Active Insights Script Editor

Reference Guide

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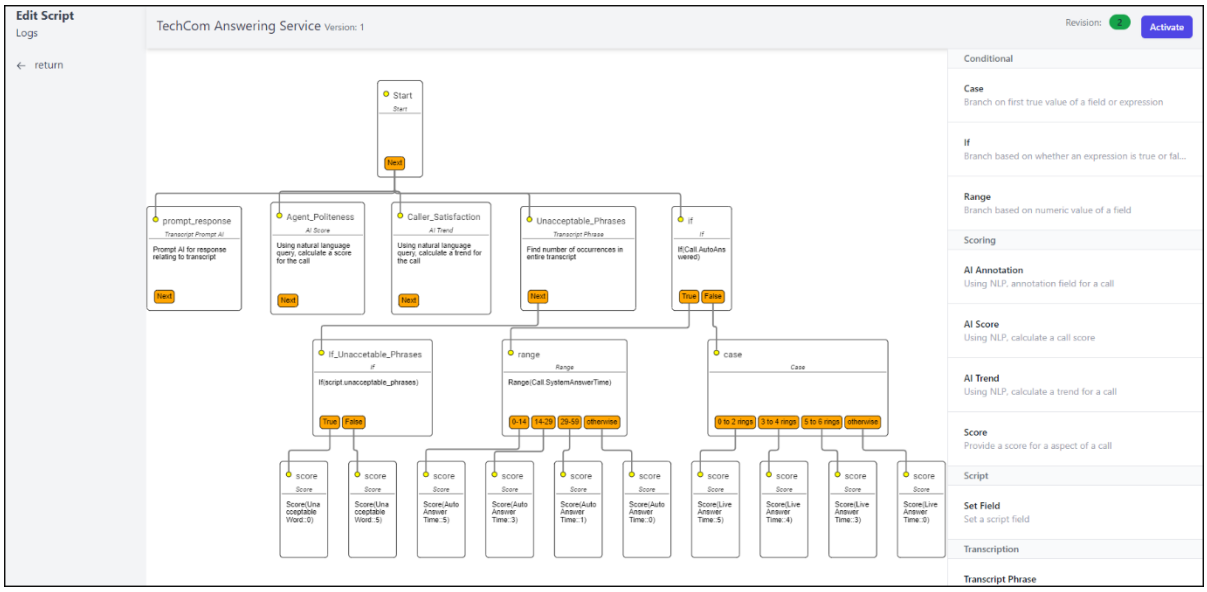


The Active Insights Script Editor enables users to create and edit Post-Call Scoring Scripts from within the Active Insights Platform. Post-Call Scoring Scripts can be assigned to Client configurations in the Active Insights platform and automatically analyze call records entering Active Insights Cloud Storage for Clients assigned to the same Client configuration. Post-Call Scoring Scripts can be used to evaluate calls based on a variety of criteria and by utilizing a variety of different call elements.

The Active Insights Script Editor enables users to create and edit Post-Call Scoring Scripts from within the Active Insights Platform.

This document covers the following topics:

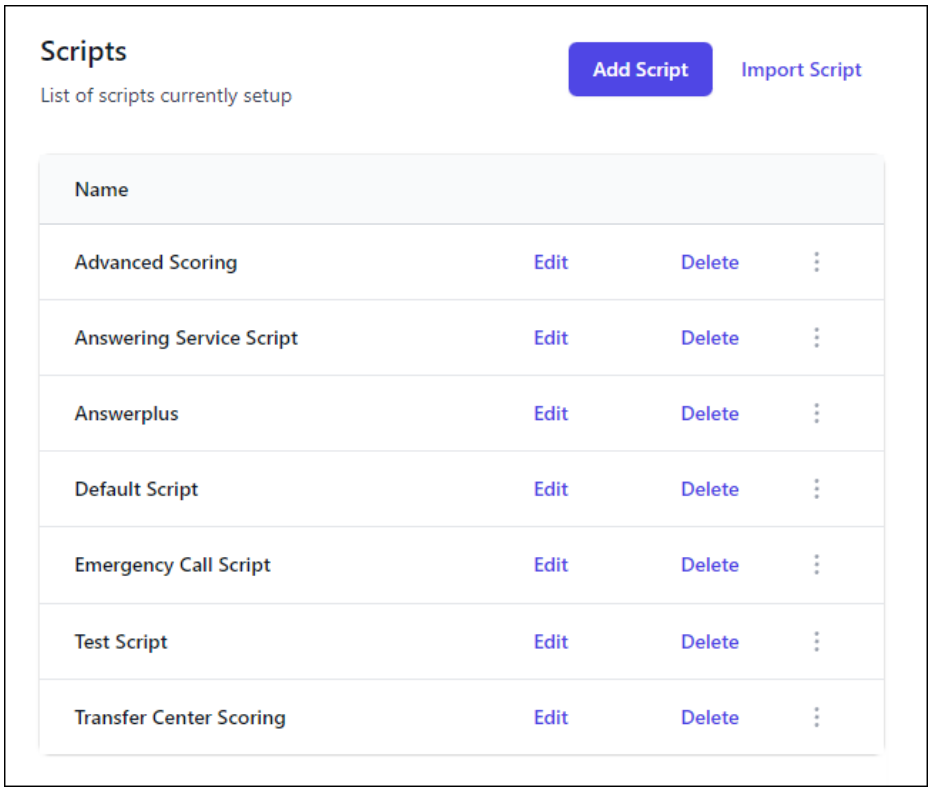
- Managing Scripts
- Managing Post Call Analytic Items
- Using the Script Editor
- Element Configuration
- Using the Script Logs Page
- Creating Expressions

Managing Scripts

The Post Call Analytics page enables users to add, edit, delete, and duplicate Post Call Scripts.

Post Call Scripts are scripts that the Active Insights platform uses to analyze and score calls based on customizable criteria. A single script can give a score for multiple Score Labels to a single call.

The Post Call Analytics page contains the Add Script button, the Import Script button, and a list of all Post Call Scripts created for your account.



Scripts

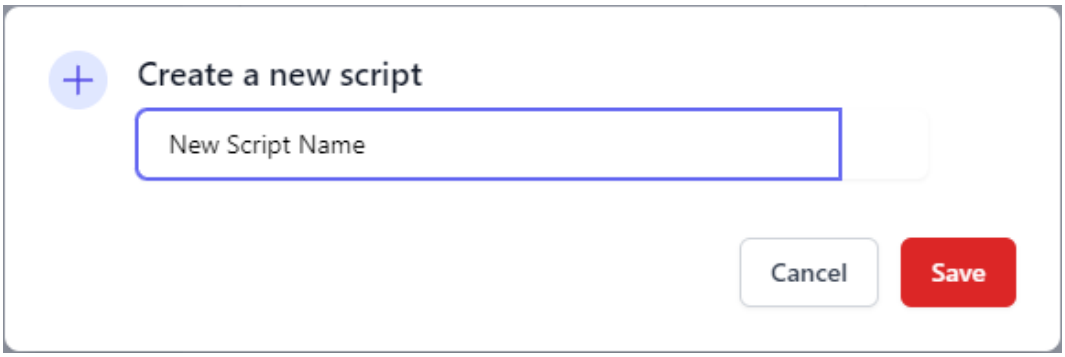
The Scripts list contains a listing for each script created for use by the Active Insights platform. The Scripts list displays the Script Name, an Edit hyperlink, a Delete hyperlink, and a Menu icon ⋮ for each script. The Menu icon ⋮ is used to access the Duplicate and Export commands.

Adding a New Script

A new Script can be added using the Add Script button.

To create a new script, click the Add Script button.

The “Create a new script” window is displayed.



Type the name you would like for the script.

Click the Save button to create a new script with the entered name.
OR
Click the Cancel button to cancel creating a script.

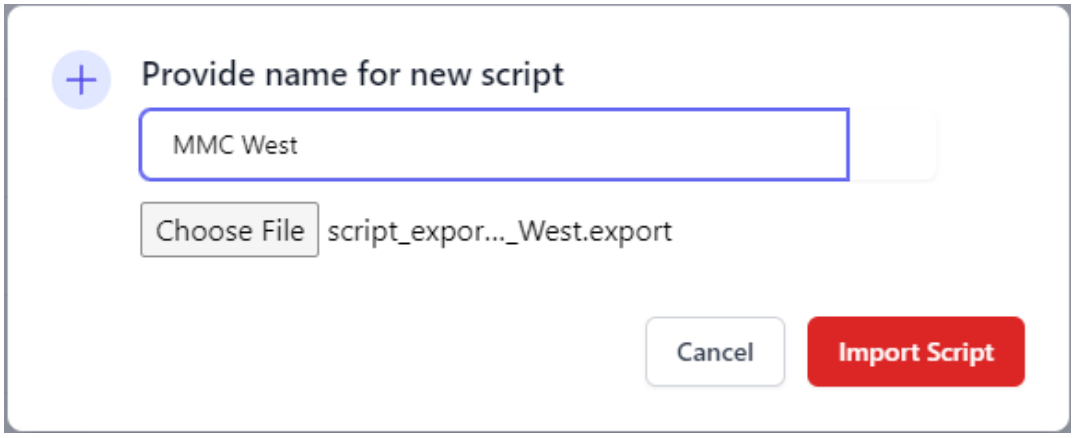
If the Save button was clicked, the new script is created with the name entered.

Importing a Script

The Import Script button is used to add an existing script that was exported. To import a script, you must have the file of an exported script.

To import a Script, click the Import Script button.

The Import Script window is displayed.



