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Recording, Quality Management and Speech Analytics User Manual

Defining Search Criteria

Defining Search Criteria

Search criteria are specified in the Filter Panel by selecting values for the various filters available. In order to make it easier for you to find the filters you need, most of them are grouped into sets. You can expand the sets to access the filters they contain, and collapse them when you do not want to view them. Most filters provide Multi-Select boxes that enable you to select multiple values for the filter. In addition, some filters allow you to create multiple sets of values; the conditions specified in each set of values must be met for an interaction to be included in the search results.

The currently defined search criteria are displayed at the top of the Interaction Grid. As you configure the search filter and add conditions to the search criteria, the display is automatically updated, so you can always see what the current selections are.

You can save the current set of search criteria in a number of ways: as a **Saved Search**, as a **permalinks**.

Important

- The Filter Panel can be used in one of two modes, Standard mode and Text mode. This section explains how to use the Filter Panel in Standard mode. For information about using Text mode, see [Using Text Mode](#).
- Some of the filter options described below are not available in Recording UI mode.

Filter Groups

Filter Groups

The filters in the Filter Panel are divided into groups. The following groups of filters are available:

Filter Group	Description
Date Range	Filter for interactions according to a specific date range.
Term & Topic	Filter for interactions according to a specific term, topic and/or speaker.
Categories & Programs	Select the Categories and/of Programs to include in your search. Only interactions in which at least one category/program is identified are included in the search results.
Agent & Workgroup	Select any combination of agents and workgroups

Filter Group	Description
	to include in your search. If you select a workgroup, all the agents in the workgroup are included in the search condition.
Metadata	Filters for selecting metadata values.
Comments	Filters for finding interactions that contain user comments.
User Actions	Interaction Review by: Filter for interactions that were played/opened by specific a user(s).
Audit and Implementation	Filter for Events based on their confidence ratings and auditing results. Note: This group only appears if the Events grid type is selected.
Interaction Properties	Filter interactions according to the type of interaction, the interaction language, duration and ID.

Available Filters

Available Filters

This section explains the filters that are available in each filter group.

General Filters

The general filters, which appear at the top of the Filter Panel, are always visible. The following filters are in this group:

Filter	Description
Types	Select the type of interactions to include in the search. This selection is not displayed if your system only includes audio interactions. Note: This set of filters is not displayed if your system only includes interactions.
Language	Select the language(s) of the interactions you want to include in the search. <ul style="list-style-type: none">In some systems, some or all interactions do not undergo speech-recognition processing. In these systems, the option No Speech Recognition appears in the list of Languages. Select this value to include interactions that did

Filter	Description
	<p>not undergo speech recognition processing.</p> <ul style="list-style-type: none"> This set of filters is not displayed if your system only includes one language, and all interactions undergo speech-recognition processing.
Date Range	<p>Select the range of dates to include in the search. The following options are available:</p> <ul style="list-style-type: none"> All: the default value that includes all interactions in the database. Yesterday: filters interactions recorded on the previous day from 00:00 until 23:59. Today: filters interactions recorded on the same day from 00:00 until the exact time the search is performed. Week to Date: filters interactions recorded from the beginning of the current week (the last Sunday at 00:00) until the exact time and date the search is performed. Note: In the U.S., the week starts on Sundays and ends on Saturdays; for users with Europe-localized versions of the software the week starts on Mondays and ends on Sundays. Last 7 Days: filters interactions from seven days prior to today (at 0:00) until the exact time and date the search is performed. Last Week: filters interactions from the beginning through the end of the previous week. Month to Date: filters interactions from the first day of the current month at 00:00 until the exact time and date the search is performed. Last 30 Days: filters interactions from thirty days prior to today (at 00:00) until the exact time and date the search is performed. Last Month: filters interactions from 00:00 on the first day until 23:59 on the last day of the previous month. Quarter to Date: filters interactions from 00:00 on the first day of the current quarter until the exact time and date the search is performed. Last 90 Days: filters interactions from 90 days prior to today (at 00:00) until the exact time and date the search is performed.

Filter	Description
	<ul style="list-style-type: none"> • Last Quarter: filters interactions from 00:00 on the first day until 23:59 on the last day of the previous quarter. • Custom: filters interactions from any date range selected from the two drop-down windows displayed. You can specify the exact day, month and year of both the beginning and end dates. <p>Note: The times given are directly associated to the time zone at which your Web server is deployed, and therefore are not necessarily the same as the time where you are physically located.</p>
Limit Processing	<p>Specify the maximum number of interactions to reprocess when Active Search is selected.</p> <p>Notes:</p> <ul style="list-style-type: none"> • If you do not have the required permissions, this field is not visible. In this case, the processing limit is fixed and you cannot change it. • This filter is not available in Recording UI-mode or in Analytics and Recording UI-mode, because Active Search is not supported in these modes.

