Recording, Quality Management and Speech Analytics User Manual

Standard Reports

12/19/2025

Standard Reports

SpeechMiner comes with a number of standard report templates. These report templates are described in this section For information about configuring and generating reports from templates, see Reports.

Important

- Some reports may not be available to all users. As such, you may not see them in your system.
- You may have access to reports that are not documented here because they were custom made for your organization.

Template Layout

Template Layout

This section explains the general layout of report templates. The Common Parameters section, describes parameters that appear in many report templates. These sections are followed by the Report Templates section, a catalog of all of the report templates, with descriptions of each report and additional information about the reports.

The report templates in SpeechMiner have a maximum of three rows of parameters, each row dealing with different functions in the report. In addition, most report templates have a Data Set filter section on the left side of the screen. The layouts of most templates are similar to the Agent Comparison template shown below.

In this section, we will explain the layout of report templates using the Agent Comparison template as an example, since it has the most common layout of parameters you will encounter.

Template Rows

The following rows appear on the right side of the template:

First Row

Contains controls for working with report results (see Creating a Custom Report), followed by the **Template** field, in which you can select the type of report, and the **Report Name** field, which you can use to name the report. If you choose to save the report parameters as a saved report (see Managing Saved Reports), the Report Name is used to identify it in the system.

Second Row

Contains fields for defining the report title and an optional report description. These items are displayed at the top of the report results. By default, the name of the report template is used as the report title, but you can modify it as necessary. Some templates also have a **Version** parameter in this row. If so, you can use this parameter to select the size or format of the report output.

Third Row

Contains the **Items on Report** parameters - the fields that determine which items will appear graphically on the report. In some reports, one or more of the parameters may also have statistical functions.

Data Set Filters

The left side of most report templates contains the Data Set filters. These filters specify which data will be included in the report's analyses. For information about the filters and how to configure them, see Common Parameters.

The current filter settings are displayed on the right side of the template below the first row:

Report Templates

Report Templates

This section contains detailed information regarding each report template, including a general description, an overview explaining how to customize the report (how the parameters function), and a sample report. For some templates, additional information on common usages and actions you can perform on the reports is provided.

Most reports are interactive: you can drill down within a report to view additional details about any graphic component (graph bars, lines, or table headers) by clicking on it. In addition, you can play an interaction in the Media Player directly from an Interaction List in the report results. These interactive options are interactioned actions. In some cases, report results offer additional action options. In these cases, the description of the report includes as Actions section describing the additional actions that are available. For more information about using the standard report actions, see Creating a Custom Report.

In some cases, reports have a number of available versions, such as a Full version, a MINI version, and a Wide version. In these cases, a single template is used to generate all of the versions, and a

Version parameter is used to select the desired version. (For additional information about the **Version** parameter, see Common Parameters.)

> **Important**
>
> - The information you see in reports is limited to the data to which you have access.
> - Recording templates do not include the **Categories** option, since recording does not categorize interactions.

The following standard report templates are available. Select a report template for more information.

Agent Bubble Chart

Agent Bubble Chart

Description

The Agent Bubble Chart report compares Agents and/or Workgroups by plotting them on a graph according to the percentage of interactions in the horizontal (x-axis) and vertical (y-axis) Categories. Each Agent is represented on the graph by a bubble. The size of each bubble represents the average interaction duration.

The X-Axis Only and Y-Axis Only versions present the data as a histogram indicating percentage of interactions per Agent and/or Workgroup, rather than a bubble chart.

> **Important**
>
> This template is only available in an Analytics UI mode.

Common Usages

- Plot Agents showing average interaction duration plus two customer-experience Categories (for example, Dissatisfaction and Escalation)
- Plot Agents showing average interaction duration plus two agent-efficiency Categories (for example, Transfer Rate and Hold Rate)
- Plot Agents showing average interaction duration plus two Categories that represent metadata (for

example, Customer Satisfaction and Issue Resolution)

Customizing the Report

General Settings

- **Version:** Available in Full Report (standard size), Mini, Wide, X-Axis Only, and Y-Axis Only versions. For additional information, see Common Parameters.

For all other parameters, see Common Parameters.

Data Set Filters

See Common Parameters.

Items on Report

- **X-Axis Categories:** Select one or more Categories to include in the x-axis of the bubble chart. Note that only Categories that were not excluded from the data set by means of the Categories parameter of the Data Set Filters section are included in the report.
- **Y-Axis Categories:** Select one or more Categories to include in the y-axis of the bubble chart. Note that only Categories that were not excluded from the data set by means of the Categories parameter of the Data Set Filters section are included in the report.

For all other parameters, see Common Parameters.

Actions

- Click a bubble in a chart, a bar in a graph, or an item in a table to open a list of interactions included in the item.
- In X-Axis Only and Y-Axis Only versions, click  to drill down to a Category Trend report.

