2.78%
Susan Day	82.51	3.06	3.71%	3.33	4.03%
Tami Smith	79.50	0.05	0.06%	0.32	0.40%
William Banks	76.20	-3.25	-4.27%	-2.98	-3.92%
Average:	79.18	-0.27	-0.44%	0.00	-0.11%



Drill-Down

The **Form** name shown in the report header is a drill-down link that opens the Evaluator Calibration – Category report. To return to the Evaluator Calibration − Recording report, click the **Back** arrow button in the report toolbar.

NOTE When the report is exported as an Excel, Word or PDF file, all drill-down links are disabled.

Header Details

Header details that are unique to this report are explained below:

Form shows the name of the form with a drill-down link to Evaluator Calibration – Category.

Recording shows the name of the recording selected in the project.

Agent shows the name of the agent associated with the recording.

Columns

The columns on this report are identical to those on the Evaluator Calibration report.

Evaluator Productivity

This report illustrates the productivity of the evaluators and helps a manager determine if an:

- Evaluation team is productive.
- Evaluator is working more efficiently than another.
- Evaluator is truly listening to the entire recording before scoring the agent's performance.

This report also displays the number of evaluations completed throughout the day. It may help a manager to determine the time of day in which an evaluator may be more productive.

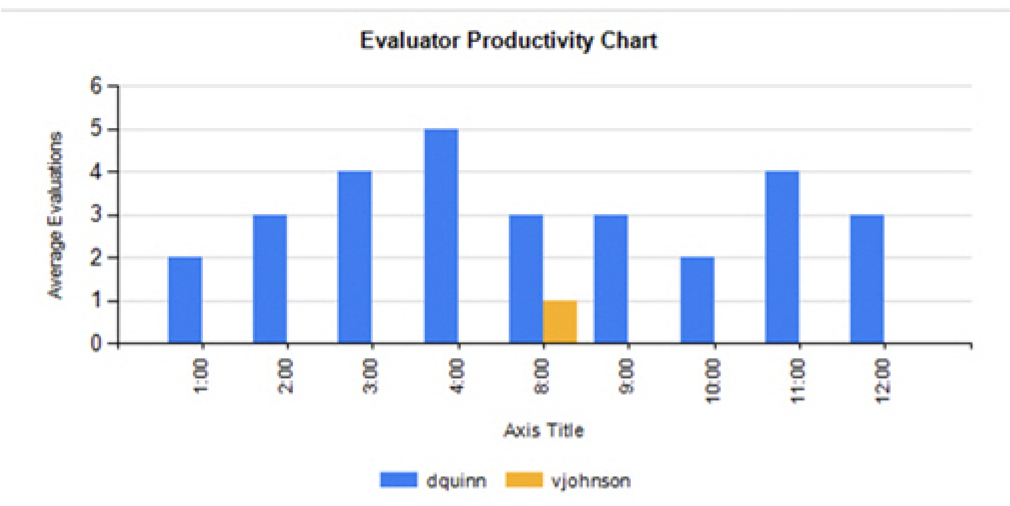
Criteria

The following criteria are unique to this report and are explained below for clarification.

Criteria	Description
Forms	Use this criterion if you would like to view information about how an evaluator scored agents using a particular form.
Recordings Time Filter	With this criterion, you can select a certain time of the day to include in the report. Since it is best to eliminate lunch or break periods from the report, it is recommended that you set this criterion for the most productive times of the day. As an example, if the time filter is set from 8:00 AM to 12:00 PM and the report includes multiple days, the report shows recordings that occurred during that time period only for each day requested in the **Recording Date** criterion.

Sample

Evaluator	Evaluations Completed	Average Completed per Hour	Average Recording Length	Average Evaluation Time	Recording Time to Evaluation Time Ratio
dquinn	65	1	00:01:24	00:16:05	1 : 11.5
vjohnson	3	0	00:02:19	00:12:54	1 : 5.6



Columns

Columns that are unique to this report are explained below:

Evaluations Completed is the total amount of evaluations completed by the evaluator.

Average Completed per Hour is the average number of evaluations completed by each evaluator per hour.

Average Recording Length is the average length of recordings assessed by the evaluator. Calculated as: <total duration for all recordings assessed by the evaluator> / <number of recordings assessed by the evaluator>.

Average Evaluation Time is the average evaluation time for each recording for the evaluator. Calculated as: <total duration of evaluations completed by the evaluator> / <number of evaluations completed by evaluator>.

Recording Time to Evaluation Time Ratio is the ratio of recording time in seconds to evaluation time in seconds.

Evaluator Productivity Per Time Period

This report displays how productive an evaluator is during a certain time period and helps to compare productivity among all evaluators.

Criteria

The following criteria are unique to this report and are explained below for clarification.

Criteria	Description
Form / Category / Question	This enables the report to include selected evaluation forms, scoring categories, and/or evaluation questions. Select the form and the revision number at the top of the window and the scoring categories and questions open in the other windows. Then select the scoring category and/or the questions to include on the report.
Report Grouping	This enables you to group the information in various ways, such as by form, scoring category, etc. If you select: • **Form**, you can view evaluations by the form used to evaluate the recording. • **Site Then Form**, you can view evaluations by site and then the form used to evaluate the recording.
Time Period	This is the time interval used in the blue columns. The sample below shows the time interval in months. You may also choose time intervals of daily, weekly, or yearly.

Sample

		January 2011	February 2011	March 2011	Total
Administrator	Num Evals:	0	6	9	15
	Avg Score:		59.39	60.48	60.04
	Avg Talk Time:	00:00:00	00:00:28	00:01:31	00:01:06
	Avg Task Time:	00:00:00	00:00:43	00:05:59	00:03:53
collection	Num Evals:	0	6	0	6
	Avg Score:		81.97		81.97
	Avg Talk Time:	00:00:00	00:00:58	00:00:00	00:00:58
	Avg Task Time:	00:00:00	00:00:44	00:00:00	00:00:44
collection2	Num Evals:	28	0	0	28
	Avg Score:	82.85			82.85
	Avg Talk Time:	00:04:06	00:00:00	00:00:00	00:04:06
	Avg Task Time:	00:12:39	00:00:00	00:00:00	00:12:39
collection3	Num Evals:	2	0	0	2
	Avg Score:	77.39			77.39
	Avg Talk Time:	00:05:47	00:00:00	00:00:00	00:05:47
	Avg Task Time:	00:17:56	00:00:00	00:00:00	00:17:56
	Num Evals:			0	43

Columns

The first column on this report lists each evaluator included on the report. Other information that is unique to this report is explained below:

Num Evals shows the number of evaluations completed by the evaluator for the date range selected.

Avg Score is the average score assessed by the evaluator on all evaluation forms for the date range selected.

Avg Talk Time is the average duration of all recordings related to evaluations created during the date range. Calculated as: <total duration of all recordings> / <number of recordings>.

Avg Task Time is the average duration of time spent evaluating calls made during the date range selected.

Evaluator Scores by Question

This report summarizes an evaluator's grading behavior, comparing the evaluator's average score assessed for each question to the average system score. You may find this information helpful when comparing how evaluators score a particular question or set of questions in order to focus on managing or training evaluators.

Criteria

The following criteria are unique to this report and are explained below for clarification.

Criteria	Description
Forms	Use this criterion if you would like to view information about how an evaluator scored agents using a particular form.
Recordings Time Filter	With this criterion, you can select a certain time of the day to include in the report. Since it is best to eliminate lunch or break periods from the report, it is recommended that you set this criterion for the most productive times of the day. As an example, if the time filter is set from 8:00 AM to 12:00 PM and the report includes multiple days, the report lists recordings that occurred during that time period only for each day requested in the **Recording Date** criterion.

Sample

Site	Evaluator	Question	# of Evals	Average Evaluator Score	Average System Score	Difference
Site 1	dquinn	Tone of voice was appropriate and confidence was evident	8	100.00	100.00	0.00
Site 1	dquinn	Was a proper greeting used?	8	100.00	100.00	0.00
Site 1	dquinn	Proper identification provided	8	100.00	100.00	0.00
Site 1	dquinn	Listened fully and attentively to the caller	8	100.00	100.00	0.00
Site 1	dquinn	Professionalism and verbiage was appropriate while	8	100.00	100.00	0.00
Site 1	dquinn	Did the representative actively listen to comprehend the	8	100.00	100.00	0.00
Site 1	dquinn	Was information about specific accounts properly notated?	8	100.00	100.00	0.00
Site 1	dquinn	Call was closed properly	8	100.00	100.00	0.00
Site 1	dquinn	Took appropriate ownership of call in order to provide	5	75.00	75.00	0.00
Site 1	dquinn	Tone of voice was appropriate and confidence was evident	5	80.00	80.00	0.00
Site 1	dquinn	Explanation/coaching provided is clear and understandable	5	60.00	60.00	0.00
Site 1	dquinn	Representative asked appropriate questions to gain	5	76.00	76.00	0.00
Site 1	dquinn	Answer given by representative is accurate and in keeping	5	80.00	80.00	0.00
Site 1	dquinn	Utilizes resources when unsure of proper procedure (Rev. 2)	5	0.00	0.00	0.00
Site 1	dquinn	Decision given was within representative's authority (as	5	0.00	0.00	0.00
Site 1	dquinn	Was the member verified according to policy?	60	94.92	94.92	0.00
Site 1	dquinn	Was the home number updated/verified?	60	83.93	83.93	0.00
		...mber updated/verified?			66.07	

Columns

Columns that are unique to this report are explained below:

# of Evals is the number of evaluations that included this question.

Average Evaluator Score is the average score an evaluator has awarded to a specific question. Calculated as: 100 x <sum of all earned points awarded by the evaluator for a question> / <sum of all possible points awarded by the evaluator for a question>.

Average System Score is the average score awarded to a question by all evaluators. Calculated as: 100 x <sum of all earned points for a question>/<number of possible points for a question>.

Difference is the Average Evaluator Score minus the Average System Score. If the Average Evaluator Score is less than the Average System Score, this number is highlighted in red.

Form Usage By Time Period

This report helps you check how often a specific form is used. It may point toward the effectiveness of a particular form and help to clear out forms that are not used often.

Criteria

The following criteria are unique to this report and are explained below for clarification.

Criteria	Description
Report Grouping	This enables you to group the information by site, so that you can see which site is using which forms more often and compare that information to its service or sales results. When using this criterion, a graph is included for each site.
Time Period	Use this criterion to group information by Daily, Weekly, Monthly, or Yearly time periods shown in the blue columns of the report.