SpeechMiner Filters

The SpeechMiner filter group includes the following filters:

Filter	Description
Categories	Select one or more Categories. Only interactions in which at least one of these Categories was identified are included in the search results. If you add lines to the filter, only interactions that meet the conditions of all the lines are included.
Programs	Select one or more Programs. Only interactions that were analyzed using one of these Programs are included in the search results. Since no interaction can belong to more than one program, you cannot add additional lines to this filter.
Topics	Select one or more Topics. Only interactions in which at least one of these Topics was identified are included in the search results. If you add lines to the filter, only interactions that meet the conditions of all the lines are included.
Terms & Topics	<p>Define a list of one or more terms or phrases that must be in the interaction.</p> <p>Multiple terms should be separated by pressing Enter to place</p>

Filter	Description
	<p>them on different lines. Interactions containing any of the terms are included in the search results. An excerpt of the interaction transcription in which the term appears is displayed in the Interaction Grid in the Text column. Click File: Addfilter.png to add additional Terms & Topics to the filter.</p>
Limit Terms and Topics to Speaker Types	<p>Select one or more Speaker Types from the list. Only interactions in which the Topics and terms specified in the search filters were found in one of the following situations are included in the search results:</p> <ul style="list-style-type: none"> • For interactions with only one audio channel (in which the system cannot identify who is speaking at any particular time in the interaction): At least one of the selected Speaker Types were involved in the interaction. For example, the Topic "Payments" was found at least once in the interaction, and one of the participants in the interaction was a speaker of type "Agent." • For interactions with more than one audio channel (which allows the system to identify who is speaking at every moment in the interaction): At least one of the selected Speaker Types mentioned the required Topics and/or terms at least once in the interaction. For example, the "Agent" in the interaction talked about the Topic "payments."

Interaction Properties Filters

The Interaction Properties filter group includes the following filters:

Filter	Description
Agents	<p>Select any combination of agents and workgroups. If you select a workgroup, all the agents in the workgroup are included in the search condition.</p> <p>You can also choose to search for the "current user" rather than a specific agent or workgroup. In this case, when the search runs, the condition changes depending on which user runs it. For example, if the user is agent 12, the search results will only include interactions that were handled by agent 12. If the user is a manager, the "current user" option includes data for the entire workgroup. This option is useful if you want to save the search criteria and share them with other users so they can run the search themselves on their own interactions (see Saved Searches).</p> <p>Note: The "current user" feature will only work if the user's profile includes a mapping. For additional information about user profiles and mapping users to agents or workgroups, see</p>

Filter	Description
	<p>Managing Users.</p>
Duration	<p>Select the range of interaction duration's to include in the search: In the first field, select either Less Than, Between, or More Than. In the second text field or fields, fill in the number of seconds. If you selected Less Than, only interactions that are shorter than the value you specified are included in the search. If you selected Between, interactions whose durations are more than the first value and less than the second value are included in the search. If you selected More Than, only interactions that are longer than the value you specified are included in the search.</p>
Interaction External ID	<p>Type any portion of an interaction's external ID; any interactions whose external IDs include the characters you specify are included in the results.</p> <p>You can use the * character as a wildcard. Place it at the beginning or end of a sequence of characters to indicate that at least one other character must be in that position in the sequence. For example, type *123 to specify external IDs that begin with any sequence, but end with 123, or type 123* to specify external IDs that begin with 123 and end with any other sequence of characters.</p>

Metadata Filters

Metadata is collected by the recording system and relayed by it to SpeechMiner. The types of available metadata vary from system to system.

You can one or more metadata conditions to apply to the search results. The search results will only include interactions for which the selected types of metadata have defined values and when you specify values or a range of values for which the values match the specified conditions.

Three types of metadata values can be used in the conditions you define:

- string of text (for example, "Detroit")
- decimal number (for example, "10" or "32.5")
- date

Dates must be entered manually in the same format used in your SpeechMiner web interface. For example, if your system represents dates in format: mm/dd/yyyy hh:mm, you would enter Oct 24, 2013 at 10 AM as 10/24/2013 10:00. The format used in your system is specified in the webserviceparams table, in the **globalDateFormat** parameter. For additional information, please consult your system administrator.