Agent Comparison

Agent Comparison

Description

The Agent Comparison report consists of a bar graph comparing Agents' performance against each other as well as against the average value of all Agents represented.

Common Usages

- Plot Agent performance statistics to see who performs above and below the benchmark (the average of a group determined by the filter selections)
- Drill down on specific Agents to play their interactions and find examples of effective agent behavior or of areas needing improvement
- Utilize the data obtained from the report to identify training needs for effective agent coaching

Customizing the Report

General Settings

- **Version:** Available in Full Report (standard size), Mini, Wide, and Table Only versions. For additional information, see Common Parameters.

For all other parameters, see Common Parameters.

Data Set Filters

See Common Parameters.

Items on Report

See Common Parameters.

Actions

- Click a bar in a graph or an item in a table to open a list of interactions included in the item.

Agent Evaluation Comparison

Agent Evaluation Comparison

Description

The Agent Evaluation Comparison Report summarizes the average evaluation score for selected agents.

Common Usage

- To compare agent evaluation scores.

Customizing the Report

General Settings

- **Date Range:** enables you to select the period of time on which to base the report.
- **Form:** enables you to select the specific form to be analyzed and displayed in your report.

> **Tip**
> If the Form list does not include the form you want to select refresh the page.

- **Agents:** enables you to select the specific agents to be analyzed and displayed in your report.

For all other settings, see Common Parameters.

Actions

- Click an agent in the Y-axis to drill down and view the form scores associated with the selected agent.

Agent Trend

Agent Trend

Description

The Agent Trend report is a line graph that displays agent performance on one or more selected categories over time.

Common Usages

- Track progress of agent performance over time to monitor effectiveness of training programs.
- Use graph to measure and compare performance and provide feedback to the agent.

Customizing the Report

General Settings

- **Version:** Available in Full Report (standard size), Mini, Wide, and Table Only versions. For additional information, see Common Parameters.

For all other parameters, see Common Parameters.

Data Set Filters

See Common Parameters.

Items on Report

See Common Parameters.

Actions

- Click a line in a graph or an item in a table to open a list of interactions included in the item.

Calibration Report

Calibration Report

Description

Summarizes all the evaluation sessions for one Calibration Evaluation and provides a graph that shows the specific Calibration Evaluation form scores.

Common Usage

- To create a report that compares two or more evaluators performance.

Customizing the Report

General Settings

- **Evaluation:** enables you to select the Calibration Evaluation on which to base the Calibration Report.

> Tip
> If the Evaluation list does not include the evaluation you want to select refresh the page.

- **Baseline Average:** enables you to highlight a score by which evaluators are compared. For example, if you enter 80% for the Baseline Average you will be able to see who scored above and below 80%.

For all other settings, see Common Parameters.

Actions

- Sort the Evaluator names in the Y-axis.

Capacity Trend

Capacity Trend

Description

The Capacity Trend report contains information that can be used by the system administrator to monitor the system load and see the extent to which the system can handle new incoming interactions. It has two parts:

- A bar graph that shows the number of hours of loaded interactions and accumulated interactions for each day in the selected time period.
- A table listing the maximum number of channels (for example, the maximum number of agents taking interactions concurrently at any one time in the day) and the maximum number of seats available for example, the maximum number of agents who could use the system) each day.

> Important
> This template is only available in an Analytics UI mode.

Common Usages

- Analyze the number of recent interactions in the system to determine if current hardware resources meet the required capacity

- Forecast future hardware needs and allocate resources accordingly

Customizing the Report

See Common Parameters.

Category Bubble Chart

Category Bubble Chart

Description

The Category Bubble Chart report compares Categories by plotting them on a graph according to the percentage of interactions in the horizontal (x-axis) and vertical (y-axis) Categories. Each Bubble Category is represented on the graph by a bubble. The size of each bubble represents the average interaction duration. The x-axis value indicates the percentage of interactions that were in both the Bubble Category and any of the selected x-axis Categories. The y-axis value indicates the percentage of interactions that were in both the Bubble Category and any of the selected y-axis Categories.

The X-Axis Only and Y-Axis Only versions present the data as a bar graph indicating percentage of interactions per Category, rather than a bubble chart.

> **Important**
> This template is only available in an Analytics UI mode.

Common Usages

- Plot interaction-reason Categories showing average interaction duration plus two customer-experience Categories (for example, Dissatisfaction and Escalation)
- Plot interaction-reason Categories showing average interaction duration plus two agent-efficiency Categories (for example, Transfer Rate and Hold Rate)
- Plot interaction-reason Categories showing average interaction duration plus two Categories that represent metadata (for example, Customer Satisfaction and Issue Resolution)

Customizing the Report

General Settings

- **Version:** Available in Full Report (standard size), Mini, Wide, X-Axis Only, and Y-Axis Only versions. For additional information, see Common Parameters.