Type the name you would like for the script.

Click the Choose File button and select the file from the File Navigation menu.
OR
Drag the file from your workstation onto the Import Script window.

The file name is displayed next to the Choose File button.

Click the Import Script button to import the script with the entered name.
OR
Click the Cancel button to cancel importing the script.

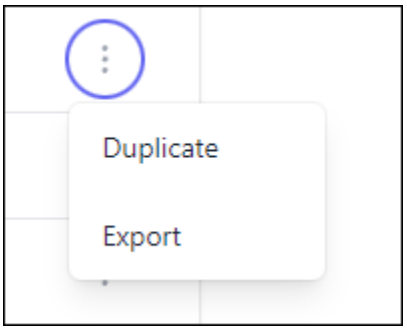
If the Import Script button was clicked, the script is added to the Script list with the name entered.

Exporting at Script

To acquire a .export file used when Importing a Script, a script must first be exported.

To export a Script, click the Menu icon. ⋮

The Duplicate and Export commands are displayed.



Click the Export command.

The .export file for the Script is generated and made available for download through the User Downloads page.

Duplicating a Script

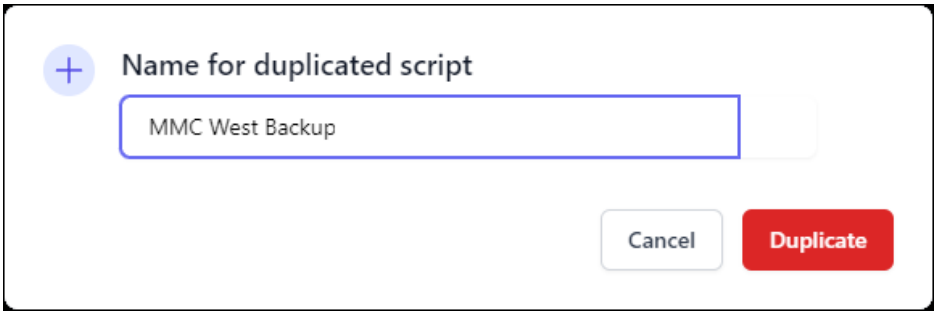
A Script can be duplicated to create a Script with the same format with a new name.

To duplicate a script, click the Menu icon. ⋮

The Duplicate and Export commands are displayed.

Click the Duplicate button.

The Duplicate Script window is displayed.



Enter the name you would like for the duplicate script.

Click the Duplicate button to create the duplicate script with the entered name.
OR
Click the Cancel button to cancel creating the duplicate script.

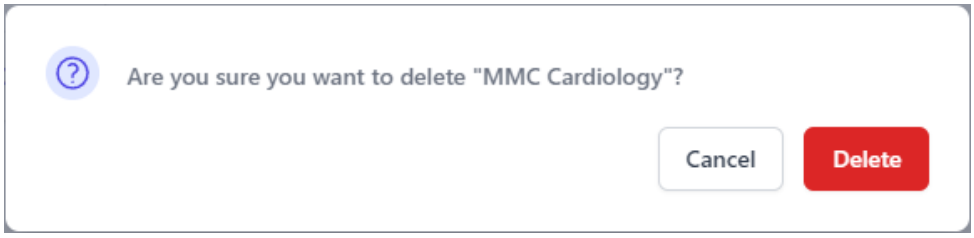
If the Save button was clicked, the duplicate script is created with the name entered.

Deleting a Script

Scripts can be removed from the Post Call Analytics page using the Delete hyperlink.

To delete a script, click the Delete hyperlink next to the script you would like to delete.

A prompt is displayed asking you to confirm that you want to delete the script.



Click the Delete button to delete the script.

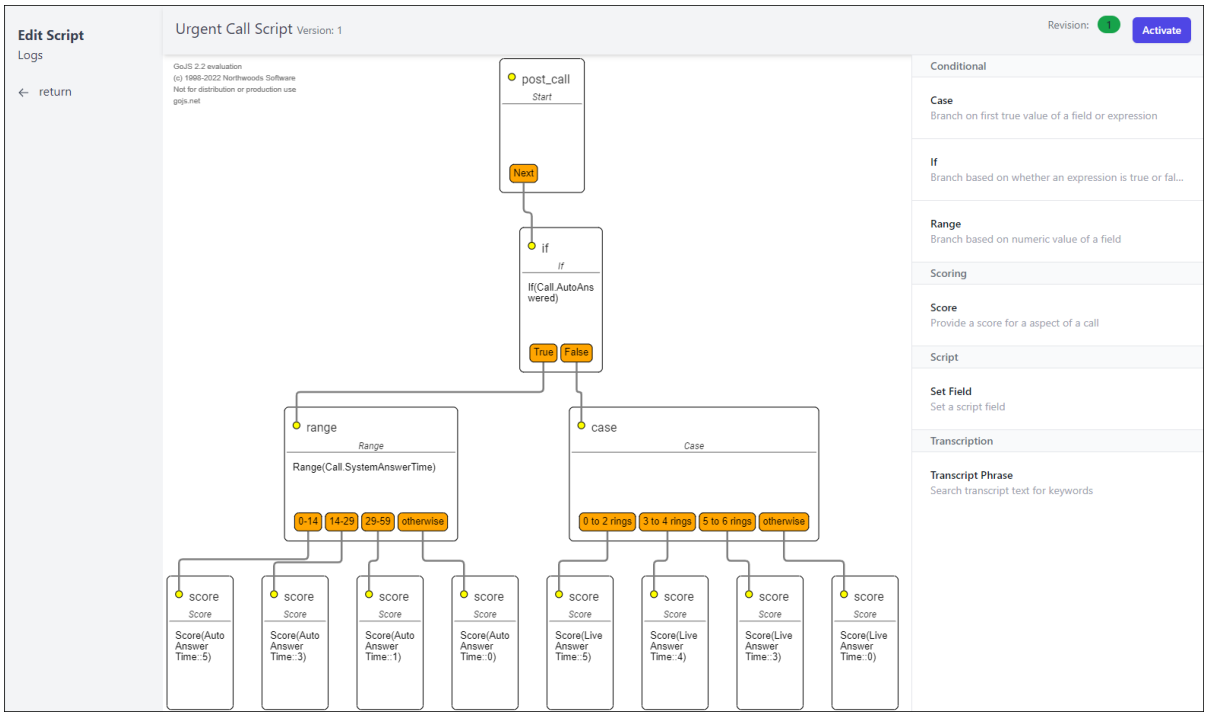
OR

Click the Cancel button to cancel deleting the script.

If the Delete button was clicked, the script is deleted.

Editing a Script

Scripts can be edited to analyze and score calls based on different criteria. Scripts can be edited with the Active Insights Script Editor.



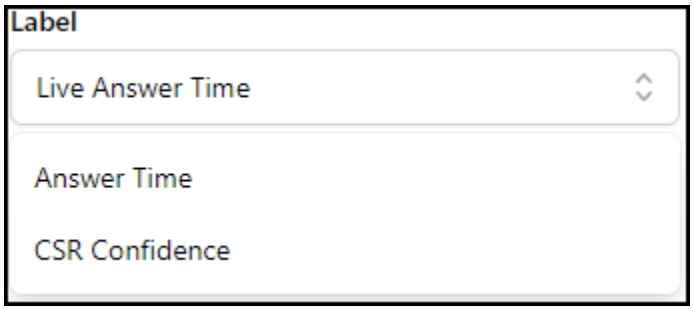
To edit a script, click the edit hyperlink next to the script that you would like to edit.

The Active Insights Script Editor is displayed.

Managing Post Call Analytic Items

The Post Call Analytics page contains the Post Call Analytic Items section. 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.

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 table, and an Annotations table. Each listing contains data about the listing and the Edit and Delete commands.

Edit

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.

To open the Edit window for a listing, click the Edit command next to the listing you would like to edit.

The Edit window for the listing is displayed.

Delete

The Delete command is used to delete the listing from the table.

To delete a listing, click the Delete command next to the listing you would like to delete.

Scores

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.

Note: Scores can be selected by label in the Score, AI Score, and AI Multi elements.

Add Score

The Add Score command is used to add a new score to the Scores table.

To add a new score, click the Add Score command and enter the Label and Maximum value for the score.

Trends

The Trends table contains all trends added to the Post Call Analytics Items list. The Trends table displays the Label for each trend.

Note: Trends can be selected by label in the AI Trend and AI Multi elements.

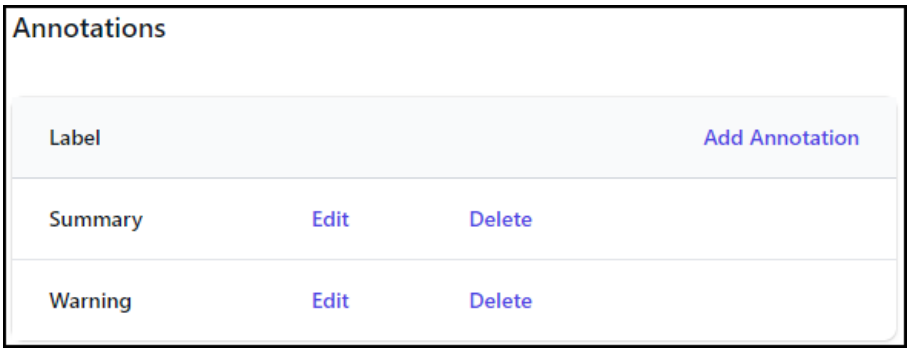
Add Score

The Add Trend command is used to add a new trend to the Trends table.

To add a new trend, click the Add Trends command and enter the Label for the trend.