Sample

	January 2011	February 2011	June 2011	Total
Card Processing Evaluation	0	0	1	1
Collection Inbound Evaluation ...	35	0	0	35
Collection Outbound Evaluation...	25	0	0	25
Collection: Vendor Evaluation	8	0	0	8
Insurance Evaluation	0	0	1	1
Technical Support Evaluation	2	0	0	2
Teleservices Call Quality Eval...	2	0	0	2
Teleservices Main Form	3	2	0	5
Total	75	2	2	79

Columns

This report lists the form names in the first column and the number of times they are used to create an evaluation in each blue column.

Hold Time Ranking

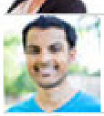
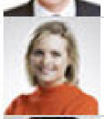
This report ranks agents in order of their hold time duration, according to the criteria selected. It displays the agents' ranking and can also show the agents' hold time duration. It may be used when setting up a contest.

Criteria

The following criteria are unique to this report and are explained below for clarification.

Criteria	Description
Hold Time	Use this criterion to filter by a certain hold time. If this criterion is not specified, then all recordings are included when calculating agent ranking, including recordings with no hold time (i.e. where hold time equals 0:00:00).
Hold Time Column	Use this criterion to either hide or show the hold time as a separate column on the report or contest widget.
Ranking Options	Use this criterion to rank agents by the average hold times (highest first or lowest first), or by highest single hold time, or by lowest single hold time. The default setting is the lowest average hold time.
Recording Date	Use this criterion to define the period during which the hold times are collected and compared.
Recordings Time Filter	Use this criterion to define a single time range in which to review hold times (in 15-minute increments).
Site/Team/Agent	Use this criterion to define the agents to be compared.
User Image	Use this criterion to either hide or show the user image associated with the user record on the report or contest widget.

Sample

Name	Hold Time	Rank	Points
 Abigail Urquizo	1:10	1	355
 Alejandro Barahona	1:55	2	300
 Alex Manasan	2:30	3	250
 Allison Benedict	3:05	4	200
 Ameka Phillips	3:45	5	125

Sections

The **Hold Time**column shows the hold time for the agents according to the criteria selected, and may either be the highest average hold time, the lowest average hold time, the highest single hold time, or the lowest single hold time (according to the **Ranking Options** criterion). This column can be omitted from the report by selecting **No** for the **Hold Time Column** criterion.

If two agents have the same hold time, they also share the same rank. For instance, if two agents tie for second place, both will be listed with a rank of 2 in alphabetical order. The next agent on the list will receive a rank of 3.

The **Rank**column shows how the agent ranks among the other agents according to the criteria selected.

The **Points** column shows the number of reward points awarded to the agents for the criteria selected, if the report is linked to a contest. If there is no linked contest, the **Points** column is not shown. The point value is blank if the agent's hold time does not qualify the agent for reward points.

Widget Requirements

Encore uses the hold times for each agent's recordings to determine the ranking for this report's widget. This report can only be included in the list of dashboard widgets if it is added to either **Shared Reports** or **My Reports** and follows these rules:

- The selected date range for the **Recording Date** criterion must be less than 400 days.
- The **Ask at Execution** option cannot be selected.

The widget displays the top ranked agents in the report, up to a maximum of five agents.

CAUTION If the report is linked to a contest, you cannot display it as a widget.

Contest Requirements

A contest must have a report associated with it in order to set the details for the contest, such as the date of the contest, the agents that can earn rewards, etc. This report can only be associated with a contest if it is added to **My Reports** and follows these rules:

- The selected date range for the **Recording Date** criterion must be less than 187 days.
- The end date selected for the **Recording Date** criterion must be in the future.
- At least one agent must be selected for **Site/Team/Agent**. If the **Me** option is selected, it will be ignored.
- A ranking method must be selected for **Ranking Options**.
- The **Ask at Execution** option cannot be selected.

CAUTION If the report is displayed as a widget, you cannot link it to a contest.

KPI Comparison Chart

This report displays the average score assigned by each evaluator for each question or Key Performance Indicator (KPI) in graph form.

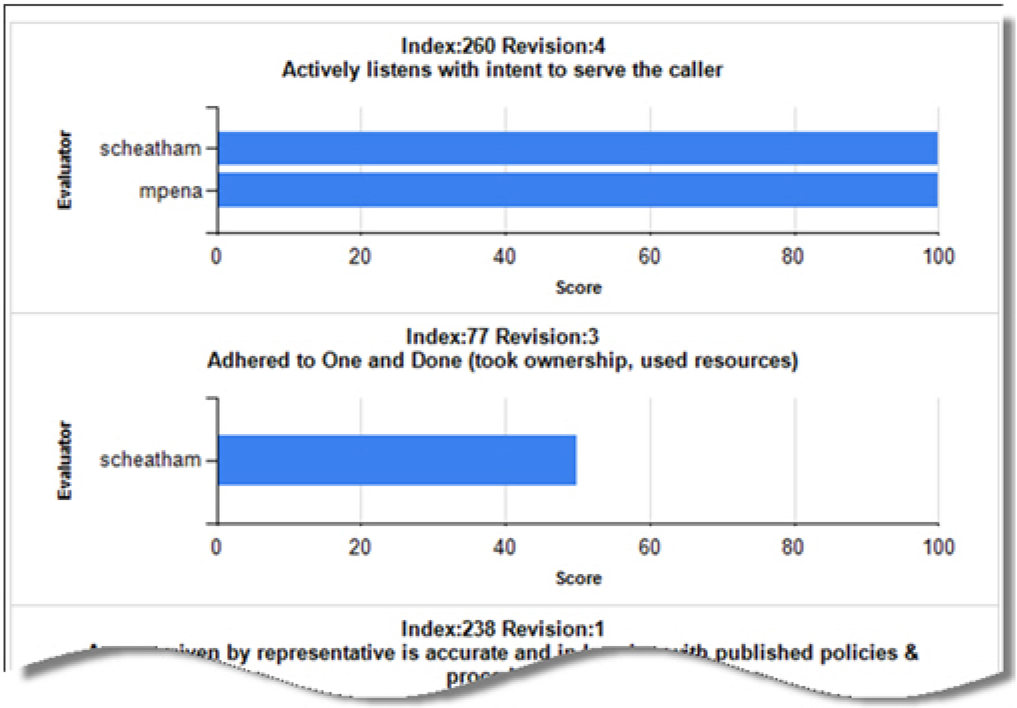
Notes

- Questions that are answered with text entries are not included in this report.
- If a question is answered for a recording created during the specified date range, it is included in this report. If you see a question missing from the report, it has likely not been answered for a recording created during the date range.
- Questions that are not answered by evaluators may be automatically marked as Not Applicable (NA). These zero point questions are not included in the calculations for this report.
- If an evaluation is marked as a Manual Fail, all questions on the form are assessed a zero score. These zero scores are included when calculating the total average score assigned by the evaluator.

Criteria

Most criteria on this report are easy to understand; however, it is important to emphasize that you must select up to five questions and five evaluators in order to run the report. If you need to run the report for several questions and evaluators, select five at a time and generate the report multiple times.

Sample



KPI Comparison Report

This report lists the average score given by each evaluator for each Key Performance Indicator (KPI). It can help you determine if the evaluation team is scoring questions/KPIs in a similar manner.

Notes

- Questions that are answered with text entries are not included in this report.
- If a question is answered for a recording created during the specified date range, it is included in this report. If you see a question missing from the report, it has likely not been answered for a recording created during the date range.
- Questions that are not answered by evaluators may be automatically marked as Not Applicable (NA). These zero point questions are not included in the calculations for this report.
- If an evaluation is marked as a Manual Fail, all questions on the form are assessed a zero score. These zero scores are included when calculating the total average score assigned by the evaluator.

Sample

Index	Rev.	Question	dquinn	mpena	scheatham	vjohnson
56	3	Tone of voice was appropriate and confidence was evident	100%	0%	0%	0%
70	3	Asked questions for clarity and understanding	0%	0%	100%	0%
77	3	Adhered to One and Done (took ownership, used resources)	0%	0%	50%	0%
149	7	Executes proper workflow when applicable and includes all necessary documentation (includes proper date, amount and follow-up date)?	0%	100%	0%	0%
197	2	Was the address updated/verified?	93%	0%	0%	0%
198	1	Was a proper greeting used?	100%	0%	0%	0%
199	1	Proper identification provided	100%	0%	0%	0%
200	1	Listened fully and attentively to the caller	100%	0%	0%	0%
201	1	Professionalism and verbiage was appropriate while maintaining good vendor rapport	100%	0%	0%	0%
202	2	Did the representative actively listen to comprehend the problem and offer applicable resolution (When Applicable)	100%	0%	0%	0%
203	1	Was information about specific accounts properly notated?	100%	0%	0%	0%
204	1	Call was closed properly	100%	0%	0%	0%
234	1	Took appropriate ownership of call in order to provide resolution for caller's concern	75%	0%	0%	0%
		...ate and confidence was evid...	80%	0%	0%	

Columns

Columns that are unique to this report are explained below. The blue columns on the right side of the report shows all the evaluators and the average scores they have assigned to questions for the selected date range.

Index is the internal system number assigned to the question.

Rev. is the revision number assigned to the question. When a question is modified, the system does not delete the previous version of the question since it may have evaluation answers attached to it. Instead, the system assigns a new revision number to it.

Overdue Assignment List

This report displays a detailed list of overdue assignments that have been assigned to agents.

Criteria

The following criteria are unique to this report and are explained below for clarification.

Criteria	Description
Assignment Date	The date an assignment was created.
Recipient	The user who was assigned the module by the sender.
Sender	The user who assigned the module to the recipient.
Site	All assignments created for agents at each site.

Sample

Status	Priority	Assignment	Due Date	Duration	Comment	Sender	Recipient	Assigned Date
Overdue	3	Employee Conduct	1/30/2012 9:43:49 PM	3		Rhonda Adams	Kevin Smith	1/26/2012 9:43:49 PM
Overdue	1	How to listen and ask good questions	1/27/2012 9:43:49 PM	1		Rhonda Adams	Kevin Smith	1/26/2012 9:43:49 PM

Columns

Columns that are unique to this report are explained below:

Priority is the priority level assigned to the eCoaching module.