For all other parameters, see Common Parameters.

Data Set Filters

See Common Parameters.

Items on Report

- **Bubble Categories:** Select the Categories to represent as bubbles in the chart.
- **X-Axis Categories:** Select one or more Categories to include in the x-axis of the bubble chart.
- **Y-Axis Categories:** Select one or more Categories to include in the y-axis of the bubble chart.

> **Important**
> For all of these parameters, only Categories that were not excluded from the data set by means of the Categories parameter of the Data Set Filters section are included in the report. Thus, if you selected specific Categories in the Data Set Filters section, only Categories that are selected both there and here will be included in the report.

Actions

- Click a bubble in a chart, a bar in a graph, or an item in a table to open a list of interactions included in the item.
- In X-Axis Only and Y-Axis Only versions, click to drill down to a Category Trend report.

Category Distribution

Category Distribution

Description

The Category Distribution report is a graph or chart that shows the distribution of interactions by Category for a specified domain. The distribution can be calculated by percentage of interactions or by percentage of resources (total duration of all interactions included in the analysis).

> **Important**
> This template is only available in an Analytics UI mode.

Common Usages

- Plot the proportion of interactions in specified Categories to analyze business trends and customer issues
- Compare the distribution of multiple Categories—such as interaction or cancellation reasons, product popularity, or competitor mentions—across your body of interactions
- Utilize the comparative data obtained from the report to identify the optimal ways to target customer issues

Customizing the Report

General Settings

- **Version:** Available in Full Report (standard size), Mini, Wide, Columns, and Summary versions:

Full Report, Mini, Wide: Bar graphs listing the selected Categories and showing their proportion in the data set. For additional information about these versions, see Common Parameters.

- **Columns:** A chart that shows the average interaction duration for each Category. These values are displayed above the total number of interactions in the Category.
- **Summary (Pie):** A pie chart indicating the proportion of interactions or resources in the entire data set that are in or used by the selected Categories. (Whether to base the calculations on the number of interactions or on the total resources is selected under Distributed By; see Items on Report below.)

For all other parameters, see Common Parameters.

Data Set Filters

See Common Parameters.

Items on Report

- **Distributed By:** Select whether the distribution should be calculated based on percentage of interactions (the total number of interactions) or percentage of resources (the total duration of all interactions).

For all other parameters, see Common Parameters.

Actions

- In Full, Mini, Wide, or Columns versions, click a Category or bar to open a list of interactions in the Category.
- In the Full version, click **Trend** ([file:smicon_reportdrilldown.png]]) to drill down to the distribution of interactions for a Category. If the distribution of the items on the report (see Items on Report above) was by percentage of interactions, the distribution of interactions is by percentage of interactions; if it was by percentage of resources, the distribution of interactions is by average interaction duration.

Category Trend

Category Trend

Description

The Category Trend report shows changes in Categories over a period of time. The trend line can represent number of interactions, percentage of interactions, average interaction duration, or total resources. There is one line per selected Category.

> **Important**
> This template is only available in an Analytics UI mode.

Common Usages

- Plot the trends in a particular Category or multiple Categories chronologically
- Identify peak periods to make informed scheduling and staffing decisions
- Measure the response to new product releases
- Evaluate the effectiveness of recent business changes and agent training

Customizing the Report

General Settings

- **Version:** Available in Full Report (standard size), Mini, Wide, and Table Only versions. For additional information, see Common Parameters.

For all other parameters, seeCommon Parameters.

Data Set Filters

See Common Parameters.

Items on Report

See Common Parameters.

Actions

- Click a point in a graph or an item in a table to open a list of interactions included in the item.

Coaching Summary

Coaching Summary

Description

The Coaching Summary report summarizes the current status of coaching sessions in a pie chart and table, and lists active coaching sessions by user. Items in the list can be expanded to display details about coaching sessions.

Common Usage

- Monitor personnel training.

Customizing the Report

General Settings

- **Version:** Available in Full Report (Expanded) and Full Report (Collapsed) versions. For additional information, see Common Parameters.

For all other settings, see Common Parameters.

Actions

- Click + beside a user/trainee to expand it and view a list of coaching sessions assigned to the user/trainee, or to collapse an expanded user/trainee.
- Click + beside a coaching session to expand it and view details about the session, or to collapse an expanded session.
- Click + or - at the top of the table to expand or collapse all of the items in the table.

Evaluation Summary

Evaluation Summary

Description

The Evaluation Summary report summarizes the evaluation performance of one or more evaluators. The report is shown in a Doughnut chart.

Common Usage

- Monitor evaluator performance.

