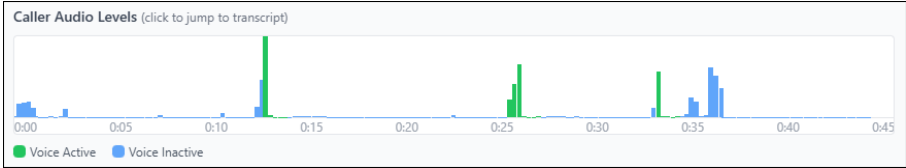
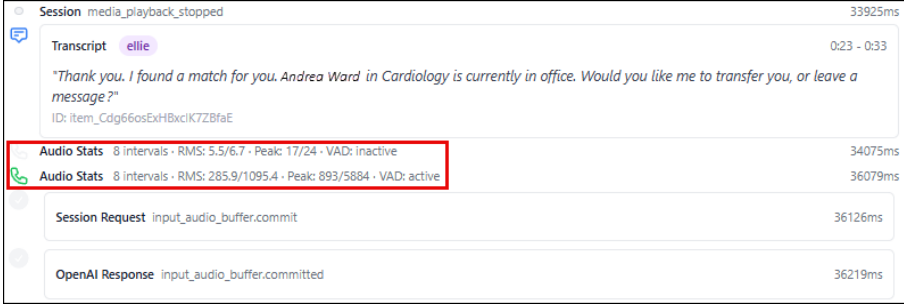




New Features in Active Insights

All rights reserved © December 2025

Please note that some of the following features may require additional licensing and hardware.

FEATURE	DESCRIPTION
<p>Caller Audio Levels Chart</p> <p><i>0.3.108</i></p>	<p>The Ellie page and Ellie Session pane contain the Caller Audio Levels chart below the Session Recording bar.</p> <p>Caller Audio Levels</p> <p>The Caller Audio Levels chart displays audio activity in quarter-second intervals. The height of each bar is determined by the Root Means Square (RMS) for each interval. The RMS represents the average absolute value of amplitude, which essentially represents the loudness of voice activity.</p>  <p>Bars in the Caller Audio Levels chart are displayed as either blue or green.</p> <ul style="list-style-type: none"> • A bar is blue when audio activity for the interval does not exceed the Voice Activity Detection (VAD) Threshold and is considered background audio. • A bar is green when audio activity for the interval exceeds the VAD Threshold and is considered caller audio. <p>The Caller Audio Levels chart is marked at five-second intervals every 20 intervals.</p> <p>Clicking on an interval sets the Session Recording bar to the matching point in the audio recording and highlights the matching spot in the Transcript.</p>
<p>Loading Indicator</p> <p><i>0.3.108</i></p>	<p>A spinner is displayed on the Call Log and Messages pages when Search Filters are applied and the table is being updated.</p>

FEATURE	DESCRIPTION
<p>Ellie Media Session Audio Status Display <i>0.3.108</i></p>	<p>The Events section of the Ellie Media Session page displays Audio Stats entries.</p>  <p>An Audio Stats entry displays data on audio statistics for quarter-second intervals, up to a maximum of eight intervals for each Audio Stats entry.</p> <p>Audio Stats entries display summary values for Root Mean Square (RMS) and Amplitude statistics and indicates whether Voice Activity Detection (VAD) was active.</p> <p>Note: If VAD was active for the interval, a call icon  is displayed to the left of the Audio Stats entry.</p> <p>Clicking the Audio Stats entry displays the Audio Stats pane. The Audio Stats pane displays detailed data for each interval.</p>  <p>Clicking the Audio Stats entry again hides the Audio Stats pane.</p>
<p>Automatic Session Timeout <i>0.3.107</i></p>	<p>Automatic Session Timeout can be enabled for the Active Insights Platform. When Automatic Session Timeout is enabled, users will be automatically logged out of Active Insights if the Active Insights platform detects that they are idle for more than five consecutive</p>

FEATURE	DESCRIPTION
	<p>minutes.</p> <div data-bbox="544 317 1411 590" style="border: 1px solid black; padding: 10px; margin: 10px 0;">  <p>Session Expiring Soon</p> <p>Your session will expire in 59 seconds due to inactivity.</p> </div> <p>A warning prompt is displayed after four consecutive minutes. The prompt displays the number of seconds remaining until the user is signed out due to inactivity, starting at 60 seconds.</p> <p>The Automatic Session Timeout feature is enabled and disabled in the Active Insights configuration settings.</p>
<p>Message Delivered and Message Discarded Filters</p> <p><i>0.3.107</i></p>	<p>The Delivered and Discarded search parameters are included under the Search menu for the Messages page in Active Insights.</p> <h3>Delivered</h3> <p>The Delivered search parameter is used to display messages based on whether the message was delivered to the recipient. Delivered filters are created using either the True or False modifier.</p> <div data-bbox="849 1119 1105 1182" style="border: 1px solid #ccc; border-radius: 5px; padding: 5px; margin: 10px 0; background-color: #f0f0f0;"> <p>Delivered False ×</p> </div> <p>If the Delivered filter was created with the True modifier, only messages that are tagged as Delivered are displayed.</p> <p>If the Delivered filter was created with the False modifier, only messages that are not tagged as Delivered are displayed.</p> <h3>Discarded</h3> <p>The Discarded search parameter is used to display messages based on whether the message was discarded. Discarded filters are created using either the True or False modifier.</p> <div data-bbox="849 1560 1105 1623" style="border: 1px solid #ccc; border-radius: 5px; padding: 5px; margin: 10px 0; background-color: #f0f0f0;"> <p>Discarded True ×</p> </div> <p>If the Discarded filter was created with the True modifier, only messages that are were Discarded are displayed.</p> <p>If the Discarded filter was created with the False modifier, only messages that were not Discarded are displayed.</p>

FEATURE

DESCRIPTION

Enhanced Message History and Script Tracker Display

0.3.107

The data in the History pane and in Script Tracker on the Message Information page are displayed in a table format. To display the History table, click the History command, and to display the Script Tracker pane, click the Script Tracker table.

History

The history table displays information about each Intelligent Series (IS) message history entries that occurred for the message. Message history entries are displayed in the order that they were logged, with message history entries that occurred first appearing highest. The following information is displayed for each message history entry:

TIMESTAMP	AGENT ID	DISPOSITION	DISPOSITION TYPE	LIST ID	TIMEZONE OFFSET	
10/27/2025 09:04:02 AM	22936	Dispatch added	Dispatch Added	0	0	No XML
10/27/2025 09:04:02 AM	1	auto dispatch started : Created by script	Auto Dispatch Started	0	0	Show XML
10/27/2025 09:04:32 AM	495	Secure message job failed to Chris Reason=MSM station(1) not configured	Page Failed	1795235	0	Show XML
10/27/2025 09:04:31 AM	1	Secure message initiated to Chris	Page Initiated	1795235	0	Show XML
10/27/2025 09:30:57 AM	18	Dispatch deleted(Deleted)	Dispatch Deleted	0	0	No XML

Timestamp

The Timestamp column displays the date and time, in hours, minutes, and seconds, that the message history entry was logged.

Agent ID

The Agent ID column displays the unique ID number assigned to the agent associated with the entry.

Disposition

The Disposition column displays the message disposition that was logged.

Disposition Type

The Disposition Type column displays the type of history entry.

List ID

The Listing ID column displays the unique ID number of the IS Directory listing associated with the entry, if any. If no IS Directory listing is associated with the entry, 0 (zero) is displayed.

Timezone Offset

The Timezone Offset column displays any timezone offset in effect for the entry.

XML

The XML column indicates whether XML (Extensible Markup Language) data is available for the message history entry.

If XML is not available for the entry, the text “No XML” is displayed.

If XML is available for the entry, the Show XML hyperlink is displayed.

FEATURE

DESCRIPTION

- If the XML data is hidden, clicking the Show XML command displays the XML data associated with the entry.
- If the XML data is displayed, clicking the Show XML command hides the XML data associated with the entry.

Script Tracker

The Script Tracker table displays information about each script event for the message. Script events are displayed in the order that they occurred, with script events that occurred first appearing highest. The following information is displayed for each script event:

TIMESTAMP	AGENT ID	AGENT NAME	LIST ID	STATION TYPE	STATION NUMBER	CLIENT NUMBER	TYPE	VALUE
10/27/2025 09:24:31 AM	22936	Jess	0	Web Agent	1024	2130	Scriptstarted	Mergecomm: False
10/27/2025 09:24:31 AM	22936	Jess	0	Web Agent	1024	2130	Branch	Name: Initialize Type: Script
10/27/2025 09:24:31 AM	22936	Jess	0	Web Agent	1024	2130	Action	CMIUserID =
10/27/2025 09:24:31 AM	22936	Jess	0	Web Agent	1024	2130	Action	CMIUserID =
10/27/2025 09:24:31 AM	22936	Jess	0	Web Agent	1024	2130	Action	CallStatus = ACD Field_acdAltCallState]
10/27/2025 09:24:31 AM	22936	Jess	0	Web Agent	1024	2130	Action	Contact =
10/27/2025 09:24:31 AM	22936	Jess	0	Web Agent	1024	2130	Action	Company =

Timestamp

The Timestamp column displays the date and time, in hours, minutes, and seconds, that the script event occurred.

Agent ID

The Agent ID column displays the unique ID number assigned to the agent involved in the script event.

Agent Name

The Agent Name column displays the Agent Name assigned to the Agent ID.

List ID

The List ID column displays the unique ID number of the IS Directory listing associated with the event, if any. If no listing is associated with the script event, 0 (zero) is displayed.

Station Type

The Station Type column displays the type of station involved in the script event.

Station Types are the categories assigned to stations based on which application is being used on the station. Some Station Types are based on applications run by a user, and some are based on applications run by the IS system. More information about Station Types can be found in the *Intelligent Series and Genesis Report Terminology* white paper.

Station Number

FEATURE	DESCRIPTION																														
	<p>The Station Number column displays the station number of the station involved in the script event.</p> <p><i>Client Number</i> The Client Number column displays the unique number assigned to the Client associated with the script event. If no Client is associated with the script event, 0 (zero) is displayed.</p> <p><i>Type</i> The Type column displays the type of script event. Script event types include Screen, ScreenMode, InputSelect, ScriptStarted, ScriptCanceled, Branch, Action, ScriptCompleted, ScriptResumed, ScriptEdited, InputValue, ContactSelect, Prompt, and PromptResponse.</p> <p><i>Value</i> The Value column displays details about the script event.</p>																														
<p>Custom Service Level Report</p> <p>0.3.106</p>	<p>The Custom Service Level report is a call report used to display service level data with custom parameters. The Custom Service Level report contains the Custom Service Level Table.</p> <p>The Custom Service Level report can be grouped by “Agent,” “Skill,” or “Client” using the Group By field.</p> <p>Additionally, the Edit Report button provides access to settings to display counts or percentages and to configure custom service level bins for the report.</p> <p>Custom Service Level Table</p> <p>The Custom Service Level table displays data calculated for the report. All Custom Service Level tables display the following columns:</p> <table border="1" data-bbox="527 1360 1425 1430"> <thead> <tr> <th>COUNT</th> <th>MAX</th> <th>AVG</th> <th>ABANDON_AGENT</th> <th>ABANDON_SYSTEM</th> <th>SLOW</th> <th>LONG</th> <th>FAIR</th> <th>GOOD</th> <th>GREAT</th> <th>BEST</th> <th>AVG_AGT_ANSWER_TIME</th> <th>AVG_ANSWER_TIME</th> <th>MAX_AGT_ANSWER_TIME</th> <th>MAX_ANSWER_TIME</th> </tr> </thead> <tbody> <tr> <td>537</td> <td>16164</td> <td>201.10</td> <td>77</td> <td>89</td> <td>0</td> <td>0</td> <td>4</td> <td>20</td> <td>78</td> <td>269</td> <td>2.96</td> <td>2.96</td> <td>46</td> <td>46</td> </tr> </tbody> </table> <p><i>Count</i> The Count column displays the total number of calls represented in the row.</p> <p><i>Max</i> The Max column displays the maximum duration in seconds of all calls in the row.</p> <p><i>Avg</i> The Avg column displays the average duration in seconds of all calls in the row.</p> <p><i>Abandon_Agent</i> The Abandon_Agent column displays either the number of calls in the row which were Agent Abandons or the percentage of all calls in the</p>	COUNT	MAX	AVG	ABANDON_AGENT	ABANDON_SYSTEM	SLOW	LONG	FAIR	GOOD	GREAT	BEST	AVG_AGT_ANSWER_TIME	AVG_ANSWER_TIME	MAX_AGT_ANSWER_TIME	MAX_ANSWER_TIME	537	16164	201.10	77	89	0	0	4	20	78	269	2.96	2.96	46	46
COUNT	MAX	AVG	ABANDON_AGENT	ABANDON_SYSTEM	SLOW	LONG	FAIR	GOOD	GREAT	BEST	AVG_AGT_ANSWER_TIME	AVG_ANSWER_TIME	MAX_AGT_ANSWER_TIME	MAX_ANSWER_TIME																	
537	16164	201.10	77	89	0	0	4	20	78	269	2.96	2.96	46	46																	

FEATURE	DESCRIPTION
	<p>row which were Agent Abandons, depending on the Edit Report Settings.</p> <p>Agent Abandons are calls in which the caller hung up after the call was distributed to an agent but before the call was answered.</p> <p><i>Abandon_System</i> The Abandon_System column displays either the number of calls in the row which were System Abandons or the percentage of all calls in the row which were System Abandons, depending on the Edit Report Settings.</p> <p>System Abandons are calls in which the caller hung up before the call was distributed to an agent.</p> <p><i>Custom Service Level Columns</i> The Service Level columns display either the total number of calls or the percentage of calls which fall into the range of one or more custom service levels created in the Edit Report Settings window.</p> <p>Calls are assigned to Custom Service Level columns based on the answer time for the call. Answer time is calculated as the number of seconds the call was in the Ring state for calls which were answered.</p> <p>The Custom Service Level table contains at least two and up to six Custom Service Level columns. The number of Custom Service Level columns, the name of each Custom Service Level column, and the answer time range used to determine which calls are represented by each Custom Service Level column are configured in the Edit Report Window settings.</p> <p><i>Avg_Agt_Answer_Time</i> The Avg_Agt_Answer_Time column displays the average number of seconds that calls were on the agent's call line before being answered.</p> <p><i>Avg_Answer_Time</i> The Avg_Answer_Time column displays the average answer time of calls represented by the row in seconds.</p> <p>Answer time is calculated as the number of seconds the call was in the Ring state for calls which were answered.</p> <p><i>Max_Agt_Answer_Time</i> The Max_Agt_Answer_Time column displays the maximum number of seconds that calls were on the agent's call line before being answered.</p> <p><i>Max_Answer_Time</i> The Max_Answer_Time column displays the highest answer time of calls represented by the row in seconds.</p> <p>Answer time is calculated as the number of seconds the call was in the</p>

FEATURE

DESCRIPTION

Ring state for calls which were answered.

Note: Additional columns may be displayed near the left side of the table depending on the option selected for the Group By field in the Report Filters section.

Edit Report Settings

When the Edit Report button is clicked, the Edit Report Settings window is displayed.

The Edit Report Settings window is used to configure custom service level bins used to categorize data generated by the Custom Service Level report. The Edit Report Settings window contains the Display field and the Service Level Bins section.

Edit Report Settings

Display

Count

Service Level Bins

Configure custom thresholds for service level reporting

Name	Threshold (seconds)
best	4
great	5
good	15
fair	30

Each bin represents calls answered within that time range.















Cancel Save Changes







Display

The Display field is used to modify the data displayed for the Abandon_Agent, Abandon_System, and Custom Service Level columns. The Display field can be set to “Count” or “Percentage.”



Count

When the Display field is set to “Count,” the affected columns display

FEATURE	DESCRIPTION						
	<p>the total number of calls that fit the parameter for each column.</p> <p><i>Percentage</i></p> <p>When the Display field is set to “Percentage,” the affected columns display the calls that fit the parameter for each column as a percentage of the total number of calls represented by the row.</p> <p>Service Level Bins</p> <p>The Service Level Bins list is used to configure between two and six custom service level bins for sorting calls in the Custom Service Level report. Each Service Level Bin represents a range of seconds, and any calls with an answer time within that range are represented in the service level column on the Custom Service Level table.</p> <p>The Service Level Bin list contains a Bin pane for each bin. Each Bin pane can contain the Name field and the Threshold field. Depending on the number of Service Level Bins created, the Delete icon  and the Add icon  may also be displayed.</p> <div data-bbox="592 884 1362 1083" style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 60%; border-bottom: 1px solid #ccc; padding: 2px 5px;">Name great</td> <td style="width: 40%; border-bottom: 1px solid #ccc; padding: 2px 5px;">Threshold (seconds) 5  </td> <td style="padding: 2px 5px;"> </td> </tr> <tr> <td colspan="3" style="padding: 2px 5px; font-size: small;">Calls answered from 5 seconds to 14 seconds</td> </tr> </table> </div> <p>Bin panes must be entered in ascending order by threshold</p> <p>Name</p> <p>The Name field is used to assign a name to the column displayed for the bin in the Custom Service Level report.</p> <p>Text entered in the Name field is displayed in the column header for the column.</p> <p>Threshold (seconds)</p> <p>The Threshold field is used to configure range in seconds for which calls with an answer time in that range are represented.</p> <p>The Threshold Range is represented at the bottom of the bin pane with the text “Calls answered from between X to Y seconds,” where X is the starting value of the range and Y is the ending value of the range.</p> <p>To update the value of a bin, enter a new number in the Threshold field.</p> <p>The Threshold value of each Service Level Bin must be greater than the Threshold value of the bin above it. If you attempt to update the Threshold value to a value that is lower than the bin above it or higher than the bin below it, Active Insights will not let you save the Edit</p>	Name great	Threshold (seconds) 5  	 	Calls answered from 5 seconds to 14 seconds		
Name great	Threshold (seconds) 5  	 					
Calls answered from 5 seconds to 14 seconds							

