MOMENTUM

CALL
RECORDING

with **Evaluate**

Quick Reference Guide
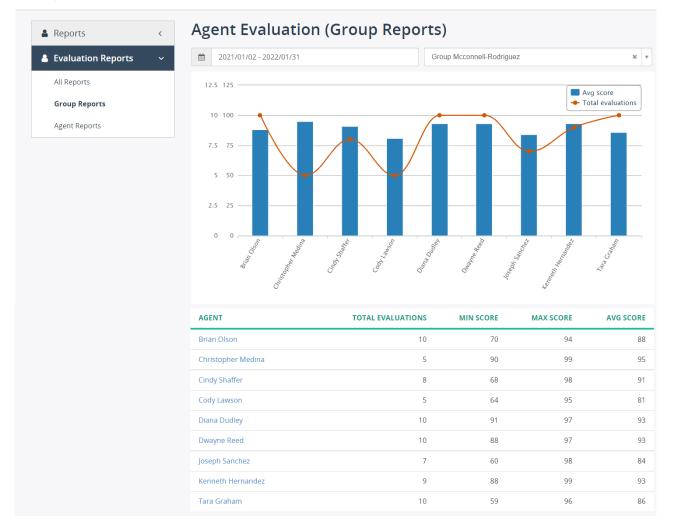
MOMENTUM

Powered By: **MiaRec** 23Q1_UC

About Call Recording with Evaluate

The Evaluate add-on license ($) offers organizations many tools for determining how their calls are going and for Quality Assurance monitoring. Both Manual and Automated evaluation scoring are supported if all required add-on licenses have been purchased.

An Evaluate license is applied to the person/line being recorded that must undergo evaluation. If the line/ person is not going to be evaluated, the add-on license is not needed.

Once purchased and enabled for the line/person who will undergo evaluation of their calls, Supervisors (or Admins) who have been authorized to manage that licensed line/person's call recordings can then perform evaluations of their calls using forms the organization has complete control to design and manage for this purpose.

Evaluation reports provide access to useful statistics, such as an average, minimum and maximum agent's score for the given period, total evaluations for specific agent, evaluations for groups, etc.

Wide view ↗

Reports

AGENT	TOTAL EVALUATIONS	MIN SCORE	MAX SCORE	AVG SCORE
Brian Olson	10	70	94	88
Christopher Medina	5	90	99	95
Cindy Shaffer	8	68	98	91
Cody Lawson	5	64	95	81
Diana Dudley	10	91	97	93
Dwayne Reed	10	88	97	93
Joseph Sanchez	7	60	98	84
Kenneth Hernandez	9	88	99	93
Tara Graham	10	59	96	86

Authorized users (Admins) can easily create an Evaluation form within the *Evaluation Form Designer* found in the **QA** section of Call Recording.

The Call Recording **Evaluate** add-on allows contact center managers to monitor and measure the performance of individual agents in a contact center. Call Recording supports both manual and automated scoring (when combined with the Speech Analytics ($) add-on for Quality Assurance.

Manual Quality Assurance

With manual Quality Assurance (QA), supervisors listen to a random sample of calls and evaluate them according to a predefined scorecard. The goal is generally to look for coachable moments and find areas where agents can improve.

A typical scorecard consists of several sections, like "Greeting", "Verification", "Problem resolution", etc. Each section includes questions or metrics that are evaluated by the supervisor as they review an agent's call.

Here is a sample of an evaluation form that might be created for manual evaluation usage:

Section	Questions
Greeting	Did the agent say "Thank you for calling"?
	Did the agent mention his/her name?
	Did the agent mention the company name?
	If the call was transferred, did the agent adapt the greeting accordingly?
Verification	Did the agent ask for the caller's name?
	Did the agent ask for the caller's account number?
Understanding the problem/ issues	Did the agent identify the customer's needs by active listening?
	Did the agent fully understand the request?
	Did the agent repeat back to the customer what their query or problem was?
	Did the agent show empathy to the customer's problem and reassure the customer?
	How well did the agent determine the problem/complaint and select the appropriate response?
Hold/mute/transfer	Did the agent inform the caller of the reason for the hold/transfer?
	Did the agent thank the caller for holding on return?
	Did the agent provide the name of the person or the department in case of transfer?
Problem resolution	Was the problem resolved in the first call?
	Did the agent describe clearly the resolution?
Closing	Did the agent offer to transfer to a customer satisfaction survey?
	Did the agent thank the customer for calling?

Humans performing quality assurance evaluations manually will always be essential in monitoring and measuring the quality of customer service in contact centers and other business interactions via telephone. But it has had some limitations - it is often time-consuming for Supervisors as they are able to listen to only a fraction of calls when evaluating agents - and that can lead to a less than accurate picture of their agents' performance. If a Supervisor only listens to a few bad calls but misses the stellar calls that helped keep their business growing... and vice versa... and that can skew the evaluation of an employee's perormance - and the Call Center's, as well.

Automated Quality Assurance

An Automated Quality Assurance process in Call Recording uses the Evaluate forms in tandem with the Speech Analytics artificial intelligence (AI) to automatically score every interaction performed by those with Evaluate <u>and</u> Speech Analytics add-on licenses to provide an unbiased evaluation of agent performance - which can also be performed automatically on a routine schedule.

By capturing, transcribing, and analyzing 100% of the interactions of those with the appropriate licenses, the Call Recording platform vastly increases insight into agent performance and offers a wealth of actionable information for call center improvement - while dramatically reducing the manual effort previously required of call center Supervisors for evaluations and screening calls.

Despite the obvious benefits of automated QA, <u>it should **not** be viewed as a complete replacement of the manual Evaluation and QA process</u>. The best approach is to integrate both manual and automated scoring into any robust QA process.

Evaluation forms are completely customizable and configurable. A Call Recording Administrator (or properly authorized/licensed Supervisor) can create many different evaluation forms to suit various departments or groups - like Sales, Customer Service, or Technical Support - using the Evaluation Form Designer to develop the questions and answers and define the scoring to produce useful evaluation tools and reporting.

A good approach when beginning to work with Auto-Scoring would be to take the Evaluation forms already defined and create duplicates of the same Evaluate form. one that will be used for manual QA by Supervisors and one that will use the Speech Analytics AI to score agent performance automatically, based on the scoring metrics defined in the form. Both methods can then be evaluated.