To define a metadata filter:

1. Select to **Include/Exclude** the metadata.

Important

If you only want to specify that the interactions must have values for the specified type of metadata, but any value is acceptable, you only have to select the name of the metadata type; you do not have to perform any of the steps below.

2. Select the type of metadata from the list provided.
3. Click **Values** to configure the metadata.

A field appears depending on the metadata you selected to add. For example, the following field appears when you select to add a name metadata:

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4. In the first field, select **Equals** if you want to specify a specific value for the type of metadata, or **Between**, if you want to define a range of values. If you select **Between**, an additional field is added to the box.

Important

If you want to define a range that is greater than a specified value, enter the value in the first field. If you want to define a range that is less than a specified value, enter the value in the second field.

5. To add an additional **OR** condition on this type of metadata value, click the [file:Smicon expand.png](#) to add a line in the box, and fill it in as explained above.
6. Click outside the box to close the box.
7. To convert the condition into a negative condition (for example, to exclude interactions with the specified metadata values from the data set), in the **Filter** panel, add **Not** to the left of the condition.
8. To add an additional **AND** metadata condition, either on the same type of metadata or on a different type, in the **Filter** panel, beside the **Name** field, click the [file:Smicon expand.png](#). A new line is added to the metadata conditions. Follow the steps above to specify the values for this condition.
9. Click the [file:Smicon expand.png](#) as necessary to add additional **AND** conditions.

Comments

Comment filters let you search for interactions according to comments when playing the interaction.

Filter	Description
Comments:	Filters for finding interactions that contain user comments.

Filter	Description
	<ul style="list-style-type: none"> • blank text field: The text that must appear in a comment about an interaction. Only interactions that contain comments in which this text is found are included in the search results. If you leave this field blank, interactions that contain comments from the selected users are included in the search results, regardless of the comments contents. • User: searches for the user(s) who added a comment about the interaction when playing back the interaction. Only interactions that contain comments from the selected users are included in the search results. • Good: searches for the user(s) who selected Good when adding a comment to the interaction when playing back the interaction. • Neutral: searches for the user(s) who selected Neutral when adding a comment to the interaction when playing back the interaction. • Bad: searches for the user(s) who selected Bad when adding a comment to the interaction when playing back the interaction.

User Actions Filters

User Action filters let you search for interactions according to the interaction a user played.

Filter	Description
Interaction Reviewed By:	<p>Filter for interactions that were played/opened by the selected user(s).</p> <p>Only interactions that were played back by the selected users are included in the search results.</p>

Audit and Implementation Filters

If the Events grid type is selected, this filter group appears in the Filter Panel. The group includes the following filters:

Filter	Description
Confidence threshold	<p>Select the minimum Confidence value required. Only Events whose Confidence values are at least this high are included in the search results.</p>

Filter	Description
	<p>Note: The Confidence value is generated by SpeechMiner during interaction processing. It indicates how reliable the identification of the Event is; the higher the value, the greater the degree of certainty.</p>
Term ID	<p>Specify the ID number of a term that is included in a Topic.</p> <p>Notes:</p> <ul style="list-style-type: none"> This field only appears if you have Event Audit permissions. The Term ID of each term that is found during a search appears in the Event Grid.
Exclude audited events	Select this checkbox to exclude interactions that have already been audited from the search.
TP, FP, SFP	Select the audit ratings required. Only audited Events whose ratings match one of the selected types are included in the search results.

Multi-Select Boxes

Using Multi-Select Boxes

Many of the filters allow you to select more than one item. For example, you can select three categories to include in your search.

Important

The logical relationship between all items selected in a single Multi-Select box is OR. That is, if *any* of the items is found to be true for an interaction, the interaction is considered to have met the specified condition. If you want to define an AND relationship between two or more items, you must add additional lines to the field, as explained below.

Two types of Multi-Select boxes exist:

Select items for a field:


1. Click the [file:Sm_multiboxicon.png](#) beside the field. The Multi-Select box opens below the field.

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2. Select the checkbox beside each item you want to select. If necessary, expand an item to select one or more of the items it contains. Use the **Search** feature and the **View Selected Only** display option to help you find the items you need and keep track of what you have selected.
3. Click outside of the Multi-Selector box. The Multi-Select box closes.

The text field indicates how many items were selected. Place your mouse over the text field to see a list of the selected items.

Expanding and Collapsing Items

The list of items in a Multi-Select box has a tree structure. When an item contains other items, a  appears to the left of that item's checkbox. You can expand an item to see and select the items it contains, or collapse an expanded item if you do not want to display its contents. You can also expand or collapse all of the items in the list.