Annotations

The Annotations table contains all annotations added to the Post Call Analytics Items list. The Annotations table displays the Label for each annotation.



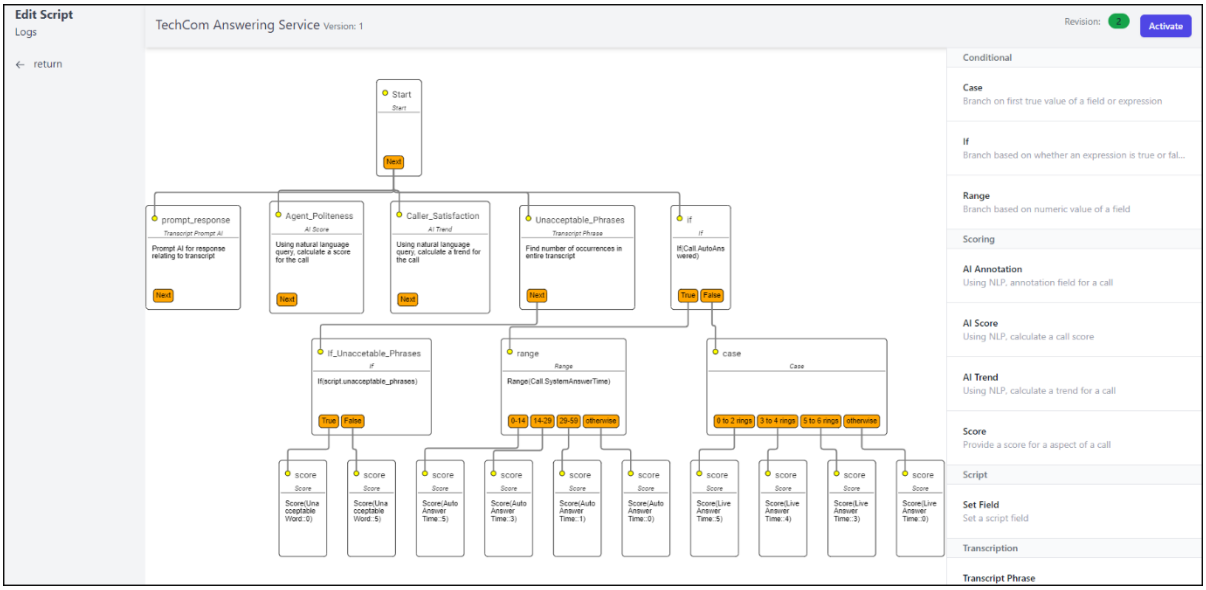
Note: Annotations can be selected by label in the AI Annotation and AI Multi elements.

Adding an Annotation

The Add Annotation command is used to add a new annotation to the Annotations table.

To add a new annotation, click the Add Annotation command and enter the Label for the annotation.

Script Editor



The Active Insights Script Editor is used to edit Post-Call Scoring Scripts from within the Active Insights Platform. The Script Editor enables users to add, edit, and delete modular elements and connections that determine the functionality of the script. The Script Editor also enables users to track changes made to the script and access the Script Logs page.

The Script Editor page displays the Logs command, the Return command, the Script Tree, the Script Title Bar, and the Elements palette.

Logs

The Logs command is used to access the Script Logs page.

To access the Script Logs page, click the Logs command.

The Script Logs page is displayed.

More information about the Script Logs page is provided in the “Script Logs” section of this document.

Return

The Return command is used to close the Script Editor page and display the Post Call Analytics page.

Script Title Bar

The Script Title Bar displays information about the script. The Script Title Bar displays the name of the script, the version number of the script, and the number of revisions in the script that have not yet been applied to a new version of the script. If one or more revisions have been made to the script, the Activate button is displayed.

Script Name

The Script Name is the unique name given to the script when it is first created. The Script Name matches the name displayed for the script on the Post Call Analytics page. The Script Name cannot be changed.

Version

The Version area displays the version number of the script being viewed. When a script is created but has not yet been edited, it is displayed with a version number of 1 (one).

Each time a script is activated, the version number is increased by one, representing that a newer iteration of the same script has been activated.

Revision

The Revision counter displays the number of unapplied changes made to the script version. If no changes have been made to the current script version, the Revision counter is set to 0 (zero). Each time a change is made to the script, the change is saved, and the Revision counter increases by one.

Changes made to the script are saved but are not applied until the Activate button is clicked. Once the Activate button is clicked, the Revision counter is reset.

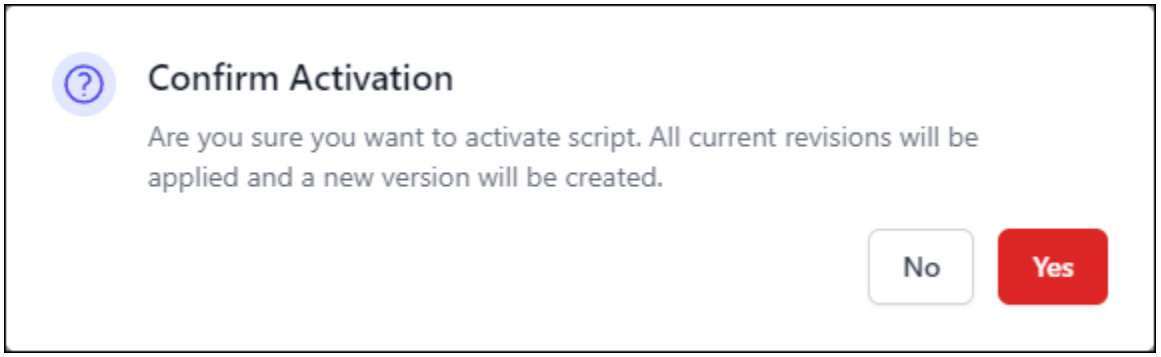
Activate

The Activate button is used to finalize changes made to the script and create an active script version. The Activate button is only displayed if one or more changes have been made to the script since the last time the script was activated and a new version was made.

Note: Changes made to the script are saved when an element is added or deleted, and when the Save button is clicked in the Edit Element pane. However, only the most recent active version of the script is used to analyze and score new call records assigned to the script. No changes made to the script affect the function of the script until the script is activated.

To save all current revisions to a script, and to begin using the revised script on new call records for Clients assigned to the Script, click the Activate button.

The Confirm Activation prompt is displayed.

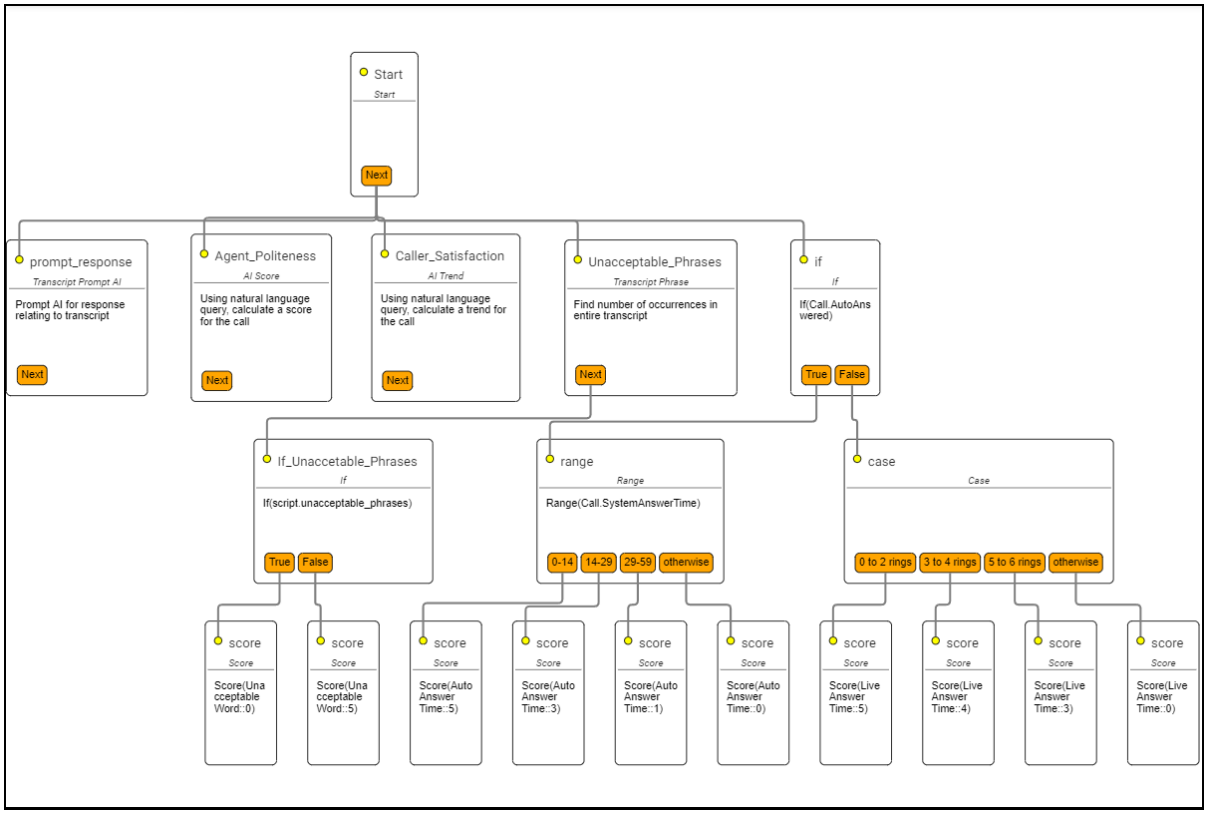


To apply all current revisions to a new version of the script, click the Yes button.
OR
To cancel applying all current revisions, click the No button.