Customizing the Report

General Settings

- **Date Range**: enables you to select the period of time on which to base the report.
- **Evaluators**: enables you to select the evaluators whose performance you would like to compare.

For all other settings, see Common Parameters.

Evaluator Evaluation Comparison

Evaluator Evaluation Comparison

Description

The Evaluator Evaluation Comparison Report summarizes the average evaluation score for selected evaluators .

Common Usage

- To compare evaluator evaluation scores.

Customizing the Report

General Settings

- **Date Range:** enables you to select the period of time on which to base the report.
- **Form:** enables you to select the specific form to be analyzed and displayed in your report.

> Tip
>
> If the Form list does not include the form you want to select refresh the page.

- **Evaluators:** enables you to select the specific evaluators to be analyzed and displayed in your report.

For all other settings, see Common Parameters.

Actions

- Click an agent in the Y-axis to drill down and view the form scores associated with the selected evaluator.

Metadata Frequency

Metadata Frequency

Description

The Metadata Frequency report is a histogram that shows, for a selected metadata field, how many interactions in the data set had each of the values of the field. The report has two levels:

- The top level is a summary that shows how many interactions they belonged to each value and the percentage of all the interactions in the data set that had the values. For example, if the metadata field "department" is selected, the report shows how many departments (values) were represented in the data set, and divides the departments into groups based on how many interactions they had.
- The lower level gives details for one of the groups in the top level, listing the values that had at least the number of interactions represented by the group, and indicating how many interactions they had. The Wide version of the report also shows the most common Category of those interactions.

Common Usages

- Classify and quantify interactions according to a metadata field.
- Utilize the comparative data obtained from the report to identify issues that may require attention.

Customizing the Report

General Settings

- **Version:** Available in Full Report (standard size), Mini, and Wide versions. For additional information, see Common Parameters.

For all other parameters, see Common Parameters.

Data Set Filters

See Common Parameters.

Items on Report

- **Metadata Field name:** Select the metadata field for which you want to run the report. Note that the field selected here must be within the range selected in the Data Set Filters or no data will appear in the report.
- **Pattern to Include:** Enter a series of one or more characters that must be found in the field value in order for it to be included in the report (optional; leave the field blank to include all patterns).
- **Values to Exclude:** Enter one or more field values to exclude from the report. Separate multiple values with commas; do not leave a space after the comma (optional; leave the field blank to include all values).
- **Minimum Call Count:** The minimum number of interactions that must be found for a value in order for the value to be included in the report

For all other parameters, see Common Parameters.

Actions

In the top level:

- Click a bar in the graph to drill down to the lower level

In the lower-level:

- Click a bar in the graph to search for interactions that have the field value represented by the bar.
- Click to drill down to a Category Distribution report.

Performance Profile

Performance Profile

Description

The Performance Profile report is a bar graph and table that compares Workgroup or Agent performance in a specified Category or group of Categories to the benchmark (the Workgroup's or Agent's average). You can choose to analyze performance based on the number of interactions, the percentage of interactions, average interaction duration, or total resources. The table includes data about the number of interactions, the difference from the benchmark, and the percentage above or below the benchmark.

> **Important**
> This template is only available in an Analytics UI mode.

Common Usages

- Visualize and compare agent performance for training and feedback.
- Utilize the data obtained from the report to increase the efficiency of team and operations management.
- Assess the efficacy of training programs by plotting performance before and after the program's implementation.

Customizing the Report

General Settings

- **Version:** Available in Full Report (Expanded), Full Report (Collapsed), Mini, and Wide versions. For additional information, see Common Parameters.

For all other parameters, see Common Parameters.

Data Set Filters

See Common Parameters.

Items on Report

- **Profile:** Select the Agents or Workgroups you would like to compare to the average (the benchmark) for specific Categories. Your selection must match the Benchmark Type, but it does not have to match the Workgroup or Agent parameters in the Data Set Filters.
- **Benchmark Type:** Select the type of benchmark to use: Agent or Team (Workgroup). The selection here must correspond with those in the Data Set Filters. If you selected Workgroups in the Data Set Filters (rather than individual Agents in the expanded Workgroups), you must select Team for the Benchmark Type in order to return results. The Benchmark Type must also match the Profile selected; if Agent is selected as the benchmark type, Agents must also be selected in the Profile parameter.
- **Compare:** See Common Parameters.
- **Categories:** See Common Parameters.
- **Threshold:** Specify the minimum percent deviation from the benchmark required for an item to be included in the report. For example, "40" means only values that are greater or less than the benchmark by at least 40% are included in the report.

Actions

- Click beside an agent or team to expand it and view a list of Categories.
- Click to collapse an expanded item.
- When an item is expanded, click Trend () to drill down to a Category Trend report.