FEATURE	DESCRIPTION
	<p>Report Settings window until the issue is corrected.</p> <p><i>Range for First Bin</i> For the first bin, the Threshold field is used to configure the upper limit of the Range. The Range of the First Bin is between 0 and the value entered in the Threshold field.</p> <p><i>Range for Other Bins</i> For all bins after the first, the Threshold field is used to configure the lower limit of the range. The Range for all bins after the first is between the Threshold value entered for the bin and one less than the Threshold value entered for the bin below it.</p> <p>Note: It is possible to create an unrepresented range between the first bin and the second bin if the Threshold value of the second bin is more than one second higher than the Threshold value of the first bin.</p> <p>Add</p> <p>The Add icon  is used to add a bin to the Service Level Bins list. The bin is added below the bin for which the add icon was clicked.</p> <p>Note: The Service Level Bins list can contain a maximum of six bins. While six bins are active, the Add icon  is removed and no more bins can be created until one is removed.</p> <p>When the Add icon  is clicked, a new Service Level Bin is created, and a new Bin pane is displayed below the current Bin pane.</p> <p>Delete</p> <p>The Delete icon  is used to delete a bin from the Service Level Bins list.</p> <p>Note: The Service Level Bins list can contain a minimum of two bins. While only two bins are active, the Delete icon  is removed and no more bins can be removed until one is created.</p> <p>When the Delete icon  for a bin is clicked, the bin is deleted and the Bin pane is removed from the Service Level Bins list. Where possible, the threshold range of the bin above the deleted bin expands to include the range of the deleted bin.</p> <p>Note: If the second bin in the Service Level Bins list is deleted, the threshold range of neither the first bin nor the third bin will expand to include the threshold range of the deleted bin.</p> <p>Saving Changes</p> <p>All changes made to the Edit Report settings page must be saved before they go into effect.</p> <p>When the Save Changes button is clicked, changes made to the Edit</p>

FEATURE	DESCRIPTION
	<p>Report Settings page are saved.</p> <p>When the Cancel button is clicked, the changes made to the Edit Report Settings page are saved.</p>
<p>Voice Activity Detection Controls</p> <p>0.3.106</p> <p><i>Ellie feature</i></p>	<p>The System Settings page in Active Insights includes the Voice Activity Detection (VAD) settings. The VAD settings are used to trim empty space from audio before sending the audio to the Voice AI for processing</p> <div data-bbox="646 590 1307 982" data-label="Image"> </div> <p>The VAD settings includes the VAD Threshold field, the Silence Duration field, and the VAD Control field.</p> <p>VAD Threshold</p> <p>The VAD Threshold field is used to adjust the sensitivity of the Active Insights platform when determining whether a caller is speaking.</p> <p>The VAD Threshold field contains a value between 0.1 and 0.9, with a higher value threshold requiring louder activity to be considered speech.</p> <p>Silence Duration (ms)</p> <p>The Silence Duration field is used to determine the duration of silence in milliseconds from the caller that is needed before the speech segment is sent to the Voice AI and a response is generated.</p> <p>The Silence Duration field contains a value between 100 and 5000 milliseconds.</p> <p>VAD Control</p> <p>The VAD Control field is used to determine what program processes audio received by Active Insights when determining speech and speech segments.</p> <p><i>Application</i></p> <p>If “Application” is selected, the Active Insights platform captures</p>

FEATURE	DESCRIPTION
	<p>audio from the caller, parses out silence, and sends audio segments to the Voice AI as determined by the VAD Threshold and Silence Duration settings.</p> <p><i>Voice AI</i> If “Voice AI” is selected, the Active Insights platform sends audio data directly to the Voice AI, and the Voice AI provides analyses for silence and pauses.</p> <p>To save changes made to the VAD settings, click the Apply button.</p>
<p>Marked for Review Toggle</p> <p>0.3.106</p>	<p>The Marked for Review slider on the Call Information page is used to determine whether the call is marked for review.</p> <p>When the Marked for Review slider is highlighted, the call is marked for review. Clicking the Marked for Review slider when it is highlighted toggles it off.</p> <div data-bbox="792 835 1162 898" style="border: 1px solid black; padding: 2px; display: inline-block;">  Marked for Review </div> <p>When the Marked for Review slider is grayed, the call is not marked for review. Clicking the Marked for Review slider toggles it on.</p> <div data-bbox="792 1003 1162 1066" style="border: 1px solid black; padding: 2px; display: inline-block;">  Marked for Review </div> <p>Marked for Review</p> <p>When a call is marked for review, the Call Notes pane and the check mark for the call on the Call Log page are updated.</p> <p>If the call was not previously reviewed, the Call Notes pane displays “Marked for Review.”</p> <div data-bbox="852 1312 1102 1367" style="border: 1px solid black; padding: 2px; display: inline-block;"> Marked for Review </div> <p>If the call was previously reviewed, the Call Notes pane displays “Previously reviewed by:” followed by the e-mail address of the Active Insights user who reviewed the call.</p> <div data-bbox="690 1509 1265 1564" style="border: 1px solid black; padding: 2px; display: inline-block;"> Previously reviewed by: award@mmcnet.com </div> <p>The call is displayed with a red check mark ✓ on the Call Log page regardless of if the call was previously reviewed.</p> <p>Not Marked for Review</p> <p>When a call is not marked for review, the Call Notes pane and the check mark for the call on the Call Log page are updated.</p> <p>If the call was not previously reviewed, the Call Notes pane displays “Not Reviewed,” and a gray check mark is displayed for the call ✓ on</p>

FEATURE	DESCRIPTION
---------	-------------

the Call Log page.

Not Reviewed

If the call was not previously reviewed, the Call Notes pane displays “Reviewed by:” followed by the e-mail address of the Active Insights user who reviewed the call, and a green check mark is displayed for the call ✓ on the Call Log page.

Reviewed by:award@mmcnet.com

Note: If the Mark as Reviewed button is clicked, the Marked for Review setting is toggled off.

Dark Mode/Light Mode Icon
0.3.106

The Active Insights user interface can be displayed in either light mode or dark mode.

When Active Insights is displayed in light mode, the background caller is white, and accents and fonts are darker by comparison.

When Active Insights is displayed in dark mode, the background is dark grey, and accents and fonts are lighter by comparison.

Mode Toggle

The Dark Mode icon ☾ or Light Mode icon ⚙️ is located on the right side of the Active Insights Title Bar.

Note: By Default, Active Insights is displayed in Light Mode, and the Dark Mode icon is displayed. ☾



When the Dark Mode icon ☾ is clicked, Active Insights is displayed in Dark Mode, and the Dark Mode icon is replaced with the Light Mode icon. ⚙️

When the Light Mode icon ⚙️ is clicked, Active Insights is displayed in Light Mode, and the Light Mode icon is replaced with the Dark Mode icon. ☾

FEATURE	DESCRIPTION																																																																																																								
<p>Call Event Pane Display Improvement <i>0.3.106</i></p>	<p>Previously, Active Insights could only be displayed in Light Mode.</p> <p>The data in the Call Event pane on the Call Information page is displayed in a table format. To display the Call Events pane, click the Call Events command.</p> <p>The Call Events table displays information about each call event that occurred during the call. Call events are displayed in the order that they occurred in the call, with call events that occurred at the beginning of the call appearing highest. The following information is displayed about each call event:</p> <table border="1" data-bbox="529 663 1425 1104"> <thead> <tr> <th>STAMP</th> <th>TYPE</th> <th>STATE</th> <th>CLIENT NUMBER</th> <th>AGENT ID</th> <th>AGENT INITIALS</th> <th>STATION NUMBER</th> <th>VALUE</th> </tr> </thead> <tbody> <tr> <td>09/12/2025 04:57:29 PM</td> <td>Newcall</td> <td>Ring</td> <td>400100</td> <td>0</td> <td></td> <td>0</td> <td>154</td> </tr> <tr> <td>09/12/2025 04:57:29 PM</td> <td>Distribute</td> <td>Ring</td> <td>400100</td> <td>10</td> <td>w.</td> <td>1004</td> <td>Code Calls skill</td> </tr> <tr> <td>09/12/2025 04:57:32 PM</td> <td>Recording</td> <td>Ring</td> <td>400100</td> <td>10</td> <td>w.</td> <td>1004</td> <td>Starting</td> </tr> <tr> <td>09/12/2025 04:57:32 PM</td> <td>Answered</td> <td>Talk</td> <td>400100</td> <td>10</td> <td>w.</td> <td>1004</td> <td></td> </tr> <tr> <td>09/12/2025 04:57:32 PM</td> <td>Screenrecording</td> <td>Talk</td> <td>400100</td> <td>10</td> <td>w.</td> <td>1004</td> <td>Started</td> </tr> <tr> <td>09/12/2025 04:58:03 PM</td> <td>Recording</td> <td>Talk</td> <td>400100</td> <td>10</td> <td>w.</td> <td>1004</td> <td>Stopping</td> </tr> <tr> <td>09/12/2025 04:58:03 PM</td> <td>Hold</td> <td>Hold</td> <td>400100</td> <td>10</td> <td>w.</td> <td>1004</td> <td></td> </tr> <tr> <td>09/12/2025 04:58:03 PM</td> <td>Screenrecording</td> <td>Hold</td> <td>400100</td> <td>10</td> <td>w.</td> <td>1004</td> <td>Stopped</td> </tr> <tr> <td>09/12/2025 04:58:18 PM</td> <td>Hungup</td> <td>Hold</td> <td>400100</td> <td>10</td> <td>w.</td> <td>1004</td> <td></td> </tr> <tr> <td>09/12/2025 05:04:13 PM</td> <td>Screenrecording</td> <td>Disc</td> <td>400100</td> <td>10</td> <td>w.</td> <td>1004</td> <td>Started</td> </tr> <tr> <td>09/12/2025 05:04:14 PM</td> <td>Endcall</td> <td>Disposed</td> <td>400100</td> <td>10</td> <td>w.</td> <td>1004</td> <td></td> </tr> <tr> <td>09/12/2025 05:04:15 PM</td> <td>Screenrecording</td> <td>Unknown</td> <td>0</td> <td>10</td> <td>w.</td> <td>1004</td> <td>Stopped</td> </tr> </tbody> </table> <p>Stamp The Stamp column displays the date and time, in hours, minutes, and seconds, that the call event occurred.</p> <p>Type The Type column displays the Call Event Type. More information about call events is provided in the <i>Intelligent Series and Genesis Report Terminology</i> white paper.</p> <p>State The State column displays the Call State at the time of the call event. More information about Call States is provided in the <i>Intelligent Series and Genesis Report Terminology</i> white paper</p> <p>Client Number The Client Number column displays the Client Number of the Intelligent Series (IS) Client on which the call came into the system.</p> <p>Agent ID The Agent ID column displays the unique ID number assigned to the agent who took the call.</p> <p>Agent Initials The Agent Initials column displays the Agent Initials of the agent who took the call.</p>	STAMP	TYPE	STATE	CLIENT NUMBER	AGENT ID	AGENT INITIALS	STATION NUMBER	VALUE	09/12/2025 04:57:29 PM	Newcall	Ring	400100	0		0	154	09/12/2025 04:57:29 PM	Distribute	Ring	400100	10	w.	1004	Code Calls skill	09/12/2025 04:57:32 PM	Recording	Ring	400100	10	w.	1004	Starting	09/12/2025 04:57:32 PM	Answered	Talk	400100	10	w.	1004		09/12/2025 04:57:32 PM	Screenrecording	Talk	400100	10	w.	1004	Started	09/12/2025 04:58:03 PM	Recording	Talk	400100	10	w.	1004	Stopping	09/12/2025 04:58:03 PM	Hold	Hold	400100	10	w.	1004		09/12/2025 04:58:03 PM	Screenrecording	Hold	400100	10	w.	1004	Stopped	09/12/2025 04:58:18 PM	Hungup	Hold	400100	10	w.	1004		09/12/2025 05:04:13 PM	Screenrecording	Disc	400100	10	w.	1004	Started	09/12/2025 05:04:14 PM	Endcall	Disposed	400100	10	w.	1004		09/12/2025 05:04:15 PM	Screenrecording	Unknown	0	10	w.	1004	Stopped
STAMP	TYPE	STATE	CLIENT NUMBER	AGENT ID	AGENT INITIALS	STATION NUMBER	VALUE																																																																																																		
09/12/2025 04:57:29 PM	Newcall	Ring	400100	0		0	154																																																																																																		
09/12/2025 04:57:29 PM	Distribute	Ring	400100	10	w.	1004	Code Calls skill																																																																																																		
09/12/2025 04:57:32 PM	Recording	Ring	400100	10	w.	1004	Starting																																																																																																		
09/12/2025 04:57:32 PM	Answered	Talk	400100	10	w.	1004																																																																																																			
09/12/2025 04:57:32 PM	Screenrecording	Talk	400100	10	w.	1004	Started																																																																																																		
09/12/2025 04:58:03 PM	Recording	Talk	400100	10	w.	1004	Stopping																																																																																																		
09/12/2025 04:58:03 PM	Hold	Hold	400100	10	w.	1004																																																																																																			
09/12/2025 04:58:03 PM	Screenrecording	Hold	400100	10	w.	1004	Stopped																																																																																																		
09/12/2025 04:58:18 PM	Hungup	Hold	400100	10	w.	1004																																																																																																			
09/12/2025 05:04:13 PM	Screenrecording	Disc	400100	10	w.	1004	Started																																																																																																		
09/12/2025 05:04:14 PM	Endcall	Disposed	400100	10	w.	1004																																																																																																			
09/12/2025 05:04:15 PM	Screenrecording	Unknown	0	10	w.	1004	Stopped																																																																																																		

FEATURE	DESCRIPTION
	<p><i>Station Number</i> The Station column displays the Station Number of the station at which the call event occurred. If the event happened while the call was not on a station, 0 (zero) is displayed.</p> <p><i>Value</i> If the call event has a value associated with it, the Value column displays the value.</p>
<p>Deepgram Voice AI Integration <i>0.3.105</i> <i>Ellie feature</i></p>	<p>Deepgram Voice AI offers alternative voice artificial intelligence (AI) option for Ellie scripting. The Deepgram option has been added as Scripting Type for Ellie-activated Intelligent Messaging scripts, and an Ellie Usage – Deepgram widget may be displayed on the Client Usage page in Active Insights.</p> <div data-bbox="756 762 1200 1110" style="border: 1px solid black; padding: 10px; margin: 10px auto; width: fit-content;"> <p style="text-align: center;">Ellie Usage - Deepgram</p> <p style="text-align: center;">3.6 Minutes</p> <p style="text-align: center;">5 Sessions</p> </div>
<p>Customer Account Management <i>0.3.105</i></p>	<p>Active Insights administrators can now deactivate customer accounts. When an administrator deactivates a customer account, they can select a period of days equal to or less than 365 days for which customer data is retained.</p>
<p>Ellie Usage Tracked by Scripting Type. <i>0.3.105</i> <i>Ellie feature</i></p>	<p>An Ellie Usage widget is displayed for each Scripting Type for which usage is present in the billing period. Each Ellie Usage widget is labeled as “Ellie Usage” followed by a hyphen and the Scripting Type for which data is presented.</p>

FEATURE	DESCRIPTION								
	<div data-bbox="678 262 1276 747" style="border: 1px solid #ccc; padding: 10px; margin-bottom: 10px;"> <p>Ellie Usage - Expert ?</p> <p>645.4 Minutes</p> <p>486 Sessions</p> <p>Total Tokens: 10.7M tokens</p> <p>gpt-4o-realtime-preview-2025-06-03</p> <p>Input: 19.8M (Text: 16.9M, Audio: 2.9M)</p> <p>Output: 522.1k (Text: 132.0k, Audio: 390.2k)</p> <p>Cached: Text: 13.4M, Audio: 2.5M</p> </div> <p>The data displayed for each Ellie Usage widget is specific to the listed Scripting Type for the current billing period. The Scripting Type is configured under the Ellie tab in the Script Properties for each Intelligent Messaging script in Web Supervisor and Intelligent Series (IS) Supervisor.</p>								
<p>AI and Ellie Data in Client Usage Report</p> <p><i>0.3.102</i></p> <p><i>Ellie feature</i></p>	<p>The Client Usage Report includes columns that display AI and Ellie usage data. The Client Usage Report contains the following columns:</p> <table border="1" data-bbox="527 1075 1427 1295" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">AI_POST_CALL_TOKENS</th> <th style="text-align: left;">AI_SCRIPTING_TOKENS</th> <th style="text-align: left;">ELLIE_SESSION_COUNT</th> <th style="text-align: left;">ELLIE_DURATION_MINUTES</th> </tr> </thead> <tbody> <tr> <td style="text-align: left;">299.2k AI Units</td> <td style="text-align: left;">0.0 AI Units</td> <td style="text-align: left;">241</td> <td style="text-align: left;">180.2</td> </tr> </tbody> </table> <p><i>AI_Post_Call_Tokens</i> The AI_Post_Call_Tokens column displays the total number of AI Units used by the Client for Post Call Scoring.</p> <p><i>AI_Scripting_Tokens</i> The AI Scripting Tokens column displays the total number of AI Units used by the Client for scripting.</p> <p><i>Ellie_Session_Count</i> The Ellie Session Count column displays the number of Ellie sessions created by the Client.</p> <p><i>Ellie_Duration_Minutes</i> The Ellie Duration Minutes column displays the total duration of Ellie sessions for the Client in minutes rounded to the first decimal position.</p>	AI_POST_CALL_TOKENS	AI_SCRIPTING_TOKENS	ELLIE_SESSION_COUNT	ELLIE_DURATION_MINUTES	299.2k AI Units	0.0 AI Units	241	180.2
AI_POST_CALL_TOKENS	AI_SCRIPTING_TOKENS	ELLIE_SESSION_COUNT	ELLIE_DURATION_MINUTES						
299.2k AI Units	0.0 AI Units	241	180.2						
<p>Ellie Usage Tracking</p>	<p>Ellie Usage widgets are displayed under the “Usage for current billing</p>								

FEATURE	DESCRIPTION
<p>0.3.102</p> <p><i>Ellie feature</i></p>	<p>period” breakdown on the Usage page.</p> <h3>Ellie Usage</h3> <p>Ellie Usage widgets are used to display usage statistics for Ellie for the billing period.</p> <div data-bbox="678 457 1276 940" style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"><p>Ellie Usage ?</p><h2 style="margin: 0;">645.4 Minutes</h2><p>486 Sessions</p><p>Total Tokens: 10.7M tokens</p><p><small>gpt-4o-realtime-preview-2025-06-03</small></p><p><small>Input: 19.8M (Text: 16.9M, Audio: 2.9M)</small></p><p><small>Output: 522.1k (Text: 132.0k, Audio: 390.2k)</small></p><p><small>Cached: Text: 13.4M, Audio: 2.5M</small></p></div> <p>Each Ellie Usage widget displays the following values for the billing period:</p> <ul style="list-style-type: none">• The total duration of Ellie sessions in minutes, rounded to the first decimal position.• The number of sessions.• The total number AI Tokens used.• The AI model and version used.• The total number of input tokens used, additionally broken down by input tokens for text and input tokens for audio.• The total number of output token used, additionally broken down by output tokens for text and output tokens for audio.• The total number of cached tokens used, additionally broken down by cached tokens for text and cached tokens for audio.