To expand an item—Click the [file:smicon_expand.png](#) beside the item.

To collapse an expanded item—Click the [file:sm_collaspeicon.png](#) beside the item.

To expand all of the items in the list—Right-click any item in the list, and then select **Expand All**.

To collapse all of the items in the list—Right-click any item in the list, and then select **Collapse All**.

Selecting Groups of Items

You can select all of the items in the list, or all of the sub-items of an item in the list. You can also clear all selections or all selections of an item's sub-items.

To select all of the items in the list—Right-click any item in the list, and then select **Check All**.

To select all of the sub-items of an item in the list—Right-click the item, and then select **Check SubTree**.

To clear all selections in the list—Right-click any item in the list, and then select **Uncheck All**.

To clear all selections of an item's sub-items—Right-click the item, and then select **Uncheck SubTree**.

Using Search to Locate an Item in the List

To help you find items in the list quickly, the Multi-Select box contains a **Search** option. This option enables you to filter the list so that it only displays items that include the sequence of letters you specify.

To use the Search option:

- At the top of the Multi-Select box, in the **Search** field, type a minimum of two letters or a sequence of letters that appears in the item you are looking for. The list is filtered as you type; only those items that contain the sequence you typed are displayed.

Important

The search will not work with one letter. You must enter at least two letters to activate the search.

Displaying Selected Items Only

In the Standard Multi-Select box, you can choose to display only those items that are currently selected.

To display only those items that are currently selected—At the top of the Standard Multi-Select box, click **View Selected Only**.

To switch back to display of all items—At the top of the Standard Multi-Select box, click **All**.

Negative Conditions

Negative Conditions

By default, a condition is met when one or more of the items selected for a field are found in an interaction or are true for an interaction. You can also choose to define negative conditions for many fields. When you define a negative condition, the condition is met when none of the items selected for the field are found in the interaction or are true for the interaction. For example, you can choose to find all interactions to which Categories A, B, and C do not apply.

When it is possible to define a negative condition for a field, a **Not** button appears to the left of the field.

To define a negative condition for a field:

1. Click the **NOT** button beside the field. The button is turned on.
2. Select the conditions for the field as usual. These are the conditions that an interaction must not fulfill in order to be included in the search results.

Adding a Line to a Filter

Adding a Line to a Filter

When you select multiple items in a Multi-Select box, an OR logical relationship is defined between the items. For example, if you select two Categories, an interaction that belongs to either of the two Categories meets the condition. If you want to define multiple conditions that must all be met in order for an interaction to be included in the search results, you must define each of the conditions in a separate line. For example, if you want to find interactions that belong both to Category A and to Category B, you have to select Category A in the first field of the Category, then add a new line to the Category filter and select Category B in the new field it contains.

To add a line to a filter:

- Click the [file:Smicon_expand.png](#) to the right an existing line in the filter. A new line is added below the existing line, with the word **And** at the beginning of the line.

Queries

Working with Queries

Saving the Query

After you have selected your search criteria, you can save the criteria in the system as a Saved Search. Then if you want to run the search again, you can do so without redefining the criteria. Saved Searches can be accessed in the **Saved Searches** tab. They can also be attached to Coaching sessions.

To save your search criteria as a Saved Search:

1. At the top of the **Filter** Panel, click **Save**. You are prompted to provide a name for the query.
2. In the text field, type a name for the query and then click **OK**. The search criteria are saved as a Saved Search, and the name you specified appears at the top of the search form.

If you opened the search criteria by selecting a Saved Search in the Saved Searches tab, you can choose either to save the current search criteria with the same name or as a new Saved Search with a new name. In this case, in addition to the **Save** option, a Save as option appears at the top of the Filter Panel. If you click Save, the search criteria are saved under the original name; if you click Save as, you are prompted to provide a name for the new query.

Generating a Link to the Query

After you have selected your search criteria, you can generate and save a Permalink to the query. To run the search again, you need only open the link in a browser.

Important

For additional information, see [Permalinks](#).

To create a Permalink to the current search criteria:

- At the top of the Filter Panel, select **Permalink**. A **Permalink** dialog box opens and displays the Permalink.

Deleting Filter Conditions

Deleting Filter Conditions

You can clear all of the filter conditions in order to begin defining new conditions from scratch.

To clear all the filter conditions:

1. In the Filter Panel, click **Clear Filters**. You are prompted to confirm that you want to delete all of the currently defined filters.
2. Click **Yes**. The filters are cleared.