Note: Clicking the No button only aborts the activation process. It does not remove any revisions that have been made to the script.

If the Yes button was clicked, all current revisions are applied to a new version of the script. The Revision counter is reset to 0 (zero), and the version number is increased by one.

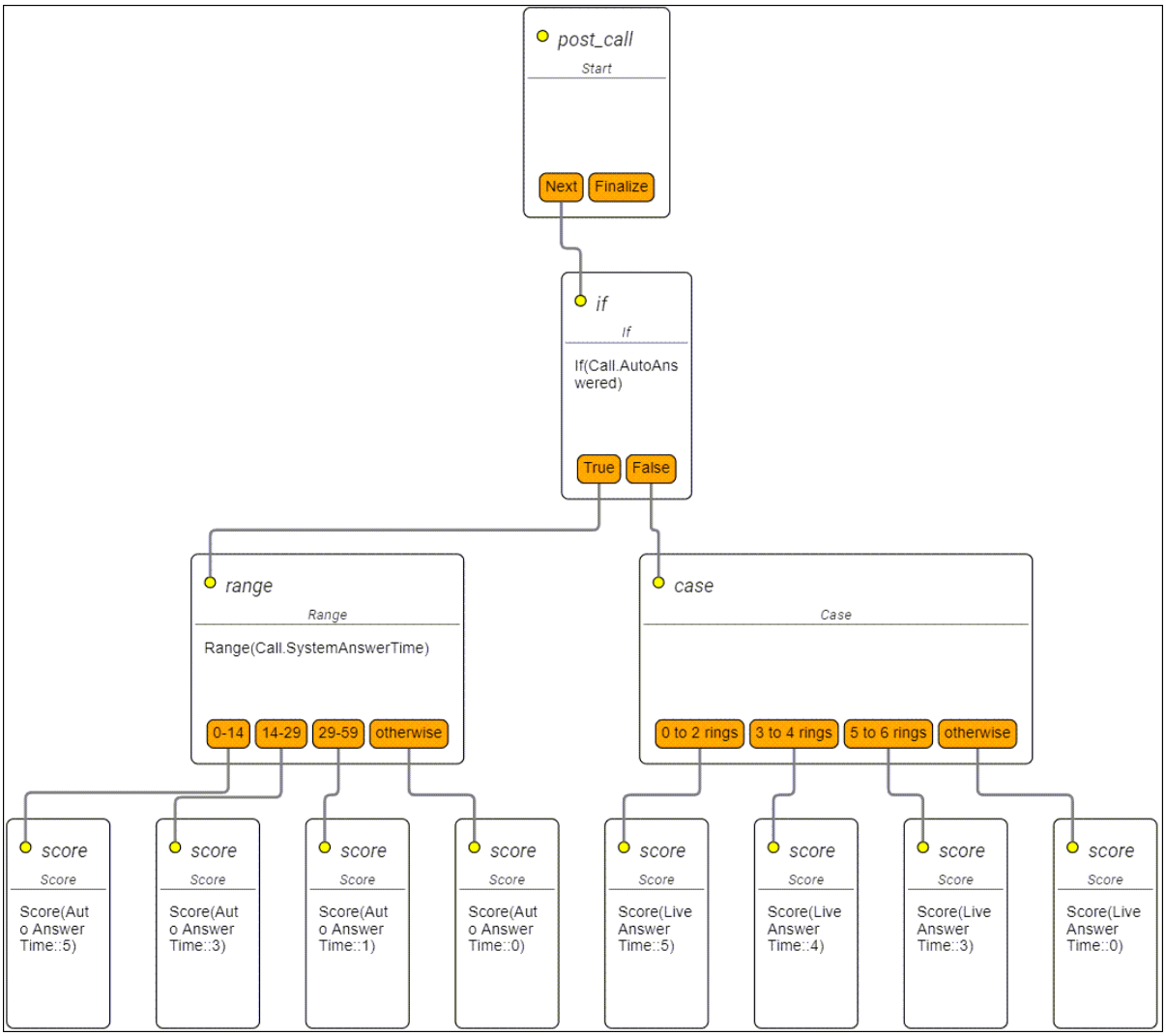
Script Tree



The Script Tree displays all elements and connections configured for the script. The Script Tree enables the user to view the script's arrangement, select elements to edit, and assign connections between elements.

Elements are displayed in tiers based on the connections made between them. Each element is displayed below the elements it is dependent on, and above the elements that depend on it.

When a new script is created on the Post Call Analytics page, a basic Script Tree is generated.



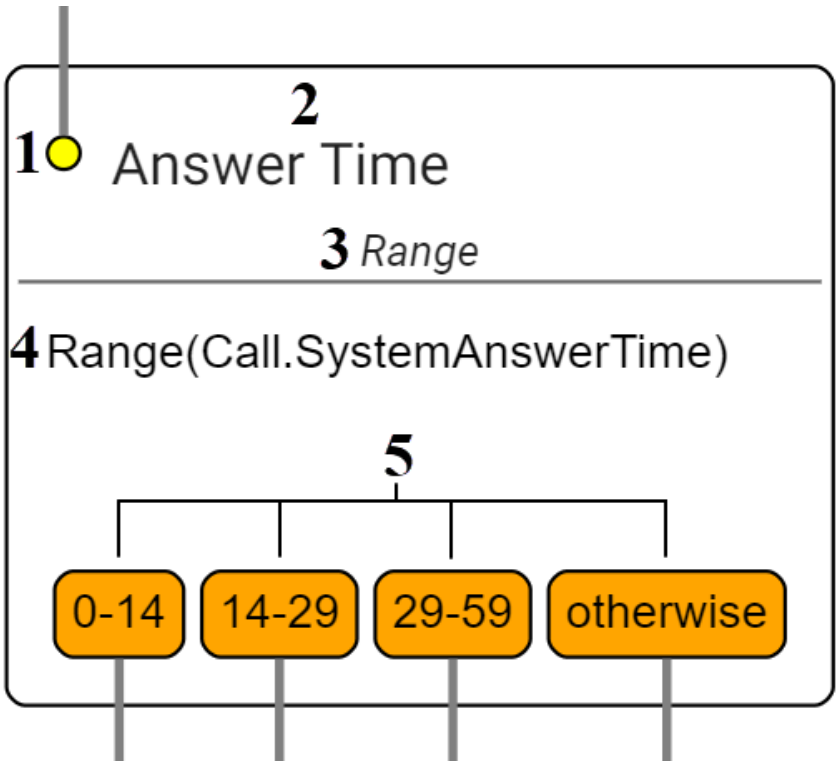
The basic Script Tree includes the following elements:

- A Start element
- An If element
- A Range element
- A Case element
- Eight Score elements

Most elements can be edited, removed, and replaced by other elements as needed.

Note: The Start element cannot be removed from the script, nor can it be added using the Element Palette

Elements



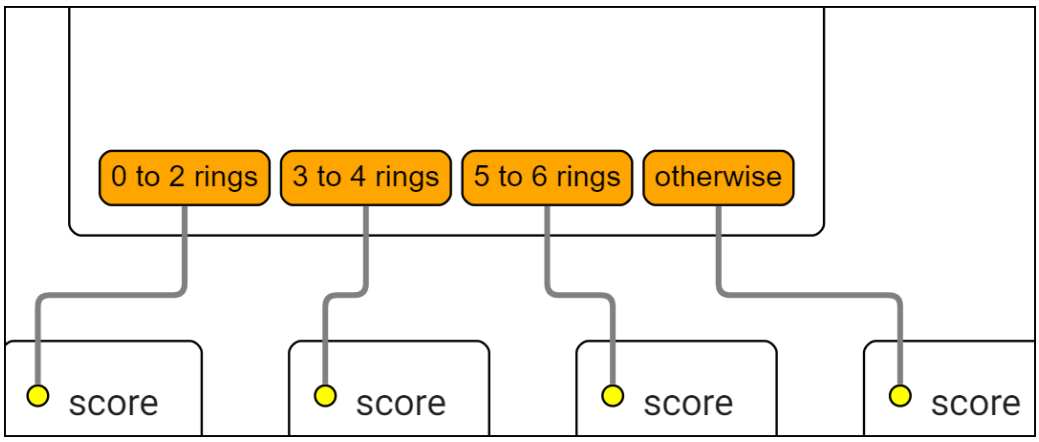
Elements are customizable components that form each Script Tree and determine how the script functions when it is run. Elements are displayed in the Script Tree view as boxes. Each element box displays the following information:

1. The Connection Node for the element
2. The Name of the element
3. The Element Type
4. The Condition that determines the output of the element
5. All possible Outputs for the element

Elements are displayed in tiers based on the connections made between them. Each element is displayed below elements from which it is receiving a connection and above the elements which are connected to any of its Outputs.

Details about the display and configuration of each element are provided in the “ Element Configuration” section of this document.

Connections



Connections determine the elements that are activated during a run of the script. When one of an element's Outputs is activated, any elements which are connected to that Output are activated.

Connections are represented by lines between elements.

There are a few requirements when making connections:

- A connection can only be made between a single Output and a single Connection Node.
- A single Output can be the source of multiple connections, and a single Connection Node can receive multiple connections.
- A connection cannot be made that forms a loop. Specifically, a connection cannot be made from an Output of an element to the Connection Node of the same element or any elements with connections that lead back to the Connection Node of the same element.

Adding a Connection

A connection can be added by clicking on an Output or a Connection Node.