FEATURE	DESCRIPTION																														
<p>AI Client Usage <i>0.3.102</i></p>	<p>AI usage under the “Usage for current billing period” section of the Usage page contains a widget for AI usage depending on usage type.</p> <div data-bbox="760 352 1195 667" style="border: 1px solid black; padding: 10px; margin: 10px auto; width: fit-content;"> <p>Post Call Scoring ?</p> <p>314.8k AI Units</p> <p>Total Prompt Tokens: 226.8k Total Completion Tokens: 88.1k</p> </div> <p>An AI usage widget is displayed for Ellie, Post Call Scoring, and Scripting. Each widget displays the total number of AI Tokens used for the usage type, the total number of prompt tokens and the total number of completion tokens.</p>																														
<p>Agent Groups <i>0.3.101</i></p>	<p>Active Insights supports the use of customizable Agent Groups.</p> <p>Agent Groups are used to create a collection of one or more Agent IDs that can be associated with an Agent Configuration or used in an Agent filter on the Call Log, Message Log, or Reports page.</p> <p>Agent Groups are created and managed on the Agent Settings page under the Agent Groups list</p> <p>Agent Groups List</p> <div data-bbox="691 1199 1263 1896" style="border: 1px solid black; padding: 10px; margin: 10px auto; width: fit-content;"> <p>Agent Groups</p> <p>List of agent groups currently setup. Agent groups are a collection of non-contiguous agent ids that can be associated with a configuration and/or searched on.</p> <p style="text-align: right;">Add Agent Group</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">Name</th> <th></th> <th></th> </tr> </thead> <tbody> <tr> <td>Commercial</td> <td style="text-align: right;">Edit</td> <td style="text-align: right;">Delete</td> </tr> <tr> <td>Demo Agents</td> <td style="text-align: right;">Edit</td> <td style="text-align: right;">Delete</td> </tr> <tr> <td>Dispatcher</td> <td style="text-align: right;">Edit</td> <td style="text-align: right;">Delete</td> </tr> <tr> <td>E Test</td> <td style="text-align: right;">Edit</td> <td style="text-align: right;">Delete</td> </tr> <tr> <td>G Test</td> <td style="text-align: right;">Edit</td> <td style="text-align: right;">Delete</td> </tr> <tr> <td>Healthcare</td> <td style="text-align: right;">Edit</td> <td style="text-align: right;">Delete</td> </tr> <tr> <td>Team Lead</td> <td style="text-align: right;">Edit</td> <td style="text-align: right;">Delete</td> </tr> <tr> <td>Test Config</td> <td style="text-align: right;">Edit</td> <td style="text-align: right;">Delete</td> </tr> <tr> <td>Trainee</td> <td style="text-align: right;">Edit</td> <td style="text-align: right;">Delete</td> </tr> </tbody> </table> </div>	Name			Commercial	Edit	Delete	Demo Agents	Edit	Delete	Dispatcher	Edit	Delete	E Test	Edit	Delete	G Test	Edit	Delete	Healthcare	Edit	Delete	Team Lead	Edit	Delete	Test Config	Edit	Delete	Trainee	Edit	Delete
Name																															
Commercial	Edit	Delete																													
Demo Agents	Edit	Delete																													
Dispatcher	Edit	Delete																													
E Test	Edit	Delete																													
G Test	Edit	Delete																													
Healthcare	Edit	Delete																													
Team Lead	Edit	Delete																													
Test Config	Edit	Delete																													
Trainee	Edit	Delete																													

FEATURE	DESCRIPTION
---------	-------------

The Agent Groups list displays Agent Groups created for the system. Each Agent Group listing displays the name of the Agent Group, the Edit command, and the Delete command.

Add Agent Group

Agent Groups can be added to the Agent Groups list using the Add Agent Group button.

When the Agent Group button is clicked, a new Agent Group is added to the Agent Groups list and the Agent Group Configuration page for the new Agent Group is displayed.

Delete

The Delete command is used to delete an Agent Group from the Agent Groups list. When the Delete command next to an Agent Group listing is clicked, the associated Agent Group is deleted.

Edit

The Edit command is used to open the Agent Group page.

Agent Group

The Agent Group page is used to add and remove Agents from the Agent Group. The Agent Group page contains the Name field, the Associated Agents section, and the Added Agents list.

Agent Group
A selection of agents as a named group

Name
Provide a unique name for group

Trainee
✎ Rename


Associate Agents
Configuration settings will apply to all associated agent numbers

Add an individual Agent

+ Add

Added Agents

Agent	
amy	Remove
adam	Remove
ryan	Remove

FEATURE	DESCRIPTION
	<p>Name</p> <p>The Name field is used to set the name of the Agent Group.</p> <p>Associated Agents</p> <p>The Associated Agents section is used to add one or more Agent IDs to the Agent Group. The Associated Agents section contains the “Add an individual Agent” field.</p> <p>Add an individual Agent</p> <p>The “Add an individual Agent” field is used to add an individual Agent to the Agent Group.</p> <p>Once an Agent is entered in the “Add an individual Agent” field, the Agent is added to the Agent Group.</p> <p>Added Agents</p> <p>The Added Agents list displays a list of individual Agent IDs added to the Agent Group. Each listing displays the Agent Name and the Remove command.</p> <p>Remove</p> <p>The Remove command is used to remove an Agent listing from the Agent list.</p> <p>To remove an Agent listing, click the Remove command. A prompt is displayed asking if you would like to remove the associated Agent listing. If you are sure you want to delete the Agent listing, click the Delete button. The Agent listing is removed from the Added Agents list.</p>
<p>Ellie Sessions in Call Log</p> <p><i>0.3.100</i></p> <p><i>Ellie feature</i></p>	<p>Ellie is Amtelco’s Intelligent Virtual Agent (IVA). Ellie uses Amtelco’s patented Intelligent Speech-Enabled Scripting to interact with callers using Artificial Intelligence.</p> <p>Calls which included an Ellie session and related data are stored in Active Insights Cloud Storage. Calls with Ellie sessions can be found using the Active Insights Call Log, and additional call information for calls with Ellie sessions are presented on the Call Information page for Ellie calls listed in the Call Log.</p> <p>Call Log</p> <p>Calls with Ellie sessions can be accessed through the Active Insights Call Log. Call listings with Ellie sessions contain the Ellie icon in the Media column  of the Call Log.</p> <p>Details for the Ellie sessions are displayed on the Call Information page for the call.</p>

FEATURE	DESCRIPTION
---------	-------------

Filtering by Ellie

The Call Log can be filtered by whether each call listing has an Ellie session using the “Has Ellie” check box in the Media search parameter.

To filter the Call Log to only display call listings which contain an Ellie session, click the Search field and select the Media search parameter.

The “Media” modifier is displayed, and a check box is displayed by which the listings can be filtered.

Select the check box next to the “Has Ellie” media type, and then click the Apply button.

A Filter pane is displayed, and only calls with an Ellie session are displayed.

Call Information

The Call Information page for calls with Ellie sessions display details about the Ellie session. In addition to the default components of the Call Information page, the Call Information page contains an Ellie Session pane for each session generated by the call.

Call Information

Ellie 000:00:48 - 96.52%

Screen Recording

Messages ▾

Call Events ▾

Ellie Session - 0:48 ▾

Ellie Session

Client: 80015 - Ellie - ABC Plumbing

Started: 08/27/2025 11:43:19 AM

Scripting Type: Expert

Completed

Duration 48.37s	Input Tokens 3,994	Output Tokens 223
---------------------------	------------------------------	-----------------------------

Transcripts

Ellie

Thank you for calling ABC Plumbing.

4663ms

🔊
▶ 0:00 / 0:01
⏸
⏹

Caller

Thank you.

5587ms

🔊

Ellie

We have a new emergency service request for you, would you like to hear the message now?

7559ms

🔊


FEATURE	DESCRIPTION
	<p>Ellie Sessions</p> <p>Ellie Sessions panes are used to view the details of an Ellie session. Each Ellie session pane is labeled as “Ellie Session” followed by a hyphen and the duration of the Ellie session.</p> <p>To display the details of an Ellie session, click the label of a collapsed Ellie session.</p> <p>The Ellie Session pane is expanded</p> <p>To hide the details of an Ellie session, click the label of an expanded Ellie session.</p> <p>The Ellie Session pane is collapsed.</p> <p>Note: Ellie Session panes are collapsed by default.</p> <p>The Ellie Session pane contains the Details section, the Usage section, and the Transcript section</p> <p>Details</p> <p>The Details section displays basic information about the Ellie Session. The Details section displays the Client field, the Started field, and the Scripting Type field.</p> <p><i>Client</i></p> <p>The Client field displays the Client Number and Client Name of the Client on which the Ellie session was initiated.</p> <p><i>Started</i></p> <p>The Started field displays the date and time at which the Ellie session began. The date is displayed in dd/mm/yyyy format, and the time is displayed in hh/mm/ss format.</p> <p><i>Scripting Type</i></p> <p>The Scripting Type field displays the value of the Scripting Type field as it was set in the Intelligent Messaging script for the call.</p> <p>Usage</p> <p>The Usage section displays Artificial Intelligence usage information. The Usage section displays the Duration field, the Input Tokens field and the Output Tokens field.</p> <p><i>Duration</i></p> <p>The Duration field displays the duration of the Ellie session. The Duration field displays the number of seconds that the Ellie session lasted to the second decimal position.</p> <p><i>Input Tokens</i></p> <p>The Input Tokens field displays the number of AI Input Tokens used by the Ellie session.</p>

FEATURE	DESCRIPTION
---------	-------------



FEATURE

Output Tokens
 The Output Tokens field displays the number of AI Output Tokens used by the Ellie session.


Transcripts
 The Transcripts field displays the transcript of the conversation between the caller and the Ellie Intelligent Virtual Agent (IVA). Each transcript segment displays the following:

- Whether the caller or IVA spoke.
- Text transcription of what the speaker said.
- The number of milliseconds into the Ellie session at which the line was spoken.
- An Audio icon. 

The Audio icon is used to toggle the display of a Playback bar for the segment of the transcript

- To display the Playback bar, click the Audio icon  in a segment for which the Playback bar is not displayed.
- To hide the Playback bar, click the Audio icon  in a segment for which the Playback bar is displayed.

Playback Bar



The Playback bar is used to control the play back of audio which was transcribed for the segment of the transcript in which it is displayed. More information about the Playback bar can be found in the *Active Insights User Guide*.

Client Usage Report
 0.3.95

The Reports page contains the Client Usage report. The Client Usage report is a system level report that displays storage usage data for Clients in the system. The Client Usage report contains the Client Usage Table.

CLIENT_NUMBER	CLIENT_NAME	VOICE_RECORDING_COUNT	VOICE_RECORDING_SIZE	SCREEN_RECORDING_COUNT	SCREEN_RECORDING_SIZE	MESSAGE_COUNT	MESSAGE_SIZE	CALL_COUNT	CALL_SIZE
3	Account Help	0	0.00	0		1	6.27k	5	43.44k
314	Mercy Medical Network	857	32.52M	100	266.27G	0	0.00	0	0.00
2144	Hospital Emergency Codes	266	10.52M	157	400.69M	138	4.76M	286	1.23M
400100	Code Script Template	8	432.75k	8		60	5.69M	42	183.52k

Client Usage Table
 The Client Usage table displays a list of client statistics related to data

FEATURE	DESCRIPTION																								
	<p>and storage usage. Information displayed in the Client Usage table is organized in ascending order by Client Number.</p> <p>The Client Number table displays the following columns:</p> <table border="1"> <thead> <tr> <th data-bbox="529 405 743 436">Column</th> <th data-bbox="743 405 1425 436">Description</th> </tr> </thead> <tbody> <tr> <td data-bbox="529 457 743 562">Client Number</td> <td data-bbox="743 457 1425 562">The Client Number column displays each Client Number for which storage is allocated in Active Insights.</td> </tr> <tr> <td data-bbox="529 583 743 730">Client Name</td> <td data-bbox="743 583 1425 730">The Client Name column displays the Client Name assigned to the Client Number in the Client Setup pages of Web Supervisor or Intelligent Series (IS) Supervisor.</td> </tr> <tr> <td data-bbox="529 751 743 856">Video Recording Count</td> <td data-bbox="743 751 1425 856">The Video Recording Count column displays the number of audio recordings in Cloud Storage for the Client.</td> </tr> <tr> <td data-bbox="529 877 743 982">Video Recording Size</td> <td data-bbox="743 877 1425 982">The Video Recording Size column displays the amount of storage utilized by audio recordings in Cloud Storage for the Client.</td> </tr> <tr> <td data-bbox="529 1003 743 1108">Screen Recording Count</td> <td data-bbox="743 1003 1425 1108">The Screen Recording Count column displays the number of Screen Capture recordings in Cloud Storage for the Client.</td> </tr> <tr> <td data-bbox="529 1129 743 1234">Screen Recording Size</td> <td data-bbox="743 1129 1425 1234">The Screen Recordings Size column displays the amount of storage utilized by Screen Capture recordings in Cloud Storage for the Client.</td> </tr> <tr> <td data-bbox="529 1255 743 1318">Message Count</td> <td data-bbox="743 1255 1425 1318">The Message Count column displays the number of messages in Cloud Storage for the Client.</td> </tr> <tr> <td data-bbox="529 1339 743 1444">Message Size</td> <td data-bbox="743 1339 1425 1444">The Messages Size column displays the amount of Cloud Storage utilized by message data for the Client.</td> </tr> <tr> <td data-bbox="529 1465 743 1528">Call Count</td> <td data-bbox="743 1465 1425 1528">The Call Count column displays the number of calls in Cloud Storage for the Client.</td> </tr> <tr> <td data-bbox="529 1549 743 1696">Calls Size</td> <td data-bbox="743 1549 1425 1696">The Calls Size column displays the amount of Cloud Storage utilized by the basic call data for the Client, such as associated Clients, agents, call events, start time, and the Call ID</td> </tr> <tr> <td data-bbox="529 1717 743 1822">Transcription Usage</td> <td data-bbox="743 1717 1425 1822">The Transcription Usage column displays the number of hours of transcription that have been used by the Client.</td> </tr> </tbody> </table>	Column	Description	Client Number	The Client Number column displays each Client Number for which storage is allocated in Active Insights.	Client Name	The Client Name column displays the Client Name assigned to the Client Number in the Client Setup pages of Web Supervisor or Intelligent Series (IS) Supervisor.	Video Recording Count	The Video Recording Count column displays the number of audio recordings in Cloud Storage for the Client.	Video Recording Size	The Video Recording Size column displays the amount of storage utilized by audio recordings in Cloud Storage for the Client.	Screen Recording Count	The Screen Recording Count column displays the number of Screen Capture recordings in Cloud Storage for the Client.	Screen Recording Size	The Screen Recordings Size column displays the amount of storage utilized by Screen Capture recordings in Cloud Storage for the Client.	Message Count	The Message Count column displays the number of messages in Cloud Storage for the Client.	Message Size	The Messages Size column displays the amount of Cloud Storage utilized by message data for the Client.	Call Count	The Call Count column displays the number of calls in Cloud Storage for the Client.	Calls Size	The Calls Size column displays the amount of Cloud Storage utilized by the basic call data for the Client, such as associated Clients, agents, call events, start time, and the Call ID	Transcription Usage	The Transcription Usage column displays the number of hours of transcription that have been used by the Client.
Column	Description																								
Client Number	The Client Number column displays each Client Number for which storage is allocated in Active Insights.																								
Client Name	The Client Name column displays the Client Name assigned to the Client Number in the Client Setup pages of Web Supervisor or Intelligent Series (IS) Supervisor.																								
Video Recording Count	The Video Recording Count column displays the number of audio recordings in Cloud Storage for the Client.																								
Video Recording Size	The Video Recording Size column displays the amount of storage utilized by audio recordings in Cloud Storage for the Client.																								
Screen Recording Count	The Screen Recording Count column displays the number of Screen Capture recordings in Cloud Storage for the Client.																								
Screen Recording Size	The Screen Recordings Size column displays the amount of storage utilized by Screen Capture recordings in Cloud Storage for the Client.																								
Message Count	The Message Count column displays the number of messages in Cloud Storage for the Client.																								
Message Size	The Messages Size column displays the amount of Cloud Storage utilized by message data for the Client.																								
Call Count	The Call Count column displays the number of calls in Cloud Storage for the Client.																								
Calls Size	The Calls Size column displays the amount of Cloud Storage utilized by the basic call data for the Client, such as associated Clients, agents, call events, start time, and the Call ID																								
Transcription Usage	The Transcription Usage column displays the number of hours of transcription that have been used by the Client.																								