Usage Prerequisites

The Role applied to a Supervisor (and Administrator) must be set up to allow usage of Evaluate tools.

The license for Evaluate must be applied and enabled on the line of every person being recorded and evaluated.

A Supervisor assigned to manage that line/person's recordings can then perform evaluation on those recordings using Evaluation forms they have been granted access to use.

An Administrator must have appropriate permissions to fully utilize the evaluation form creation and reporting functionality. The Permissions settings in their Role specify which tasks are permitted on the accessible evaluation reports. These permissions can include view (read only), create, edit, delete.

The permissions on the Role(s) in use within the tenant that need to be enabled for correct usage of Evaluate tools and reports are found within the Other Permissions section of the Edit Role dialog:

Own evaluations of agents	☑ View	☑ Create	☑ Edit	☑ Delete	set all | clear all
Other managers' evaluations of agents	☑ View	☑ Edit	☑ Delete		set all | clear all
Evaluations of self	☑ View				set all | clear all
REST API	☑ Allow				set all | clear all

Save

Own evaluations of agents

- **View** - if enabled, the Supervisor will be able to view the evaluations of their managed agents
- **Create** - if enabled, the Supervisor will be able to create new evaluation forms
- **Edit** - if enabled, the Supervisor will be able to modify or change the evaluation forms of agents under his/her supervision
- **Delete** - if enabled, the Supervisor will be able to delete the evaluations of agents under his/her supervision. Use with caution.

Other managers' evaluations of agents

- **View** - if enabled, the user will be able to view the evaluations of agents under other managers' supervision
- **Edit** - if enabled, the Supervisor will be able to modify the evaluations of agents under other managers' supervision
- **Delete** - if enabled, the Supervisor will be able to delete the evaluations of agents under other managers' supervision. Use with caution.

Evaluations of self

- **View** - if enabled, the Supervisor will be able to view their own evaluations. If this is the only option selected, the Supervisor will only see the results of their own evaluations but no others.

Note: All Role settings are predefined and cannot be edited.

Manual Evaluation Review

To manually evaluate interactions, select a call recording in the Call Recording portal and click on the **Evaluate** button.

Then, listen to the call recording and answer the questions presented in the evaluation form.

Once all questions have been answered and saved, this call will receive a score from 0 to 100 points, based on the way the evaluation's scoring for the answers to each question was defined.

Manage Evaluation Forms (Admins)

To Access Evaluation Form Designer

Admins - Go to **QA > Form Designer**

There are 3 basic ways of making new Evaluation forms to Call Recording:

Create a New Evaluation Form

Clone an Existing Evaluation Form

Import an Existing Evaluation Form from a Fle

To Create a New Evaluation Form

While viewing the **Evaluation Form Designer** section:

1. Click the **Add** button to open the *Add Evaluation Form* dialog to begin creating a new Evaluation form.

2. Enter the following information in the fields provided:

   Name*: Required. Enter the form name in this field. This name displays in lists and reports.

   Status: Click to make Active or make it inactive (no check)

   Type: Select Manual score or Auto score

   Description: Optional. Enter a short description of the purpose of this evaluation form.

3. Click the **Save** button when finished to save the new form and return to the list.

To Add Sections to Evaluation Forms

While viewing the list in **QA > Form Designer**:

1. Click on the name of the evaluation form to which new sections and questions will be added.
2. Click on the **Add Section** button.

The **Add Section** dialog displays.

Administration > Customization > Evaluation Form Designer > Inbound Sale Report

Add Section

Name *	Problem Resolution
Description	This section contains the questions to address the problem resolution, if any,
Display N/A option	☑ Allow to mark whole section N/A
Weight *	10
Order *	1

Save

3. Complete the following:

- **Name***: Required. Enter the name of the form's first section in the **Name** field.

- **Description**: Optionally, provide a short description of the purpose of this section in the *Description* field.

- **Display N/A option:** Click to place a check in this box to allow Supervisors to set the section of questions as N/A (not applicable) as needed when performing evaluations.

- **Weight**: Enter a numeric value defining how much this section influences the Section score. The integer value can be both positive and negative numbers within the ±1000 allowed. Do not enter 0. The value 0 is not supported. See [Evaluation Form Scoring](#) for more about calculating the weighted score.

- **Order** field, specify the order in which the section appears in the evaluation form when performing an evaluation. Sections are ordered by lowest value first. So, 1 would display to Supervisors first, 2 would display to Supervisors after 1, 3 would display after 2, etc.

4. Click **Save**.

To Add Questions to Evaluation Sections

1. Click the evaluation form where new questions will be added to a section.

2. Click on the **Add Question** link at the bottom of the new section to create a new Question.

3. Complete the following required and optional sections in the dialog:

- **Question***: Required. Type the question text in this field.
- **Description**: Optional. Type a short description of the purpose of the question.
- **Type**: Click to choose Multiple Choice, Numeric Value, or Auto Score.

If Numeric Value is selected, define the following:

Display As: Select what the Supervisor will see - a Rating *(stars)* or Input box *(a text field)*.

This option specifies how to display this question in the report, either as the option to **Rate** (using stars) or as an **Input box** (text field)·

The following examples demonstrate how each of these options are viewed during an Evaluation and in the report:

Maximum Points*: Required. Define a maximum numeric value assignment for the question (the best score an agent can achieve).

If Multiple Choice is selected, define the following:

- **Display As** option specifies how to display this question in the report, either as **Choice (single-line)**, **Choice (multi-line),** or **Drop-down list**.

  The following example demonstrates each of these options in a report:

Single line	Did the agent ask for the caller's name?	○ yes ● no ○ n/a
Choice (multi-line)	Did the agent ask for the caller's company name?	○ yes ● no ○ n/a
Drop-down List	Did the agent ask for the caller's telephone number?	no ▾

- **Choices** option specifies a list of all possible answers for the question. Each choice has a title and an outcome that will be applied to a report when such an answer is chosen.
  The outcome can be one of the following values:

  - **Points -** The specified number of points will be granted for this question.

  - **N/A question -** The question will be excluded from the score calculations.

  - **N/A section** - A whole section will be excluded from the score calculations.

  - **Fail a section -** When such a choice is selected in a report, a whole section will be marked as failed, i.e. the section gets 0 score.