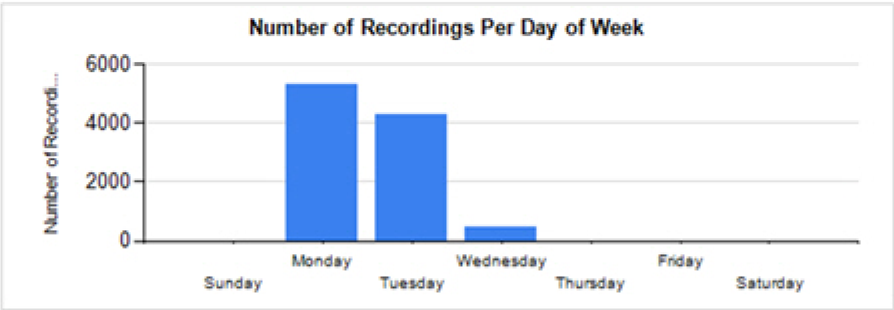
Duration is the number of hours it takes to complete the eCoaching module.

Peak Period Daily

This report displays the number of recordings made on different days of the week. This report helps to:

- Determine the busiest day of the week for any time period selected, such as month, quarter, or year.
- Illustrate the peak periods as a graph and in data form.
- Provide a different view of data reported on the Call Distribution report.

Sample



	Number of Recordings
Sunday	0
Monday	5,288
Tuesday	4,302
Wednesday	480
Thursday	0
Friday	0
Saturday	0

Columns

The **Number of Recordings** column lists the number of recordings created during each day of the week for the selected date range. The graph at the top of this report shows the same information as an illustration.

Widget Requirements

This report can only be included in the list of dashboard widgets if it is added to either **Shared Reports** or **My Reports** and follows these rules:

- The selected date range for the **Recording Date** criterion must be less than 187 days.
- The **Ask at Execution** option cannot be selected.

Peak Period Hourly

This report displays the number of recordings made on different days of the week. This report helps to:

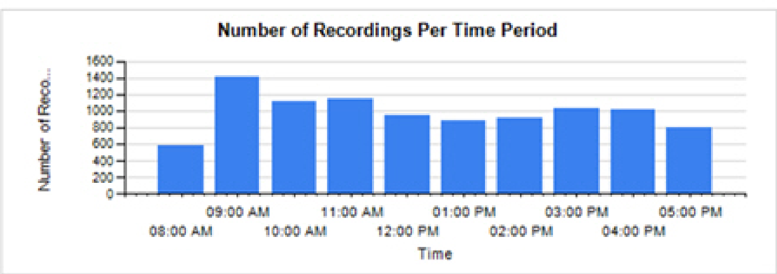
- Determine the busiest day of the week for any time period selected, such as month, quarter, or year.
- Illustrate the peak periods as a graph and in data form.
- Provide a different view of data reported on the Call Distribution report.

Criteria

The following criteria are unique to this report and are explained below for clarification.

Criteria	Description
Granularity	This is the time interval shown in the left column of the report. The number of recordings can be shown in 15 minute, 30 minute, or 1 hour intervals.
Recordings Time Filter	This enables you to set the time period for the report. If you want to view calls made between 8:00 AM and 5:00 PM, move the slider to include these times. Any calls created outside of this time period are not included in the report. If no time period is selected, the report includes all 24 hours.

Sample



	Number of Recordings
8:00:00 AM - 9:00:00 AM	582
9:00:00 AM - 10:00:00 AM	1,423
10:00:00 AM - 11:00:00 AM	1,114
11:00:00 AM - 12:00:00 PM	1,157
12:00:00 PM - 1:00:00 PM	954
1:00:00 PM - 2:00:00 PM	883
2:00:00 PM - 3:00:00 PM	912
3:00:00 PM - 4:00:00 PM	1,043
4:00:00 PM - 5:00:00 PM	1,026
5:00:00 PM - 6:00:00 PM	811

Columns

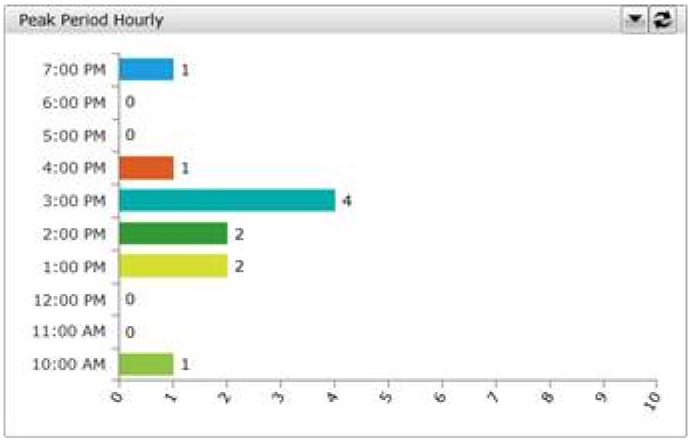
The **Number of Recordings** column lists the number of recordings created during each day of the week for the selected date range. The graph at the top of this report shows the same information as an illustration.

Widget Requirements

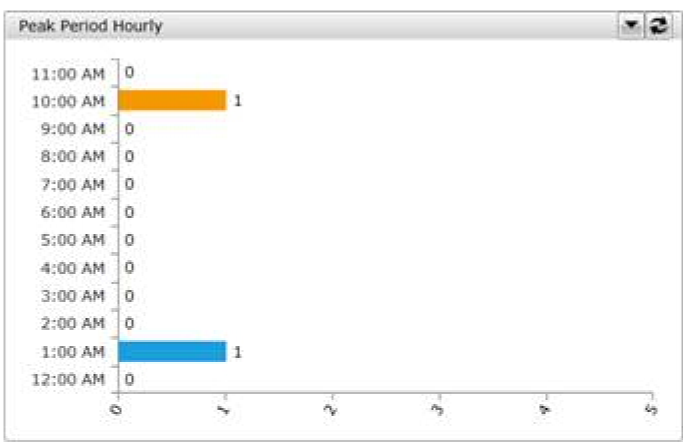
This report can only be included in the list of dashboard widgets if it is added to either **Shared Reports** or **My Reports** and follows these rules:

- The selected date range for the **Recording Date** criterion must be less than 187 days.
- The **Ask at Execution** option cannot be selected.

This report widget shows a maximum of 12 time slots. Set the 12 hours you want to view on the widget by selecting the time range in the **Recordings Time Filter** criterion. For example, this report has the **Recordings Time Filter** criterion set to 10 am – 8 pm:



By contrast, this report has no criteria set in the **Recordings Time Filter**, so the widget automatically shows the first 12 slots which start at midnight and end at 11 am:



Post Contact Survey – Average Score by Question

This report displays the average score for each question on a survey evaluation.

Criteria

The following criteria are unique to this report and are explained below for clarification.

Criteria	Description
Project Name	Use this criterion to view question scores per survey project.

Sample

Post Contact Survey
Average Score by Question

Project: Customer Care - Team 1
Form: Customer Care Survey

Report Date: 11/11/2011 08:42:08
Evaluation Date: 12/3/2011 - 5/5/2012

Question	Average Points	Possible Points	Average Score
Actively listens with intent to serve the caller	8.00	10.00	80.00
Answer given by representative is accurate and in keeping with published policies & procedures	17.50	20.00	87.50
Ask effective open and closed questions to uncover needs?	8.25	10.00	82.50
Did the agent accurately complete order information?	9.12	10.00	91.20
Did the agent present information in clear, easy to understand language?	7.40	10.00	74.00
Obtained caller permission to be put on hold?	24.60	30.00	82.00
Average:			87.50

Header Details

Header details that are unique to this report are explained below:

Project shows the name of the project.

Report Date shows the timestamp when the report is run.

Form shows the name of the form associated with the survey project.

Columns

Columns that are unique to this report are explained below:

Average Points shows the average score received by agents.

Possible Points shows the total number of possible points an agent may earn for the question.

Average Score is calculated using this formula: (Average Points/Possible Points) x 100.

Quiz Score Ranking

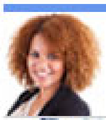
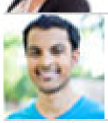
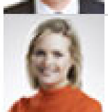
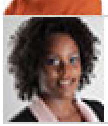
This report ranks agents in order of their quiz scores, according to the criteria selected. It displays the agents' ranking and can also show the agent's quiz scores. It may be used when setting up a contest.

Criteria

The following criteria are unique to this report and are explained below for clarification.

Criteria	Description
Quiz	Select one or more quizzes to be compared. If no quiz is selected, then all quiz forms are used to aggregate the score data.
Quiz Date	Define the period during which quiz scores are collected and compared.
Ranking Options	Choose to rank agents by the average score (highest first or lowest first), or by highest single score, or by lowest single score. The default setting is the highest average score.
Score Column	Choose to either hide or show the score column on the report or contest widget.
Site/Team/Agent	Define the agents to be compared.
User Image	Choose to either hide or show the user image associated with the user record on the report or contest widget.

Sample

Name	Score	Rank	Points
 Abigail Urquizo	82	1	575
 Alejandro Barahona	79	2	405
 Alex Manasan	70	3	375
 Allison Benedict	68	4	345
 Ameka Phillips	61	5	305

Sections

The **Score** column shows the quiz scores for the agents according to the criteria selected, and may either be the highest average score, the lowest average score, the highest single score, or the lowest single score (according to the **Ranking Options** criterion). This column can be omitted from the report by selecting **No** for the **Score Column** criterion.

If two agents earn the same score, they also share the same rank. For instance, if two agents tie for second place, both will be listed with a rank of 2 in alphabetical order. The next agent on the list will receive a rank of 3.

The **Rank** column shows how the agent ranks among the other agents according to the criteria selected.

The **Points** column shows the number of reward points awarded to the agents for the criteria selected, if the report is linked to a contest. If there is no linked contest, the **Points** column is not shown. The point value is blank if the agent's score does not qualify the agent for reward points.

Widget Requirements

Encore uses the quiz score earned by each agent to determine the ranking for this report's widget. This report can only be included in the list of dashboard widgets if it is added to either **Shared Reports** or **My Reports** and follows these rules:

- The selected date range for the **Quiz Date** criterion must be less than 400 days.
- The **Ask at Execution** option cannot be selected.

The widget displays the top ranked agents in the report, up to a maximum of five agents.

CAUTION If the report is linked to a contest, you cannot display it as a widget.

Contest Requirements

A contest must have a report associated with it in order to set the details for the contest, such as the date of the contest, the agents that can earn rewards, etc. This report can only be associated with a contest if it is added to **My Reports** and follows these rules:

- The selected date range for the **Quiz Score Date** criterion must be less than 400 days.
- The end date selected for the **Quiz Score Date** criterion must be in the future.
- At least one agent must be selected for **Site/Team/Agent**. If the **Me** option is selected, it will be ignored.
- A ranking method must be selected for **Ranking Options**.
- The **Ask at Execution** option cannot be selected.