FEATURE	DESCRIPTION																											
	<p>A.I. Usage The A.I. Usage column displays the number of AI Units that have been used by the Client.</p> <p>Note: Each AI Unit represents 1000 tokens.</p>																											
<p>Filter by Message ID <i>0.3.93</i></p>	<p>The search parameters list for the Search field on the Message page includes the Message ID search parameter.</p> <div data-bbox="813 520 1141 646" style="border: 1px solid black; padding: 5px; margin: 10px auto; width: fit-content;"> <p>MessageID 1234567 ×</p> </div> <p>The Message ID search parameter is used to display the message listing with the unique Message ID number. When the Message ID filter is created, only the listing with the unique Message ID entered for the filter is displayed.</p>																											
<p>Client Groups <i>0.3.89</i></p>	<p>Active Insights supports the use of customizable Client Groups. Client Groups are used to create a collection of one or more non-contiguous Client Numbers that can be associated with a Client Configuration or used in a Client filter on the Call Log, Message Log, or Reports page.</p> <p>Client Groups are created and managed on the Client Settings page under the Client Groups list</p> <p>Client Groups List</p> <div data-bbox="678 1209 1276 1831" style="border: 1px solid black; padding: 10px; margin: 10px auto;"> <p>Client Groups</p> <p>List of client groups currently setup. Client groups are a collection of non-contiguous client numbers that can be associated with a configuration and/or searched on.</p> <p style="text-align: right;">Add Client Group</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">Name</th> <th></th> <th></th> </tr> </thead> <tbody> <tr> <td>AI Scoring</td> <td style="text-align: right;">Edit</td> <td style="text-align: right;">Delete</td> </tr> <tr> <td>Advanced Scoring</td> <td style="text-align: right;">Edit</td> <td style="text-align: right;">Delete</td> </tr> <tr> <td>Billing Group</td> <td style="text-align: right;">Edit</td> <td style="text-align: right;">Delete</td> </tr> <tr> <td>Codes</td> <td style="text-align: right;">Edit</td> <td style="text-align: right;">Delete</td> </tr> <tr> <td>Page Test</td> <td style="text-align: right;">Edit</td> <td style="text-align: right;">Delete</td> </tr> <tr> <td>Evan Test</td> <td style="text-align: right;">Edit</td> <td style="text-align: right;">Delete</td> </tr> <tr> <td>Medical</td> <td style="text-align: right;">Edit</td> <td style="text-align: right;">Delete</td> </tr> <tr> <td>Mercy Medical</td> <td style="text-align: right;">Edit</td> <td style="text-align: right;">Delete</td> </tr> </tbody> </table> </div> <p>The Client Groups list displays Client Groups created for the system. Each Client Group listing displays the name of the Client Group, the</p>	Name			AI Scoring	Edit	Delete	Advanced Scoring	Edit	Delete	Billing Group	Edit	Delete	Codes	Edit	Delete	Page Test	Edit	Delete	Evan Test	Edit	Delete	Medical	Edit	Delete	Mercy Medical	Edit	Delete
Name																												
AI Scoring	Edit	Delete																										
Advanced Scoring	Edit	Delete																										
Billing Group	Edit	Delete																										
Codes	Edit	Delete																										
Page Test	Edit	Delete																										
Evan Test	Edit	Delete																										
Medical	Edit	Delete																										
Mercy Medical	Edit	Delete																										

FEATURE	DESCRIPTION
	<p>Edit command, and the Delete command.</p> <p>Add Client Group</p> <p>Client Groups can be added to the Client Groups list using the Add Client Group button.</p> <p>When the Client Group button is clicked, a new Client Group is added to the Client Groups list and the Client Group Configuration page for the new Client Group is displayed.</p> <p>Delete</p> <p>The Delete command is used to delete a Client Group from the Client Groups list. When the Delete command next to a Client Group listing is clicked, the associated Client Group is deleted.</p> <p>Edit</p> <p>The Edit command is used to open the Client Group Configuration page.</p> <p>Client Group</p> <p>The Client Group page is used to add and remove Clients from the Client Group. The Client Group page contains the Name field, the Associated Clients section, and the Client Ranges list.</p>

FEATURE

DESCRIPTION

Client Group
A selection of clients as a named group

Name
Provide a unique name for group

AI Scoring Rename

Associate Clients
Configuration settings will apply to all associated client numbers

Add an individual Client

+ Add

Add a range of Clients

Starting Client Number Ending Client Number

2100 2600 + Add

Client Ranges

Starting Client Number	Ending Client Number	
2100	2600	Remove
2130	2130	Remove
2891	2891	Remove

Name

The Name field is used to set the name of the Client Group.

Associated Clients

The Associated Clients section is used to add one or more Clients to the Client Group. The Associated Clients section contains the “Add an individual Client” field and the “Add a range of Clients” fields.

Add an individual Client

The “Add an individual Client” field is used to add an individual Client to the Client Group.

Once a Client is entered in the “Add an individual Client” field, the Client is added to the Client Group.

Add a range of Clients

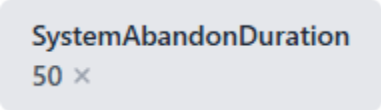
The “Add a range of Clients” fields are used to add Clients in a range based on the Client Numbers of the starting and ending Clients for the range.

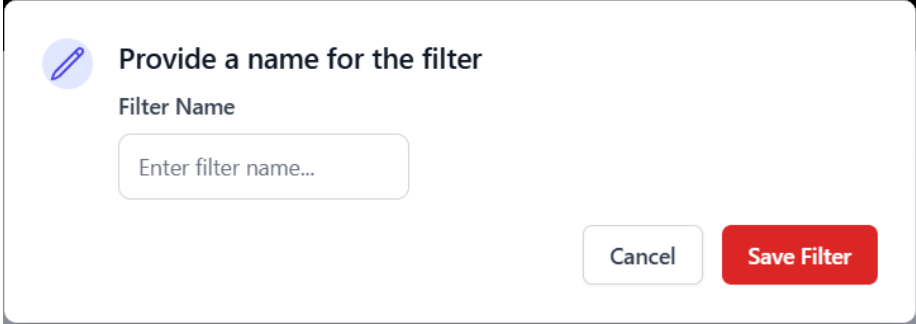


Starting Client Number

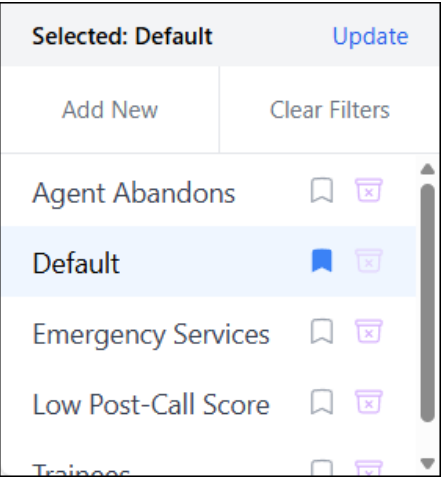





The first “Add a range of Clients” field is used to select the Client that

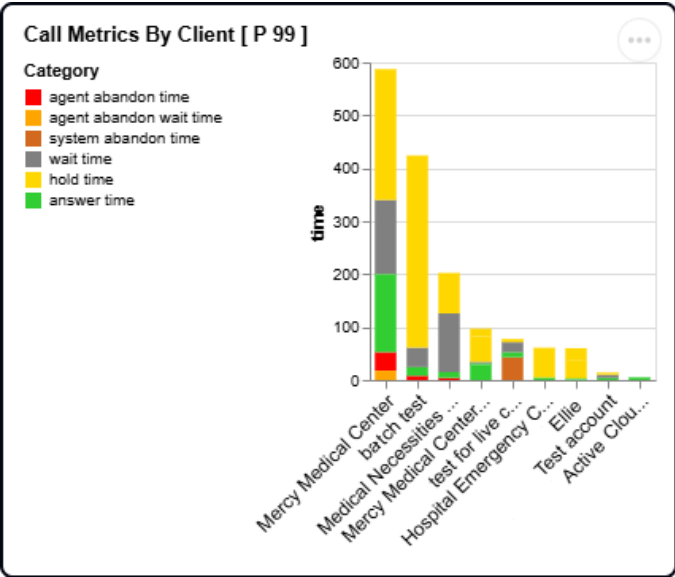
FEATURE	DESCRIPTION
	<p>represents the first Client in the range.</p> <p><i>Ending Client Number</i></p> <p>The second “Add a range of Clients” field is used to select the Client that represents the last Client in the range.</p> <p>When a Client is entered in both “Add a range of Clients” fields, a range of clients are added to the Client Group.</p> <p>Client Ranges</p> <p>The Client Ranges list displays a list of Client ranges and individual Clients added to the Client Group. Each listing displays the starting Client Number of the range, the ending Client Number of the range, and the Remove command. All Clients included in ranges on the Client Ranges list are included in the Client Group.</p> <p>Note: Client numbers can be contained within multiple Client ranges. A Client is included in the Client Group if it is included in one or more Client ranges.</p> <p>Starting Client Number</p> <p>The Starting Client Number for each listing displays the lowest Client Number of the range.</p> <p>Ending Client Number</p> <p>The Ending Client Number for each listing displays the highest Client Number of the range.</p> <p>Note: Listings for individual Clients that have been added display the Client Number for the Client in the Starting Client Number column and the Ending Client Number column.</p> <p>Remove</p> <p>The Remove command is used to remove a client range listing from the Client Ranges list.</p> <p>To remove a Client range, click the Remove command. A prompt is displayed asking if you would like to remove the associated Client Range listing. If you are sure you want to delete the client range, click the Delete button. The client range listing is removed from the Client Ranges list.</p>

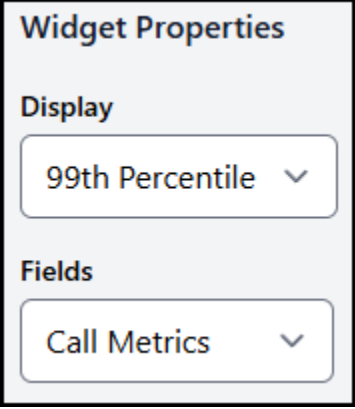
FEATURE	DESCRIPTION
<p>Exporting Call Log Table View</p> <p>0.3.89</p>	<p>The Call Export window contains the Table View check box.</p> <div data-bbox="748 317 1208 961" style="border: 1px solid black; padding: 10px; margin: 10px auto; width: fit-content;"> <p>Call Export Export calls for selected range</p> <hr/> <p>Calls in selected range</p> <hr/> <p>Selected Search Criteria</p> <ul style="list-style-type: none"> <input type="checkbox"/> Call Start/End <input type="checkbox"/> Messages <input type="checkbox"/> Call Trackers <input type="checkbox"/> Voice Recordings <input type="checkbox"/> Screen Recordings <input type="checkbox"/> Transcripts <input type="checkbox"/> PDF View <input checked="" type="checkbox"/> Table View </div> <p>When the Table View check box is selected, exported call information is compiled as a Character Separated Values (CSV) file. The layout of data in the CSV file is similar to the layout of the Call Log from which data is being exported.</p>
<p>Filter on Abandon Thresholds</p> <p>0.3.88</p>	<p>The Agent Abandon Duration search parameter and System Abandon Duration search parameter can be selected in the Search field for the Call Log page of Active Insights.</p> <p>Agent Abandon Duration</p> <div data-bbox="797 1346 1159 1457" style="border: 1px solid gray; border-radius: 5px; padding: 5px; margin: 10px auto; width: fit-content;"> <p>AgentAbandonDuration 50 ×</p> </div> <p>The Agent Abandon Duration search parameter is used to display call listings based on the number of seconds between when the call entered the system and when the caller hung up for calls which were distributed to an agent but the caller hung up before the call was answered.</p> <p>When the Agent Abandon Duration search parameter is selected, the “Less than <” and “Greater than >” modifiers are displayed.</p> <ul style="list-style-type: none"> • The “Less than <” modifier is used to search for calls with an Agent Abandon duration less than a certain value. • The “Greater that >” search parameter is used to search for calls with an Agent Abandon duration greater than a certain

FEATURE	DESCRIPTION
	<p>value.</p> <p>Once a value is entered, a Filter pane is displayed for the selected modifier and entered value for the search parameter.</p> <p>Only listings or call data for calls with an Agent Abandon duration greater than or less than the entered value are displayed.</p> <p>Note: Agent Abandon duration values equal to the selected value are not displayed.</p> <h3>System Abandon Duration</h3>  <p>The System Abandon Duration search parameter is used to display call listings based on the number of seconds between when the call entered the system and when the caller hung up before the call was distributed to an agent.</p> <p>When the System Abandon Duration search parameter is selected, the “Less than <” and “Greater than >” modifiers are displayed.</p> <ul style="list-style-type: none"> • The “Less than <” modifier is used to search for calls with a System Abandon duration less than a certain value. • The “Greater that >” search parameter is used to search for calls with a System Abandon duration greater than a certain value. <p>Once a value is entered, a Filter pane is displayed for the selected modifier and entered value for the search parameter.</p> <p>Only listings or call data for calls with a System Abandon duration greater than or less than the entered value are displayed.</p> <p>Note: System Abandon duration values equal to the selected value are not displayed.</p>
<p>Saved Searches</p> <p>0.3.86</p>	<p>The Saved Searches feature enables users to save a selected set of filters for Search and Filter fields in the Active Insights platform. Saved Searches for a field are accessed using the Saved Searches command.</p> <p>The Saved Searches pane is used to access, manage, and select Saved Searches. One or more filters are saved to each Saved Search. When a Saved Search is selected, the filters saved to the Saved Search are applied, and a Filter pane is displayed for each filter.</p> <p>The Saved Searches pane contains a list of Saved Searches saved to</p>

FEATURE	DESCRIPTION
	<p>the Filter field for each report available on the Reports page.</p> <p>The Saved Searches pane contains the Update command, the Add New button, the Clear Filters button, and the Saved Searches list.</p> <p>Add New</p> <p>The Add New button is used to create a new Saved Search. The Add New button creates a new Saved Search based on the currently applied filters.</p> <div data-bbox="527 583 1437 905" style="border: 1px solid black; padding: 10px; margin: 10px 0;">  </div> <p>Update</p> <p>The Update command is used to update the Saved Search selected in the Saved Search pane.</p> <p>When the Update command is clicked, all active filters are applied to the selected Saved Search.</p> <p>Clear Filters</p> <p>The Clear Filters button is used to clear the current filters.</p> <p>When the Clear Filters button is clicked, all filters except for the Date filter are removed.</p> <p>Saved Searches List</p> <p>The Saved Searches list displays a list of Saved Searches and is used to select a Saved Search to apply to the associated field. Each Saved Search listing contains a Default icon  and a Remove icon. </p>

FEATURE	DESCRIPTION
	 <p><i>Default</i></p> <p>The Default icon  is used to mark the Saved Search as default. If a Saved Search is marked as default, the filters contained by the Saved Search are loaded by default when the page containing the associated Search field is displayed.</p> <p>Only one Saved Search can be marked as Default at once. If another Saved Search is marked as default, the original Saved Search is no longer marked as default, and the new Saved Search is marked as default.</p> <p>If a Saved Search is marked as default, the Default icon is filled  and the Remove icon  is disabled.</p> <p><i>Remove</i></p> <p>The Remove icon  is used to remove the Saved Search from the Saved Searches list.</p> <p>If the Remove icon  is clicked, the Saved Search is removed from the Saved Search list.</p> <p>Note: The Saved Search marked as default cannot be removed, and when a Saved Search is marked as default, the Remove icon for the Saved Search is disabled. To enable the Remove icon for the default Saved Search, mark a different Saved Search as default.</p>
<p>Service Level by Client Widget Limit</p> <p>0.3.85</p>	<p>The Service Level by Client widget displays data by Client for up to the 20 Clients to which the most calls were assigned.</p> <p>Previously, the Service Level by Client widget displayed a bar for each Client represented in the dataset.</p>

FEATURE	DESCRIPTION
<p>Call Metrics by Client Widget Limit</p> <p>0.3.85</p>	<p>The Call Metrics by Client widget displays data by Client for up to the top 20 Clients to which the most calls were assigned.</p> <p>Previously, the Call Metrics by Client widget displayed a bar for each Client represented in the dataset.</p>
<p>Call Metrics by Client Widget</p> <p>0.3.84</p>	<p>The Call Metrics by Client widget contains a bar graph that displays data for calls organized by the Client to which the calls were assigned.</p> <p>The Call Metrics by Client legend indicates which data category is assigned to each color.</p> <p>Bar Graph</p>  <p>The Call Metrics by Client graph displays a bar for each client to which calls were assigned in the dataset. The left side of the Call Metrics By Client graph displays the duration in seconds.</p> <p>Each bar is broken into colored segments by the Service Level represented. The height of each section represents either the number of calls or the percentage of calls for the client that fit the Service Level category, depending on the configuration of the widget properties.</p> <p>Bar sections are organized vertically from largest to smallest with sections that represent a greater number of seconds for the value of the data category for the Client.</p> <p>Tooltips</p> <p>A tooltip is provided for each bar segment.</p> <p>The tooltip displays the following information about the segment:</p>

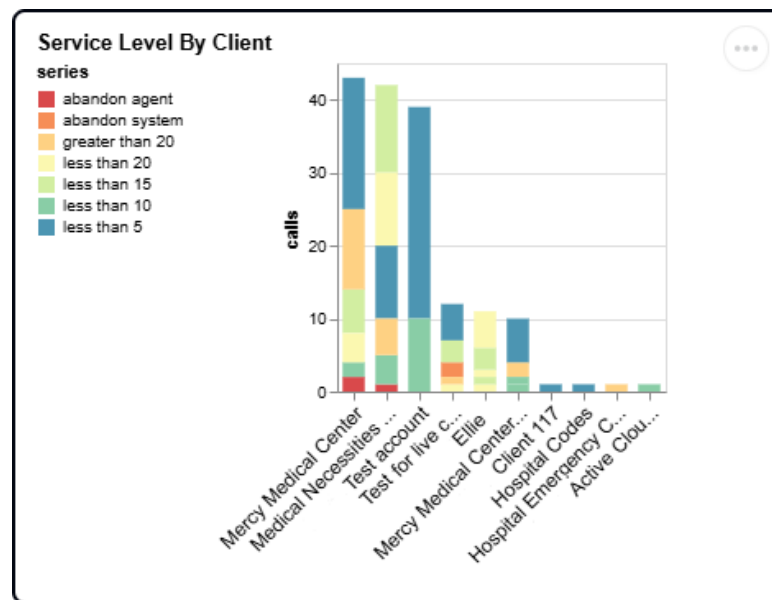
FEATURE	DESCRIPTION
	<ul style="list-style-type: none"> • The data category for which data is displayed • The Client Number for which the segment displays data • The maximum value in seconds that the segment represents • The average value in seconds that the segment represents • The minimum value in seconds that the segment represents • The total number of hours for which data is represented <p>Widget Properties</p>  <p>The widget properties contain the Display field and Fields field.</p> <p>Display</p> <p>The Display field determines what formula is used to calculate the value displayed for each data category. The selected formula is used to calculate all values for the category type within the dataset.</p> <p>Note: An abbreviation of the formula selected in the Display field is displayed in brackets following the graph title.</p> <ul style="list-style-type: none"> • If 99th Percentile is selected, “P 99” is displayed. • If 95th Percentile is selected, “P 95” is displayed. • If Average is selected, “avg” is displayed. • If Minimum is selected, “min” is displayed. • If Maximum is selected, “max” is displayed. <p>The Display field contains the following formula options.</p> <p><i>99th Percentile</i></p> <p>The 99th Percentile option displays the number of seconds that 99 percent of values were less than. This can be used to show the upper limit of the values a dataset contains while excluding the largest one percent.</p>

FEATURE	DESCRIPTION
	<p><i>95th Percentile</i> The 95th Percentile option displays the number of seconds that 95 percent of values were less than. This can be used to show the upper limit of the values a dataset contains while excluding the largest five percent.</p> <p><i>Average</i> The Average option displays the average of all values in the dataset.</p> <p><i>Minimum</i> The Minimum option displays the smallest value contained in the dataset.</p> <p><i>Maximum</i> The Maximum option displays the largest value contained in the dataset.</p> <p>Fields The Fields field is used select the set of data categories for which information is displayed. The following data category sets can be selected:</p> <p><i>Call Metrics</i> If the Call Metrics option is selected, information is displayed for the Agent Abandon Time, Agent Abandon Wait Time, Wait Time, Hold Time, and Answer Time data categories.</p> <p><i>Abandon Type</i> If the Abandon Type option is selected, information is displayed for the Agent Abandon Time, Agent Abandon Wait Time, and System Abandon Time data categories.</p> <p><i>Call Duration</i> If the Call Duration option is selected, information is displayed for the Agent Abandon Call Duration, System Abandon Call Duration, and Call Duration data categories.</p>
<p>Service Level by Client Widget <i>0.3.84</i></p>	<p>The Service Level by Client widget contains a bar graph that displays colored sections to represent the number or percentage of calls received for the client that are within the Service Level category.</p> <p>The Service Level by Client legend indicates which Service Level category is assigned to each color.</p>

FEATURE

DESCRIPTION

Bar Graph



The Service Level by Client graph displays a bar for each of up to the top 20 clients to which the most calls were assigned. The left side of the Service Level By Client graph displays either call count or call percentage intervals, depending on the configuration of the widget properties.

