

Quality Management Reports Overview

There are three main Quality Management reports:

- Average Quality Scores
 - This report has a wide variety of settings that allow you to display average evaluation scored in a number of different ways
- Quality Scoring Trends
 - This report allows you to see how evaluation scores are trending across variable time periods grouped by your chosen interval
- Evaluation Summary
 - This report presents evaluations in a summary form that provides the highlights at the top with additional highlighted details as well.

All of the reports share a similar interface. I'll use the Average Quality Scores report as the example report which shows shared report features. I've presented the Edit view of the report that one gets when creating a new report or when editing an existing report.

The screenshot shows the 'Average Quality Scores Report' in the 'Edit' view. The interface includes a top navigation bar, a left sidebar with an 'Edit' panel, and a main data table. Red circles with numbers 1 through 12 highlight specific UI elements:

- 1: Edit icon
- 2: Evaluation dropdown
- 3: Time period dropdown (This Month)
- 4: Filter and search input
- 5: Star icon
- 6: Edit panel title
- 7: Reset button
- 8: Additional Filters button
- 9: Agent/Speaker 1 dropdown
- 10: Data cell (80.61%)
- 11: Overall column header
- 12: Grand Total row

Agent/Speaker 1	Hire Date	Avg Duration	Egret Villa	Marge Alpina	Chey Marr	Max Prat	Greg Kish	Mary Aldino	Phil Joy	Tony	Overall
Group 5205 Customer Support											
Hison Gotal	2021-10-21	00:11:24	-	-	-	-	62.5% (1)	-	92.86% (3)	-	85.27% (4)
5205 Customer Support Subtotal	-	00:11:24	-	-	-	-	62.5% (1)	-	92.86% (3)	-	85.27% (4)
Group 11	-	00:09:32	-	-	-	-	-	94.34% (15)	-	-	94.55% (16)
Group 14	-	00:20:28	-	-	-	80.61% (7)	-	-	-	-	82.14% (8)
Group 15	-	00:29:26	70.53% (2)	-	-	87.95% (2)	-	-	-	-	82.32% (5)
Group 19	-	00:11:25	90.18% (5)	-	-	93.3% (4)	-	-	-	-	92.81% (16)
Group 20	-	00:00:00	-	-	-	-	-	91.77% (4)	-	-	91.77% (4)
Group 25	-	00:19:08	86.96% (5)	-	-	84.52% (6)	-	-	-	-	82.26% (16)
Group 26	-	00:19:42	-	-	-	81.96% (5)	-	95.35% (1)	-	-	85.63% (13)
Group 28	-	00:14:46	-	-	-	-	-	-	-	-	0% (1)
Group 29	-	00:00:00	-	-	-	-	-	-	-	-	97.34% (2)
Group 32	-	00:15:48	-	-	-	-	-	-	100% (1)	-	98.23% (20)
Group Global Application Supp...	-	00:00:00	-	-	-	-	-	-	-	-	100% (2)
Group NIA	-	00:21:21	89.68% (9)	95.89% (5)	-	74.46% (10)	-	-	-	-	86.43% (41)
Group No Screen Recording	-	00:00:22	-	-	-	-	-	-	-	74%	74% (1)
Grand Total	-	00:16:0	7.33% (21)	95% (10)	88.39% (6)	81.05% (35)	86.31% (3)	93.87% (20)	96.36% (20)	74%	89.74% (201)

1 - Report controls



From left to right the controls do the following:

- **Edit and edit indication** - If you are not in edit mode you can click this to get into edit mode. If the report has been edited but not saved a red circle with an exclamation mark appears over the icon
- **Conditional formatting** - Allows you to set up color shading of values based on rules you enter.
- **Refresh** - Forces a refresh of the report data
- **Download** - Allows you to download the report data in Excel format
- **Print** - Allows the report to be sent to a printer

2 - Evaluation date type selector



This drop down menu allows you to choose evaluations by the date the interaction occurred or the date it was evaluated.