CAUTION If the report is displayed as a widget, you cannot link it to a contest.

Recording Analysis Detail

This report provides details about agents and the calls they have handled.

Criteria

The following criteria are unique to this report and are explained below for clarification.

Criteria	Description
Call Direction	Use this criterion to show calls that were either incoming, outgoing or both call directions on the report.
Report Grouping	Use this criterion to group the data by day or week.
First Day of Week	Set the first day of the week as either Sunday or Monday.

Sample

Recording Analysis Detail

Report Date: Tuesday, May 29, 2018 12:55 PM

Recording Date: 4/1/2018 12:00:00 AM - 4/30/2018 11:59:59 PM

Report Grouping: Day

Account Protection (1 Agents)

Agent Name	First	Last	Recordings	Incoming	Outgoing	Internal	External	Avg Call Length	Calls Per Hour	Avg Hold Time
Lopez,April 4/20/2018	4/20/2018 3:14 PM	4/20/2018 3:21 PM	2	0	0	0	0	00:02:48	2.00	00:00:00
Team Totals:	4/20/2018 3:14 PM	4/20/2018 3:21 PM	2	0	0	0	0	00:02:48	2.00	00:00:00

Advanced Support (2 Agents)

Agent Name	First	Last	Recordings	Incoming	Outgoing	Internal	External	Avg Call Length	Calls Per Hour	Avg Hold Time
Herman,Angelica 4/20/2018	4/20/2018 3:14 PM	4/20/2018 3:21 PM	2	0	0	0	0	00:02:00	2.00	00:00:00
Medina,Elias 4/20/2018	4/20/2018 3:14 PM	4/20/2018 3:22 PM	2	0	0	0	0	00:02:47	2.00	00:00:00
Team Totals:	4/20/2018 3:14 PM	4/20/2018 3:22 PM	4	0	0	0	0	00:02:23	4.00	00:00:00

Columns

Columns that are unique to this report are explained below:

Agent Name includes both the name of the agent and either the day or week in which the data occurred.

First is the date and time of the first recording in this set of data.

Last is the date and time of the last recording in this set of data.

Recordings shows the total number of recordings in the data set.

Incoming shows the number of incoming calls in the data set.

Outgoing shows the number of outgoing calls in the data set.

Internal shows the number of calls made inside the organization that are included in the data set.

External shows the number of calls made to parties outside the organization that are included in the data set.

Avg Call Length shows the average length of a call in this data set.

Calls Per Hour shows the average number of calls this agent handled each hour for this data set.

Avg Hold Time shows the average hold time for all calls included in this data set.

Recording Distribution Over Time

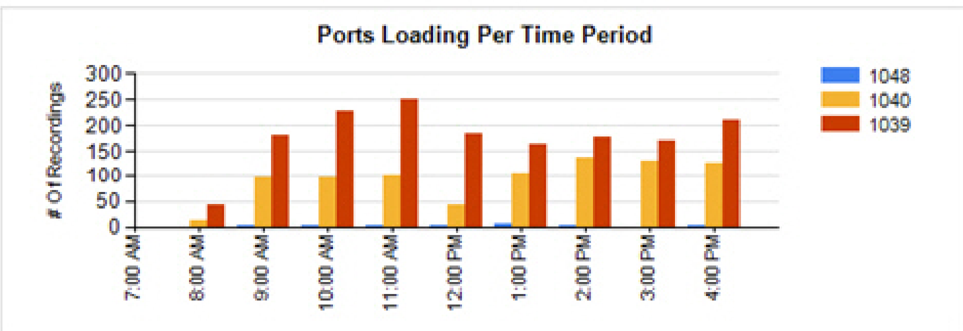
This report displays the number of recordings created for ports during the defined time intervals, and helps to pinpoint the time of day when ports are most busy with recorded calls. It can provide information for up to five extensions at a time.

Criteria

The following criteria are unique to this report and are explained below for clarification.

Criteria	Description
Extension (Limit 5)	Only five extensions can be selected at a time on this report in order for it to run.
Granularity	This is the time intervals shown in the left column of the report. The number of recordings can be shown in 15 minute, 30 minute, or 1 hour intervals.
Recordings Time Filter	With this criterion, you can select a certain time of the day to include in the report. If the day begins at 8:00 AM and ends at 5:00 PM, set this criterion to include these times. Any recording occurring outside of these times will not be included on the report.

Sample



	Extension 1039	Extension 1040	Extension 1048	Total
08:00 - 09:00	42	12	0	54
09:00 - 10:00	181	97	4	282
10:00 - 11:00	228	97	3	328
11:00 - 12:00	251	99	4	354
12:00 - 13:00	183	43	2	228
13:00 - 14:00	162	107	6	275
14:00 - 15:00	178	135	1	314
15:00 - 16:00	170	131	0	301
16:00 - 17:00	209	126	2	337
Total:	1,604	847	22	2,473

Columns

The extension columns, such as **Extension 1039**, show the number of recordings created during the time interval noted. If this report is run for multiple days, it displays the total number of recordings created during the hour for every day included in the date range.

Recording Distribution Top 20

This report displays the top 20 extensions that have the highest number of recordings made during the selected date range. At the end of the report, a graph illustrates the data. This report helps to:

- Show the extension with the most recordings for diagnostic purposes.
- Tell a manager which agent is making the most recordings; who is the most active.
- Identify agents that have the highest number of recordings created in order to determine if this agent may need to adjust his sales approach, etc. For instance, an agent with many recordings may be rushing the process and might possibly sound pushy or abrasive to customers. There could be several reasons for looking into the agents who have the highest number of recordings.

Criteria

The following criteria are unique to this report and are explained below for clarification.

Criteria	Description
Ranked by	This criterion enables you to choose how the information is ranked. These options are available: • Number of Recordings • Average Talk Time • Total Talk Time

Sample

Extension	Agent Login ID	Number of Recordings
1890	11096	303
1008	10716	230
1821	11852	220
1597	806	217
1989	11879	217
1592	808	211
1719	10100	206
1839	10364	198
1842	10331	195
1868	11138	186
1578	804	186
1846	11906	181
1807	11348	178
1845	11120	175
1843	11031	172
1847	10628	172
1579	821	166
1896	11034	155
[illegible]	947	153
[illegible]	[illegible]	151

Columns

Number of Recordings is the total number of recordings for the extension.

Average Talk Time (not shown on the sample above) is the average recording time. Calculated as: <total duration of all recordings> / <number of recordings>.

Total Talk Time (not shown on the sample above) is the total amount of recording time.

Reward Points Statement

This report is a log of all reward point transactions. It is helpful in the following tasks:

- View a history of contest activity including which agents earned points and how contest points are spread across the team or organization.
- Review reward points by agent.
- Verify the manual adjustments.

Base filters are applied for the user running this report.

Criteria

The following criteria are unique to this report and are explained below for clarification.

Criteria	Description
Contest Name	Use this criterion to select the contest(s) you would like to view on the report. If this criterion is not selected, all contests show on the report.
Reward Name	Use this criterion to select the reward you would like to view on the report. If this criterion is not selected, all rewards show on the report.
Transaction	Use this criterion to filter the data by these transaction types: earned points, redeemed points, or adjustments. If this criterion is not selected, all transaction types show on the report.

Sample

NOTE By default, the report is sorted by date with the most recent date showing first. If no criteria are selected for the report, the most recent transaction for each agent matches that agent's current reward points balance. If criteria are selected for the report, the most recent transaction for each agent on the report may not reflect the current (or today's) reward point balance.

Date Time	Participant	Earned Points	Trans. Points	Contest / Reward Name	Contest / Reward Owner	Balance	Reason
3/24/2016	Jacob Allen	Adjustment	100	N/A	Adam Woods	900	Jacob and Emelda were in training
3/24/2016	Emelda Alvarado	Adjustment	100	N/A	Adam Woods	1000	Jacob and Emelda were in training
3/24/2016	Christy Johnson	Earned Points	500	October Eval Perf Contest	Adam Woods	2500	Rewarded at the end of October Eval Perf Contest
3/24/2016	Teresa Ramirez	Earned Points	100	October Eval Perf Contest	Adam Woods	100	Rewarded at the end of October Eval Perf Contest
3/24/2016	Sue Wilbur	Earned Points	200	October Eval Perf Contest	Adam Woods	800	Rewarded at the end of October Eval Perf Contest
3/24/2016	Peter Lindell	Redeemed Points	-250	Amazon Gift Card $25	Adam Woods	2100	Point redemption for reward

Columns

The **Participant** column shows the agent who received or redeemed the points.

The **Earned Points** column shows the origin of the points for the transaction.

The **Contest/Reward Owner** column shows the individual who set up the award and redeems the points for it.

Sales Results

This report helps to:

- Identify those agents performing particularly well with sales. These recordings may offer training or best practice examples.
- Identify those agents who may not be as successful with the sales process and may benefit from additional training or coaching.
- Compare the agent’s sales success with the evaluation score to determine if high evaluation scores result in increased sales. The correlation between these two numbers may point to whether the correct Key Performance Indicators (KPIs) are being measured.

Notes

In order for data to show in the **Sales** and **Attempts** columns of this report, data must be populated in the fldSales and fldAttempts columns of Encore's tblCall. If you need more information about these columns or this table, see your system administrator or call dvsAnalytics' Customer Support at 800.910.4564.

If you are using scheduled recording, the sales numbers on this report should not be used as an official number in which to base commissions, etc.

Criteria

The following criteria are unique to this report and are explained below for clarification.

Criteria	Description
Average Score Threshold	This option highlights information that meets the criterion. For instance, if you want to highlight agents that have an average score of more than 95%, choose **Greater than** and enter **95** in the blank field. When the report is run, all agents are listed but those whose average score exceeds 95% are highlighted in red.
Percent of Sales Threshold	This option highlights information that meets the criterion. For instance, if you want to highlight agents that have a percentage of sales lower than 60%, choose **Less Than** and enter **60** in the blank field. When the report is run, all agents are listed but those whose percentage of sales is less than 60% are highlighted in red.
Report Grouping	This enables you to group the information in various ways: • **Team**, you can view the sales results by team. • **Team Then Site**, you can view the sales results by team then site.