To add a connection to the Script Tree, click and hold either the Output you would like to be the source of the connection or the Connection Node you would like to receive the connection.

A line is displayed between the Output and Connection Node and the cursor.

Drag the line from either the Output to the Connection Node or from the Connection Node to the Output.

The connection is made between the Output and Connection Node, represented by a line. Additionally, the Script Tree is reorganized to reflect the relationship between the two elements.

Removing a Connection

A connection can be removed using the DELETE key or the BACKSPACE key.

To remove a connection from the Script Tree, click the connection you would like to remove.

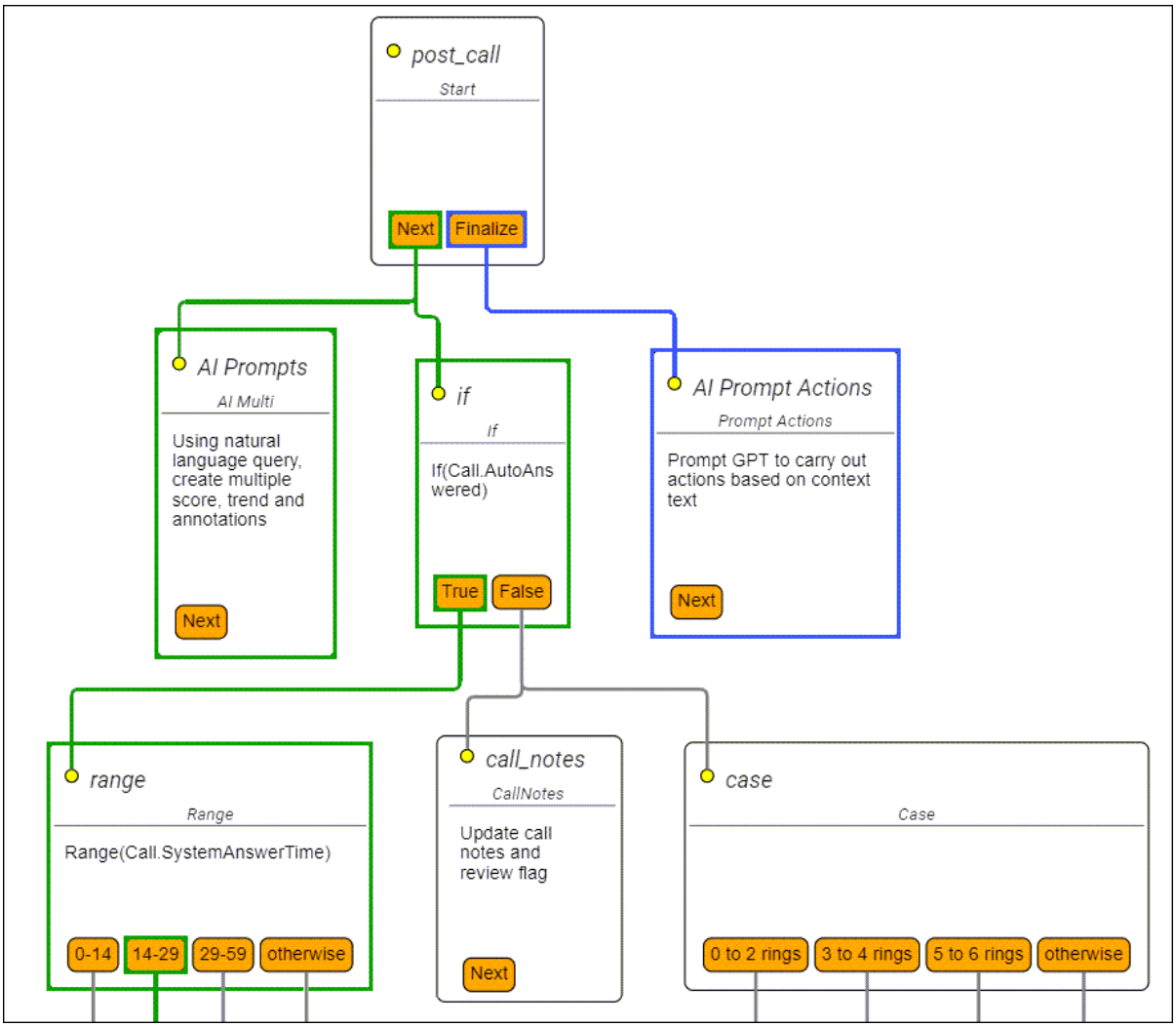
The selected connection is highlighted.

Press the DELETE key or BACKSPACE key on your keyboard.

The connection is removed, and the Script Tree is reorganized to reflect the change in relationship between the elements.

Script Flow

Script Flow describes which elements in a script are activated and in what order. Script Flow begins at the Start Element and moves generally downward as consecutive elements are activated in a branch. Script Flow is determined by which Output Nodes are activated, and which elements' Connection Nodes are connected to the Output Nodes.



An example script displayed in the Script Editor. An example of the Output Nodes, connections, and elements that might be activated for a call are highlighted. The Script Flow originating from the Start element's Next node is highlighted in green. The Script Flow originating from the Finalize node is highlighted in blue.

Start

Script Flow starts at the Start element. When the script runs, the Start element's Next node is activated. The following steps occur:

1) Elements connected to the activated Output are activated. When an element is activated, any functions related to the element are performed. This may include

prompting the Natural Language Processing (NLP) model, populating a script field, producing a score, or analyzing the call transcript.

If more than one element is connected to an activated Output Node, both elements are activated simultaneously, and the activation process for any proceeding branches occur simultaneously as well.

2) One of the element's Output Nodes are activated.
    - If the element only has the Next node, the node is always activated when the element is activated.
    - If the element has more than one Output Node, the node that is activated is determined by the settings of the element.
    - If the element has no Output Nodes, no elements are activated.

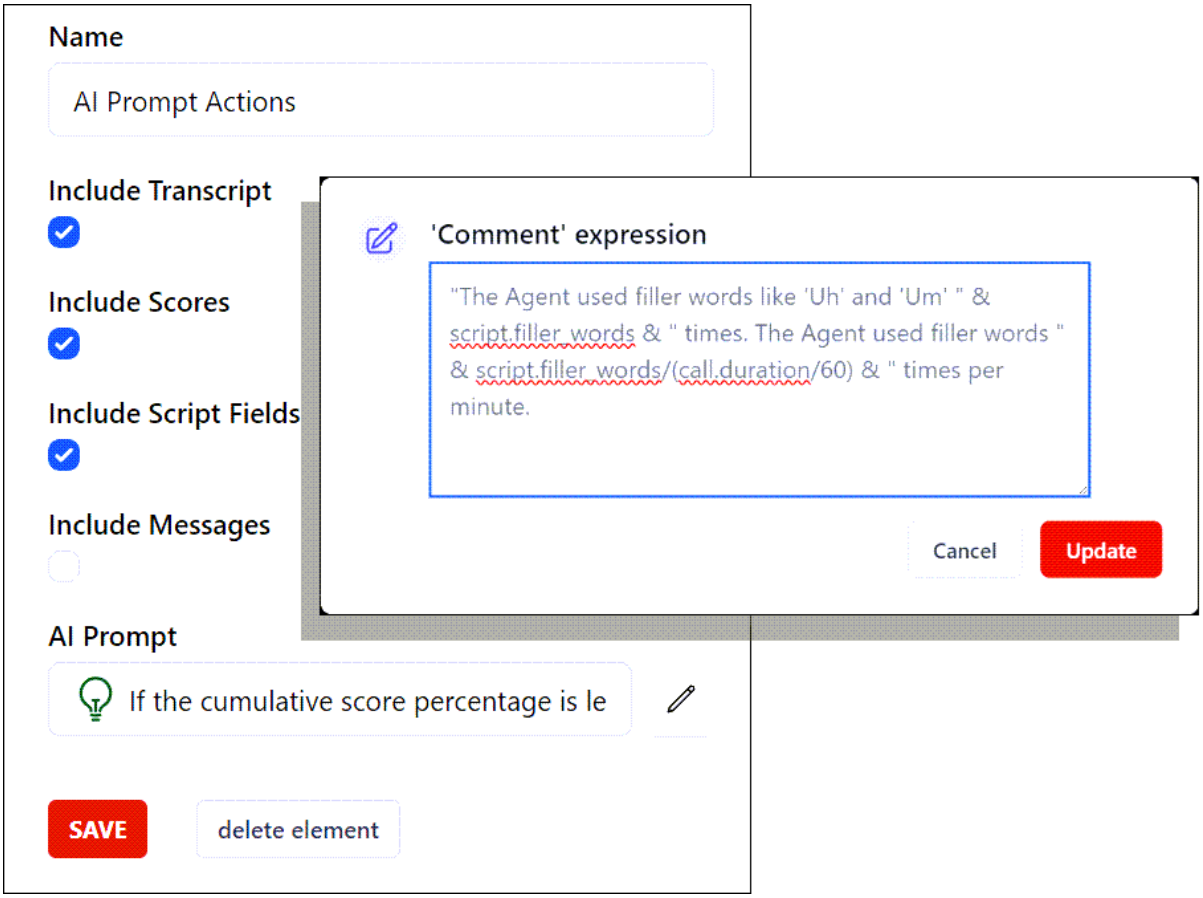
These two steps occur for each activated element. This activation process continues until it reaches the end of any element branches, and no elements are active.

Finalize

The Finalize node of the Start element can be used to activate elements after all elements branching from the Start element's Next node have been activated. This can be used to assure that elements that are dependent on elements can be run after the initial run of the script.