3 - Evaluation date range selector

The screenshot shows a web interface for selecting an evaluation date range. At the top, there's a toolbar with icons for edit, text, refresh, download, and print. Below this is a dropdown menu labeled 'Evaluated Date' with 'This Month' selected. The main area is divided into two sections. The top section has fields for 'From' (12/01/2021), 'Start time' (12:00 AM), 'To' (12/09/2021), and 'End time' (11:59 PM). The bottom section displays two calendar views: 'November 2021' and 'December 2021'. The 'This Month' option is selected in the left sidebar. The 'Clear' and 'Ok' buttons are at the bottom right.

From	Start time	To	End time
12/01/2021	12:00 AM	12/09/2021	11:59 PM

November 2021							December 2021						
Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat
	1	2	3	4	5	6			1	2	3	4	
7	8	9	10	11	12	13	5	6	7	8	9	10	11
14	15	16	17	18	19	20	12	13	14	15	16	17	18
21	22	23	24	25	26	27	19	20	21	22	23	24	25
28	29	30					26	27	28	29	30	31	

Clear Ok

This section allows you to choose a date range for the evaluation date or interaction date depending on what you've chosen for the evaluation date type.

Along the left are preset periods such as Today, Last Hour, etc... It also allows one to choose Last X Days where one specifies the number of days to include. One can also choose specific calendar dates for the evaluation date range.

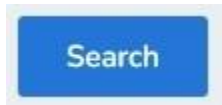
If you choose a selection in the left column the date range will be updated automatically every time the report is run. If you choose specific dates the report will only include that date range every time the report is run.

4 - Report filter textbox

The screenshot shows a single-line text input field with the placeholder text 'Filter and search'. A star icon is located at the right end of the field.

Various filters are available, please see the separate explanation of evaluation report filters

5 - Search button



The search button needs to be clicked on before changes to any of the controls in this section of the report will be applied and reflected in the report preview.

6 - Report content and presentation controls

Edit

×

Average Quality Scores

A

Metric

Average Quality Score (Evaluations)

B

▼

Add Columns

Add Columns

C

▼

Report Layout

Group By: Group

D

▼

↳ Then By: None

E

▼

Row: Agent/Speaker 1

F

▼

↔

Col: Evaluator

G

▼

Subtotals and Grand Total

H

☒

Goal Subtotals and Grand Total

I

☐

Deactivated Agents

J

☒

Layer Templates

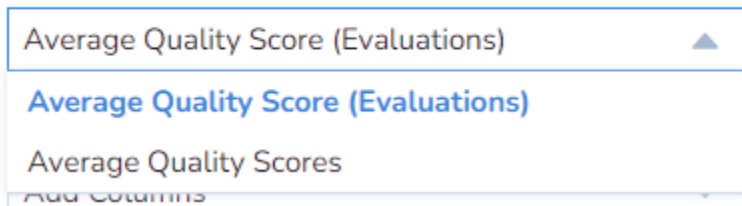
K

☒

This section of the report provides several ways to change the report output. The sections are described below.

- A. Report Title
- B. Report Metric

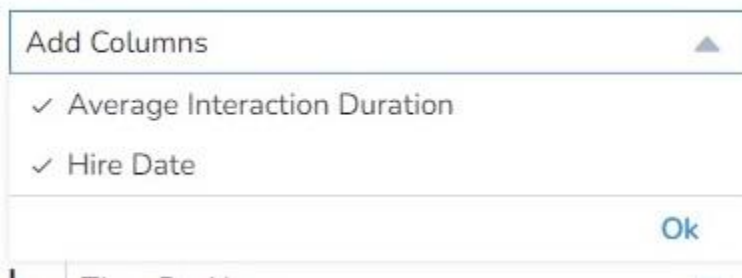
Metric

A screenshot of a dropdown menu titled "Metric". The menu is open, showing three options: "Average Quality Score (Evaluations)" (highlighted with a blue border and an upward arrow), "Average Quality Score (Evaluations)" (in blue text), and "Average Quality Scores". At the bottom of the menu, there is a partially visible option "Add Columns".