Each bar is broken into colored segments by the Service Level represented. The height of each section represents either the number of calls or the percentage of calls for the client that fit the Service Level category, depending on the configuration of the widget properties.

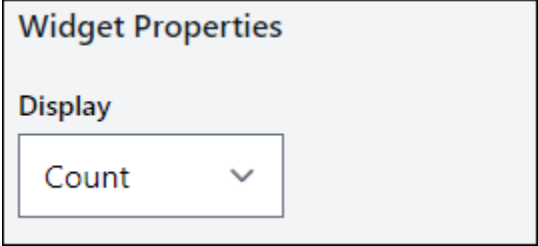
Bar sections are organized vertically from largest to smallest with sections that represent a greater number or proportion of calls appearing higher in the graph and sections that represent a lesser number or proportion of calls appearing lower.

Tooltips

A tooltip is provided for each bar segment.

The tooltip displays the following information about the segment:

- The Client Number for which the segment displays data
- The Client Name for which the segment displays data
- The Service Level category that the segment represents
- The number of calls that the segment represents
- The percentage of calls for the agent that were answered

FEATURE	DESCRIPTION
	<p>within 20 seconds</p> <ul style="list-style-type: none"> • The percentage of calls for the Agent that were abandons of any type • The percentage of calls for the Agent that the segment represents <p>Widget Properties</p>  <p>The widget properties contain the Display field.</p> <p>Display</p> <p>The Display field determines how the Service Level data is displayed for each agent. The Display field can be set to “Count” or “Percentage.”</p> <p>Note: The Display field is set to “Count” by default.</p> <p><i>Count</i></p> <p>If the Display field is set to “Count,” the Service Level By Client widget displays the number of calls received for each Client within each Service Level category. The Service Level By Client widget displays a stacked bar graph for each Client that is oriented along the horizontal edge. The height of each segment represents the number of calls for the Service Level. The vertical scale is labeled “Calls” and displays intervals by call count.</p> <p><i>Percentage</i></p> <p>If the Display field is set to “Percentage,” the Service Level By Client widget displays the percentage of calls received for each Client within each Service Level category. The Service Level By Skill widget displays a proportional bar graph for each Client. The height of each segment represents the proportion of calls for the Service Level. The vertical scale is labeled “Percentage of Calls” and displays intervals by call percentage.</p>
<p>Reports Value Rounding</p> <p>0.3.84</p>	<p>Values displayed on the Reports page are rounded to the nearest two decimal places.</p>

FEATURE	DESCRIPTION																														
<p>Group By Client Option</p> <p>0.3.84</p>	<p>The Group By field for the Call Metric report and System Service Level report contains the “Client” option. When the Group By field is set to “Client,” data presented in the report is grouped by client, and the Call Metric table and System Service Level table contain the following columns:</p> <table border="1" data-bbox="565 464 1386 842"> <thead> <tr> <th>CLIENT_NUMBER</th> <th>CLIENT_NAME</th> <th>SYSTEM_ABANDON_CALL_DURATION_MAX</th> <th>AGENT_ABANDON_WAIT_TIME_COUNT</th> <th>ANSWER_TIME_AVG</th> <th>HOLD_TIME_COU</th> </tr> </thead> <tbody> <tr> <td>2130</td> <td>Mercy Medical Center</td> <td></td> <td>0</td> <td>29.80</td> <td>10</td> </tr> <tr> <td>3175</td> <td>Mercy Medical Education</td> <td></td> <td>0</td> <td>6.20</td> <td>2</td> </tr> <tr> <td>7004</td> <td>Medical Necessities Clinic</td> <td></td> <td>0</td> <td>3.75</td> <td>17</td> </tr> <tr> <td>9182</td> <td>Mercy Medical Center Emergency</td> <td></td> <td>0</td> <td>2.14</td> <td>4</td> </tr> </tbody> </table> <p>Client_Number The Client Number column displays the unique Client Number which represents the client for whom statistics are displayed in the row.</p> <p>Client_Name The Client Name column displays the name of the client for whom statistics are displayed in the row.</p>	CLIENT_NUMBER	CLIENT_NAME	SYSTEM_ABANDON_CALL_DURATION_MAX	AGENT_ABANDON_WAIT_TIME_COUNT	ANSWER_TIME_AVG	HOLD_TIME_COU	2130	Mercy Medical Center		0	29.80	10	3175	Mercy Medical Education		0	6.20	2	7004	Medical Necessities Clinic		0	3.75	17	9182	Mercy Medical Center Emergency		0	2.14	4
CLIENT_NUMBER	CLIENT_NAME	SYSTEM_ABANDON_CALL_DURATION_MAX	AGENT_ABANDON_WAIT_TIME_COUNT	ANSWER_TIME_AVG	HOLD_TIME_COU																										
2130	Mercy Medical Center		0	29.80	10																										
3175	Mercy Medical Education		0	6.20	2																										
7004	Medical Necessities Clinic		0	3.75	17																										
9182	Mercy Medical Center Emergency		0	2.14	4																										
<p>Call Metrics Report</p> <p>0.3.78</p>	<p>The Call Metric report is a system report that displays statistics for system service quality. The Group By field for the Call Metrics report can be set to the “None,” “Agent,” or “Date.”</p> <p>Call Metrics Table</p> <table border="1" data-bbox="565 1304 1386 1682"> <thead> <tr> <th>CLIENT_NUMBER</th> <th>CLIENT_NAME</th> <th>SYSTEM_ABANDON_CALL_DURATION_MAX</th> <th>AGENT_ABANDON_WAIT_TIME_COUNT</th> <th>ANSWER_TIME_AVG</th> <th>HOLD_TIME_COU</th> </tr> </thead> <tbody> <tr> <td>2130</td> <td>Mercy Medical Center</td> <td></td> <td>0</td> <td>29.80</td> <td>10</td> </tr> <tr> <td>3175</td> <td>Mercy Medical Education</td> <td></td> <td>0</td> <td>6.20</td> <td>2</td> </tr> <tr> <td>7004</td> <td>Medical Necessities Clinic</td> <td></td> <td>0</td> <td>3.75</td> <td>17</td> </tr> <tr> <td>9182</td> <td>Mercy Medical Center Emergency</td> <td></td> <td>0</td> <td>2.14</td> <td>4</td> </tr> </tbody> </table> <p>The Call Metrics table displays information related to call and call answering in the system. The Call Metrics table displays different columns and call statistics depending on which option is selected in the Group By field.</p>	CLIENT_NUMBER	CLIENT_NAME	SYSTEM_ABANDON_CALL_DURATION_MAX	AGENT_ABANDON_WAIT_TIME_COUNT	ANSWER_TIME_AVG	HOLD_TIME_COU	2130	Mercy Medical Center		0	29.80	10	3175	Mercy Medical Education		0	6.20	2	7004	Medical Necessities Clinic		0	3.75	17	9182	Mercy Medical Center Emergency		0	2.14	4
CLIENT_NUMBER	CLIENT_NAME	SYSTEM_ABANDON_CALL_DURATION_MAX	AGENT_ABANDON_WAIT_TIME_COUNT	ANSWER_TIME_AVG	HOLD_TIME_COU																										
2130	Mercy Medical Center		0	29.80	10																										
3175	Mercy Medical Education		0	6.20	2																										
7004	Medical Necessities Clinic		0	3.75	17																										
9182	Mercy Medical Center Emergency		0	2.14	4																										

FEATURE DESCRIPTION

System Service Level Report
0.3.78

The System Service Level report is a system report that displays general system service data. The Group By field for the System Service Level report can be set to “None,” “Agent,” “Date,” or “Skill.”

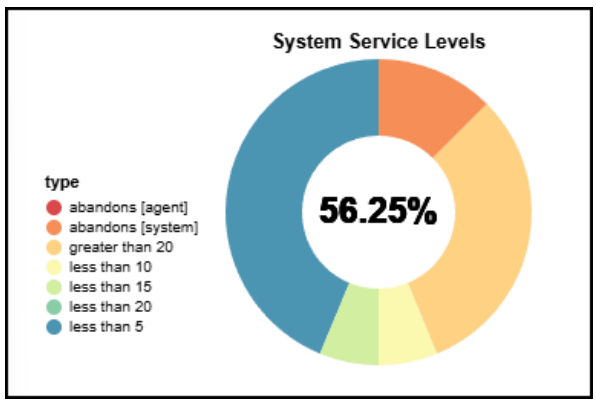
System Service Level Table

SKILL	AVG	COUNT	MAX	ABANDON_AGENT	ABANDON_SYSTEM	ANSWERED_GREATER_THAN_20	ANSWERED_LESS_THAN_10	ANSWERED_LESS_THAN_15
Commercial	15.00	1	15	0	0	0	0	0
Education	48.00	5	160	0	0	1	0	3
General	241.08	26	1268	0	0	7	2	3
Medical	74.71	34	232	0	0	2	3	12

The System Service Level table displays information related to service quality in the system. The System Service Level table displays different columns and service level statistics depending on what option is selected in the Group By field.

The System Service Level Report contains the System Service Level table, regardless of how the report is grouped.

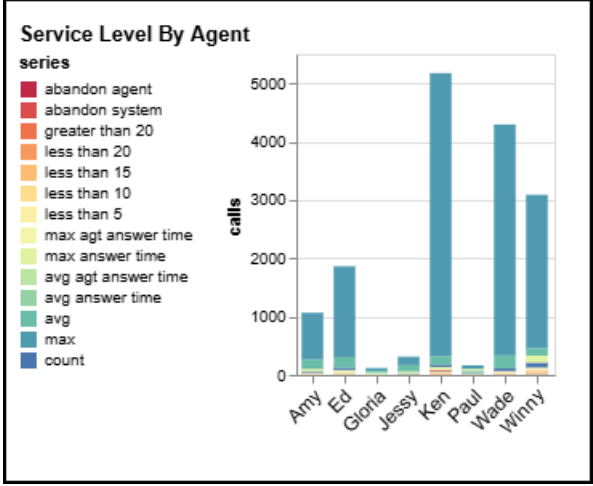
System Service Levels Pie Chart



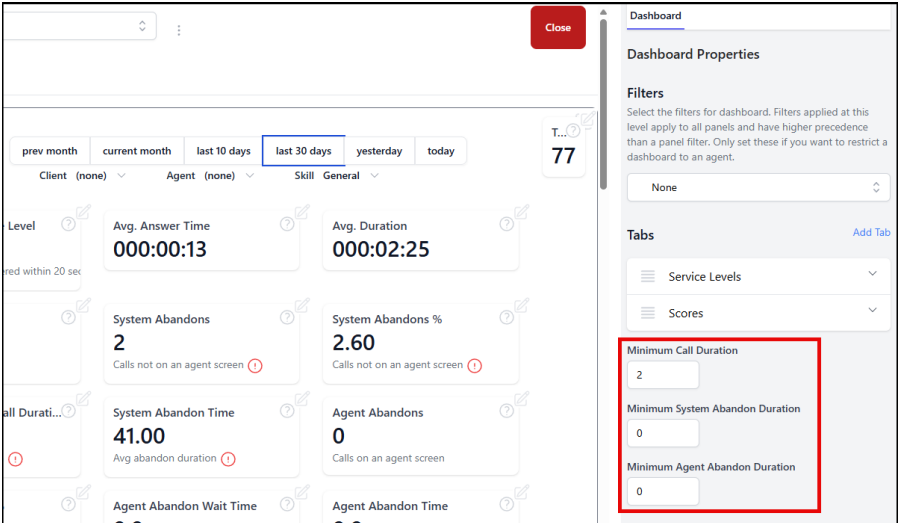
If the Group By field for the System Service Level report is set to “None,” the System Service Levels pie chart is displayed.

The System Service Levels pie chart displays colored wedges in portions based on the percentage of calls that were answered within the listed time range intervals and the percentage of calls that were Agent Abandons or System Abandons. The System Service Levels pie chart sections are displayed in clockwise order following the order of the legend.

The System Service Levels legend indicates what Service Level category is assigned to each color in the System Service Levels pie

FEATURE	DESCRIPTION
	<p>chart. The System Service Levels percentage in the center of the pie chart indicates the percentage of calls taken with an answer time of less than 20 seconds.</p> <p>Service Level By Agent Chart</p>  <p>The Service Level By Agent graph displays a bar for each agent who took calls in the dataset. The left side of the Service Level By Agent graph displays either call count or call percentage intervals, depending on the configuration of the widget properties.</p> <p>The Service Levels By Agent legend indicates which Service Level category is assigned to each color.</p> <p>Each bar is broken into colored segments by the Service Level represented. The height of each section represents either the number of calls or the percentage of calls for agents that fit the Service Level category, depending on the configuration of the widget properties.</p> <p>Bar sections are organized vertically from largest to smallest, with sections that represent a greater number or proportion of calls appearing higher in the graph and sections that represent a lesser number or proportion of calls appearing lower.</p>
<p>Dashboard Duration Thresholds</p> <p>0.3.78</p>	<p>The Dashboard Duration fields determine when calls are counted as certain types of calls. For each Dashboard Duration field that is set to a value greater than 0 (zero), a call must have a duration for that category greater than or equal to the number of seconds entered to be considered a call of that type.</p>

FEATURE	DESCRIPTION
---------	-------------

	 <p>The Dashboard Duration fields include the Minimum Call Duration field, the System Abandon Duration field, and the Agent Abandon Duration field.</p> <h3>Minimum Call Duration</h3> <p>The Minimum Call Duration field is used to determine the minimum number of seconds between when a call entered the system and when the call was disconnected in order for the call to be counted and displayed as a call on the Dashboard.</p> <h3>System Abandon Duration</h3> <p>The Minimum System Abandon Duration field is used to determine the minimum number of seconds between when a call was distributed to a queue and when the caller hung up in order for the call to be considered a System Abandon.</p> <h3>Agent Abandon Duration</h3> <p>The Minimum Agent Abandon Duration field is used to determine the minimum number of seconds between when a call was distributed to an agent and when the caller hung up in order for the call to be considered an Agent Abandon.</p>
--	-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

<p>Dashboard Filter Retention</p> <p>0.3.78</p>	<p>Filters applied to a dashboard on the Dashboard page are retained and restored if the dashboard is reloaded using the browser's Back button. This enables users to navigate to other pages and return to the Dashboard page without losing their filter selections.</p>
-------------------------------------------------	----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

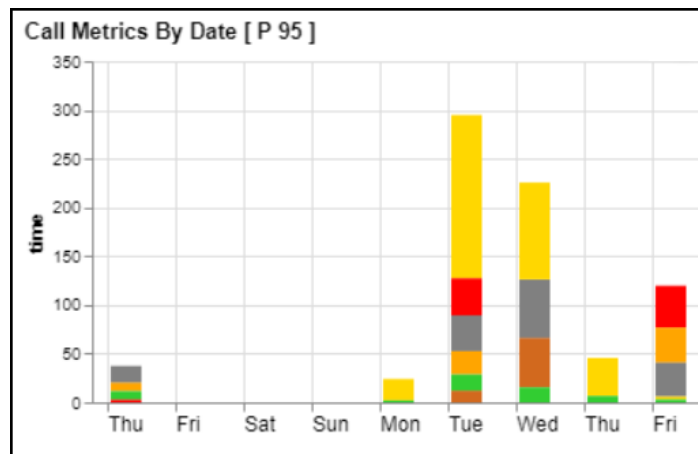
FEATURE	DESCRIPTION																																										
	<div data-bbox="529 264 1427 396" style="border: 1px solid black; padding: 5px;"> <div style="display: flex; justify-content: space-between; align-items: center;"> prev month current month last 10 days last 30 days yesterday today </div> <div style="display: flex; justify-content: space-around; margin-top: 5px;"> Client (none) ▾ Agent (none) ▾ Skill General ▾ </div> </div> <p>Previously, when returning to the Dashboard page using the browser's Back button, the dashboard would be loaded with the default filters selected.</p>																																										
<p>Call Metrics by Date Widget</p> <p>0.3.76</p>	<p>The Call Metrics by Date widget displays a graph of data for calls in the dashboard's dataset organized by portions of time. The Call Metric by Date widget contains a graph and a legend.</p> <div data-bbox="529 688 1427 1234" style="border: 2px solid black; padding: 10px;"> <p>Call Metrics By Date [P 95]</p> <table border="1" style="margin-top: 10px;"> <caption>Approximate Call Metrics by Date Data</caption> <thead> <tr> <th>Day</th> <th>agent abandon time</th> <th>agent abandon wait time</th> <th>system abandon time</th> <th>wait time</th> <th>hold time</th> <th>answer time</th> </tr> </thead> <tbody> <tr> <td>Monday</td> <td>0</td> <td>0</td> <td>0</td> <td>0</td> <td>~20</td> <td>0</td> </tr> <tr> <td>Tuesday</td> <td>~20</td> <td>~20</td> <td>~20</td> <td>~150</td> <td>~150</td> <td>~50</td> </tr> <tr> <td>Wednesday</td> <td>0</td> <td>0</td> <td>~100</td> <td>~100</td> <td>~400</td> <td>~100</td> </tr> <tr> <td>Thursday</td> <td>~20</td> <td>~20</td> <td>~20</td> <td>~20</td> <td>~20</td> <td>~20</td> </tr> <tr> <td>Friday</td> <td>~20</td> <td>~20</td> <td>~20</td> <td>~20</td> <td>~20</td> <td>~20</td> </tr> </tbody> </table> </div> <p>Legend</p> <p>The Call Metrics legend indicates which data category is represented by each color.</p> <div data-bbox="808 1394 1149 1654" style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <p>Category</p> <ul style="list-style-type: none"> ■ agent abandon time ■ agent abandon wait time ■ system abandon time ■ wait time ■ hold time ■ answer time </div> <p>The following data categories may be displayed, depending on the Field setting in the widget properties.</p> <p>Agent Abandon Time</p> <p>The Agent Abandon Time category represents the number of seconds between when the call was distributed to an agent and when the caller hung up. The Agent Abandon Time statistic only includes Agent</p>	Day	agent abandon time	agent abandon wait time	system abandon time	wait time	hold time	answer time	Monday	0	0	0	0	~20	0	Tuesday	~20	~20	~20	~150	~150	~50	Wednesday	0	0	~100	~100	~400	~100	Thursday	~20	~20	~20	~20	~20	~20	Friday	~20	~20	~20	~20	~20	~20
Day	agent abandon time	agent abandon wait time	system abandon time	wait time	hold time	answer time																																					
Monday	0	0	0	0	~20	0																																					
Tuesday	~20	~20	~20	~150	~150	~50																																					
Wednesday	0	0	~100	~100	~400	~100																																					
Thursday	~20	~20	~20	~20	~20	~20																																					
Friday	~20	~20	~20	~20	~20	~20																																					