  - **Fail a report -** when such a choice is selected in a report, a whole report will be marked as failed; i.e. the entire evaluation report gets a 0 score.

  The following example demonstrates these outcome variants:

Choices *	≡	yes	5	Points ▲	☐ default	✕
				Points		
	≡	no	0	N/A question	☑ default	✕
				N/A section		
	≡	n/a		Fail a section	☐ default	✕
				Fail a report		

+ Add Choice

There is also an option to mark one of the choices as the default answer.

In such a case, when an evaluator creates a report, the question will be set to a default answer and the evaluator can elect to choose a different option from the choices provided.

If none of choices are marked to use as a default answer, then an evaluator <u>must</u> always select an answer for the question in order to save the Evaluation as **Completed**.

If Auto Score is selected, the Admin will define the following for the AI to use:

Note: *Regular Expression syntax is used to define the text to locate in the transcript.*
For details regarding syntax, see Expression Syntax

Conditions - This section allows the Admin to specify one or more conditions that will be checked by the auto scoring engine.

- **Display As** - Define a Yes and a No option to allow the AI to use the appropriate answer when auto scoring.

- **Expression** - This field allows entry of a query expression that will be applied to the transcript automatically. For example, the expression POSBEFORE:50 AGENT: R"(my name|this is)" means:

  - **POSBERFORE:50** - This expression means search within the first 50 words of the transcript

  - **AGENT:** - This expression operator means the text is spoken by / must be the agent

  - **R"** - This expression means search for the following key phrases within the quotation marks (and parentheses) - so find the phrases, "my name" or "this is"

Outcome - Select one of the following values for the auto scoring engine to use:

- **Points -** When such a condition matches in an interaction, the specified number of points will be granted this question

- **N/A question -** When such a condition matches in an interaction, the question will be excluded from the score calculation

- **N/A section -** When such a condition matches in an interaction, a whole section will be excluded from the score calculation

- **Fail a section** - When such a condition matches in an interaction, a whole section will be marked as failed, i.e. the section gets 0 score

- **Fail a report -** when such a condition matches in an interaction, a whole report will be marked as failed, i.e. the report gets 0 score

+ Add Expression - Click to define additional Conditions and outcomes. Note: If multiple conditions created here match in the transcript, then the first one in the order listed will be chosen by the AI.

- **"No match" Outcome** - Define a default outcome for the AI to use if none of the Conditions that were defined above match text in the transcript.

4. In the **Weight** field, enter how much this question influences the Question Score in this evaluation.
    The integer value can be 1 - 1000. The value `0` is not supported.
    For details on calculating the weighted scores, see Evaluation Form Scores.

5. In the **Order** field, specify the order in which the question appears.
    Questions are displayed in ascending order - by lowest value first. So, an entry of 1 here would mean this is the first question displayed in the section. A 3 entered here would display the question as third in the list of questions.

6. Click **Save** when finished defining questions to submit to the Evaluation Form.

To Edit an Evaluation Form Name

At any time an Admin can edit the name or description for any form that was previously created and saved.

1. Click the **Edit Form** button next to the desired form.

*The **Edit Evaluation Form** page displays.*

2. Change the name or description and click **Save**.

To Edit an Evaluation Form's Sections or Questions

At any time an Admin can edit the sections or questions in any form that was previously created and saved.

While viewing the Evaluation Forms list:

1. Click the **View Sections** button next to the desired form in the list to view the form's sections and questions.

    Tools are provided to allow the Admin to Add, Edit, or Delete both Sections and questions within the form, or Edit the Form name/description.

To Clone an Evaluation Form

If authorized and enabled, Administrators can create an exact copy of an existing form and use it as the basis for a new and different evaluation form.

1. Click the name of the form that is to be copied and reused as the basis for a new Evaluation.

2. Click on the **Clone Form** button to make a copy that can be edited.

3. Click **Continue** when prompted.

4. Use the same steps described before to name the Form appropriately (a unique identifier) and add or modify sections and questions within the form to make it useful.

5. Click **Save** when finished modifying the cloned Evaluation to make it unique.

To Delete an Evaluation Form

While viewing the Evaluations Forms list:

1. Locate the desired form.

2. Click to select the check box next to the target form

3. Click on the **Delete** button above the list.

Administration > Customization

Evaluation Forms

	NAME	TENANT		
☑	Inbound Sale Report	System	View Sections	Edit Form
☐	Sample form	Becker-Acosta	View Sections	Edit Form
☐	Sample form	System	View Sections	Edit Form

NOTE: Deleting an evaluation form will delete all report results based on this form as well. The popup notification dialog displays noting that the form has been deleted.

Clicking the **Undo** link that displays in the notification dialog will restore the form to the list for future use.
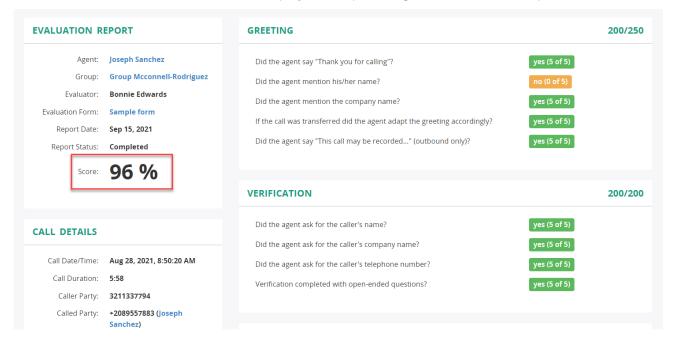
To Import an Evaluation Form from a File

You can import one or more forms from a file that was exported previously from the Call Recording application.

1. Navigate to the Evaluations Forms List

2. Click on the **Import** button.

3. Provide the **Name** (required) for the new form and choose the file to import - click Submit.

QA

Evaluation Forms

QA

Evaluation F

Import Evaluation Form

Name * New form

Import file * Browse... Auto_Score_Card.xml
*.xml file

Submit

Evaluation Form Scores

Each evaluation is scored based on a point system. By default, the sections and questions are not weighted; that is, the number of points gained by the agent determines its weight. Alternatively, each section and question could have its own weight that determines how much it influences the total score for the evaluation report. These weights are applied *after* all sections are scored to arrive at the overall score for the evaluation. The calculated total score is displayed as a percentage in the evaluation report.