Sample

Agent	Sales	Attempts	% Of Sales	Evaluations	Avg Score
Aaron Oplinger	276	309	89%	30	76%
Abigail Urquizo	213	228	93%	36	88%
Adam Ivins	333	366	91%	24	94%
Adam Key	195	255	76%	45	69%
Adrian Rivas	303	471	64%	33	67%
Adriana Gloria	351	396	87%	18	79%
Adrienne Peterson	549	594	92%	42	91%
Adrienne Tilly	270	285	95%	30	96%
Alane Wachholz	327	417	78%	42	72%
Alejandro Barahona	231	333	69%	30	93%
Alex Flores	192	321	60%	15	82%
Alex Manasan	156	246	63%	36	88%
...danescu	[illegible]	483	[illegible]	[illegible]	85%

Columns

Columns that are unique to this report are explained below:

Sales is the number of sales made.

Attempts is the number of calls made that may or may not have resulted in a sale.

% Of Sales is the percent of calls that resulted in a sale. Calculated as: <number of sales> / <number of attempts>.

Evaluations is the number of evaluations completed.

Avg Score is the average score earned on all evaluations included in the **Evaluations** column.

Sales Trending

This report compares the evaluation scores to the percentage of sales made to determine whether successful scores on the Key Performance Indicators (KPIs) result in increased sales. The trending graph displays sales results compared to attempted sales for a selected time period.

Notes

In order for data to show in the **Sales** and **Attempts** columns of this report, data must be populated in the fldSales and fldAttempts columns of Encore's tblCall. If you need more information about these columns or this table, see your system administrator or call dvsAnalytics' Customer Support at 800.910.4564.

If you are using scheduled recording, the sales numbers on this report should not be used as an official number in which to base commissions, etc.

Criteria

The criteria on this report are simple and easy to understand. Just to clarify one criterion, you may group information by **Daily**, **Weekly**, **Monthly**, or **Yearly** time periods using the **Time Period** criterion.

Sample

Period	Sales	Attempts	% Of Sales	Evaluations	Score
Mon, 01/03/2011	6	56	11%	58	88%
Tue, 01/04/2011	3	15	20%	18	94%
Wed, 01/05/2011	0	6	0%	57	61%
Wed, 01/12/2011	0	0	0%	0	0%
Fri, 02/11/2011	0	0	0%	1	96%
Total:	9	77	12%	134	78%

Columns

Columns that are unique to this report are explained below:

Sales is the number of sales made during the time period.

Attempts is the number of calls made that may or may not have resulted in a sale.

% Of Sales is the percent of calls that resulted in a sale. Calculated as: <number of sales> / <number of attempts>.

Evaluations is the number of evaluations completed.

Score is the average score earned on all evaluations included in the **Evaluations** column.

Screen Recording Error Summary

This report lists errors and other events that have occurred in the Encore Screen Recorder. dvsAnalytics recommends generating this report daily to check the health of your screen recording system for the previous day. You may also generate this report at any time to investigate or troubleshoot any issues that may arise.

Criteria

The following criteria are unique to this report and are explained below for clarification.

Criteria	Description
Error Types	Use this criterion to view certain error types that occurred during desktop recording. Only error types that have recorded data for the selected time period are listed in this filter. If you do not see a particular error type, adjust the date range to include a time when data was most likely recorded for the error type.
Port	Use this criterion to view errors that occurred for certain ports. Only ports that have recorded data for the selected time period are listed in this filter. If you do not see the port you need, adjust the date range to include a time when data was most likely recorded for the port.

Sections

This report is grouped into several sections. Each section is explained below and most columns in each section are easy to understand.

The **Summary** section provides a simple overview of the number of recordings versus the number of screen recordings. It lists the number of recordings that are impacted on this report.

The **Error Details** section shows how many times each error type has occurred. The **% of Errors** column shows how often this error type occurred compared to the total number of recordings. Calculated as: <number of this error type> / <number of total audio recordings>.

The **SRS Error Details** section provides details for all errors that occurred in the Screen Recording Server (SRS).

The **VED Error Details** section provides details for all errors that occurred in the Video Engine DLL (VED).

The **SIS Error Details** section provides details for all errors that occurred in the Station Information Server (SIS).

Sample

Summary	
# of Total Audio Recordings:	10,070
# of Total Screen Recordings:	3,023
# of Screen Errors:	7,047

Error Details

Error #	Count	Source	First Error	Last Error	% of Errors	Description
ERR0	7,019	SIS	1/3/2011 8:00 AM	1/5/2011 9:49 AM	69.7	No server connection, or invalid query type
ERR609	15	SRS	1/3/2011 9:13 AM	1/4/2011 5:35 PM	0.15	ERR609: Machine <IP Address:Port> is already in recording state, however new START command was received for this Extension. The START command is ignored. Recording '*wsr' will be lost.
ERR24	3	VED	1/3/2011 8:16 AM	1/4/2011 9:49 AM	0.03	Screen Recording Host not installed and running on workstation
ERR26	10	VED	1/3/2011 8:30 AM	1/5/2011 9:21 AM	0.1	Workstation or SRS did not respond
Total:	7,047					

SRS Error Details

SRS609 ERR609: Machine <IP Address:Port> is already in recording state, however new START command was received for this Extension. The START command is ignored. Recording *.wsr' will be lost.

Port	Extension	# Of Errors	First Error	Last Error
1008	1008	1	1/4/2011 4:11:46 PM	1/4/2011 4:11:46 PM
1375	1375	1	1/4/2011 2:05:27 PM	1/4/2011 2:05:27 PM
1592	1592	1	1/3/2011 2:33:45 PM	1/3/2011 2:33:45 PM
1755	1755	2	1/4/2011 9:11:47 AM	1/4/2011 4:37:03 PM
1842	1842	1	1/3/2011 9:13:56 AM	1/3/2011 9:13:56 AM
1845	1845	1	1/4/2011 12:01:18 PM	1/4/2011 12:01:18 PM
1847	1847	1	1/4/2011 5:35:37 PM	1/4/2011 5:35:37 PM
1890	1890	1	1/4/2011 1:52:07 PM	1/4/2011 1:52:07 PM
1891	1891	2	1/3/2011 12:34:22 PM	1/4/2011 11:26:53 AM
1896	1896	1	1/3/2011 9:27:12 AM	1/3/2011 9:27:12 AM
1957	1957	1	1/4/2011 4:25:11 PM	1/4/2011 4:25:11 PM
1958	1958	1	1/4/2011 11:49:45 AM	1/4/2011 11:49:45 AM
1989	1989	1	1/3/2011 4:03:16 PM	1/3/2011 4:03:16 PM
Total:		15		

VED Error Details

VED24 Screen Recording Host not installed and running on workstation

Port	Extension	# Of Errors	First Error	Last Error
1207	1207	1	1/4/2011 9:49:23 AM	1/4/2011 9:49:23 AM
1584	1584	1	1/3/2011 9:18:45 AM	1/3/2011 9:18:45 AM
1891	1891	1	1/3/2011 8:16:02 AM	1/3/2011 8:16:02 AM
Total:		3		

VED26 Workstation or SRS did not respond

Port	Extension	# Of Errors	First Error	Last Error
1133	1133	1	1/3/2011 9:17:58 AM	1/3/2011 9:17:58 AM
1554	1554	1	1/4/2011 2:50:04 PM	1/4/2011 2:50:04 PM
1842	1842	1	1/4/2011 10:27:33 AM	1/4/2011 10:27:33 AM
1843	1843	1	1/3/2011 3:31:14 PM	1/3/2011 3:31:14 PM
1845	1845	1	1/3/2011 8:30:18 AM	1/3/2011 8:30:18 AM
1890	1890	1	1/3/2011 11:35:55 AM	1/3/2011 11:35:55 AM
1896	1896	1	1/5/2011 9:21:23 AM	1/5/2011 9:21:23 AM
1989	1989	3	1/4/2011 3:26:26 PM	1/4/2011 4:56:09 PM
Total:		10		

SIS Error Details

SIS0 No server connection, or invalid query type

Port	Extension	# Of Errors	First Error	Last Error
1008		193	1/3/2011 8:00:41 AM	1/5/2011 9:35:55 AM
1013		60	1/3/2011 8:28:14 AM	1/5/2011 9:17:29 AM
1062		14	1/3/2011 9:40:01 AM	1/4/2011 4:57:43 PM
1086		30	1/3/2011 12:36:32 PM	1/5/2011 9:09:55 AM
1090		58	1/3/2011 9:27:54 AM	1/3/2011 5:57:37 PM
1093		31	1/3/2011 9:00:41 AM	1/5/2011 9:44:29 AM
1094		8	1/3/2011 11:28:19 AM	1/4/2011 5:55:41 PM
1121		24	1/3/2011 9:03:45 AM	1/4/2011 5:39:14 PM
1124		17	1/3/2011 8:57:39 AM	1/4/2011 2:11:06 PM
1126		2	1/4/2011 3:32:56 PM	1/4/2011 4:21:16 PM
1127		70	1/3/2011 1:13:49 PM	1/4/2011 5:58:28 PM
1128		9	1/3/2011 9:35:39 AM	1/4/2011 3:57:43 PM
1131		10	1/3/2011 9:59:28 AM	1/4/2011 5:28:02 PM
1133		89	1/3/2011 9:06:26 AM	1/5/2011 9:41:33 AM
[illegible]		16	[illegible]	1/5/2011 9:15:42 AM