System Load

System Load

Description

The System Load report includes a line graph and a grid displaying the amount of audio hours processed per day or hour. On the line graph, two lines are displayed, one for processed interactions and one for loaded interactions. The grid below the graph shows each point (either a date or time) that appears in the line graph, with its corresponding loaded and processed hours.

> **Important**
> A smaller version of this template, MINI_System Load, is also available. It is intended for use in the **Views** page. This template is only available in an Analytics UI mode.

Common Usage

- Monitor the processing load of the system.

Customizing the Report

- **Dates:** The same as **Date Range** in Data Set Filters (See Common Parameters)
- **Granularity:** Choose either **HOUR** or **DAY** for the scale on the horizontal axis. Make sure your selection is reasonable for the dates you selected.
- **Report Title:** See Common Parameters.

Team Comparison

Team Comparision

Description

The Team Comparison report is a bar graph that compares performance between teams and against the average value of all teams represented.

Common Usages

- Analyze the report data to optimize team and operations management
- Provide clear visual reports for training assessment and feedback

Customizing the Report

General Settings

- **Version:** Available in Full Report (standard size), Mini, and Wide versions. For additional information, see Common Parameters.

For all other parameters, see Common Parameters.

Data Set Filters

See Common Parameters.

Items on Report

- **Teams:** Select specific Workgroups to be analyzed and displayed on your report. The default value ("Any") includes all Workgroups. You must also make the appropriate selections on the Workgroup or Agent, Language, and Program filters in the Data Set Filters. If, in the Data Set Filters, individual Agents were selected instead of Workgroups, you must select the Team that contains those Agents, or no results will be returned.
- **Compare:** See Common Parameters.
- **Categories:** See Common Parameters.

Actions

- Click a bar in the graph to open a list of interactions included in the item.

Team Evaluation Comparison

Team Evaluation Comparison

Description

The Team Evaluation Comparison Report summarizes the average evaluation score for selected teams.

Common Usage

- To compare team evaluation scores.

Customizing the Report

General Settings

- **Date Range:** enables you to select the period of time on which to base the report.
- **Form:** enables you to select the specific form to be analyzed and displayed in your report.

> Tip
> If the Form list does not include the form you want to select refresh the page.

- **Teams:** enables you to select the specific teams to be analyzed and displayed in your report.

For all other settings, see Common Parameters.

Actions

- Click a team in the Y-axis to drill down and create an Agent Evaluation Comparison report for the agents in the selected team.

Top and Bottom Performers

Top and Bottom Performers

Description

The Top and Bottom Performers report is a bar graph that indicates values for three groups (top performers, bottom performers, and average performers) across multiple Categories. This enables you to identify what top performers do differently from the rest and thereby spread the knowledge of best practices. This report is only useful if you know ahead of time who your top, bottom, and average Agents or teams are. It is purely a graphical representation of comparison, and will NOT tell you who the top and bottom Agents are, but rather how they compare in specific areas of performance.

> **Important**
> This template is only available in an Analytics UI mode.

Common Usages

- Compare the behavior of top and bottom performers to identify best practices.
- Utilize the data obtained from the report to optimize agent training and improve business processes.

Customizing the Report

General Settings

- **Version:** Available in Full Report (standard size), Mini, and Wide versions. For additional information, see Common Parameters.

For all other parameters, see Common Parameters.

Data Set Filters

See Common Parameters.

Items on Report

- **Top Agents:** Specify the top Agents (based on prior assessment) to be displayed for each Category. The percentage of interactions handled by the selected top Agents will be displayed for each Category. Selections here must be within those made in the Workgroup and Agent filters in the Data Set Filters.
- **Bottom Agents:** Specify the bottom Agents (based on prior assessment) to be displayed for each Category. The percentage of interactions handled by the selected bottom Agents will be displayed for each Category. Selections here must be within those made in the Workgroup and Agent filters in the Data Set Filters.
- **Average:** Specify the average-performing Agents (based on prior assessment) to be displayed for each Category. The percentage of interactions handled by the selected average-performing Agents will be displayed for each Category. Selections here must be within those made in the Workgroup and Agent filters in the Data Set Filters.
- **Categories:** See Common Parameters.

Actions

- Click a bar or a value to open a list of interactions included in the item.

Topic Analysis - Audits

Topic Analysis - Audits

Description

The Topic Analysis - Audits report is a table that shows the precision with which each Topic was identified by SpeechMiner. Precision values are given for one or more confidence levels, as specified in the report parameters, and are determined by the TP/FP/SFP (True Positive/False Positive/Sense False Positive) selections made by the interaction auditor (see Using an Event Grid).