Allows the report to include both the average quality score and the number of evaluations in the average or just the average quality score

- C. Report Columns

Add Columns

A screenshot of a dialog box titled "Add Columns". The dialog box has a header bar with "Add Columns" and an upward arrow. Below the header, there are two checkboxes: "✓ Average Interaction Duration" and "✓ Hire Date". At the bottom right of the dialog box, there is a blue "Ok" button.

Allows one to include Average Interaction Duration and/or Hire Date as columns in the report.

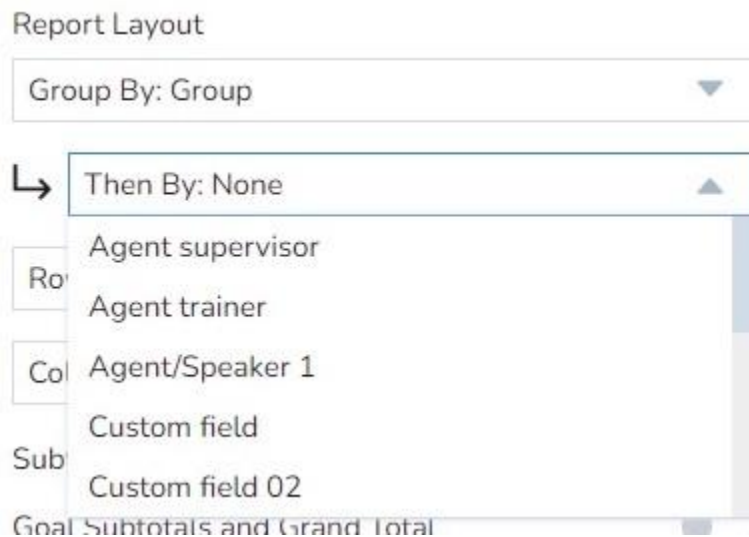
D. Report Layout (Grouping controls)



The first group by selection. Values to group by can be selected under Settings -> Reporting for the entire tenant. The values Custom Field and Custom Field 2 have been added in the example above. The standard selections are listed below:

- Agent supervisor
- Agent trainer
- Agent/Speaker 1
- Evaluation questions
- Evaluator
- Group
- Labels
- None
- Section
- Template

E. Report Layout Subgroup



The subgroup has the same standard values and additional values as described for the group above.

F. Row Type



Sets the row types in the report. The little double arrow to the right of the selection transposes rows and columns. After clicking on the double arrow you must click on the Preview button to change the report preview.

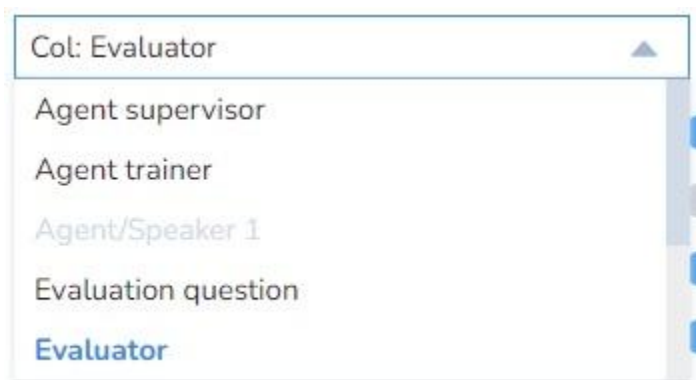
The standard rows to choose from are:

- Agent supervisor
- Agent trainer
- Agent/Speaker 1

- Evaluation question
- Evaluator
- Group
- Labels
- Section
- Template

NOTE: Any values selected for group by, subgroup by or column type will be grayed out in the list and not be available to be chosen. If you wish to use one of those values for a row type you must choose something else in the area it's already selected in.

G. Column Type



The Column Type control works in much the same way as the Row Type control described above.