Survey Analysis

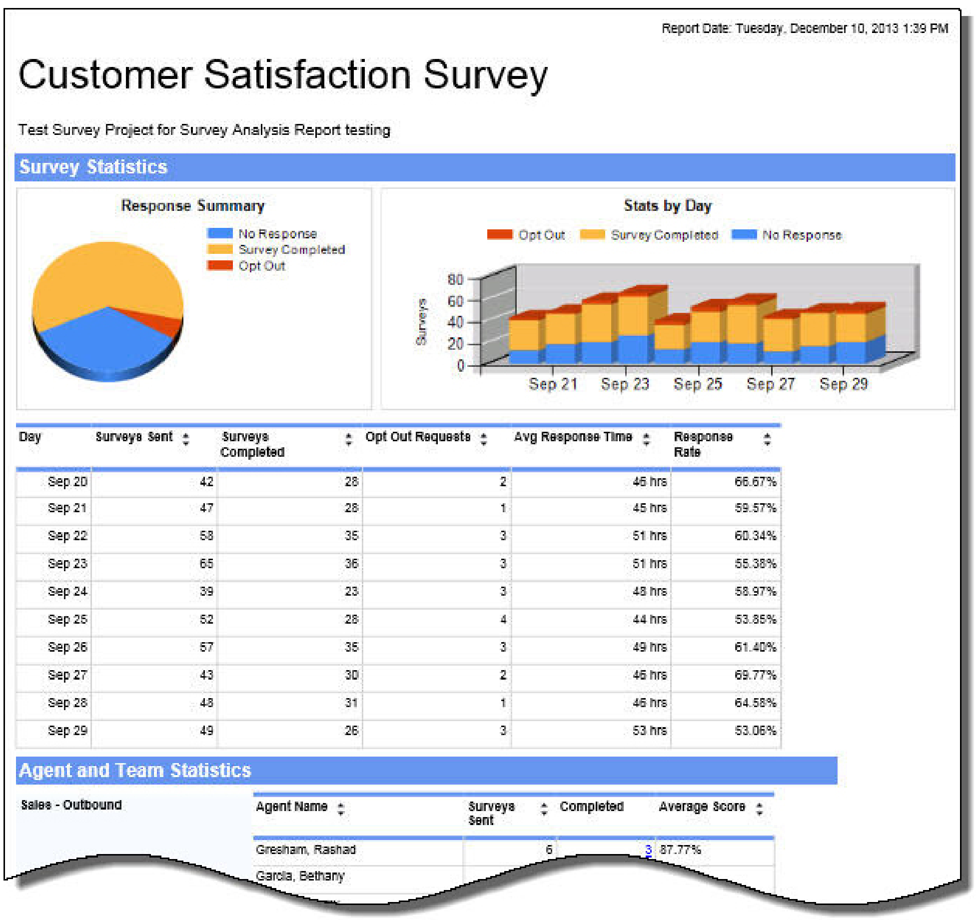
The **Survey Analysis** report helps you manage the survey project and track responses as they arrive. It is designed to complement the **Post Contact Survey – Average Score by Question** report.

Criteria

The following criteria are unique to this report and are explained below for clarification.

Criteria	Description
Agent	Use this criterion to limit the results of the report to a specific agent or agents.
Survey	Select the survey project(s) that you would like to include in the report. Each survey project selected appears on its own area of the report.
Survey Sent Date	Use this criterion to limit the results of the report based on when the survey was sent. For example, this criterion allows you to review surveys sent out in the current week.
Team	Use this criterion to limit the results of the report to a specific team or teams.

Sample


Report Date: Tuesday, December 10, 2013 1:39 PM

Customer Satisfaction Survey

Test Survey Project for Survey Analysis Report testing

Survey Statistics

Day	Surveys Sent	Surveys Completed	Opt Out Requests	Avg Response Time	Response Rate
Sep 20	42	28	2	46 hrs	66.67%
Sep 21	47	28	1	45 hrs	59.57%
Sep 22	58	35	3	51 hrs	60.34%
Sep 23	65	36	3	51 hrs	55.38%
Sep 24	39	23	3	48 hrs	58.97%
Sep 25	52	28	4	44 hrs	53.85%
Sep 26	57	35	3	49 hrs	61.40%
Sep 27	43	30	2	46 hrs	69.77%
Sep 28	48	31	1	46 hrs	64.58%
Sep 29	49	26	3	53 hrs	53.06%

Agent and Team Statistics

Sales - Outbound

Agent Name	Surveys Sent	Completed	Average Score
Gresham, Rashad	6	3	87.77%
Garcia, Bethany			

Drill-Down

This report provides drill-down links in the **Completed** column to show a list post contact surveys (evaluations) complete by customer for an agent.

Survey Analysis

Agent	AvgScore	Form	Evaluator	Date	Team
Rashad Gresham	98.30	Collection Evaluation	Collection	8/16/2010	Sales - Outbound
Rashad Gresham	100.00	Collection Evaluation	collection1	7/27/2010	Sales - Outbound
Rashad Gresham	65.00	Collection Evaluation	collection1	7/20/2010	Sales - Outbound

If you click a link in the **Form** column, Encore opens the post contact survey (evaluation) that was completed.

AgentEvaluation

Agent:	Rashad Gresham	**ModifiedBy:**	Collection
Team:	Sales - Outbound	**ModifiedDate:**	8/16/2010 4:04:00 PM
EvaluatedBy:	Collection	**ContactRecordingDate:**	8/16/2010 1:15:56 PM
EvaluatedDate:	8/16/2010 4:04:00 PM	**FormUsed:**	Collection Evaluation (Revision 14)

ScoreByCategories

Accuracy Skills	100.0%	33.0 / 33.0
Call Closing and Wrap Up	100.0%	11.0 / 11.0
Professionalism and Call Handling	94.8%	31.3 / 33.0
Solve	100.0%	8.0 / 8.0
Verification	100.0%	15.0 / 15.0
Total:	98.3%	98.3 / 100.0

EvaluationComment

This was a great call, Rashad! This may be a member that you want to follow up with to help ensure the promise is kept.

Agent Performance

Evaluation		
Was the member verified according to policy	Yes	15.0 / 15.0
Was th... number updated/verified?	Yes	3.0 / 3.0
...ted/verified?		2.0 / 2.0

NOTE When the report is exported as an Excel, Word or PDF file, all drill-down links are disabled.

Charts

Chart 1 shows the response summary in a pie chart, including the breakdown of surveys sent, surveys completed and opt-out requests for each survey project selected.

Chart 2 shows the statistics by day, including a day-by-day breakdown of surveys sent, surveys completed and opt-out requests based on the day the survey was sent.

Tables

Table 1 shows the statistics by day. This information may help you decided which day of the week or month surveys are most likely to get a response. It's important to remember that the responses and opt-out requests are grouped and sorted by the day the original survey was sent, rather than by when the opt-out request was processed or the survey was completed. For instance, if a survey sent on August 31 was completed on September 3, then the completed survey is counted on the August 31 row, and its average response time and response rate is credited to that day's subtotals.

Table 2 shows survey responses based on agent and team. This information can be used to ensure you have enough surveys for each agent or team. It may also be used to decide whether to extend the end date of a survey project or end the project sooner, if you have received enough responses.

Columns

Columns shown in both tables and are unique to this report are explained below:

Surveys Sent shows the number of survey links sent to customers on that day, either for a project (table 1) or for an agent (table 2).

Surveys Completed shows the total number of surveys completed, of the total number of survey links sent to customers.

Opt Out Requests shows the total number of opt-out requests, of the total number of survey links sent to customers.

Average Response Time shows the average number of hours recipients have taken to respond to the survey.

Response Rate shows the total number of surveys completed, of the total number of survey links sent to customers, as a percentage.

Agent shows the name of the agent who helped a customer that was sent a survey link.

Completed shows the total number of surveys completed, of the total number of survey links sent to customers for this agent.

Average Score shows the average score awarded to the agent by customers who completed a survey.

Widget Requirements

This report can only be included in the list of dashboard widgets if it is added to either **Shared Reports** or **My Reports** and follows these rules:

- Must have at least one and no more than 10 agents or teams selected.
- Cannot have both agents and teams selected.
- The selected date range for the **Survey Sent Date** criterion must be less than 400 days.
- The **Ask at Execution** option cannot be selected.

Team Analysis

This report displays how a team performed on each form and compares its performance to the average score earned by all teams in the organization. For the team's average score at the evaluation level compared to the organization's average score, use the Team Score Analysis report.

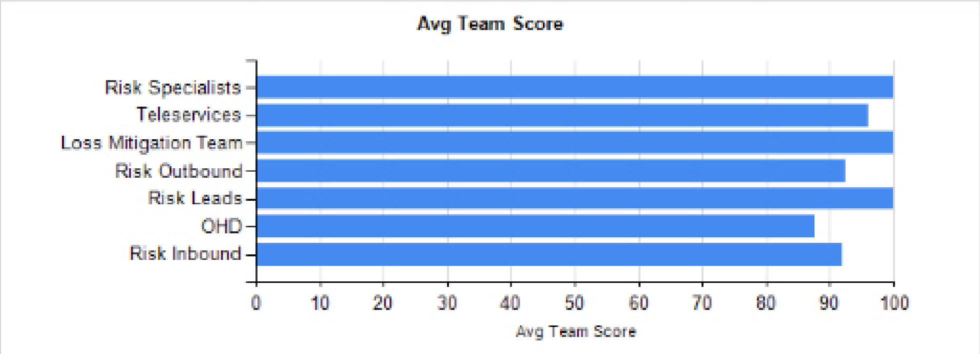
Criteria

The following criteria are unique to this report and are explained below for clarification.

Criteria	Description
Forms	This enables the report to include certain forms. Be sure to select the correct revision of the form(s) to include on the report.
Include Failed Evaluations?	If you would like to include failed evaluations on the report, select **Yes** for this criterion.

Sample

Form Name and Revision	Team	Avg Score	Org. Score	Difference	# of Evals	Last Evaluation
Collection Inbound Evaluation Form (3)	Risk Inbound	91.99	93.68	-1.69	33	1/5/2011 9:37:00 AM
OHD Evaluation Form (2)	OHD	87.72	93.68	-5.96	1	1/3/2011 10:50:00 AM
Teleservice Evaluation (1)	Risk Leads	100.00	93.68	6.32	3	1/3/2011 1:24:00 PM
Collection Outbound Evaluation Form (3)	Risk Outbound	92.08	93.68	-1.61	22	1/4/2011 3:34:00 PM
Loss Mitigation (2)	Loss Mitigation Team	100.00	93.68	6.32	1	1/3/2011 3:33:00 PM
Technical Support Evaluation (1)	Teleservices	100.00	93.68	6.32	2	1/4/2011 8:15:00 AM
Collection Inbound Evaluation Form (3)	Risk Outbound	97.00	93.68	3.32	1	1/4/2011 8:44:00 AM
Collection: Vendor Evaluation (1)	Risk Specialists	100.00	93.68	6.32	8	1/4/2011 4:13:00 PM
Collection Outbound Evaluation Form (3)	Risk Specialists	100.00	93.68	6.32	1	1/4/2011 1:35:00 PM
Teleservices Call Quality Evaluation (1)	Teleservices	93.37	93.68	-0.31	3	1/5/2011 8:49:00 AM
Totals:		93.68	93.68	0.00	75	1/5/2011 9:37:00 AM



Columns

Columns that are unique to this report are explained below:

Avg. Score is the average score earned by the team on that form.

Org. Score is the average score earned by all teams that have been evaluated with the form.