EVALUATION REPORT

Agent:	Joseph Sanchez
Group:	Group Mcconnell-Rodriguez
Evaluator:	Bonnie Edwards
Evaluation Form:	Sample form
Report Date:	Sep 15, 2021
Report Status:	Completed
Score:	**96 %**

CALL DETAILS

Call Date/Time:	Aug 28, 2021, 8:50:20 AM
Call Duration:	5:58
Caller Party:	3211337794
Called Party:	+2089557883 (Joseph Sanchez)

GREETING   200/250

Did the agent say "Thank you for calling"?	yes (5 of 5)
Did the agent mention his/her name?	no (0 of 5)
Did the agent mention the company name?	yes (5 of 5)
If the call was transferred did the agent adapt the greeting accordingly?	yes (5 of 5)
Did the agent say "This call may be recorded..." (outbound only)?	yes (5 of 5)

VERIFICATION   200/200

Did the agent ask for the caller's name?	yes (5 of 5)
Did the agent ask for the caller's company name?	yes (5 of 5)
Did the agent ask for the caller's telephone number?	yes (5 of 5)
Verification completed with open-ended questions?	yes (5 of 5)

Question Score Calculations

Question scores are calculated based on the applied weights and use the following formula:

```
Weighted Question Score = Question Score X Question Weight
```

If an evaluator answers N/A, Call Recording treats the score as if the question does not exist.

The following table shows the potential points that a question with a 0–5 answer scale could earn if it has a weight of 1 or 5.

Scale Answer	Points Earned (Question Weight of 1)	Points Earned (Question Weight of 5)
N/A	—	—
0	0	0
1	5	25
2	10	50
3	15	75
4	20	100
5	25	125

The following table shows the potential points that a Yes/No question could earn if it has a weight of 1 or 5.

Answer	Points Earned (Question Weight of 1)	Points Earned (Question Weight of 5)
Yes	10	50
No	5	25
N/A	—	—

Section Score Calculations

Section scores are calculated by aggregating the question responses within the section altogether. The example below illustrates the section score with no weighting applied (or weighting of **1**).

GREETING   25/25

Did the agent say "Thank you for calling"?   yes (5 of 5)

Did the agent mention his/her name?   yes (5 of 5)

Did the agent mention the company name?   yes (5 of 5)

If the call was transferred did the agent adapt the greeting accordingly?   yes (5 of 5)

Did the agent say "This call may be recorded..." (outbound only)?   yes (5 of 5)

To calculate weighted section scores, the system will multiply the section score by its weight. The example below illustrates the section score with a weighting of **10**.

GREETING   250/250

Did the agent say "Thank you for calling"?   yes (5 of 5)

Did the agent mention his/her name?   yes (5 of 5)

Did the agent mention the company name?   yes (5 of 5)

If the call was transferred did the agent adapt the greeting accordingly?   yes (5 of 5)

Did the agent say "This call may be recorded..." (outbound only)?   yes (5 of 5)

CALL RECORDING EVALUATE

QUICK REFERENCE GUIDE

Total Score Calculations

The total score is calculated by aggregating the section scores altogether. Evaluation forms use the following formula for calculating the total score:

```
[Total Score / Maximum possible score ] * 100
```

The following table shows the results for several sections in a sample evaluation form.

Section	Weight	Score	Weighted Score
1	1	10 of 10	10 of 10
2	1	20 of 20	20 of 20
3	2	10 of 10	20 of 20
4	2	20 of 20	40 of 40
5	3	5 of 10	15 of 30

Section Score: 105/120 x 100 = **88%**

The following table shows the results for several sections with the first section marked as "not applicable" (N/A) .

Section	Weight	Score	Weighted Score
1	1	N/A	N/A
2	1	20 of 20	20 of 20
3	2	10 of 10	20 of 20
4	2	20 of 20	40 of 40
5	3	5 of 10	15 of 30

Section Score: 95/110 x 100 = **86%**

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To Filter Evaluation Reports by Group or Agent

By clicking **Group Reports** in the navigation tree and then specifying the group name, evaluation reports can be filtered bythe target group. The summary chart with the evaluation performance is provided at the top of the page.

By clicking **Agent Reports** in the navigation tree and then specifying the Agent name, evaluation reports can be filtered by the target agent. The summary chart with the evaluation performance is provided at the top of the page.

To Review an Evaluation Report

Authorized Supervisors or Admins may open and review the details in an evaluation report by clicking the **View** button next to a report.

To Delete an Evaluation Report

1. Go to **Administration > Reports > Evaluation Reports**.
2. Locate the report to be deleted within the list of reports that have been created.
3. Click to place a check in the box next to the report of choice
4. Click the **Delete** button above the list.
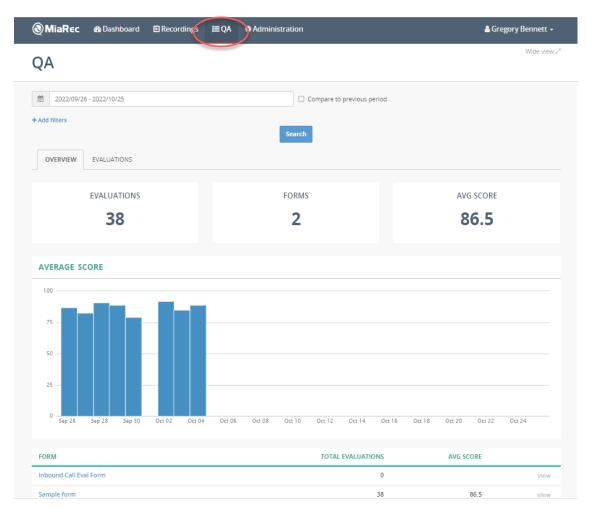
QA Dashboard and Reports

QA Dashboard

Once the call recordings have been evaluated, you can check evaluation results by navigating to the QA dashboard.