H. Subtotals and Grand Total inclusion

Turns on or off subtotals and grand totals

I. Goals Subtotals and Grand Total inclusion

Turns on or off goals subtotals and grand total inclusion. When this is turned on the goals are listed at the bottom of the report as shown below:

Goals Grand Total	-	-	47.62%	(10/21)	80%	(8/10)
Grand Total	-	00:16:09	87.33%	(21)	95%	(10)

J. Deactivated Agents

Turns on and off the inclusion of deactivated agents in the report

K. Layer Templates

7 - Save and Reset buttons



The Save button saves the report with the current settings. The Reset button sets the filters to their default values for the report type and saves the report with the default values.

NOTE: Be careful using the Reset button as it will reset the filters set for an existing saved report back to default values and saves them forcing you to have to recreate the saved report if it's what you wanted. It DOES NOT reset the changed values back to what they were when the saved report was opened.

8 - Preview button



Clicking on this button after making changes in the report content and presentation section will update the report preview with those changes.

9 - Report rows

⊕ Agent/Speaker 1
▼ Group 5205 Customer Support
Huson Gotal
5205 Customer Support Subtotal
▶ Group 11
▶ Group 14
▶ Group 15
▶ Group 19
▶ Group 20
▶ Group 25
▶ Group 26
▶ Group 28
▶ Group 29
▶ Group 32
▶ Group Global Application Supp...
▶ Group N/A
▶ Group No Screen Recording
Grand Total

Depending on what you've chosen for Grouping, Subgrouping, Row Type, Subtotal and Grand

Total the rows of your report will look different. In the example above we have a Group by Group and subgroup of None. The Row Type is Agent/Speaker 1 and the Subtotal and Grand Total options are turned on.

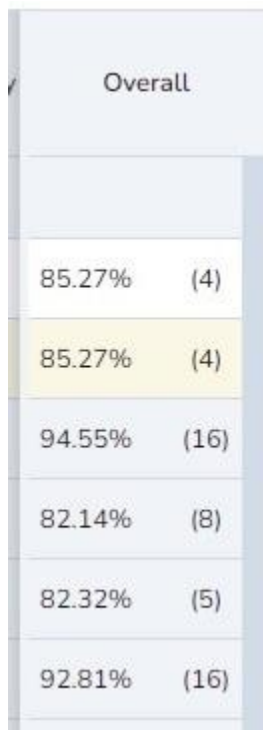
There is a scroll bar to the right of the list if the content is larger than the Row column.

10 - Report content

Hire Date	Avg Duration	Egret Villa		Marge Alpina		Chey Marr		Max Prat	
2021-10-21	00:11:24	-	-	-	-	-	-	-	-
-	00:11:24	-	-	-	-	-	-	-	-
-	00:09:32	-	-	-	-	-	-	-	-
-	00:20:28	-	-	-	-	-	-	80.61%	(7)
-	00:29:26	70.53%	(2)	-	-	-	-	87.95%	(2)
-	00:11:25	90.18%	(5)	-	-	-	-	93.3%	(4)

The image above is the upper left hand corner of the report content. It shows the rows to the right of the row column with the Hire Date and Avg Duration columns which are turned on for this report along with the columns for evaluators. The white line is the one for Huson Gotal who has no evaluations from the listed evaluators. There are more to the right and at the bottom of the section is the Report content scroll bar which allows you to move horizontally in the report. The beige line is the subtotal for Group 5205 Customer Support the group that Huson is in.

11 - Report grand totals (if selected)



The image shows a vertical list of report rows. The top row is labeled 'Overall'. Below it are several rows with percentage and count values. The second row is highlighted in yellow.

Overall	
85.27%	(4)
85.27%	(4)
94.55%	(16)
82.14%	(8)
82.32%	(5)
92.81%	(16)

The image above shows the top of the Support Grand Totals column for the rows of our report.

12 - Report content scroll bar



The image shows a horizontal report table. The first column is labeled 'Grand Total'. The other columns contain values: a hyphen, a time '00:16:09', a percentage '87.33%', a count '(21)', another percentage '95%', and another count '(10)'. A blue scroll bar is visible below the table.

Grand Total	-	00:16:09	87.33%	(21)	95%	(10)
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The image above shows the blue report content scroll bar you can move to see the content of the report that is not shown yet.