FEATURE	DESCRIPTION
	<p>Abandons, which are calls in which the caller hung up after the call was assigned to an agent without the call being answered.</p> <p><i>Agent Abandon Call Duration</i> The Abandon Call Duration category represents the number of seconds between when the call entered the system and when the caller hung up. The Agent Abandon Call Duration statistic only includes Agent Abandons. Agent Abandon Wait Time and Agent Abandon Time are included in the Agent Abandon Call Duration.</p> <p><i>Agent Abandon Wait Time</i> The Agent Abandon Wait Time category represents the number of seconds that the call was in Waits. The Agent Abandon Wait Time statistic only includes Agent Abandons.</p> <p><i>System Abandon Time</i> The System Abandon Time category represents the number of seconds between when the call was distributed to a queue and when the caller hung up. The System Abandon Time statistic only includes System Abandons, which are calls in which the caller hung up before the call could be assigned to an agent.</p> <p><i>System Abandon Call Duration</i> The System Abandon Call Duration category represents the number of seconds between when the call entered the system and when the caller hung up. The System Abandon Call Duration statistic only includes System Abandons.</p> <p><i>Wait Time</i> The Wait Time category represents the number of seconds the call was in the Waits queue. The Wait Time statistic includes Agent Abandons, System Abandons, and non-abandon calls.</p> <p><i>Hold Time</i> The Hold Time category represents the number of seconds the call was in the Hold state. The Hold Time statistic only includes non-abandon calls.</p> <p><i>Answer Time</i> The Answer Time category represents the number of seconds the call was in the Ringing state. The Answer Time statistic includes Agent Abandons and non-abandon calls.</p> <p><i>Call Duration</i> The Call Duration category represents the number of seconds from when the call entered the system to when the call was disconnected. The Call Duration statistic includes Agent Abandons, System Abandons, and non-abandon calls. Wait Time, Hold Time, and Answer Time are included in the Call Duration.</p>

FEATURE

DESCRIPTION

Graph



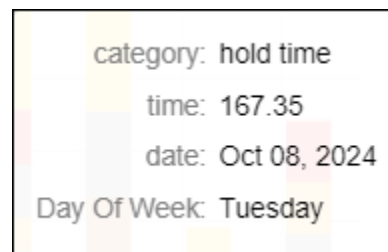
The Call Metrics graph is displayed as a stacked bar graph. The graph displays a bar or area for each statistic displayed in the graph. The left side of the Call Metrics graph displays the number of seconds that the graph represents. The bottom of the call metrics chart displays the time ranges for which data is displayed.

The height of each segment of the bar represents the number of seconds produced by the calculation for the category.

Segments displayed in each bar are organized by size, with smaller segments appearing below larger segments.

Tooltips

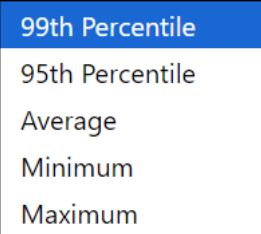
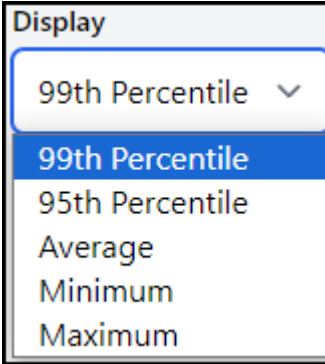
A tooltip is provided for each bar or area.



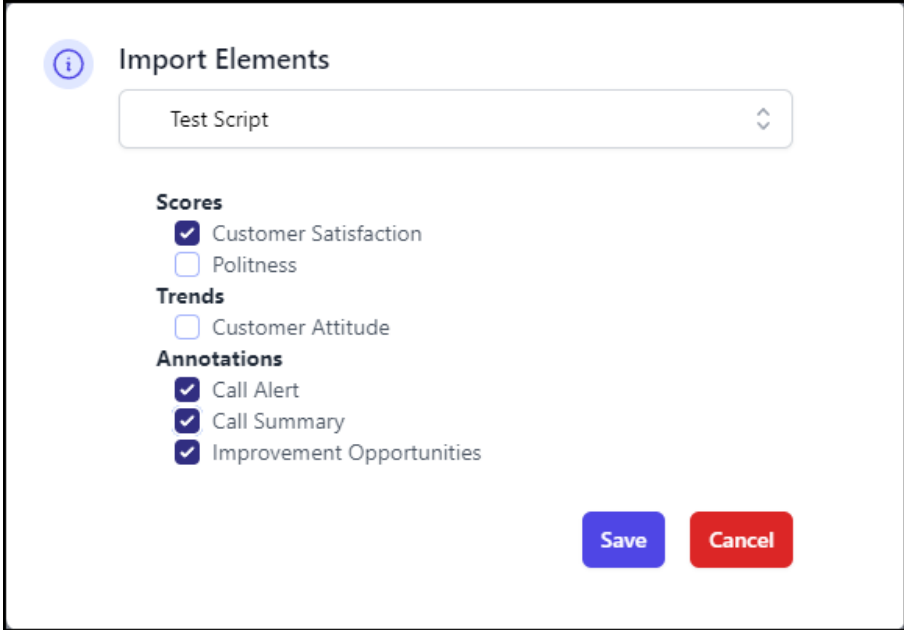
The tooltip displays the following information about the bar or area:

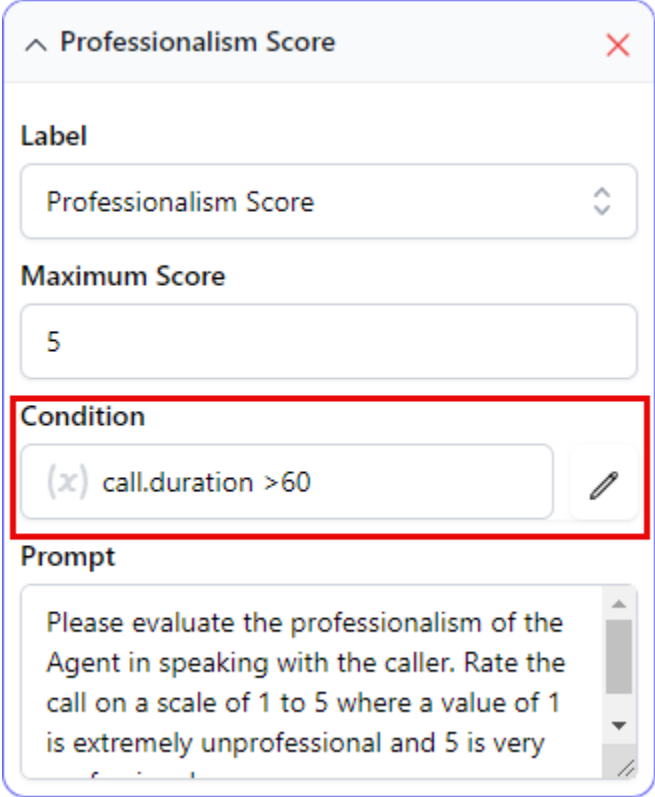
- The category for which data is displayed
- The value represented
- The date for which data is displayed
- The day of the week for which data is displayed

Note: If the Date Display field is set to “Group by Day of Week,” the date and day of the week are not displayed in the tooltip.

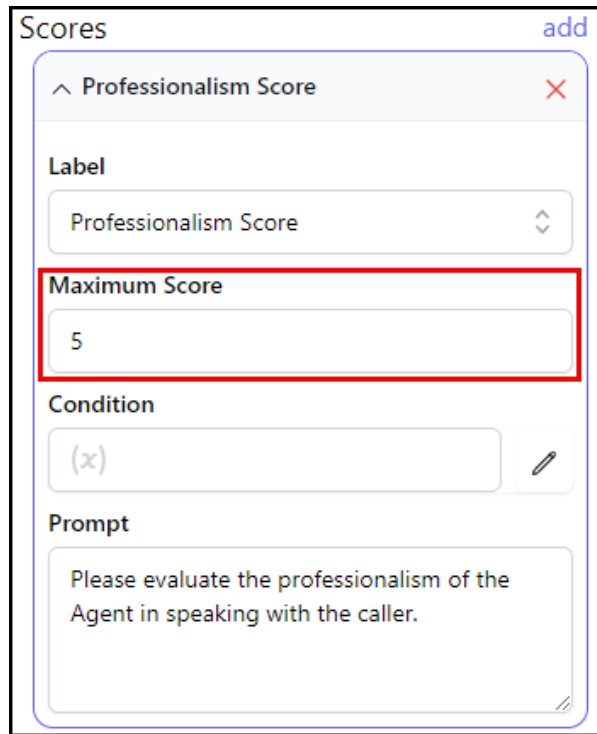
FEATURE	DESCRIPTION
	<p>Widget Properties</p> <p>The widget properties for the Call Metrics by Date widget are used to change what type of data is displayed and how it is organized. The widget properties for Call Metrics by Date widget contain the Display field, the Date Display field, and the Fields field.</p> <p>Display</p> <p>The Display field determines what formula is used to calculate the value displayed for each data category. The selected formula is used to calculate all values for the selected category type within the dataset.</p> <p>Note: An abbreviation of the formula selected in the Display field is displayed in brackets following the graph title.</p> <ul style="list-style-type: none"> • If 99th Percentile is selected, “P 99” is displayed. • If 95th Percentile is selected, “P 95” is displayed. • If Average is selected, “avg” is displayed. • If Minimum is selected, “min” is displayed. • If Maximum is selected, “max” is displayed. <p>The Display field contains the following formula options.</p> <p><i>99th Percentile</i> The 99th Percentile option displays the number of seconds that 99 percent of values were less than. This can be used to show the upper limit of the values a dataset contains while excluding the largest one percent.</p> <p><i>95th Percentile</i> The 95th Percentile option displays the number of seconds that 95 percent of values were less than. This can be used to show the upper limit of the values a dataset contains while excluding the largest five percent.</p> <p><i>Average</i> The Average option displays the average of all values in the dataset.</p> <p><i>Minimum</i> The Minimum option displays the smallest value contained in the dataset.</p> <p><i>Maximum</i></p>  

FEATURE	DESCRIPTION
	<p>The Maximum option displays the largest value contained in the dataset.</p> <p>Date Display</p> <p>The Date Display field determines how data displayed by the Call Metrics by Date widget is grouped. The Date Display field can be set to the following options.</p> <p><i>Date</i></p> <p>If the “Date” option is selected, the graph displays a bar for each date in the dataset, and each bar is labeled with the date it represents.</p> <p><i>Day of Week</i></p> <p>If the “Day of Week” option is selected, the graph displays a bar for each date in the dataset, and each bar is labeled with the day of the week it represents.</p> <p><i>Group by Day of Week</i></p> <p>If the “Group by Day of Week” option is selected, the graph displays a bar for each day of the week, and each bar is labeled with the day of the week it represents. If the dataset contains data for multiple dates with the same day of the week, all data for the day of the week is combined into one bar.</p> <p>Fields</p> <p>The Fields field is used select the set of data categories for which information is displayed.</p> <p>The following data category sets can be selected:</p> <div data-bbox="1144 1087 1427 1249" style="border: 1px solid black; padding: 5px;"> <p>Call Metrics</p> <p>Abandon Type</p> <p>Call Duration</p> </div> <p><i>Call Metrics</i></p> <p>If the Call Metrics option is selected, information is displayed for the Agent Abandon Time, Agent Abandon Wait Time, Wait Time, Hold Time, and Answer Time data categories.</p> <p><i>Abandon Type</i></p> <p>If the Abandon Type option is selected, information is displayed for the Agent Abandon Time, Agent Abandon Wait Time, and System Abandon Time data categories.</p> <p><i>Call Duration</i></p> <p>If the Call Duration option is selected, information is displayed for the Agent Abandon Call Duration, System Abandon Call Duration, and Call Duration data categories.</p>
AI Multi Importing 0.3.74	<p>The AI Multi element contains the “Import from any script” button. The “Import from any script” button is used to import scores, trends, and annotations from the current script or other scripts.</p> <p>When the “Import from any script” button is clicked, the Import</p>

FEATURE	DESCRIPTION
	<p>Elements window is displayed.</p> <h3>Import Elements</h3> <p>The Import Elements window is used to select the script from which elements are being imported and which elements of the script are imported. The Import Elements window contains the Script menu and a check box for each score element, trend element, and annotation element in the selected script.</p>  <p>Script</p> <p>The Script menu is used to select the script for which elements are displayed.</p> <p>To select a script, click the Script menu and select the desired script from the list. A check box is displayed for each score, trend, and annotation contained by the selected script. These check boxes are sorted into scores, trends, and annotations.</p> <p>Select the check box next to each item which you would like copied into the AI Multi element and click the Save button.</p> <p>When the Save button is clicked, an entry is created in the AI Multi element and the Label, Condition, and Prompt fields are copied from the source item, if available. Additionally, it may try to copy additional fields depending on the type of entry being created:</p> <ul style="list-style-type: none"> • For scores, the Max Score value is copied. • For annotations, the Type value is copied. <p>Note: If a Label value is not imported with the item, a label must be</p>

FEATURE	DESCRIPTION
<p>AI Multi Conditions <i>0.3.74</i></p>	<p>given before the item can be saved.</p> <p>The AI Multi script element allows specifying conditions for scores, trends, and annotations.</p>  <p>Entries in the AI Multi script element include the Condition field. The Condition field is used to enter an expression to determine if the entry is active for the call. If the expression entered in the Condition field evaluates to true, the entry is used when producing Post-Call Scoring results.</p> <p>The Condition for an entry can contain normal logical expressions and can reference any call, message, and script variables.</p>
<p>AI Multi Max Value <i>0.3.74</i></p>	<p>When adding or editing a score entry in the AI Multi element, the Max Score field is displayed.</p>

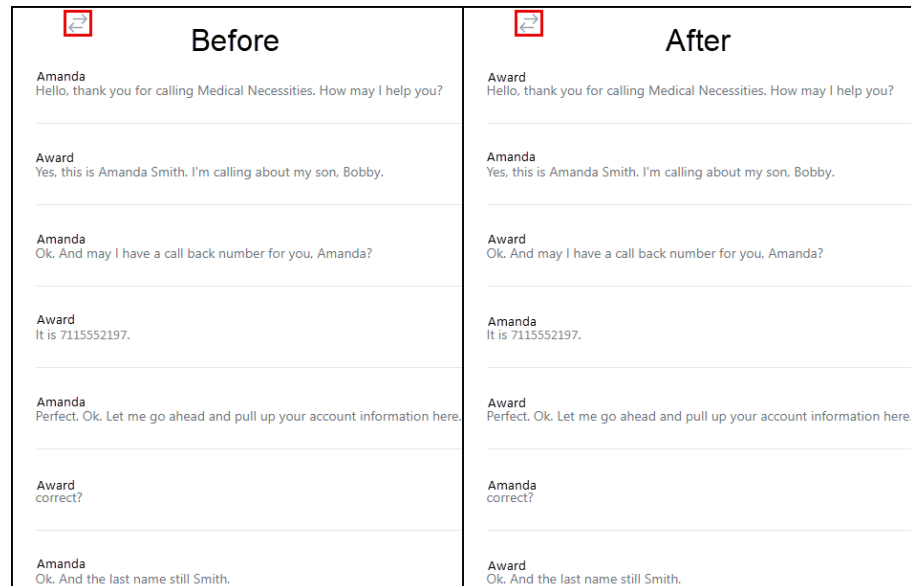
FEATURE	DESCRIPTION
---------	-------------



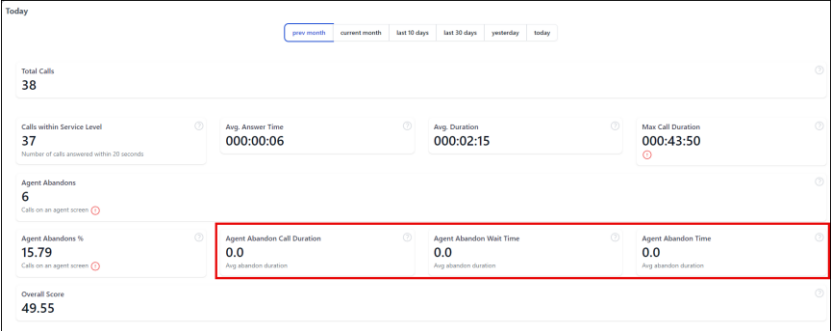
The Max Score field is used to set the highest value that can be assigned to the score. The Max Score field is set to 5 by default.

Call Information Transcription Agent/Caller Swap
0.3.74

The Call Information page contains a Swap icon for each separate transcription that a call includes. The Swap icon is used to swap the speaker assigned to segments of the transcript in cases where the speaker was misidentified. Clicking the Swap icon swaps the label assigned to each segment of a transcript.