The QA dashboard is an intuitive visual reporting tool that provides useful statistics, such as an average, minimum and maximum agent's score for the given period, total evaluations for a specific group or agent, etc., This allows customer service managers and teams to monitor and optimize performance and spot emerging trends in a central location.
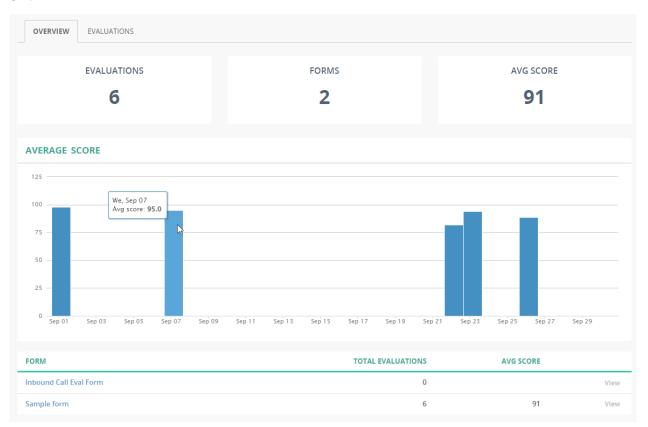
Key features of the QA dashboard:

- A dynamic view of the total number of evaluated recordings, the average score calculated, evaluation forms being used, and more.
- The drill-down analytics capability allows you to instantly shift from an overview of data to a more detailed and granular view within the same dataset they are analyzing by navigating to a group/user level.
- Comparing metrics over time to instantly measure changes by highlighting differences between two identical timeframes.
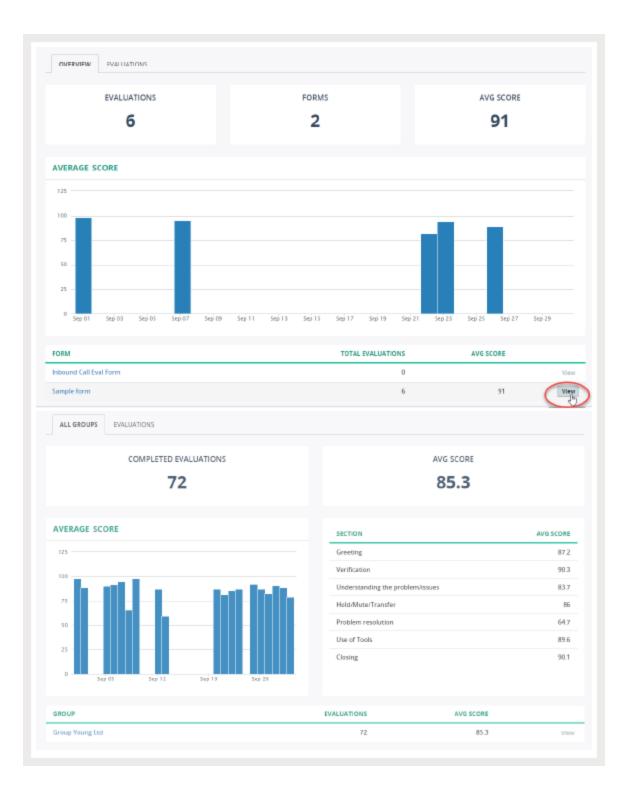
Overview Tab

The **Overview** tab displays the summary chart with the evaluation performance and provides information about the total number of evaluated recordings, evaluation forms used, and average score calculated.

You can view the number of evaluations per day within the chart by hovering the cursor over a point on the graph.

To view evaluation data based on a specific evaluation form that was used, click the form name at the bottom. This opens a new view with details about the selected form.

Evaluations Tab

The Evaluations tab lists all evaluation reports being used for a specific group or user.

You can open the most recent evaluation report by clicking the **View** button next to the report.

User «Alexis Henderson»

Manage user

📅 2022/09/01 - 2022/09/30   ☐ Compare to previous period

+ Add filters

Search

OVERVIEW   EVALUATIONS

☐	CALL DATE/TIME	NAME	STATUS	SCORE	GROUP	AGENT	EVALUATOR	DATE CREATED		
☐	Sep 1, 2022, 12:20 AM	Sample form	Completed	98	Group Young Ltd	Alexis Henderson	Bryan Gonzales	Oct 4, 2022, 8:10 PM	View	✎ Edit
☐	Sep 7, 2022, 9:02 AM	Sample form	Completed	95	Group Young Ltd	Alexis Henderson	Bryan Gonzales	Oct 4, 2022, 8:11 PM	View	✎ Edit
☐	Sep 22, 2022, 10:47 AM	Sample form	Completed	82	Group Young Ltd	Alexis Henderson	Joseph Miller	Oct 4, 2022, 8:21 PM	View	✎ Edit
☐	Sep 23, 2022, 9:46 AM	Sample form	Completed	94	Group Young Ltd	Alexis Henderson	Joseph Miller	Oct 4, 2022, 8:21 PM	View	✎ Edit
☐	Sep 26, 2022, 1:37 PM	Sample form	Completed	91	Group Young Ltd	Alexis Henderson	Joseph Miller	Oct 4, 2022, 8:21 PM	View	✎ Edit
☐	Sep 26, 2022, 1:46 PM	Sample form	Completed	86	Group Young Ltd	Alexis Henderson	Joseph Miller	Oct 4, 2022, 8:21 PM	View	✎ Edit

✕ Delete   0-6 of 6 ‹ ›

20 per page ▼   0-6 of 6 ‹ ›

QA

Wide view ⤢

Evaluation report for «Alexis Henderson»

Edit Report   Delete Report   Export ▾

EVALUATION REPORT		GREETING	250/250
Agent:	Alexis Henderson	Did the agent say "Thank you for calling"?	yes (5 of 5)
Group:	Group Young Ltd	Did the agent mention his/her name?	yes (5 of 5)
Evaluator:	Bryan Gonzales	Did the agent mention the company name?	yes (5 of 5)
Evaluation Form:	Sample form	If the call was transferred did the agent adapt the greeting accordingly?	yes (5 of 5)
Report Date:	Oct 4, 2022	Did the agent say "This call may be recorded…" (outbound only)?	yes (5 of 5)
Report Status:	Completed		

Score: **98 %**

VERIFICATION	200/200
Did the agent ask for the caller's name?	yes (5 of 5)
Did the agent ask for the caller's company name?	yes (5 of 5)
Did the agent ask for the caller's telephone number?	yes (5 of 5)
Verification completed with open-ended questions?	yes (5 of 5)

UNDERSTANDING THE PROBLEM/ISSUES	240/250

Drill-Down Capabilities

An intuitive graphical dashboard lets you quickly analyze group or user-level evaluation data.