Once all element activations originating from the Start element's Next node have ended, the Start element's Finalize node is activated. All elements branching from the Finalize node are activated using the same activation process.

Dependent Elements



Some elements are affected by script fields or scores created by other elements. If these elements are activated before the fields on which they depend are given values, the elements may not work or may function incorrectly. For dependent elements to function properly, they must be activated after the values on which they rely are created.

Script elements that rely on the function of other elements do not need to be connected to the elements on which they rely, but they must be added to the script in such a way that they are activated after the elements on which they depend.

Amtelco recommends connecting these elements to branches that originate from the elements on which they depend or connecting these elements to a branch originating from the Finalize node of the Start element if the elements on which they depend originate from the Next node of the Start element.

Elements Palette

The Elements Palette displays a list of all elements that can be added to the Script Tree. Each element listing displays the name of the element and a brief description of the element's function.

The Elements Palette enables users to add elements to the Script Tree.

Adding an Element

To add an element to the Script Tree, drag the desired element type to the white space of the Script Tree.

An element of the selected element type is added to the Script Tree.

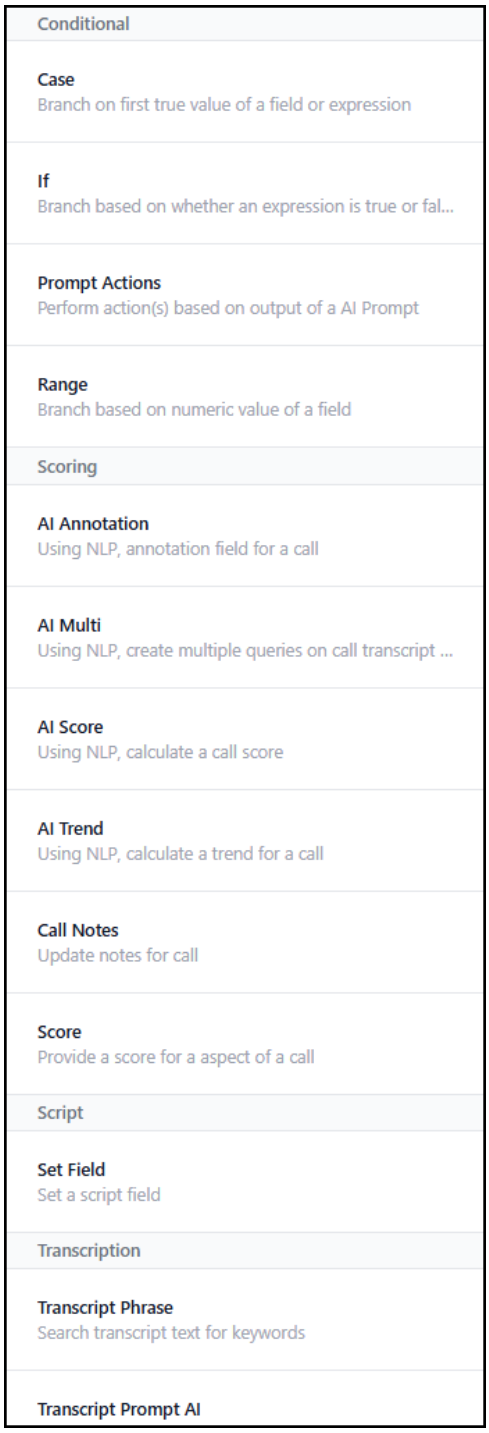
The element is displayed at the bottom right of the Script Tree with no connections.

To add an element to the Script Tree with a connection, drag the desired element type onto the Output to which you would like the element connected.

An element of the selected element type is added to the Script Tree, and a connection is made between the desired Output and the Connection Node of the new element.

Element Types

There are four categories of elements that can be added to a Post-Call Scoring Script. Each category contains one or more element types. All elements of the same type contain the same customization options.



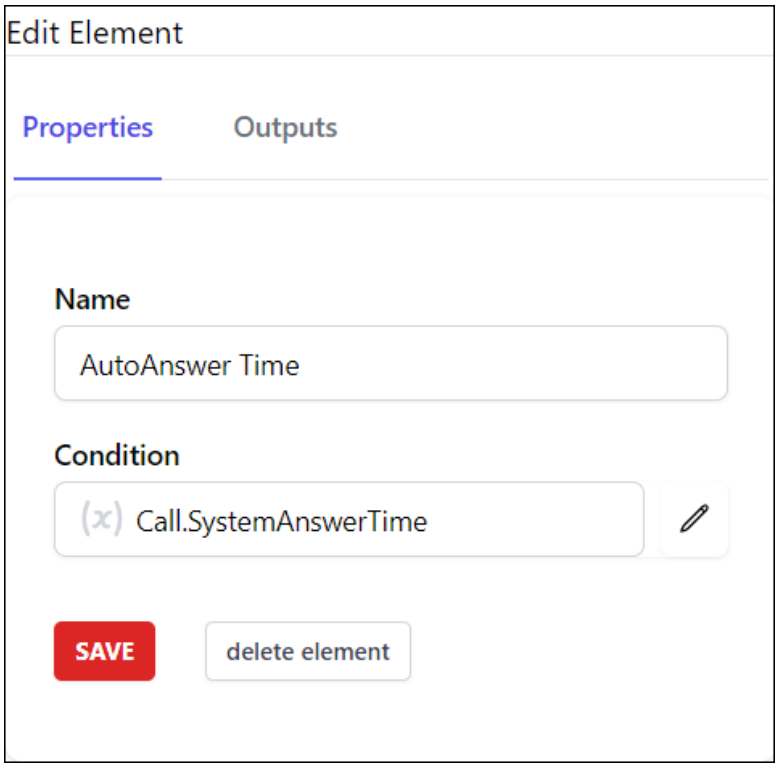
Category/Type	Description
Conditional	The Conditional category contains element types that branch to two or more elements based on how the call compares to one or more conditions. The Conditional category contains the Case, If, and Range element types.
Case	The Case element type is used to branch the script on the first true value of a field or expression.
If	The If element type is used to branch the script based on whether an expression is true or false.
Prompt Actions	The Prompt Actions element type is used to prompt the Natural Language Processing (NLP) model to perform one or more actions based on the call.
Range	The Range element type is used to branch the script based on ranges of values for a field.
Scoring	The Scoring category contains element types that are used to assign scores to the call. The Scoring category contains the AI Annotation, AI Score, AI Trend, and Score element types.
AI Annotation	The AI Annotation element type is used to prompt the NLP model to annotate the call based on instructions provided in the Artificial Intelligence (AI) Prompt. The annotation generated by the AI Annotation element is displayed under the Post Call Scoring section on the Call Information page for the call.
AI Multi	The AI Multi element type is a multi-purpose element that can be used to create and manage AI Annotation, AI Score, and AI Trend elements. The conditions under which each element is triggered can be adjusted.
AI Score	The AI Score element type is used to prompt the NLP model to evaluate the call based on instructions provided in the AI Prompt. The Score assigned to the call by the AI Score element is displayed under the Post Call Scoring section of the Call Information page for the call.
AI Trend	The AI Trend element type is used to prompt the NLP model to evaluate the call transcript for a trend as determined by the AI Prompt.

Category/Type	Description
	The trend generated by the AI Trend element is displayed under the Post Call Scoring section of the Call Information page for the call.
Score	The Score element type is used to assign a score and score label to the call.
Script	The Script category contains element types that are used to store information for use elsewhere in the script. The Script category contains the Set Field element type.
Set Field	The Set Field element type is used to create and set the value of a field that can be used within the script.
Transcription	The Transcription category contains element types that analyze the transcription text generated for a call and affect the script path based on the results. The Transcript category contains the Transcript Phrase and Transcript Prompt AI element types.
Transcript Phrase	The Transcription element type is used to check the call transcript for instances of one or more phrases. The Transcription element can check if the phrases exists, can count the number of instances of the phrases, and can check for phrases spoken by the agent, the caller, or either.
Transcript Prompt AI	The Transcript Prompt AI element type is used to prompt the NLP model to answer one or more questions based on the call transcript.

In addition to these element types, each script also contains a Start element. The Start element marks the starting point of the script. The Start element is included in the script when it is first generated. The Start element can be neither added nor deleted.

Editing an Element

Each element type has its own settings, and the process for editing each element type is different. Each element is edited individually through the Edit Element menu.



To display the Edit Element pane, click the element in the script you would like to edit.

The Element Palette is hidden and the Edit Element pane for the selected element is displayed.

Information on editing each element is provided in the "Element Configuration" section of this document.

Saving an Element.

The Properties tab of each element contains the Save button. The Save button is used to Save any changes made to element.

To save changes made to the element, click the Save button.

If the Save button is clicked, changes made to the element are saved.