Each line in the table contains auditing and precision information for one Topic, including the level of strictness required for recognizing the Topic (as defined in the Topic definition in SMART), how many times the Topic was found in the interactions that were included in the report, how many interactions it was found in, and how many of the events found were audited. In addition, the precision is graded for each threshold included in the report. The grades are calculated by dividing the number of TP events by the sum of the TP and FP events. The grades are presented as follows:

Grade	Value of TP/(TP+FP)
A	A >= 0.8
B	0.8 > B >= 0.7
C	0.7 > C >= 0.6
D	0.6 > D >= 0.5
F	F < 0.5

This report is instrumental to implementers, as it allows them to fine-tune the system to the correct accuracy level. After learning about Topic-identification performance, the implementer can adjust confidence levels as necessary.

> **Important**
> This template is only available in an Analytics UI mode.

Common Usage

- Monitor the quality of the different Topics in the system based on audit information.

Customizing the Report

General Settings

See Common Parameters.

Items on Report

- **Topics:** Choose the Topics whose audits you want to examine.
- **Confidence Thresholds:** Type in the confidence levels for which you wish to see precision values. Separate multiple values with commas.

> **Important**
>
> Confidence levels are assigned by the system to each term it identifies. They indicate how closely the term defined in the Topic matches the term that was discovered in the audio segment. "Precision" in the report means the percentage of TPs for all the audits in the Topic whose confidence levels were equal to or above the given Thresholds. This means that each of the Thresholds includes all of the audits in the Threshold levels above it. Thus, in the example below, the 40-Threshold column includes all audits with precision values of 40 or higher, the 50-Threshold column includes all audits with confidence levels of 50 or higher, and so on.

Actions

- Click a Topic to drill down to the audit information for each of the terms in the Topic.
- Click the  to drill down to an item's details. The details show information about the precision as a function of confidence level and as a function of elapsed time in interactions.
- In the list of terms for a Topic, click the name of a term in order to open an interaction-search window and find interactions in which the term is found.

Topic Analysis - Trends

Topic Analysis - Trends

Description

The Topic Analysis - Trends report is a table that compares how often particular Topics were found in the selected time period with how often they were found in the preceding time period. Each line in the table contains information for one Topic, including the percent change between the current period and the preceding period, and the number and percent of interactions in each period in which the

Topic was found.

The baseline time period for the report is selected in the Data Set parameters (see Common Parameters). The preceding time period is automatically set by the system based on the baseline. For example, if the baseline is a two-month period, the preceding time period used is the two months preceding that baseline period.

The Percent Change is calculated by the number of calls per topic in the selected period (A) divided by the total number of calls in the selected period (B) divided by the number of calls per topic in the previous period (C) divided by the total number of calls in the previous period (D). For example, (A/B)/(C/D) = (A*D)/(B*C).

> **Important**
> This template is only available in an Analytics UI mode.

Common Usage

- Monitor Topic trends in interactions handles by the system

Customizing the Report

General Settings

See Common Parameters.

Items on Report

- **Topics:** Choose the Topics whose audits you want to examine.
- **Minimum Number of Calls:** Type in the minimum number of interactions in which a Topic must be found in order for it to be included in the results.

Actions

- Click a Topic to drill down to the trend information for each of the terms in the Topic.
- In the list of terms for a Topic, click the name of a term in order to open an interaction-search window and find interactions in which the term is found.

Topic Correlation

Topic Correlation

Description

The Topic Correlation report gives information about the co-occurrence of Topics. The report generates a list of association patterns by mining the set of Topic events for frequent and significant patterns of association. Each pattern of association is composed of a cause ("Left Hand Side") and a consequence ("Right Hand Side"); that is, each pattern identifies a particular Topic or sequence of Topics that seem to lead to the appearance of another specific Topic. For example, the report might include a pattern indicating that when the Topics Transfer and Dispute are found in an interaction, they are often followed by the Topic Dissatisfaction.

For each correlation in the report, statistical information is provided indicating how significant the correlation was in the data set:

- **Support:** How many times the pattern was found in the data set
- **Confidence:** How frequently the consequence was found in interactions in which the cause was found; that is, from the collection of interactions in which the cause was found, the percentage of interactions in which the consequence was also found
- **Lift:** How dependent the consequence was on the causes
- **Saliency:** The significance of the correlation - how much information is represented by the pattern of association

> **Important**
> This template is only available in an Analytics UI mode.

Common Usages

Identifying scenarios in the flows of interactions that tend to produce certain results Investigating the root causes of events that take place during interactions Customizing the Report

General Settings

- **Report Title:** See Common Parameters.
- **Description:** See Common Parameters.