To drill down the dashboard data by groups and agents, scroll down to the table section and click the **View** button next to the group/user.

You can also use the breadcrumb trail to quickly move up to the higher-level page.

Use a Date Range

This search option lets you filter evaluation data within a specific range of dates.
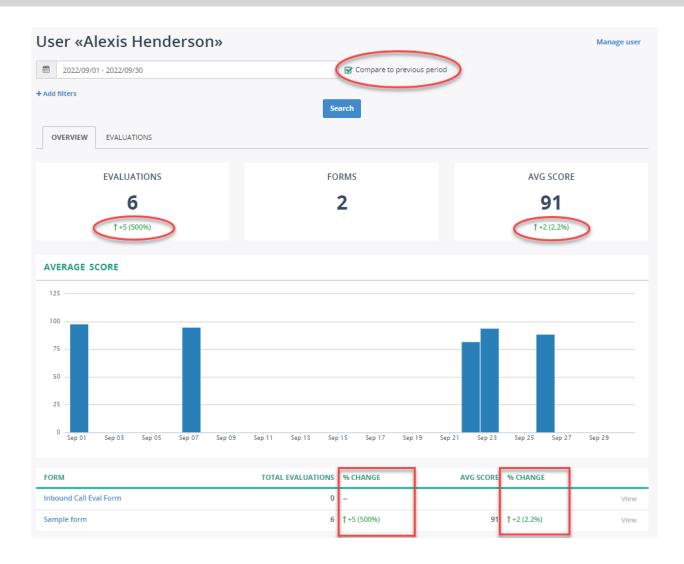
To view the data by date range, click the date field and choose from one of the available options:

- Today
- Yesterday
- Last 7 Days
- Last 30 Days
- This Month
- Last Month
- Date Range
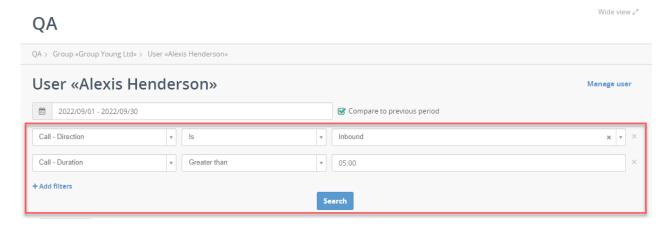
Comparing metrics over time is a great way to benchmark progress and identify issues as they come up.

If the **Compare to previous period** checkbox is selected, then all applicable metrics are calculated between two identical timeframes (for example between this week and a previous one) and a change in percentage is displayed.

User «Alexis Henderson»

Manage user

📅 2022/09/01 - 2022/09/30   ☑ Compare to previous period

+ Add filters

Search

OVERVIEW	EVALUATIONS

EVALUATIONS	FORMS	AVG SCORE
6	**2**	**91**
↑ +5 (500%)		↑ +2 (2.2%)

AVERAGE SCORE

FORM	TOTAL EVALUATIONS	% CHANGE	AVG SCORE	% CHANGE	
Inbound Call Eval Form	0	--			View
Sample form	6	↑ +5 (500%)	91	↑ +2 (2.2%)	View

Add Filters

Optionally, you can click **Add filters** to filter the evaluation data based on specific recordings.
For example, the data based on call recordings by direction (only inbound calls) and duration (between 0:15 and 5:00).

QA

Wide view ⤢

QA > Group «Group Young Ltd» > User «Alexis Henderson»

User «Alexis Henderson»

Manage user

📅 2022/09/01 - 2022/09/30   ☑ Compare to previous period

Call - Direction	▾	Is	▾	Inbound	✕ ▾ ✕
Call - Duration	▾	Greater than	▾	05:00	✕

+ Add filters

Search

Auto Score Expressions (Admins)

Expression Syntax

Call Recording supports very powerful expression syntax for creating expressions the AI can use to match phrases in the text. Some experience with writing Regular Expressions is required.
The following regular expression operators are supported:

- AND
- OR
- &
- |
- NOT
- NOTIN
- NEAR
- NOTNEAR
- ONEAR
- AFTER
- POSBEFORE
- POSAFTER
- AGENT
- CUSTOMER
- A
- C

Additionally, it supports:

- parentheses "(" and ")" for grouping.
- Wildcard

Boolean Operators (AND, OR, NOT, & and |)

Expression	Description
quick OR brown	matches "**quick fox**" and "**brown fox**"
quick AND fox	matches "**quick fox**"
NOT brown AND fox	matches "**quick fox**" but not "**brown fox**"

Synonyms & and I

Symbols & and | are synonyms for AND and OR respectively.

Expression	Equivalent form
quick	brown	quick OR brown
quick & fox	quick AND fox
(quick | brown | grey) & fox	(quick OR brown OR grey) AND fox

When using | and & symbols, a space charter between words is optional. The following are valid expressions:

- `(quick | brown | grey ) & fox`
- `(quick|brown|grey)&fox`

Case in Operator Names

A case in the operator's name is important. `AND` is treated as an operator, while `and` is treated literally as a word `and` in the text "*what a beautiful and amazing day*".

Order of term match

An order of matched words is not taken into account. If an order is important, then use the `ONEAR` operator.

Expression	Description
quick AND fox	matches both "**quick fox**" and "**fox quick**"

Distance between matched words

The distance between words is not taken into account. Use operators quoted terms or `NEAR`, `ONEAR` and `NOTNEAR` if a distance is important.

Expression	Description
quick AND fox	matches both "**quick fox**" and "**quick dog was chasing a fox**"
"quick fox"	matches "**dog was chasing a quick fox**" bot not "**quick dog was chasing a fox**"
quick NEAR:3 fox	matches "**quick fox**" and "**quick and cute fox**" but not "**quick dog was chasing a fox**", because of a distance between **quick** and **fox** words is more than 3 words.

Quoted Term

Use quotes (") to search for an exact phrase.

Expression	Description
"quick fox"	matches "**dog was chasing a quick fox**" bot not "**quick dog was chasing a fox**"
quick fox	matches both "**quick fox**" and "**quick dog was chasing a fox**", because of such expression is equivalent to "**quick NEAR:5 fox**", i.e. words **quick** and **fox** can be found up to 5 words in distance between each other.