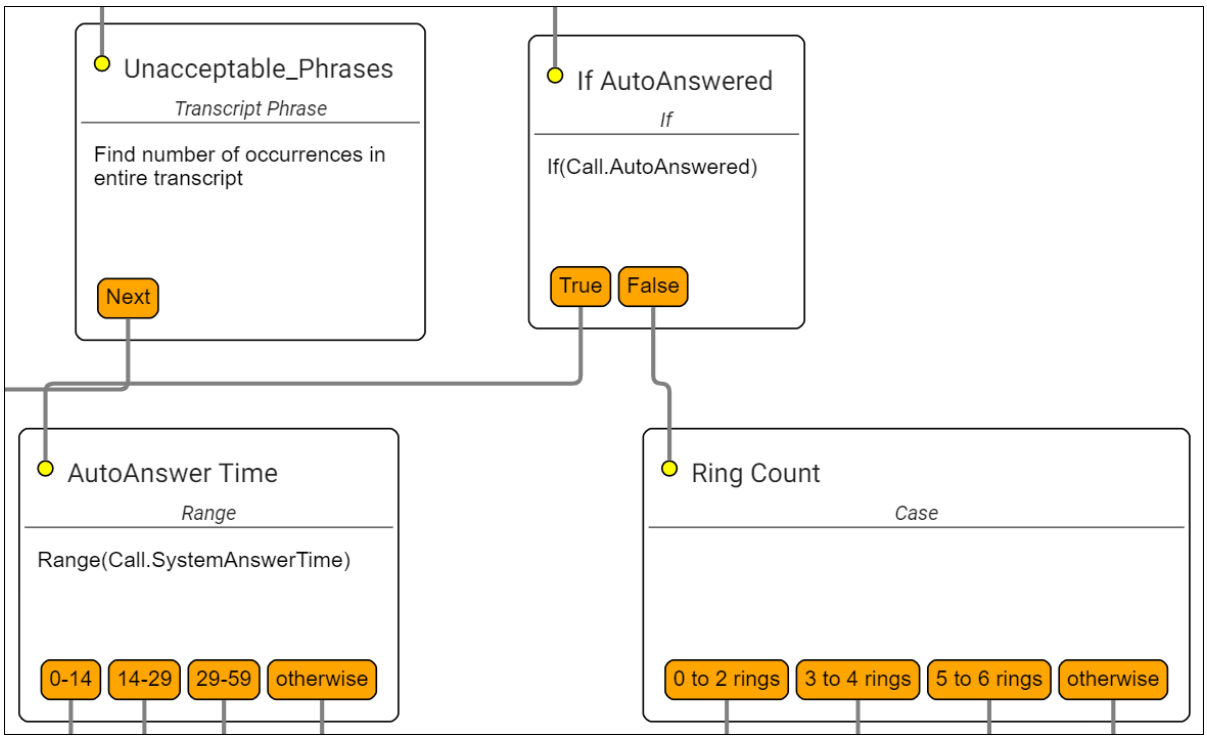
Deleting an Element.

The Properties tab of each element contains the Delete Element button. The Delete Element button is used to remove the element from the Script Tree.

To delete the Element, click the Delete Element button.

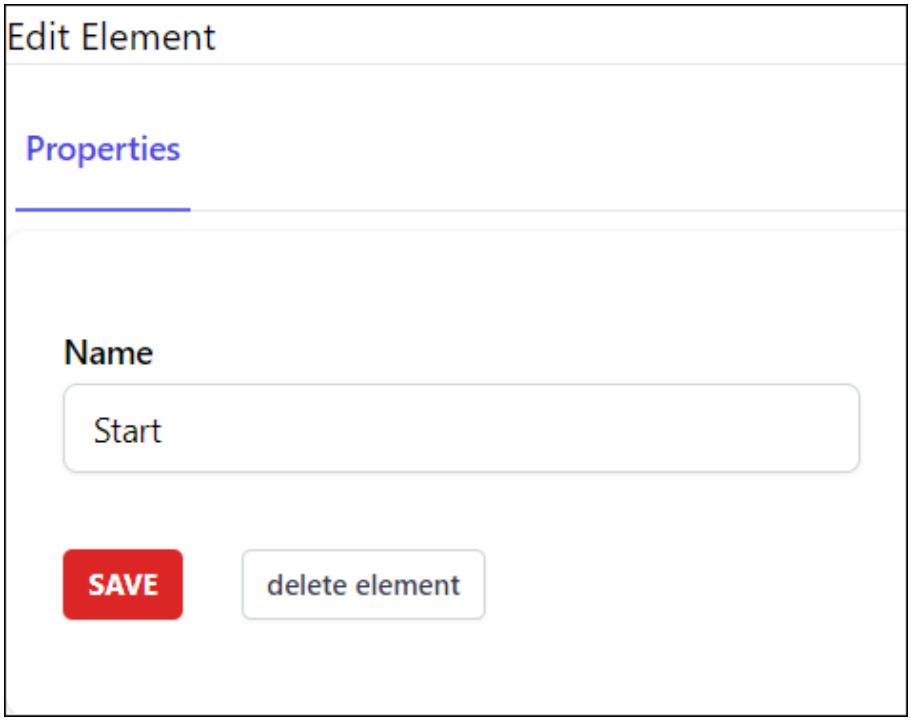
The element is removed from the script, and any connections between the element and other elements are deleted.

Element Configuration



Each element type has a unique set of settings, and each element can be configured individually. This section provides general instructions for editing elements of each element type.

Start



The Start element is located at the top of each Script Tree. The Start element is the starting point for the script when it is run. The Start element can neither be added nor removed.

The Edit Element pane for the Start element contains the Properties tab.

Properties

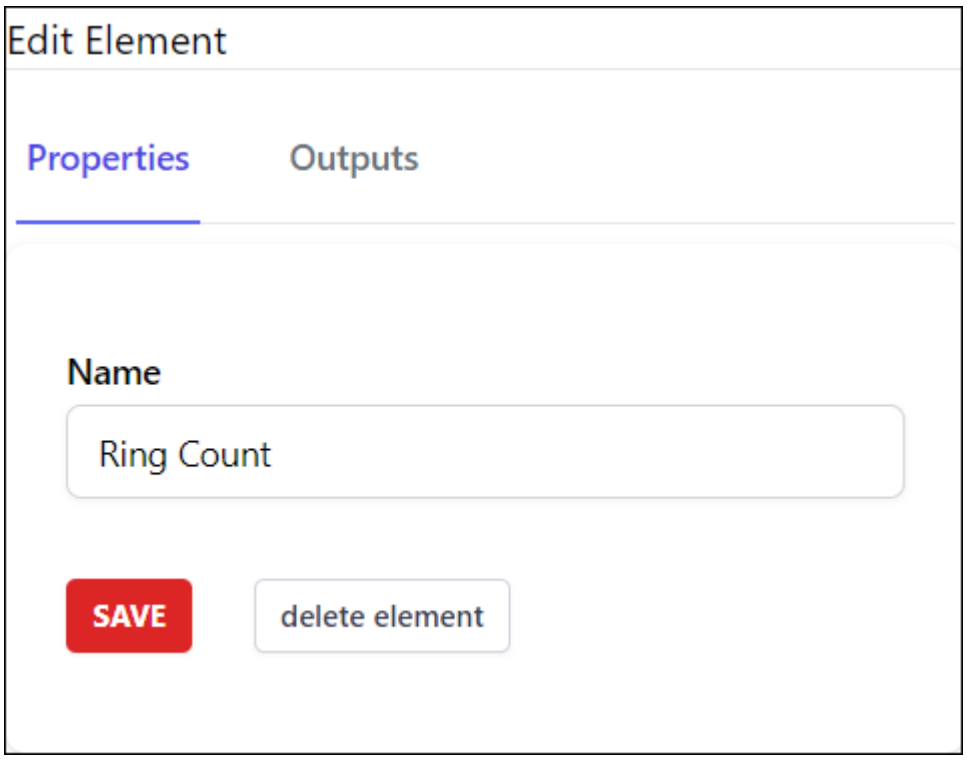
The Properties page is displayed by default. The Properties page contains the Name field.

Name

The Name field is used to determine the name that is displayed for the element.

Enter the name that you would like used for the element.

Case



The Case element is a conditional element that branches the script if any of the Conditions assigned to its Outputs are true.

The Edit Element pane for the Case element includes the Properties tab and the Outputs tab.

Properties

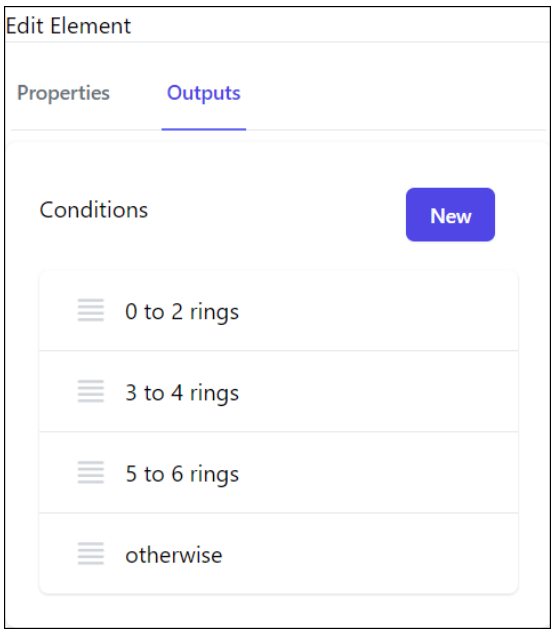
The Properties page is displayed by default. The Properties page contains the Name field, the Save button, and the Delete Element button.

Name

The Name field is used to determine the name that is displayed for the element.

Enter the name that you would like used for the element.

Outputs



The Outputs page is used to manage Outputs for the element.

Click the Outputs tab to access the Outputs page.

The Outputs page contains a New button and an expandable listing for each Output currently created for the element.