Difference is the **Avg. Score** minus the **Org. Score**. If the **Avg. Score** is less than the **Org. Score**, the team has an average score that is less than the average score earned by all teams in the organization for that form. These numbers show in red.

 # Of Evals shows the number of evaluations included in the **Avg. Score** for the team for the evaluation form noted.

Last Evaluation shows the last date and time that an agent on the team was evaluated with the form. This may be helpful to understand how long ago the team was evaluated to determine if training has occurred since the last evaluation or if the team is only periodically evaluated with a particular form.

Widget Requirements

This report can only be included in the list of dashboard widgets if it is added to either **Shared Reports** or **My Reports** and follows these rules:

- The **Report Grouping** criterion cannot be used.
- Must have at least one and no more than five teams selected.
- The selected date range for the **Evaluation Date** or **Recording Date** criteria must be less than 400 days.
- The **Ask at Execution** option cannot be selected.

Team Performance Analysis

This report is no longer supported. The Team Score Analysis report should be used instead.

This report displays how a team performed on each form and compares its performance to the average score earned by all teams in the organization. Only forms that were used to score the team are included on this report, so if you see a form missing from the report, this is the likely reason.

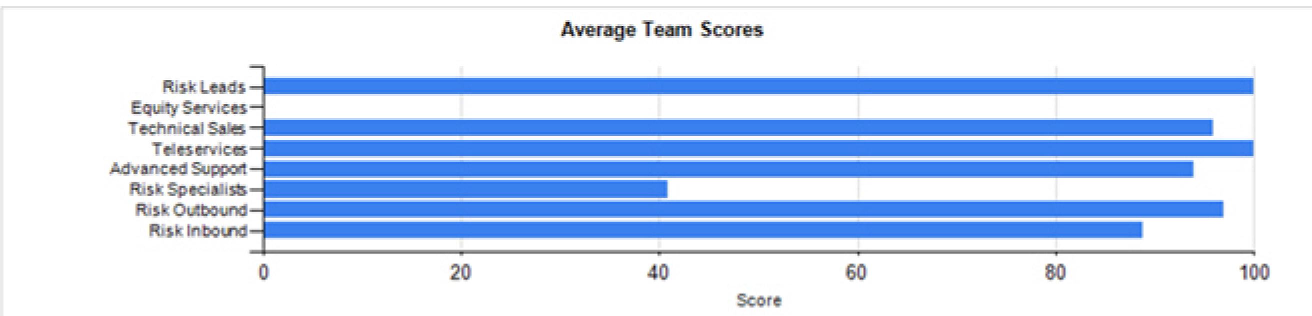
Criteria

The following criteria are unique to this report and are explained below for clarification.

Criteria	Description
Average Score	Use this criterion to only view teams that match a certain average score. For instance, if you want to view all teams with an average score of less than 70%, choose **Less Than** and enter **70** in the **Select Average Score** field.
Avg Score Threshold	Use this criterion to highlight teams that match a certain average score. For instance, if you want to view all teams with a score greater than 80%, choose **Greater Than** and enter **80** in the field. All teams are listed but only teams with an average score greater than 80% are highlighted.
Form / Category / Question	This enables the report to include selected evaluation forms, scoring categories, and/or evaluation questions. Select the form and the revision number at the top of the window, and the scoring categories and questions open in the lower portion of the window. Then select the scoring category and/or the questions to include on the report.
Number of Evals	Use this criterion to view teams that have a certain number of evaluations completed for them. For instance, if you want to view teams that have less than 10 evaluations completed in a months time, select the date range in either the **Evaluation Date** or **Recording Date** criteria, then select **Number of Evals**. Choose **Less Than** and enter **10** in the **Select Number of Evals** field.
Report Grouping	This enables you to group the information in various ways, such as by form, scoring category, etc. If you select: • **Site**, you can view evaluations by site. • **Site Then Form**, you can view evaluations by site and then the form used to evaluate the recording. • **Site Then Form Then Scoring Category**, you can view all evaluations by site, then the form used to evaluate the recording, and then the scoring category for the form. • **Site Then Form Then Question**, you can view all evaluations by site. then the form used to evaluate the recording, and then the question on the form. • **Site Then Form Then Evaluator**, you can view all evaluations by site, then the form used to evaluate the recording, and then the evaluator who assessed the recording.

Sample

Form	Team	Avg. Score	Org. Score	Difference	# Of Evals	Last Evaluation	Last Evaluated By
Collection Inbound Evaluation Form (rev.3)	Risk Inbound	88.83	89.10	- 0.27	34	1/5/2011 9:37:00 AM	dquinn
Collection Inbound Evaluation Form (rev.3)	Risk Outbound	97.00	89.10	7.90	1	1/4/2011 8:44:00 AM	dquinn
Collection Outbound Evaluation Form (rev.3)	Risk Outbound	88.24	84.76	3.49	23	1/4/2011 3:44:00 PM	dquinn
Collection Outbound Evaluation Form (rev.3)	Risk Specialists	40.83	84.76	- 43.93	2	1/4/2011 4:04:00 PM	dquinn
Collection: Vendor Evaluation (rev.1)	Risk Specialists	100.00	100.00	0.00	8	1/4/2011 4:13:00 PM	dquinn
Insurance Evaluation (rev.1)	Advanced Support	94.00	94.00	0.00	1	6/1/2011 6:46:21 AM	Administrator
Technical Support Evaluation (rev.1)	Teleservices	100.00	100.00	0.00	2	1/4/2011 8:15:00 AM	vjohnson
Teleservices Call Quality Evaluation (rev.1)	Teleservices	100.00	97.92	2.08	1	1/5/2011 8:49:00 AM	vjohnson
Teleservices Call Quality Evaluation (rev.1)	Technical Sales	95.83	97.92	- 2.08	1	1/5/2011 8:32:00 AM	vjohnson
Teleservices Main Form (rev.1)	Equity Services	0.00	68.24	- 68.24	1	2/2/2011 10:33:00 AM	dquinn
Teleservices Main Form (rev.1)	Risk Leads	100.00	68.24	31.76	3	1/3/2011 1:24:00 PM	dquinn
Teleservices Main Form (rev.1)	Risk Outbound	71.11	68.24	2.87	1	2/2/2011 10:30:00 AM	dquinn
		87.88			78	6/1/2011 6:46:21 AM	



Columns

Columns that are unique to this report are explained below:

Avg. Score is the average score earned by the team on that form. You can group the report by team if you need to view all the scores received by a certain team on multiple forms, or you can group it by form, site, scoring category, etc.

Org. Score is the average score earned by all teams that have been evaluated with the form. In the sample above, the Risk Inbound team received an average score of 88.83 and the organization's score is 89.10. This means the team's score is lower than the average score earned by all the other teams. It may be helpful to review the team's calls and see if there are other ways the team may handle calls to improve its score.

Difference is the **Avg. Score** minus the **Org. Score**. If the **Avg. Score** is less than the **Org. Score**, the team has an average score that is less than the average score earned by all teams in the organization for that form. These numbers show in red.

 # Of Evals shows the number of evaluations included in the **Avg. Score** for the team for the evaluation form noted.

Last Evaluation shows the last date and time that an agent on the team was evaluated with the form. This may be helpful to understand how long ago the team was evaluated to determine if training has occurred since the last evaluation or if the team is only periodically evaluated with a particular form.

Last Evaluated By shows which evaluator last evaluated the team.

Team Score Analysis

This report provides the team's average evaluation score compared to the organization's average score. To view the team's average score at the question or scoring category level compared to the organization's average score, use the Team Analysis report.

Criteria

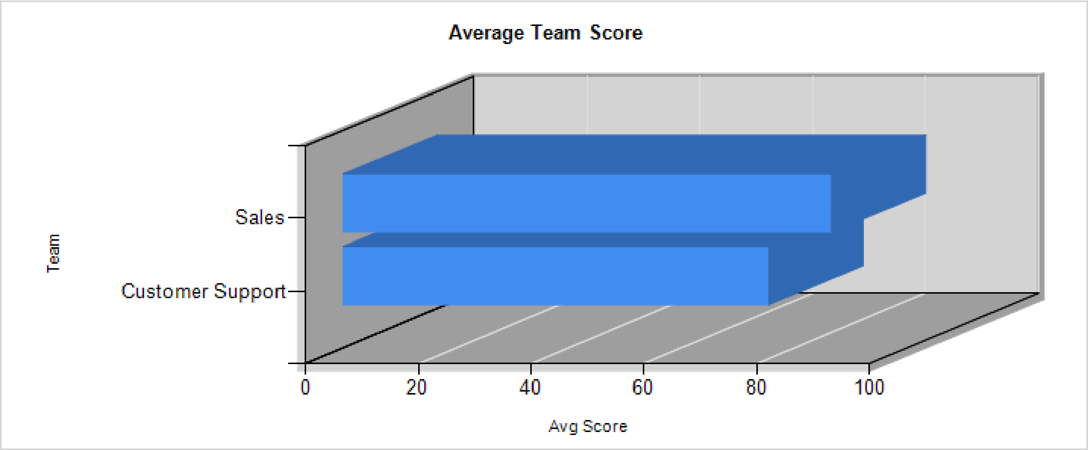
The following criteria are unique to this report and are explained below for clarification.

Criteria	Description
Detail Rows	This criterion specifies how the detail rows in the report are grouped. • **Group By Form (Default)** – When this option is selected (or the criterion is not used) the report detail rows are grouped according to **Form**, then **Team**, showing one row for each unique combination of form/team. This is the detail row grouping shown in the report example. The **Org Score** that is presented shows the combined score for all teams using that form. The difference is calculated based on that number. This type of detail is useful when different forms have different point structures and you want to compare similar data. • **Group By Team** – When this option is selected each detail row combines all the team's evaluations into one row and one score. In addition, the **Org Score** combines the scores of all the different forms that were used, giving a single number for all forms. The difference is calculated based on that number.
DNIS	Select the DNIS codes to include in the report. This list is limited to the distinct DNIS numbers used within the last year.
Evaluation Date	Select a date range that includes the evaluation dates you need to review.
Evaluation Score	This criterion limits the evaluations included in the report calculations so that only evaluations that match the score criteria are included. For instance, if you need to include all evaluations with an average score of less than 70%, choose **Less Than** and enter **70** in the field below the comparison options.
Evaluation Type	Select the type of evaluations you would like to view on the report: either evaluations of recorded conversations or post contact surveys completed by customers.
Number of Evals	Use this criterion to view teams that have a certain number of evaluations completed for them. For instance, if you want to view teams that have less than 25 evaluations completed in a months time, select the date range in either the **Evaluation Date** or **Recording Date** criteria, then select **Number of Evals**. Choose **Less Than** and enter **10** in the field below the comparison options. Only teams having a number of evaluations that meet this criterion are included in the report.
Only Show Evaluations	Limits the number of returned evaluations based on whether a recording was evaluated. • **With Recordings** only shows evaluations with recordings; evaluations without recordings are excluded. • **Without Recordings** only shows evaluations without recordings; evaluations based on recordings are excluded.
Recording Date	Select a date range that includes the recording dates for completed evaluations you need to review.