Wildcards

A wildcard character is used to substitute one or more characters in a string. Supported wildcard characters:

Symbol	Description	Example
*	Represents zero or more characters	**bl** *finds bl, black, blue, and blob**
?	Represents a single character	**h?t** finds **hot**, **hat**, and **hit**
[ ]	Represents any single character within the brackets	**h[oa]t** finds **hot** and **hat**, but not **hit**
!	Represents any character not in the brackets	**h[!oa]t** finds **hit**, but not **hot** and **hat**
-	Represents a range of characters	**c[a-b]t** finds **cat** and **cbt**

To use one wildcard character literally, escape it with \ symbol. For example, the **yes!** expression will find **yes!** text.

Grouping

Multiple terms or clauses can be grouped with parentheses, to form sub-queries:

Examples:
- (quick OR brown) AND fox
- (quick | brown | grey) fox
- NOT brown AND (fox OR dog)

Proximity Operators (NEAR, ONEAR, NOTNEAR, NOTIN, AFTER)

Proximity operators allow you to locate one searched term within a certain distance of another.

NEAR[:x]

Finds the phrase where the terms joined by the operator are within the specified number of words of each other. Where **x** is the maximum distance between the searched terms.

> **Note 1.**
>
> A distance parameter is optional. If omitted, a default distance of 5 is used, i.e. **NEAR** is equivalent to **NEAR:5**

> **Note 2.**
>
> An order of the found terms is not taken into account, i.e. brown NEAR fox will match both "**dog is chasing brown fox**" and "**fox is chasing brown dog**".

> **Note 3.**
>
> When chaining multiple operators, then parentheses must be used when the distance is not the same. For example, expressions brown NEAR quick NEAR fox and brown NEAR:2 quick NEAR:2 fox are both valid, but brown NEAR:2 quick NEAR:5 fox is not valid because a distance is 2 in one case and 5 in another. Parentheses must be added to make such expression valid: (brown NEAR:2 quick) NEAR:5 fox

Expression	Description
cancel* NEAR order	Matches "**cancel my order**", "**order is cancelled**", but not "**cancel my account and then place an order**", because of a distance between **cancel** and **order** in the last example is more than default 5 words.
cancel* NEAR:1 order	Matches "**cancel order**", but not "**cancel my order**" because of distance between words is more than requested (1).
brown NEAR quick NEAR fox	Matches "**brown and quick fox**", but not "**brown fox**"

ONEAR[:x]

Similar to the **NEAR** operator, but an order of the matched terms is taken into account. For example, brown NEAR fox will match "**brown fox**" but not "**fox brown**".

Expression	Description
cancel* ONEAR order	Matches "**cancel my order**" but not "**order is cancelled**", because of the order of terms is important.

> **Note 1.**
>
> A distance parameter is optional. If omitted, a default distance of 5 is used, i.e. **ONEAR** is equivalent to **ONEAR:5**

> **Note 2.**
>
> When chaining multiple operators, then parentheses must be used when the distance is not the same. For example, expressions brown ONEAR quick ONEAR fox and brown ONEAR:2 quick ONEAR:2 fox are both valid, but brown ONEAR:2 quick ONEAR:5 fox is not valid because a distance is 2 in one case and 5 in another. Parentheses must be added to make such expression valid: (brown ONEAR:2 quick) ONEAR:5 fox

NOTNEAR[:x]

Syntax:

```
<term-1> NOTNEAR[:x] <term-2>
```

Operator NOTNEAR finds the term on the left side of the operator (<term-1>) that is not in close proximity to the term on the right side of the operator (<term-2>).

Expression	Description
cancel* NOTNEAR account	Matches "**cancel order**", "**order is cancelled**", but neither "**cancel my account**" not "**this account is cancelled**".
cancel* NOTNEAR:1 account	Matches "**cancel my bank account**" but not "**cancel account**", because of a required distance between terms is maximum 1.

> **Note 1.**
>
> A distance parameter is optional. If omitted, a default distance of 5 is used, i.e. **NOTNEAR** is equivalent to **NOTNEAR:5**

> **Note 2.**
>
> An order of the found terms is not taken into account, i.e. cancel* NOTNEAR account will exclude both "**cancel account**" and "**account canceled**"

> **Note 3.**
>
> Chaining of operator NOTNEAR is not supported. Use parentheses to specifically group multiple expressions. For example, cancel* NOTNEAR bank* NOTNEAR account must be rewritten as cancel* NOTNEAR (bank* NOTNEAR account)

NOTIN

Operator NOTIN allows matching terms that are not part of a longer term. For example, you would like to find the word "**problem**", but not when it is part of the phrase "not a problem".

Examples:

- problem NOTIN "not a problem"
- problem NOTIN "no problem"
- problem NOTIN ((no|not) ONEAR problem) • problem NOTIN no*
- ONEAR:2 problem

AFTER[:x]

Finds the phrase that is appears in a transcript after another phrase. An optional argument after colon symbol (**x**) is the maximum distance between the searched terms.

> ✏️ **Note 1.**
>
> A distance parameter is optional. If omitted, a default distance of 5 is used, i.e. **AFTER** is equivalent to **AFTER:5**

> ✏️ **Note 2.**
>
> The operator AFTER is partially equivalent to ONEAR operator, i.e. a search expression you AFTER thank can be replaced with thank ONEAR you .
>
> But there is one key differece between AFTER and ONEAR operators: ONEAR expression marks a whole matched text as a match ("thank you" in our example), while AFTER operator markes only the left term ("you" in our example).
>
> This becomes very handy when using data redaction functionality with search expression like R"[0-9]+" AFTER "credit card" , which would reduct consecutive digits from a recording and transcript while keeping the text "credit card" intact.
>
> The equivalent expression "credit card" ONEAR R"[0-9]+" would redact both text `"credit card" and digits and any other text in between these two texts.

Expression	Description
R"[0-9]+" AFTER "credit card"	Matches "**123456**" in phrase "**my credit card number is 123456**" but not in "**my phone number is 123456**"

Count Occurrences (REPEATS)

Operator **REPEATS** finds the term, that occurs the requested number of times in a text. For example, it can be used to find the phrase where at least 8 digits are spoken.