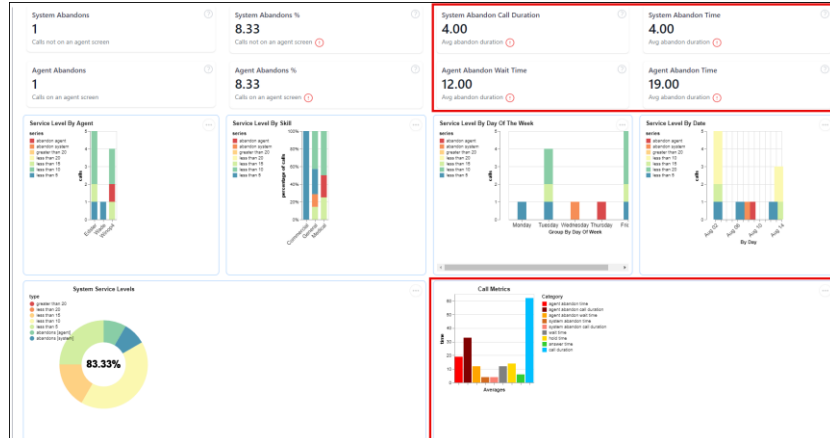


FEATURE	DESCRIPTION																																																																						
	<p>Additionally, after speakers have been swapped, the Post-Call script can be run using the new speaker assignments to correct any errors caused by the speaker being mislabeled.</p>																																																																						
<p>Talk Spans to Determine Speaker <i>0.3.73</i></p>	<p>Genesis records talk spans when audio is detected for the agent or caller, and these talk spans are sent to Active Insights. When a call is finished, Active Insights compares the talk spans provided by Genesis with the transcription segments produced in Active Insights to better determine the speaker.</p>																																																																						
<p>Call.Name Variable <i>0.3.73</i></p>	<p>The Call.Name variable can be referenced in Script Element Conditions and Prompts. The Call.Name variable contains the name of the agent taking the call as a string.</p>																																																																						
<p>Default Search <i>0.3.70</i></p>	<p>The ability to set a default search has been added to the Usage, Call Log, and Messages Search fields. Setting default searches enable users to set groups of one or more search parameters as the default set of search parameters that will be used to filter listings when the respective table is displayed in the future.</p> <div data-bbox="592 982 1364 1661" data-label="Complex-Block"> <p>Calls</p> <p> <input type="checkbox"/> MarkedForReview True × <input type="checkbox"/> PostCall Score >= .25 × <input type="checkbox"/> Date between 01/24/2024 and 2/24/2024 <input type="checkbox"/> Set default search </p> <p>Search: <input type="text"/> X</p> <p style="text-align: right;">export</p> <table border="1"> <thead> <tr> <th></th> <th>START TIME</th> <th>SCORING</th> <th>DURATION</th> <th>CLIENT NUMBER</th> <th>CLIENT NAME</th> <th>ANI</th> </tr> </thead> <tbody> <tr> <td>✓</td> <td>02/13/2024 02:55:19 PM</td> <td>84.0% △</td> <td>183</td> <td>7004</td> <td>Medical Necessities (866-844-1586)</td> <td>154</td> </tr> <tr> <td>✓</td> <td>02/13/2024 02:51:46 PM</td> <td>69.0% △</td> <td>132</td> <td>7004</td> <td>Medical Necessities (866-844-1586)</td> <td>154</td> </tr> <tr> <td>✓</td> <td>02/13/2024 02:46:05 PM</td> <td>84.0% △</td> <td>19</td> <td>7004</td> <td>Medical Necessities (866-844-1586)</td> <td>154</td> </tr> <tr> <td>✓</td> <td>02/13/2024 02:44:18 PM</td> <td>80.0% △</td> <td>64</td> <td>2130</td> <td>Genesis Intelligent Series System</td> <td>124</td> </tr> <tr> <td>✓</td> <td>02/13/2024 02:44:03 PM</td> <td>84.0% △</td> <td>36</td> <td>7004</td> <td>Medical Necessities (866-844-1586)</td> <td>154</td> </tr> <tr> <td>✓</td> <td>02/13/2024 02:38:18 PM</td> <td>80.0% △</td> <td>47</td> <td>7004</td> <td>Medical Necessities (866-844-1586)</td> <td>154</td> </tr> <tr> <td>✓</td> <td>02/13/2024 02:36:34 PM</td> <td>84.0% △</td> <td>77</td> <td>7004</td> <td>Medical Necessities (866-844-1586)</td> <td>154</td> </tr> <tr> <td>✓</td> <td>02/05/2024 03:59:51 PM</td> <td>84.0% △</td> <td>212</td> <td>2251</td> <td>Active Insights Cloud Archival and Analytics</td> <td>124</td> </tr> <tr> <td>✓</td> <td>02/01/2024 09:45:10 AM</td> <td>80.0% △</td> <td>278</td> <td>3175</td> <td>Ed's test for live calls</td> <td>175</td> </tr> </tbody> </table> </div> <p>Default Search</p> <p>When a default search is set for a table, the search parameters selected for the default search are applied to the table by default. When the respective table is displayed in the future, the table's listings are filtered by the search parameters selected for the default search</p>		START TIME	SCORING	DURATION	CLIENT NUMBER	CLIENT NAME	ANI	✓	02/13/2024 02:55:19 PM	84.0% △	183	7004	Medical Necessities (866-844-1586)	154	✓	02/13/2024 02:51:46 PM	69.0% △	132	7004	Medical Necessities (866-844-1586)	154	✓	02/13/2024 02:46:05 PM	84.0% △	19	7004	Medical Necessities (866-844-1586)	154	✓	02/13/2024 02:44:18 PM	80.0% △	64	2130	Genesis Intelligent Series System	124	✓	02/13/2024 02:44:03 PM	84.0% △	36	7004	Medical Necessities (866-844-1586)	154	✓	02/13/2024 02:38:18 PM	80.0% △	47	7004	Medical Necessities (866-844-1586)	154	✓	02/13/2024 02:36:34 PM	84.0% △	77	7004	Medical Necessities (866-844-1586)	154	✓	02/05/2024 03:59:51 PM	84.0% △	212	2251	Active Insights Cloud Archival and Analytics	124	✓	02/01/2024 09:45:10 AM	80.0% △	278	3175	Ed's test for live calls	175
	START TIME	SCORING	DURATION	CLIENT NUMBER	CLIENT NAME	ANI																																																																	
✓	02/13/2024 02:55:19 PM	84.0% △	183	7004	Medical Necessities (866-844-1586)	154																																																																	
✓	02/13/2024 02:51:46 PM	69.0% △	132	7004	Medical Necessities (866-844-1586)	154																																																																	
✓	02/13/2024 02:46:05 PM	84.0% △	19	7004	Medical Necessities (866-844-1586)	154																																																																	
✓	02/13/2024 02:44:18 PM	80.0% △	64	2130	Genesis Intelligent Series System	124																																																																	
✓	02/13/2024 02:44:03 PM	84.0% △	36	7004	Medical Necessities (866-844-1586)	154																																																																	
✓	02/13/2024 02:38:18 PM	80.0% △	47	7004	Medical Necessities (866-844-1586)	154																																																																	
✓	02/13/2024 02:36:34 PM	84.0% △	77	7004	Medical Necessities (866-844-1586)	154																																																																	
✓	02/05/2024 03:59:51 PM	84.0% △	212	2251	Active Insights Cloud Archival and Analytics	124																																																																	
✓	02/01/2024 09:45:10 AM	80.0% △	278	3175	Ed's test for live calls	175																																																																	

FEATURE	DESCRIPTION
	<p>Set Default Search</p> <p>The Set Default Search command is used to set the current search parameters as the default search. When the Set Default Search command is clicked, all search parameters that are currently created for the table are saved and will be used to filter the table by default when it is displayed in the future.</p> <p>Note: If a default search is already set, the previous default search is deleted and the new default search is saved.</p>
<p>AI Determination of Speaker <i>0.3.69</i></p>	<p>The AI Multi script element prompts ChatGPT to determine if the speaker is the agent or the caller.</p>
<p>Abandon Time Widgets added to Standard Default Dashboard <i>0.3.67</i></p>	<p>The Standard Default Agent Dashboard contains three instances of the Abandon Time widget.</p>  <ul style="list-style-type: none"> • The first Abandon Time widget displays the average time value of the Agent Abandon Call Duration values. • The second Abandon Time widget displays the average time value of the Agent Abandon Wait Time values. • The third Abandon Time widget displays the average time value of the Agent Abandon Time values.
<p>Abandon Time and Call Metric Widgets Added to Standard Default Dashboard <i>0.3.66</i></p>	<p>The Standard Default Dashboard contains four instances of the Abandon Time widget and a Call Metrics widget.</p>

FEATURE

DESCRIPTION



These widgets are located under the Service Levels tab.

- The first Abandon Time widget displays the average time value of the System Abandon Call Duration values.
- The second Abandon Time widget displays the average time value of the System Abandon Time values.
- The third Abandon Time widget displays the average time value of the Agent Abandon Wait Time values.
- The fourth Abandon Time widget displays the average time value of the Agent Abandon Time values.
- The Call Metrics widget displays the average time value for each data category.

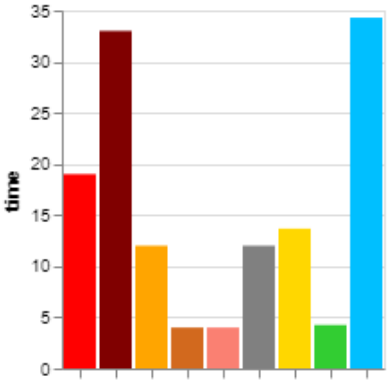
Message Script Fields in Message Details

0.3.64

Script fields have been added to the Message Details window and the Message Information page of Active Insights. The Message Details window and Message Information page contain the expandable Fields section.

```
Fields
{
  "annotations": [
    "Edited by Amy at 1:36 PM, 8/14/2024"
  ],
  "fields": {
    "CHOICESCREEN": "",
    "CODECHOICE": "Code Red",
    "CODEINFO": "Fire Emergency",
    "CODESCREEN": "CodeRed",
    "DATETIME": "5/9/2024 8:44:04 AM",
    "FIRSTNAME": "Shere",
    "LASTNAME": "Test",
    "LOCATION": "W123",
    "OVERHEADCOMPLETED": "True",
    "REASON": "Cardiac arrest",
    "_TESTDRIVE": "False"
  },
  "revision": 2
}
```

FEATURE	DESCRIPTION
	<ul style="list-style-type: none"> To view the Fields section, open the Message Details window for a message, and click the Fields label. To hide the Fields section, click the Fields label again. <p>The Fields section contains the Annotations field, the Fields field, and the Revisions field.</p> <p>Annotations</p> <p>The Annotations field displays the text of all annotations entered for the message.</p> <p>Fields</p> <p>The Fields field displays a list of all Message Script Fields contained within the Intelligent Messaging Script used to create the message. The Fields field contains the name of the Message Script Field and the value it contains for the message.</p> <p>Revisions</p> <p>The Revisions field contains the number of revisions made to the message.</p>
<p>Message Fields can be accessed in Script Expressions</p> <p><i>0.3.64</i></p>	<p>Active Insights Script Expressions can reference Message Script Fields for Artificial Intelligent (AI) and Non-AI prompts.</p> <p>Message Script Fields are referenced in the Expression field by entering “Message.Fields.” followed by the name of the Message Script Field.</p> <p>Example: Entering “Message.Fields.Patient_Name” would refer to the Message Script Field named “Patient_Name” field.</p>
<p>Comparison Operator</p> <p>=~</p> <p><i>0.3.64</i></p>	<p>The Comparison operator, represented by an equals sign and a tilde (=~), can be used to determine if a field contains one or more character strings. The Comparison operator returns true if the left operand contains the value in the right operand.</p> <p>Examples</p> <p>‘Message.Fields.Address =~ “park street”’ will return True if the Address variable contains “park street.”</p> <p>‘Message.Fields.Name =~ “bob bill”’ will return True if the Name variable contains either the name Bob or Bill.</p>
<p>Support for GPT-4o-mini</p> <p><i>0.3.63</i></p>	<p>Support for using GPT-4o-mini is available in Active Insights. This is experimental and can be enabled by Amtelco on a per customer basis. The ai_gpt_4o_mini feature flag controls whether Active Insights uses gpt-3.5 or the newer gpt-4o-mini.</p>

FEATURE	DESCRIPTION																				
<p>PDF View checkbox in Call Export</p> <p>0.3.62</p>	<p>The PDF View check box in the Call Export window is used to compile exported call information as a Portable Document Format (PDF) file for each call. The PDF file can contain the contents of the Notes field, the Call Details section, the Messages section, the Transcript, and Post-Call Scoring Script results.</p> <div data-bbox="756 464 1200 1131" style="border: 1px solid black; padding: 10px; margin: 10px 0;"> <p>Call Export Export calls for selected range</p> <hr/> <p>Calls in selected range</p> <hr/> <p>Selected Search Criteria</p> <ul style="list-style-type: none"> <input type="checkbox"/> Call Start/End <input type="checkbox"/> Messages <input type="checkbox"/> Call Trackers <input type="checkbox"/> Voice Recordings <input type="checkbox"/> Screen Recordings <input type="checkbox"/> Transcripts <input checked="" type="checkbox"/> PDF View </div> <p>Note: The PDF file is created in addition to the Comma-Separated Values (CSV) files exported by Active Insights for non-media fields.</p>																				
<p>Call Metrics Widget</p> <p>0.3.62</p>	<p>The Call Metrics widget can be added to dashboards in the Active Insights platform. The Call Metrics widget displays a graph of data for calls in the dashboard's dataset.</p> <div data-bbox="605 1428 1351 1923" style="border: 1px solid black; padding: 10px; margin: 10px 0;"> <p style="text-align: center;">Call Metrics</p>  <table border="1" style="margin-top: 10px;"> <caption>Call Metrics Averages</caption> <thead> <tr> <th>Category</th> <th>Time (Approximate)</th> </tr> </thead> <tbody> <tr> <td>agent abandon time</td> <td>19</td> </tr> <tr> <td>agent abandon call duration</td> <td>33</td> </tr> <tr> <td>agent abandon wait time</td> <td>12</td> </tr> <tr> <td>system abandon time</td> <td>4</td> </tr> <tr> <td>system abandon call duration</td> <td>4</td> </tr> <tr> <td>wait time</td> <td>12</td> </tr> <tr> <td>hold time</td> <td>14</td> </tr> <tr> <td>answer time</td> <td>4</td> </tr> <tr> <td>call duration</td> <td>34</td> </tr> </tbody> </table> </div>	Category	Time (Approximate)	agent abandon time	19	agent abandon call duration	33	agent abandon wait time	12	system abandon time	4	system abandon call duration	4	wait time	12	hold time	14	answer time	4	call duration	34
Category	Time (Approximate)																				
agent abandon time	19																				
agent abandon call duration	33																				
agent abandon wait time	12																				
system abandon time	4																				
system abandon call duration	4																				
wait time	12																				
hold time	14																				
answer time	4																				
call duration	34																				

FEATURE	DESCRIPTION
	<p>Legend</p> <p>The Call Metrics legend indicates which data category is represented by each color. Calculations for the following data categories are displayed in the Call Metrics graph.</p> <p><i>Agent Abandon Time</i> The Agent Abandon Time category represents the number of seconds between when the call was distributed to an agent and when the caller hung up. The Agent Abandon Time statistic only includes Agent Abandons, which are calls in which the caller hung up after the call was assigned to an agent without the call being answered.</p> <p><i>Agent Abandon Call Duration</i> The Abandon Call Duration category represents the number of seconds between when the call entered the system and when the caller hung up. The Agent Abandon Call Duration statistic only includes Agent Abandons. Agent Abandon Wait Time and Agent Abandon Time are included in the Agent Abandon Call Duration.</p> <p><i>Agent Abandon Wait Time</i> The Agent Abandon Wait Time category represents the number of seconds that the call was in Waits. The Agent Abandon Wait Time statistic only includes Agent Abandons.</p> <p><i>System Abandon Time</i> The System Abandon Time category represents the number of seconds between when the call was distributed to a queue and when the caller hung up. The System Abandon Time statistic only includes System Abandons, which are calls in which the caller hung up before the call could be assigned to an agent.</p> <p><i>System Abandon Call Duration</i> The System Abandon Call Duration category represents the number of seconds between when the call entered the system and when the caller hung up. The System Abandon Call Duration statistic only includes System Abandons.</p> <p><i>Wait Time</i> The Wait Time category represents the number of seconds the call was in the Waits queue. The Wait Time statistic includes Agent Abandons, System Abandons, and non-abandon calls.</p> <p><i>Hold Time</i> The Hold Time category represents the number of seconds the call</p>  <p>The legend, titled 'Category', lists eight categories with corresponding color swatches: agent abandon time (red), agent abandon call duration (dark red), agent abandon wait time (orange), system abandon time (brown), system abandon call duration (pink), wait time (grey), hold time (yellow), answer time (green), and call duration (blue).</p>

FEATURE

DESCRIPTION

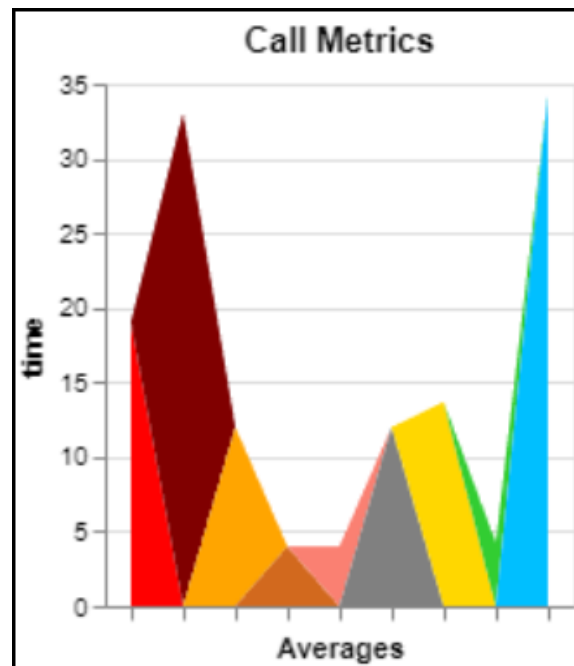
was in the Hold state. The Hold Time statistic only includes non-abandon calls.

Answer Time

The Answer Time category represents the number of seconds the call was in the Ringing state. The Answer Time statistic includes Agent Abandons and non-abandon calls.

Call Duration

The Call Duration category represents the number of seconds from when the call entered the system to when the call was disconnected. The Call Duration statistic includes Agent Abandons, System Abandons, and non-abandon calls. Wait Time, Hold Time, and Answer Time are included in the Call Duration



Graph

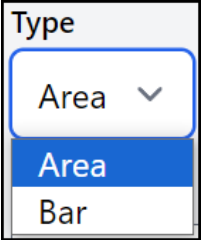
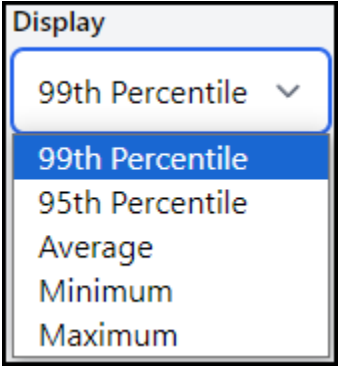
The Call Metrics graph is displayed as either a bar graph or area graph, depending on the Widget Properties. The graph displays a bar or area for each statistic displayed in the graph. The right side of the Call Metrics graph displays the number of seconds that the graph represents.

The height of each bar or area represents the number of seconds produced by the calculation for the category.

