



This PDF is generated from authoritative online content, and is provided for convenience only. This PDF cannot be used for legal purposes. For authoritative understanding of what is and is not supported, always use the online content. To copy code samples, always use the online content.

Recording, Quality Management and Speech Analytics User Manual

The Widgets

The Widgets

The following sections describe the widgets.

Report

Report Widget

The Report widget can be used to display any of the existing reports saved in the system. Many report templates are available in Mini versions that are specially formatted for the Dashboard page because they require less space on your screen, but you can select reports of any size.

Drilling Down in a Report

Clicking on certain locations in the Report widget will drill down to other reports or to Interaction Lists, as appropriate for the item that was clicked. For example, clicking on a bar in the report above will open a list of interaction specific to the agent whose name was clicked. Interaction Lists are opened in a separate window, but other drill-down reports are usually opened in the same widget. For information about available reports and the expected drill-down results, see [Templates](#).

A **Back (10px)** button appears in the left corner of the Report widget's title bar. If you have drilled down from a report to another report, you can use the back button to return to the original report.

To close a drill-down report and return to the report results:

- Click **Back (10px)**.

Configuring a Report Widget

You can specify the height of a Report widget, how often it is updated, and what report it should contain.

To configure a Report widget:

1. In the upper-right corner of the widget, click **Edit**. The widget's configurable settings are displayed.
2. Fill in the fields as follows:

Settings	Description
Height	The height of the widget, in pixels.
Refresh Rate	How often the data in the report should be

Settings	Description
	refreshed, in minutes.
Report Description	Enter a description of the report you want to create.
Select	Select the report you want to display in the widget. The list contains all saved reports for which you have permissions. Reports that are saved in your account are marked with an asterisk (*). The name of the user who saved the report appears in parentheses after the name of the report.

Important

If a report has already been selected, additional configuration fields may appear.

3. In the widget's settings, click **Save**. The settings are implemented, and the name of the saved report is displayed at the bottom-left of the widget.
4. In the upper-right corner of the widget, click **Close**. The setting options are hidden.

Changing the Settings of the Report

Once you have selected a saved report for display in a widget, you can modify the report's settings as necessary.

To change the settings of the report:

1. In the upper-right corner of the widget, click **Edit**. The widget's configurable settings are displayed.
2. Click the **Edit Report** icon ([file:smicon_edit.png](#)). The report template opens in a new window.
3. Modify the settings as necessary.
4. Click **Save Changes**. The dialog box closes. The report is generated with the new settings, and the results are displayed in the widget.

Important

If the saved report you modified was not in your account, you are prompted to provide a new name for the saved report. The modified settings are saved under the new name you specified, in your account. The original saved report in the other user's account is not changed.

5. In the upper-right corner of the widget, click **Close**. The setting options are hidden.

Opening the Edit Report Page

You can open the Edit Report page directly from a Report widget. You can then run the report with

different settings, view a larger version of it, or create a new saved report.

To open the Edit Report page:

- In the bottom-left corner of the widget, click the name of the saved report. The **Edit Report** page opens.

Important

To return to the **Dashboard** page, use your browser's **Back** button.

My Messages

My Messages Widget

The My Messages widget is a mailbox in which you can send and receive messages and schedule a new coaching session.

Important

Coaching session is not available in the Recording UI mode.

Three types of messages may appear in the My Messages widget:

Message Type	Description
Call	<p>A message containing a link to a recorded interaction. This type of message is sent by other users.</p> <p>Click the link to play the interaction. When you click the play icon, the player is opened in a pop up window.</p> <p>Note: This type of message is sent when a user forwards an Interaction Grid or from the Media Player.</p>
Note	<p>A note from another user.</p>
Coaching	<p>An automated notice from the system informing you that another user has scheduled a coaching session for you. When you open the message, the Session Details page of the coaching session opens. To accept the coaching session, in the My Messages widget, under Action, click Accept. The</p>

Message Type	Description
	coaching session is accepted, and the message is deleted from the message list.

To open a message:

- Click the subject of the message.

To send a message to another user:

1. Click **New** and then select **Note**. A **New Note** dialog box opens.
2. Fill in the fields and then click **Send**. A message pops up confirming that the message was sent successfully.

To schedule a new coaching session:

1. Click **New** and then select **Coaching Session**. A **New Coaching Session** dialog box opens.
2. Fill in the fields and then click **Save**. A message pops up confirming that the session was added successfully.

If your mailbox contains too many messages to display in the widget at one time, the message list is divided into pages. In this case, page numbers appear at the bottom of the list.

Important

The number of messages that can be displayed in a page depends on the height of the widget.

To go to a different page in the mailbox:

- At the bottom of the list of messages, click the page number.

Configuring the Widget

You can configure the height and refresh rate of a My Messages widget.

To configure a My Messages widget:

1. In the upper-right corner of the widget, click **Edit**. The widget's configurable settings are displayed. Fill in the fields as follows:

Setting	Description
Height	The height of the widget, in pixels.
Refresh Rate	How often the list should be refreshed, in minutes.

2. Click **Save**. The settings are implemented.

3. Click **Close**. The settings are hidden.