Sample

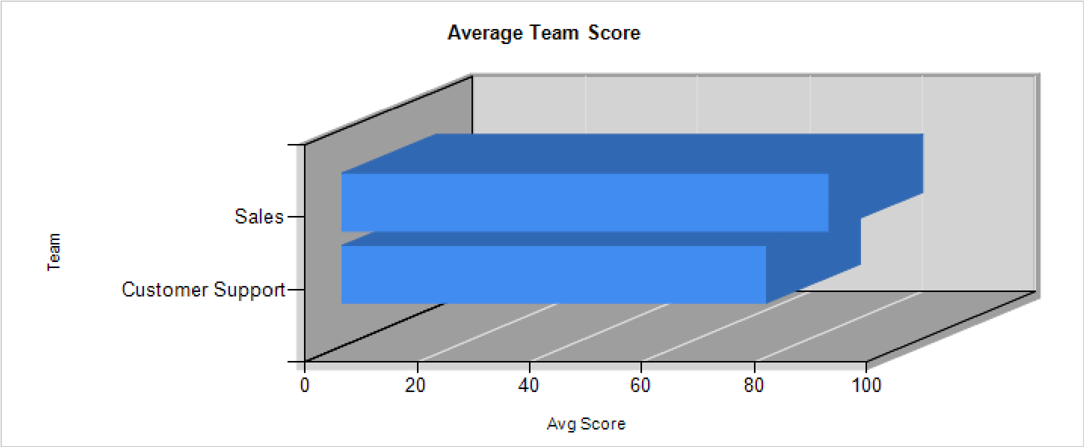
The sample below shows the report with the default **Detail Rows** setting, **Group by Form**, selected:

Form	Team	Avg Score	Org. Score	Difference	# Of Evals	Last Evaluation
Customer Service	Customer Support	73.71	75.01	- 1.30	63	12/14/2016 11:38:19 AM
Customer Service	Sales	86.67	75.01	11.66	7	12/14/2016 11:38:04 AM
Survey	Customer Support	80.00	80.00	0.00	26	10/13/2016 2:31:58 PM
		76.36			96	12/14/2016 11:38:19 AM



This second sample illustrates how the report looks with the **Detail Rows** criterion set to **Group by Team**.

Team	Avg Score	Org. Score	Difference	# Of Evals	Last Evaluation
Customer Support	75.55	76.36	- 0.81	89	12/14/2016 11:38:19 AM
Sales	86.67	76.36	10.31	7	12/14/2016 11:38:04 AM
	76.36			96	12/14/2016 11:38:19 AM



Drill-Down

This report provides a drill-down link in the **# of Evals** column (see samples above) to show a list of agents included in that specific count (see sample below).

Agent	Score	Form	Evaluator	Date	Team
Jackson McCoullough	76.67	Customer Service	Administrator	12/14/2016	Customer Support
Brad Ellison	86.67	Customer Service	Administrator	12/14/2016	Customer Support
Karyn Peters	93.33	Customer Service	Administrator	12/14/2016	Customer Support
Sheryl Knight	95.00	Customer Service	Administrator	12/14/2016	Customer Support
Sheryl Knight	95.00	Customer Service	Administrator	12/14/2016	Customer Support
Brad Ellison	96.67	Customer Service	Administrator	12/14/2016	Customer Support
Jackson McCoullough	73.33	Customer Service	Administrator	12/14/2016	Customer Support

On the second level drill-down, the form name shown in the **Form** column is a link and, when clicked, shows a copy of the evaluation completed for the agent.

NOTE When the report is exported as an Excel, Word or PDF file, all drill-down links are disabled.

Columns

Columns that are unique to this report are explained below:

Form is the name of the form without the revision number. If the report is grouped by team, this column does not show.

Avg. Score is the average score earned by the team. It is different depending on the value selected for the **Detail Rows** criterion:

- If the **Detail Rows** criterion is set to **Group By Team**, the **Avg. Score** value is calculated by averaging the scores of all evaluations for a team that meet the report criteria. Only data that meets both the team and evaluation criteria are shown on the report.
- If the **Detail Rows** criterion is set to **Group By Form**, either by specifically choosing this option or by default, the **Avg. Score** value is calculated by averaging the scores of all evaluations for a team and a form that meet the report criteria. Only data that meets both the team and form criteria are shown on the report.

Org. Score is the average score of all evaluations that meet the selected criteria.

- If the **Detail Rows** criterion is set to **Group By Team**, the **Org. Score** value is calculated by averaging the scores of all evaluations that meet the report criteria. Each team shows the same **Org. Score** on the report.
- If the **Detail Rows** criterion is set to **Group By Form**, either by specifically choosing this option or by default, the **Org. Score** value is calculated by averaging the scores of all evaluations for a form that meet the report criteria.

Difference is the **Avg. Score** minus the **Org. Score**. If the **Avg. Score** is less than the **Org. Score**, the difference shows in red.

 # Of Evals shows the number of evaluations completed for the team using that form, in the date range selected (per the **Evaluation Date** or **Recording Date** criteria).

Last Evaluation shows the last date and time that the team was evaluated with the form. This may be helpful to understand how long ago the team was evaluated to determine if training has occurred since the last evaluation, or if the team is only periodically evaluated with a particular form.

Widget Requirements

This report can only be included in the list of dashboard widgets if it is added to either **Shared Reports** or **My Reports** and follows these rules:

- Must have at least one and no more than five teams selected.
- The selected date range for the **Evaluation Date** or **Recording Date** criteria must be less than 400 days.
- The **Ask at Execution** option cannot be selected.

Team Scores by Question

This report provides a comprehensive list of the team's accumulated scores for evaluation questions. It can be used to provide report cards for teams or to evaluate the difficulty and effectiveness of different questions.

Criteria

The following criteria are unique to this report and are explained below for clarification.

Criteria	Description
Average Score	Use this criterion to only view questions that match a certain average score. For instance, if you want to view questions with an average score of less than 70%, choose **Less Than** and enter **70** in the **Select Average Score** field.
Average System Score	Use this criterion to view questions that match a certain average system score. For instance, if you want to view questions with an average system score greater than 80%, choose **Greater Than** and enter **80** in the **Select Average System Score** field.
Form / Category / Question	This enables the report to include selected evaluation forms, scoring categories, and/or evaluation questions. Select the form and the revision number at the top of the window, and the scoring categories and questions open in the lower portion of the window. Then select the scoring category and/or the questions to included on the report.
Number of Evals	Use this criterion to view questions that have a certain number of evaluations completed for them. For instance, if you want to view questions that have less than 10 evaluations completed in a months time, select the date range in the **Recording Date** criterion, then select **Number of Evals**. Choose **Less Than** and enter **10** in the **Select Number of Evals** field.
Report Grouping	This enables you to group the information in various ways, such as by question, scoring category, etc. Question scores may be grouped by: • **Site** • **Team** • **Question** • **Scoring Category** • **Site Then Agent** • **Site Then Question**
Score Threshold	When selected, this threshold setting highlights information on the report that meets the criterion. For instance, if you want to highlight teams that have an average score greater than 80, you would choose **Greater than** and enter **80** in the blank field. When the report is run, all teams are listed but only teams with a score greater than 80 are highlighted in red.

Sample

Site	Team	Question	# Of Evals	Average Team Score	Average System Score	Difference
Site 1	Risk Specialists	Tone of voice was appropriate and confidence was evident(Rev. 3)	8	100.00	100.00	0.00
Site 1	Risk Inbound	Was the address updated/verified?(Rev. 2)	34	93.94	93.22	0.72
Site 1	Risk Outbound	Was the address updated/verified?(Rev. 2)	24	95.83	93.22	2.61
Site 1	Risk Specialists	Was the address updated/verified?(Rev. 2)	2	50.00	93.22	-43.22
Site 1	Risk Specialists	Was a proper greeting used?	8	100.00	100.00	0.00
Site 1	Risk Specialists	Proper identification provided	8	100.00	100.00	0.00
Site 1	Risk Specialists	Listened fully and attentively to the caller	8	100.00	100.00	0.00
Site 1	Risk Specialists	Professionalism and verbiage was appropriate while maintaining good vendor rapport	8	100.00	100.00	0.00
Site 1	Risk Specialists	Did the representative actively listen to comprehend the problem and offer applicable resolution (When Applicable)(Rev. 2)	8	100.00	100.00	0.00
Site 1	Risk Specialists	Was information about specific accounts properly notated?	8	100.00	100.00	0.00
Site 1	Risk Specialists	Call was closed properly	8	100.00	100.00	0.00
Site 1	Equity Services	Took appropriate ownership of call in order to provide resolution for caller's concern.	1	0.00	75.00	-75.00
Site 1	Risk Leads	Took appropriate ownership of call in order to provide resolution for caller's concern.	3	100.00	75.00	25.00
Site 1	Equity Services	Tone of voice was appropriate and confidence was evident (i.e. respectful, polite, welcoming, etc)	1	0.00	80.00	-80.00
Site 1	Risk Outbound	Tone of voice was appropriate and confidence was evident (i.e. respectful, polite, welcoming, etc)	1	100.00	80.00	20.00
Site 1	Risk Leads	Tone of voice was appropriate and confidence was evident (i.e. respectful, polite, welcoming, etc)	3	100.00	80.00	20.00
		...lanation/coaching provided i...		0.00	60.00	

Columns

Columns that are unique to this report are explained below:

 # Of Evals lists the number of evaluations included to calculate the average scores for the question.

Average Team Score is the average score earned by the team for a particular question. You can group the report by team if you need to view all the scores received by a certain team on multiple questions, or you can group it by question, site, etc.

Average System Score is the total average score earned by all teams for a particular question.

Difference shows the difference between the average team score and the average system score for a question. If the team score is less than the system score, this number shows as red. This calculation shows how the team is performing compared to other teams in the system.