Syntax:

```
REPEATS:N[-M] <term>
```

Where:

- `<term>` is a search expression, which can be a word, phrase or a complex expression like `(brown | quick)`
- `N` is the minimum number of occurrences of the term in the text
- `M` is the maximum number of occurrences of the term in the text.
- If omitted, then maximum M is equal to N, i.e `brown MATCHES: 2` is the same as `brown MATCHES: 2-2`

Expression	Description
REPEATS:5-10 (one|two|three|four|five|six|seven|eight|nine|ten)	Matches "**one two two four five seven**" but not "**one two**"

Precedence Rules

When no parentheses are present, then the operators are evaluated in the following order:

- NOTNEAR
- ONEAR
- NEAR
- NOTIN
- MATCHES
- NOT
- AND
- OR

Expression	Equivalent form
quick OR brown AND fox	quick OR (brown AND fox)
quick NEAR brown AND fox	(quick NEAR brown) AND fox

Default Operator

If no operator is included between terms, then a default NEAR operator is used:

Expression	Equivalent form
brown fox	brown NEAR fox
(quick OR brown) fox	(quick OR brown) NEAR fox
quick OR brown fox	quick OR (brown NEAR fox)

> ✎ **Note**
>
> The NEAR operator has a higher priority than OR and AND (see **Precedence rules** section).

Combining Operators

Multiple operators can be combined to form a complex expression.

Expression	Description
cancel* NEAR (order|account)	matches "**cancel order**", "**order is cancelled**", "**I am cancelling my account**", "**I want to cancel this order**"
problem NOTIN ("no problem" OR "not a problem")	matches "**This is a problem**", but ignores "**no problem at all**", and "**not a problem**"

Review Automatic Scores

To review the automatic score for an interaction, open the report details.

In the report, you will be able to see what conditions were matched and at what location in a transcript.

For example, in the following screenshot, the second question **Did the agent mention his/her name?** is matched because the agent said *this is Tom Braxton* at the beginning of the call.

Override Scores

In some situations, the automated machine score may be incorrect, for example, when a speaker was using a vocabulary that was not expected by the designer of the scorecard.

In such a case, a reviewer can override the machine score by clicking **Edit Report** button and selecting the **Override** option for the corresponding question.

Edit Evaluation Report

MEDIA PLAYER Wide view ⤢

▶ Play x1 x1.2 x1.5 x1.7 x2 ⬇ Save audio file

REPORT DETAILS   CALL DETAILS   **VOICE ANALYTICS**   NOTES

SENTIMENT SCORE

-46 😞   **-53** 😣   **-32** 😐
Total Score   Agent Score   Customer Score

TRANSCRIPT

Agent [0:00]:   Good evening. this is Tom Braxton, I need to disclose that you're on a recorded line. Do you grant Brad if insurance partners permission to record this call for quality and training purposes?

GREETING

▸ Did the agent say "Thank you for calling"?   ⦿ Yes ◯ no 🐾   ☑ Override

▸ Did the agent mention his/her name?   **Yes** no   ☐ Override

▸ Did the agent mention the company name?   Yes **no**   ☐ Override

Comments

Enter a new answer and any comments and repeat for other questions as needed - then **Save**.

After the report is saved, the score is automatically recalculated.

The questions that are overridden manually are marked with a red star icon and the message:
Score is overridden by ... (original score: ...)

▶ Play x1 x1.2 x1.5 x1.7 x2 ⬇ Save audio file

REPORT DETAILS   CALL DETAILS   **VOICE ANALYTICS**   NOTES

SENTIMENT SCORE

-46 😞   **-53** 😣   **-32** 😐
Total Score   Agent Score   Customer Score

TRANSCRIPT

Agent [0:00]:   Good evening. this is Tom Braxton, I need to disclose that you're on a recorded line. Do you grant Brad if insurance partners permission to record this call for quality and training purposes?

Customer [0:09]:   **Yes, I do.**

Agent [0:11]:   Thank you so much for that. Can we start with your name?

Customer [0:14]:   **My name is and purse, p, e, r, t, H.**

Agent [0:20]:   Thank you, Anne. can I have your date of birth?

Customer [0:24]:   It's 7, 20, 72

EVALUATION SCORE

62
Score

GREETING   66%

▾ Did the agent say "Thank you for calling"?   Yes (10 of 10) ✳

Auto score results

No match

Expression: `POSBEFORE:50 AGENT: R"(you|thanks) for calling"`

✳ Score is overriden by Ellis Manager (original score: no)

▸ Did the agent mention his/her name?   Yes (10 of 10)

▸ Did the agent mention the company name?   no (0 of 10)

Manage Evaluation Reports (Admins)

To Access Evaluation Reports

The Call Recording Evaluation Reports section has the following structure:

- **All Reports** - lists all available evaluation reports.
- **Group Reports** - lists the evaluation reports from the specified group.
- **Agent Reports** - lists the evaluation reports by a specific agent.

Administrators can access each report group via the **Evaluation Reports** navigation tree or clicking a specific group on the **Reports** home page.

To Search Evaluation Reports

To search for an existing evaluation report, enter the name of the evaluation form in the search field, and click the **Search** button. Also, to narrow down the search results, search the report by a specific user or group.

The page refreshes to display only the evaluation reports that match the search criteria.

Reports

Reports

- **Reports**
- **Evaluation Reports**
  - All Reports
  - Group Reports
  - Agent Reports

Evaluation Reports

	Select a User or Group ▾	inbound	Search ▾

✕ Delete			0-1 of 1 ‹ ›

☐	CALL DATE/TIME	AGENT	GROUP	EVALUATION FORM	SCORE	
☐	Nov 15, 2021, 1:51 PM	Brian Olson	Group Mcconnell-Rodriguez	Inbound Sale Report		View ☑ Edit

20 per page ▾		0-1 of 1 ‹ ›

To reset the search criteria, click the Search button drop-down arrow and then select Reset search.

Evaluation Reports

Select a User or Group ▾	inbound	Search ▾

✕ Delete		0-1	Reset search

☐	CALL DATE/TIME	AGENT	GROUP	EVALUATION FORM	SCORE	
☐	Nov 15, 2021, 1:51 PM	Brian Olson	Group Mcconnell-Rodriguez	Inbound Sale Report		View ☑ Edit

20 per page ▾		0-1 of 1 ‹ ›