Items on Report

- **Date:** The end-date of the Date Range included in the report
- **Date Range:** The time period to include in the report, relative to the date specified under Date
- **Program:** Select the Program to use as the data set; interactions belonging to this Program will be included in the report

- **Target Topics:** Select one or more Topics for the Right Hand Side of the report, or Any to include all Topics; only patterns associating Topics with the selected target Topics will be included in the report.
- **Minimum Lift:** The minimum degree of dependency that must be exhibited between the causes and affects of an association for the pattern to be included in the report. "Lift" is always greater than or equal to "0"; the higher the value, the greater the dependency.
- **Minimum Confidence:** The minimum confidence level required for the pattern to be included in the report. The confidence level is the percentage of those interactions in which the cause was found that also contained the consequence. Range: an integer between 0 and 100.

Usage Tracking

Usage Tracking

Description

The Usage Tracking report shows information about the activities of users over a selected date range.

Common Usage

- Monitor the activity of SpeechMiner users.
- Find out who performed the last system Apply in SMART
- See which interactions have been listened to

Customizing the Report

- **Report Title:** See Common Parameters.
- **Description:** See Common Parameters.
- **Dates:** The same as Date Range in Data Set Filters (see Common Parameters).

Actions

- Click a user to drill down to a log of the user's actions.
- In the log of user actions, click one of the tabs at the top of the list to filter the list. For example, click **Logins** to see a list of when the user logged into or out of the system.

Important

In a Recording UI mode the Applies column is not relevant and will not be included in the report.

Common Parameters

Common Parameters

The following parameters are the most common ones you will encounter. Most of them have the same function no matter which template you use. Exceptions will be briefly explained in this section, and dealt with in detail in the documentation on individual reports in the Templates section.

General Settings

Template

You can choose or switch to any of the report templates available.

Report Name

Text entered in this field will be used as a file name for the report if you choose to save the report. This name will appear under the **Saved Reports** tab for future access.

Report Title

Text entered in this field will be displayed in large, bold type at the top of the report results. The report title is optional. The name of the report template appears in this field by default, but can be modified or deleted.

Description

Text entered in this field will be displayed in fine print directly below the Report Title in the report results. The description is optional.

Version

The output of some reports can be generated in different versions - different sizes or formats In this field, select the desired output version from the dropdown list. The available options vary depending on the template. The following options may be available:

- **Full Report:** Full-size report output optimized for printing (either 11" wide x 8.5" high, or 8.5" wide by 11" high, depending on the template). Full reports often contain two parts: a graph or chart followed by a summary table which may also contain additional details.
  In some cases, when a Full report contains items that can be expanded to display more details, the version has two options, **Expanded** and **Collapsed**. When **Full Report (Expanded)** is selected, all items are initially expanded when the report is displayed; when **Full Report (Collapsed)** is selected, all items are initially collapsed. In either case, the items can be expanded or collapsed by the user after the report is generated.
- **Mini:** Small output for display in the **Views** page (480px wide x 288px high).
- **Wide:** Wide-width output for display in the wider columns of the **Views** page (768px wide x 288px high).
- **Table Only:** Full-size report output that only includes the summary table; graphs and diagrams are not printed (either 11" wide x 8.5" high, or 8.5" wide by 11" high, depending on the template).
- **X-Axis Only:** For bubble charts; when this option is selected, the report output is in the form of a table with a bar graph representing the x-axis values. No bubble-chart is produced, and y-axis values are not represented (Width: 768px).
- **Y-Axis Only:** For bubble charts; when this option is selected, the report output is in the form of a table with a bar graph representing the y-axis values. No bubble-chart is produced, and x-axis values are not represented (Width: 768px)

Data Set Filters

The Data Set Filters allow you to narrow down the data from the entire database in order to base your report on a subset of the available data.

All of the Data Set Filters have an "AND" relationship, which means each filter further restricts the options available, and all interaction events and topics represented in your final data set satisfy all Data Set Filters. Should you choose options from two different filters that mutually exclude each other (e.g., a Program designated as "Customer Service France" with interactions only in French and the Language option "Dutch"), you will have zero data in your report.

Note that the parameters that appear under **Items on Report** (for example, the third row of parameters) allow you to select specific information from the base of data that is selected under Data Set Filters. Distributional information presented in the report is calculated for the items selected under Items on Report, built upon the base of data that is selected using the Data Set Filters.

The Data Set Filters appear in the Filter Panel on the left side of the report template for all reports that support them. The filters are divided into groups. The basic filters appear at the top of the Filter Panel and are always displayed when the panel is displayed. The other groups of filters can be expanded or collapsed. The following groups of filters are available:

Filter Group	Description
Basic filters	Filters for selecting interaction types, languages, and the date range. **Note:** A day begins at 0:00 and ends at 23:59. "To Date" date filters (All, Today, Week to Date, Last 7 Days, Month to Date. Last Month, Quarter to Date, Last 90 Days) include interactions until the exact time and date the report is generated. The times given are for the time zone where your Web server is deployed, and therefore are not necessarily the same as the times where you are physically located.