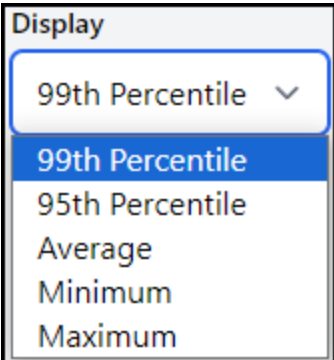
Tooltips

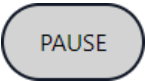

A tooltip is provided for each bar or area.

The tooltip displays the following information about the bar or area:

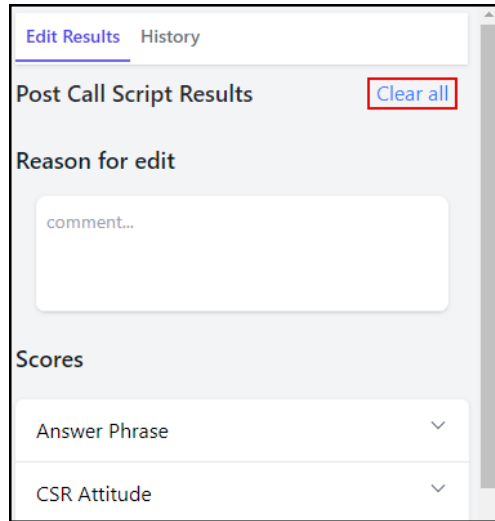
FEATURE	DESCRIPTION
	<ul style="list-style-type: none"> • The category for which data is displayed. • The value represented. <h3>Widget Properties</h3> <p>The widget properties for the Call Metrics widget are used to change what type of chart the widget displays and what type of calculation is used for each data category in the dataset.</p> <h4>Type</h4> <p>The Type field is used to select how data is displayed in the Call Metrics graph. The Type field can either be set to “Area” or “Bar.”</p> <p><i>Area</i> When the Type field is set to “Area,” each value in the Call Metrics graph is displayed as a line graph connecting each data point, and the area below each point is colored to represent the category for which a value is displayed.</p>  <p><i>Bar</i> When the Type field is set to “Bar,” each value in the Call Metrics graph is displayed as a vertical bar. Each bar is colored to represent the category for which a value is displayed.</p> <h4>Display</h4> <p>The Display field determines what formula is used to calculate the value displayed for each data category. The selected formula is used to calculate all values for the selected category type within the dataset.</p> <p>Note: A description of the formula selected in the Display field is displayed below the Call Metrics graph.</p> <p>The Display field contains the following formula options.</p> <p><i>99th Percentile</i> The 99th Percentile option displays the number of seconds that 99 percent of values were less than. This can be used to show the upper limit of the values a dataset contains while excluding the largest one percent.</p> <p><i>95th Percentile</i> The 95th Percentile option displays the number of seconds that 95 percent of values were less than. This can be used to show the upper limit of the values a dataset contains while excluding the largest five percent.</p> 

FEATURE	DESCRIPTION
	<p><i>Average</i> The Average option displays the average of all values in the dataset.</p> <p><i>Minimum</i> The Minimum option displays the smallest value contained in the dataset.</p> <p><i>Maximum</i> The Maximum option displays the largest value contained in the dataset.</p>
<p>Abandon Time Widget 0.3.62</p>	<p>The Abandon Time widget can be added to dashboards in Active Insights platform. The Abandon Time widget displays a single statistic related to abandons for the dashboard's dataset.</p> <div data-bbox="527 735 1425 982" style="border: 1px solid black; padding: 5px;"> </div> <p>Widget Properties</p> <p>The widget properties for the Abandon Time widget are used to change the type of abandon statistic displayed and how the statistic is displayed.</p> <p>Type</p> <p>The Type field is used to select what type of abandon data category is used from calls in the dataset by the Abandon Time widget. Each category is measured in seconds and is used in calculating the information displayed by the Abandon Time widget.</p> <div data-bbox="703 1396 1250 1753" style="border: 1px solid black; padding: 5px;"> </div> <p>Note: The data category selected in the Type field is displayed as the title of the Abandon Time widget in the Dashboard.</p> <p>The Type field contains the following data category options.</p>

FEATURE	DESCRIPTION
	<p><i>System Abandon Time</i> The System Abandon Time category represents the number of seconds between when the call was distributed to a queue and when the caller hung up for System Abandons. System Abandons are calls in which the caller hung up before the call could be assigned to an agent.</p> <p><i>System Abandon Call Duration</i> The System Abandon Call Duration category represents the number of seconds between when the call entered the system and when the caller hung up for System Abandons. The System Abandon Call Duration includes the System Abandon Time.</p> <p><i>Agent Abandon Time</i> The Agent Abandon Time category represents the number of seconds between when the call was distributed to an agent and when the caller hung up for Agent Abandons. Agent Abandons are calls in which the caller hung up after the call was assigned to an agent without the call being answered.</p> <p><i>Agent Abandon Call Duration</i> The Abandon Call Duration category represents the number of seconds between when the call entered the system and when the caller hung up for Agent Abandons. The Agent Abandon Call Duration includes the Agent Abandon Wait Time and the Agent Abandon Time.</p> <p><i>Agent Abandon Wait Time</i> The Agent Abandon Wait Time category represents the number of seconds that the call is in Waits for Agent Abandons.</p> <p>Display The Display field determines what formula is used to calculate the value displayed for the selected data category. The selected formula is used to calculate all values for the selected data category within the dataset.</p> <p>Note: A description of the formula selected in the Display field is displayed below the value displayed by the Abandon Times widget.</p> <p>The Display field contains the following formula options.</p> <p><i>99th Percentile</i> The 99th Percentile option displays the number of seconds that 99 percent of values were less than. This can be used to show the upper limit of the values a dataset contains while excluding the</p> 

FEATURE	DESCRIPTION
	<p>largest one percent.</p> <p><i>95th Percentile</i> The 95th Percentile option displays the number of seconds that 95 percent of values were less than. This can be used to show the upper limit of the values a dataset contains while excluding the largest five percent.</p> <p><i>Average</i> The Average option displays the average of all values in the dataset.</p> <p><i>Minimum</i> The Minimum option displays the smallest value contained in the dataset.</p> <p><i>Maximum</i> The Maximum option displays the largest value contained in the dataset.</p>
<p>Call Log Play Button Indicator</p> <p><i>0.3.61</i></p>	<p>The Call Information page Play button toggles between Play and Pause when the button is clicked.</p> <ul style="list-style-type: none"> • If the Play button is clicked, the audio playback begins, and the Play button is replaced by the  Pause button. • If the Pause button is clicked, the audio playback paused, and the Pause button is replaced by the  Play button. <p>Note: If a screen capture video was recorded for the call and the Screen Recording slider is enabled, the screen capture video pauses and plays along with the audio playback.</p>
<p>Clear All Command</p> <p><i>0.3.61</i></p>	<p>In the Call Log Edit Panel, the Edit Results tab contains the Clear All command. The Clear All command is used to clear all Post Call Script Results from the call selected on the Call Information page. When Post Call Script Results are removed from a call, the call will no longer count towards score calculations.</p>

FEATURE	DESCRIPTION
---------	-------------



When the Clear All command is clicked, all Post Call Script Results are cleared.

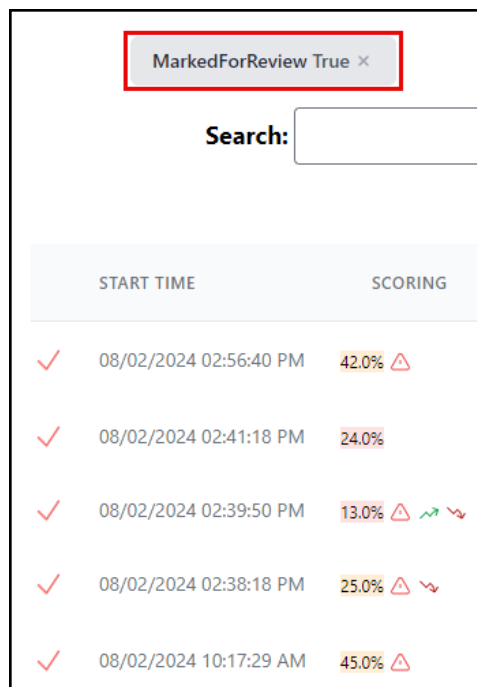
To save the Post Call Script Results changes, click the Save button in the Edit Panel.

MarkedForReview and ReviewedScores Search Parameters
0.3.61

The Call Log contains the MarkedForReview and Reviewed Scores search parameters.

MarkedForReview

The MarkedForReview search parameter is used to display call listings where the call either was or wasn't marked for review.



FEATURE

DESCRIPTION

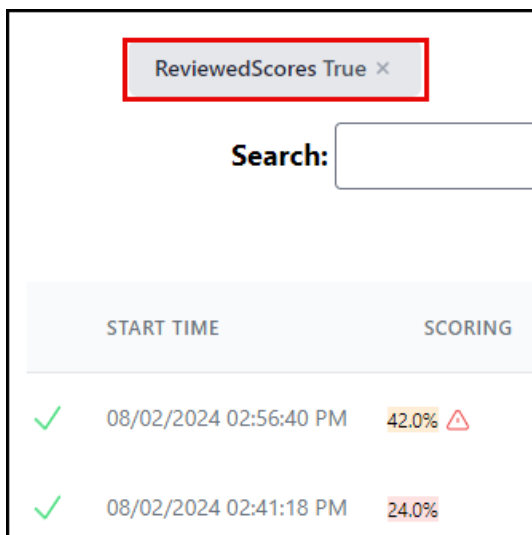
The MarkedForReview search parameter is used to create a filter using the Equals modifier and can either be set to “True” or “False.”

- If the MarkedForReview filter is set to “True,” then the Call Log only displays call listings that are marked for review.
- If the MarkedForReview filter is set to “False,” then the Call Log will only display call listings that are not marked for review.

Note: Calls which were marked for review but were then marked as Reviewed will not be displayed when the MarkedForReview filter is set to “True,” as these calls are no longer marked for review.

ReviewedScores

The ReviewedScores search parameter is used to display call listings where the call was reviewed by an Active Insights user and marked as Reviewed.

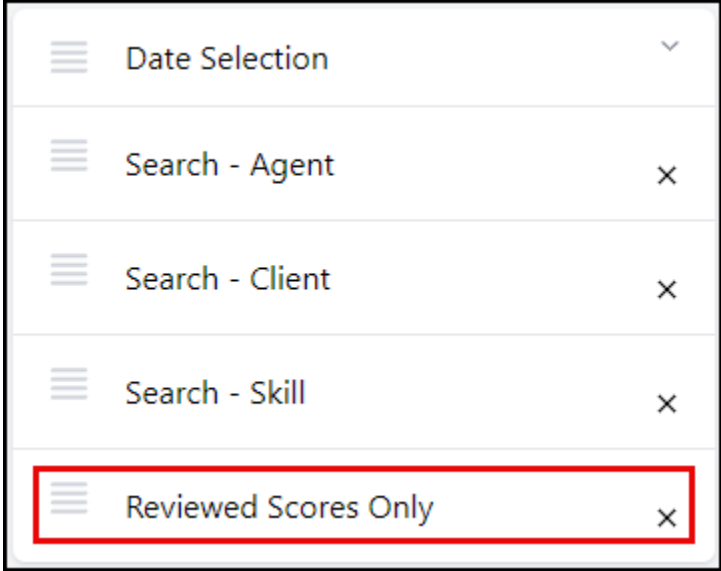
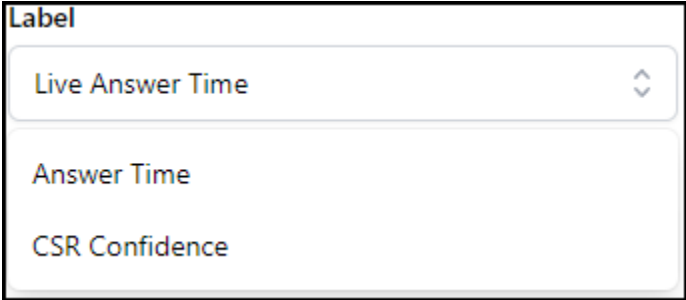


	START TIME	SCORING
✓	08/02/2024 02:56:40 PM	42.0% ⚠
✓	08/02/2024 02:41:18 PM	24.0%

The ReviewedScores search parameter is used to create a filter using the Equals modifier and can either be set to “True” or “False.”

- If the ReviewedScores filter is set to “True,” then the Call Log only displays call listings that have been marked as Reviewed.
- If the ReviewedScores filter is set to “False,” then the Call Log only displays call listings that have not been marked as Reviewed.

Note: When the ReviewedScores filter is set to “False,” the Call Log will display both calls that have been marked for reviewed and calls that are not marked for review and have not been marked as Reviewed.

FEATURE	DESCRIPTION
<p>Reviewed Scores Only Filter in Dashboard</p> <p><i>0.3.61</i></p>	<p>The Filters list for dashboard panels includes the Reviewed Scores Only filter. When this filter is applied to a panel, widgets in the panel that display score information only display scores and score calculations for calls which have been reviewed.</p>  <p>Note: The Reviewed Scores Only filter does not affect widgets that do not display score information.</p>
<p>Post Call Analytics Items List</p> <p><i>0.3.58</i></p>	<p>The Post Call Analytics Items list is located on the Scripts page. The Post Call Analytics Items list is used to manage Scores, Trends, and Annotations across multiple scripts so these items are consistent globally when changed or added. This ensures that items that are supposed to share a label across multiple scripts share the label exactly, resulting in more consistent statistics.</p>  <p>Items added to the Post Call Analytics Items list can be selected via the Label field in the Edit Element pane for various elements in a script using the Menu icon. ⌵ The Post Call Analytics Items list contains a Scores table, a Trends Label, and an Annotations table. Each listing contains data about the listing and the Edit and Delete commands.</p>

FEATURE	DESCRIPTION																		
	<p>Edit</p> <p>The Edit command is used to open the Edit window for the listing. The contents of the Edit window are determined by the type of listing.</p> <p>Delete</p> <p>The Delete command is used to delete the listing from the table.</p> <p>Scores</p> <p>The Scores table contains all scores added to the Post Call Analytics Items list. The Scores table displays the score Label and the Maximum value for each score.</p> <div data-bbox="529 695 1425 1037" style="border: 1px solid black; padding: 5px;"> <p>Scores</p> <table border="1"> <thead> <tr> <th>Label</th> <th>Maximum</th> <th colspan="2">Add Score</th> </tr> </thead> <tbody> <tr> <td>Answer Time</td> <td>10</td> <td>Edit</td> <td>Delete</td> </tr> <tr> <td>CSR Confidence</td> <td>20</td> <td>Edit</td> <td>Delete</td> </tr> </tbody> </table> </div> <p>Note: Scores can be selected by label in the Score, AI Score, and AI Multi elements.</p> <p>Add Score</p> <p>The Add Score command is used to add a new score to the Scores table.</p> <p>To add a new score, click the Add Score command and enter the Label and Maximum value for the score.</p> <p>Trends</p> <p>The Trends table contains all trends added to the Post Call Analytics Items list. The Trends table displays the Label for each Trend.</p> <div data-bbox="529 1520 1425 1776" style="border: 1px solid black; padding: 5px;"> <p>Trends</p> <table border="1"> <thead> <tr> <th>Label</th> <th colspan="2">Add Trend</th> </tr> </thead> <tbody> <tr> <td>Caller Sentiment</td> <td>Edit</td> <td>Delete</td> </tr> </tbody> </table> </div> <p>Note: Trends can be selected by label in the AI Trend and AI Multi elements.</p>	Label	Maximum	Add Score		Answer Time	10	Edit	Delete	CSR Confidence	20	Edit	Delete	Label	Add Trend		Caller Sentiment	Edit	Delete
Label	Maximum	Add Score																	
Answer Time	10	Edit	Delete																
CSR Confidence	20	Edit	Delete																
Label	Add Trend																		
Caller Sentiment	Edit	Delete																	

FEATURE	DESCRIPTION									
	<p>Add Trend</p> <p>The Add Trend command is used to add a new trend to the Trends table.</p> <p>To add a new trend, click the Add Trends command and enter the Label for the trend.</p> <p>Annotations</p> <p>The Annotations table contains all Annotations added to the Post Call Analytics Items list. The Annotations table displays the Label for each Annotation.</p> <div data-bbox="529 680 1427 1016" style="border: 1px solid black; padding: 5px;"> <p>Annotations</p> <table border="1"> <thead> <tr> <th data-bbox="537 768 808 848">Label</th> <th colspan="2" data-bbox="808 768 1419 848">Add Annotation</th> </tr> </thead> <tbody> <tr> <td data-bbox="537 848 808 928">Summary</td> <td data-bbox="808 848 971 928">Edit</td> <td data-bbox="971 848 1419 928">Delete</td> </tr> <tr> <td data-bbox="537 928 808 1008">Warning</td> <td data-bbox="808 928 971 1008">Edit</td> <td data-bbox="971 928 1419 1008">Delete</td> </tr> </tbody> </table> </div> <p>Note: Annotations can be selected by label in the AI Annotation and AI Multi elements.</p> <p>Add Annotation</p> <p>The Add Annotation command is used to add a new annotation to the Annotations table.</p> <p>To add a new annotation, click the Add Annotation command and enter the Label for the Annotation.</p>	Label	Add Annotation		Summary	Edit	Delete	Warning	Edit	Delete
Label	Add Annotation									
Summary	Edit	Delete								
Warning	Edit	Delete								
<p>Delivered/Undelivered Call Conditions</p> <p><i>0.3.57</i></p>	<p>The Call Conditions page contains a Message characteristic. The Message characteristic can be used to limit conditions to be considered true when the message associated with the call was marked delivered or not marked delivered.</p>									

Requirements:

Active Insights

Outbound Ports 50052 and 50053 open to Active Insights Website

IS 5.5 System

- IS Server 5.5.8931.15540 or later
- IS Supervisor 5.5.7605.74 or later
- Genesis 6.6

IS 5.6 System

- IS Server 5.6.8930.25267 or later
- IS Supervisor 5.6.8259.29 or later
- Genesis 6.7

Optional:

Call Transcription Additional Hours

Keyword Sentiment Additional AI Tokens

Ellie Intelligent Virtual Agent (IVA)

- Ellie call licenses
- IS Server 6.0.9335.19335 or later
- IS Supervisor 6.0.9335.01 or later
- Genesis 7.2

Browser Compatibility:

Web applications are tested with the latest release of the following browsers.

- Google Chrome
- Microsoft Edge

Part Numbers: 232A663-R30, 232MP366, 232MP367