Filter Group	Description
SpeechMiner	Filters for selecting the Categories and Programs of interactions, and the Topics that must be found in them. For each option, select one or more values. Only interactions in which at least one of the selected values for each option was identified are included in the data set. For example, if you select three Categories and two Programs, only interactions belonging to at least one of the Categories and one of the Programs are included. You can add lines to the Categories and Topics. The logical relationship between each line is AND. For example, if one line under Categories specifies one Category and another line specifies another Category, an interaction must be in both Categories to be included. To add a line, click [+]. To create a negative filter, click the Not button beside the field. For example, to include all Categories except Category A, select Category A and select the Not button beside the Category field.
Interaction Properties	Filters that allow you to select agents, interaction length, and external interaction ID properties. • **Agents:** Select any combination of agents and workgroups. If you select a workgroup, all the agents in the workgroup are included in the data set. You can also choose to search for the "current user" rather than a specific agent or workgroup. In this case, the condition changes depending on which user runs the report. • **Interaction Length:** Select the range of interaction durations to include in the data set: In the first field, select either **Less Than**, **Between**, or **More Than**. In the second text field or fields, fill in the number of seconds. If you selected **Less Than**, only interactions that are shorter than the value you specified are included. If you selected **Between**, interactions whose durations are more than the first value and less than the second value are included. If you selected **More Than**, only interactions that are longer than the value you specified are included. • **Interaction External ID:** Type any portion of an interaction's external ID; any interactions whose external IDs include the characters you specify are included in the data set. 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

Filter Group	Description
	type **123*** to specify external IDs that begin with 123 and end with any other sequence of characters.
Metadata	Filters for selecting metadata values. 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 select any type of metadata available in your system and, if you wish, you can specify a value for it. The search results will only include interactions for which the selected type of metadata has a value defined, and, if you specify a value, for which the defined value equals the specified value.
User Actions	Filters for finding interactions that have user comments, were played back by users, about which forms were filled out, or quality checking was performed. Under **Interaction Comment Text**, specify text that must appear in a comment that a user added to an interaction. In the other fields, select the users who must have performed the specified actions.

Items on Report

The parameters in this section allow you to select specific information and calculate distributional information on the data in the data set that was specified using the Data Set Filters. If no selections are made under **Items on Report**, default values will determine how the data you have narrowed down through the Data Set Filters appear in the report.

Since the parameters in **Items on Report** differ from report to report, only the most common ones are explained in this section, listed alphabetically. Less common parameters will be explained in their respective templates.

Agents

You can select the specific Agents or Workgroups to be analyzed and displayed in your report. The default value ("Any") includes all agents. Your selections here must match up with your selections in the Data Set Filters (e.g., the same Workgroups or Agents, belonging to the same Languages and Programs), if the latter are not all set to default ("Any"). In other words, the report output will only include Agents who were selected here and who were not excluded from the data set in the Data Set Filters.

Categories

You can select specific Categories of interactions to limit the data set analyzed for your report. Your data set will include interactions belonging to any of the Categories selected. Use the default value ("Any") to include all available Categories. Note that if a single interaction belongs to multiple Categories, it will be counted as one interaction for each Category selected under this parameter. Also, bear in mind that the report output will only include interactions in Categories that were selected here and were not excluded from the data set in the Data Set Filters. Thus, if you selected certain Categories in the Data Set Filters section, only Categories that are selected both there and here will appear.

When used with Percentage of Interactions in the Data Type parameter, the report will display the ratio of {the number of interactions from the selected Categories in Items on Report} to {the number of interactions from the Categories selected for analysis in Data Set Filters}, as a percentage. Note that if one or more interactions belong to multiple Categories, the sum of the percentages of interactions for all Categories may add up to more than 100%.

Data Type or Compare

You can specify the type of data you wish to display in your report. The most common choices are:

- **Number of Interactions:** Displays the number of interactions per each report item. Data may vary depending on the other filters selected.
- **Percentage of Interactions:** Displays the percentage of interactions per report item in your data set. For additional information, see Categories (in this Items on Report section).
- **Average Interaction Duration:** Displays the average length, in minutes, of all interactions for each report item. The entire conversation for the interaction recording session is considered, excluding the wrap time after the interaction.
- **Total Resources:** Displays the total amount of time, in hours, of all the interactions per report item. It is essentially the sum of all interaction durations.

Period Type or Period

This parameter is most commonly seen on reports that show trends. The output of the report will be displayed in increments of the selected Period Type. For each increment, the value of the selected Data Type will be displayed for each particular report item. For example, if the Data Type is "Number of Interactions" and the Period Type is "Day," the number of interactions for each day in the date range included in the report will be shown.

Top or Display

In this parameter, you can choose how many of the highest or lowest values are displayed on the report. The options may include 5, 10, 15, 20, All, All Sorted, and All Unsorted.