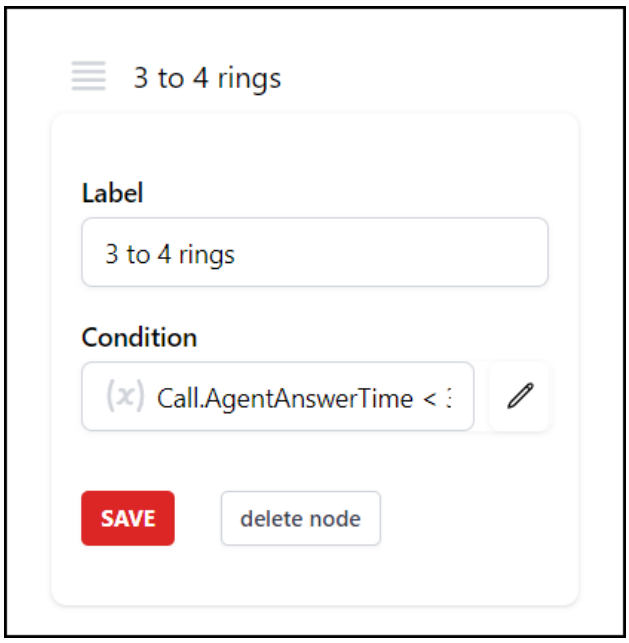
To create a new Output, click the New button.

A new Output listing is created at the bottom of the Output list. The new Output listing has the "new" label and a blank Condition field.

Output listings are used to configure the condition under which the element activates the Output Node.

To edit an existing Output listing, click the listing that you would like to edit.

The Output listing expands to display the Label field, the Condition field, a Save button and Delete Node button.



Label

The label field is used to give a descriptive label to the Output Node. The text entered in the label field is displayed in the Output Node in the Element Box.

Enter the label you would like used for the Output Node.

Condition

The Condition field is used to enter the expression that is evaluated to determine if the script activates the Output Node. If the variable or expression is evaluated as true, the element activates the Output Node.

Enter the expression that will be used to determine the element's output.

Note: If the Condition field is blank, the element behaves as if the condition is true.

More information on writing expressions is provided in the "Building Expressions" section of this document.

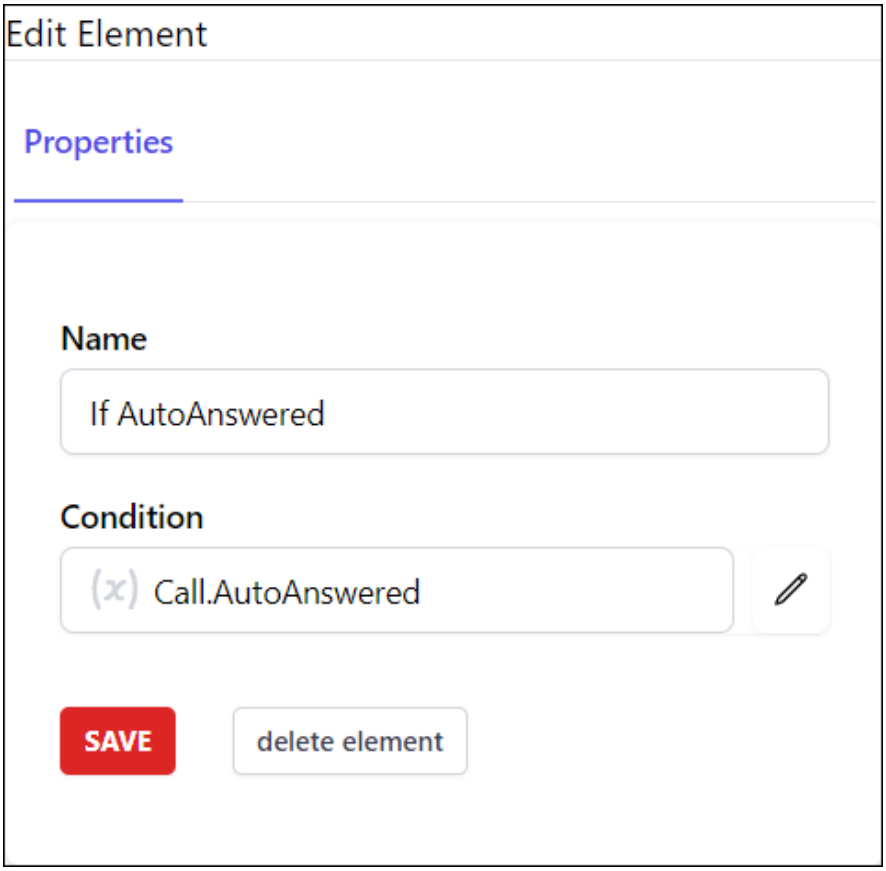
To save changes made to the Output Node, click the Save button.

All changes made to the Output Node are saved.

To delete the Output Node, click the Delete Node button.

The Output Node is removed from the list.

If



The If element is a conditional element that activates one of two Output Nodes depending on if the Condition entered for the element is evaluated as true or false.

The Edit Element pane for the If element contains the Properties tab.

Properties

The Properties page is displayed by default. The Properties page is used to configure settings for the If element. The Properties page contains the Name field and the Condition field.

Name

The Name field is used to determine the name that is displayed for the element.

Enter the name that you would like used for the element.

Condition

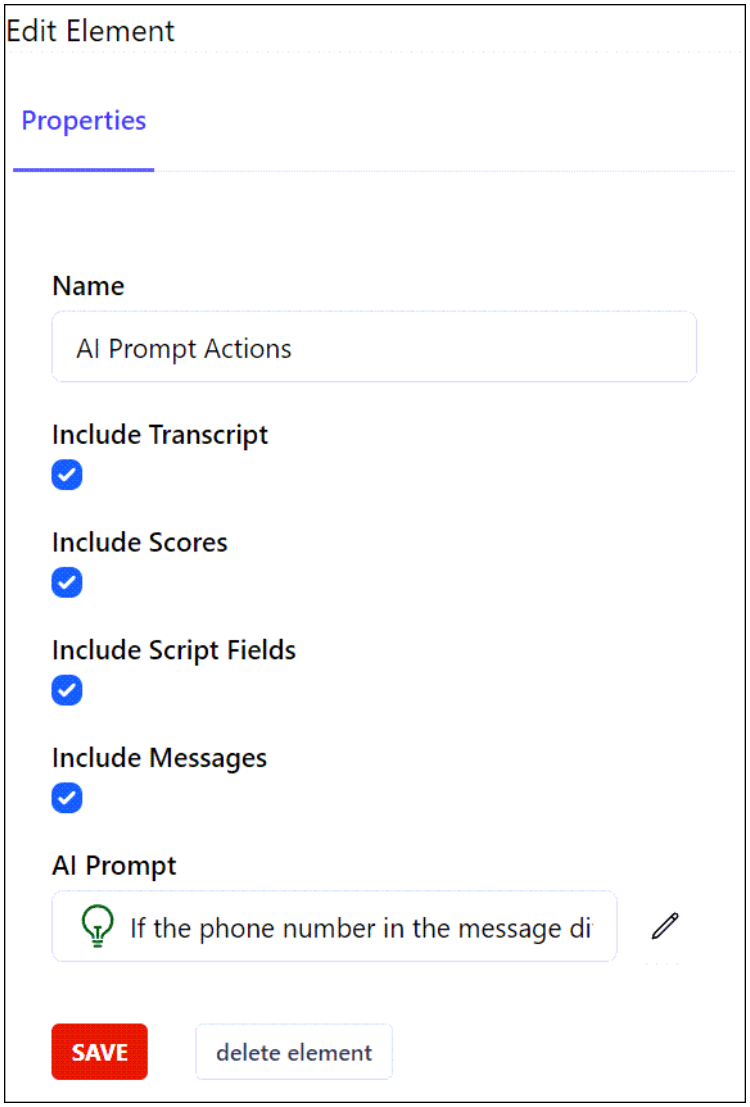
The Condition field is used to enter the expression that is evaluated to determine which Output Node is activated. If the variable or expression is evaluated as true, the element activates the “True” Output Node. If the variable or expression is evaluated as false, the element activates the “False” Output Node.

Enter the expression that will be used to determine the element’s output.

Note: If the Condition field is blank, the element behaves as if the condition is true.

More information on writing expressions is provided in the “Building Expressions” section of this document.

Prompt Actions



The Prompt Actions element is a conditional element that prompts the Natural Language Processing (NLP) model to perform one or more actions.

The Edit Element pane for the Prompt Actions element contains the Properties tab.

Properties

The Properties page is used to configure settings for the Prompt Actions element. The Properties page contains the Name field, a check box for each type of call data that can be sent to the NLP model, and the AI Prompt field.

Name

The Name field is used to determine the name that is displayed for the element.

Enter the name that you would like used for the element.

Include Transcript

The Include Transcript check box is used to include transcript data in the prompt to the NLP model.

To include transcript data in the prompt to the NLP model, select the Include Transcript check box.

OR

To exclude transcript data from the prompt to the NLP model, clear the Include Transcript check box.

Include Scores

The Include Scores check box is used to include score data in the prompt to the NLP model.

Note: Only scores that have been generated before the Prompt Actions element is triggered are included.

To include score data in the prompt to the NLP model, select the Include Scores check box.

OR

To exclude score data from the prompt to the NLP model, clear the Include Scores check box.

Include Script Fields

The Include Script Fields check box is used to include Post-Call Scoring Script field values in the prompt to the NLP model.

Note: Only script fields to which values have been assigned before the Prompt Actions element is triggered are included.

To include Post-Call Scoring Script field values in the prompt to the NLP model, select the Include Script Fields check box.

OR

To exclude Post-Call Scoring Script field values from the prompt to the NLP model, clear the Include Script Fields check box.

Include Messages

The Include Messages check box is used to include Intelligent Series message data in the prompt to the NLP model.

To include message data in the prompt to the NLP model, select the Include Messages check box.

OR

To exclude message data from the prompt to the NLP model, clear the Include Messages check box.

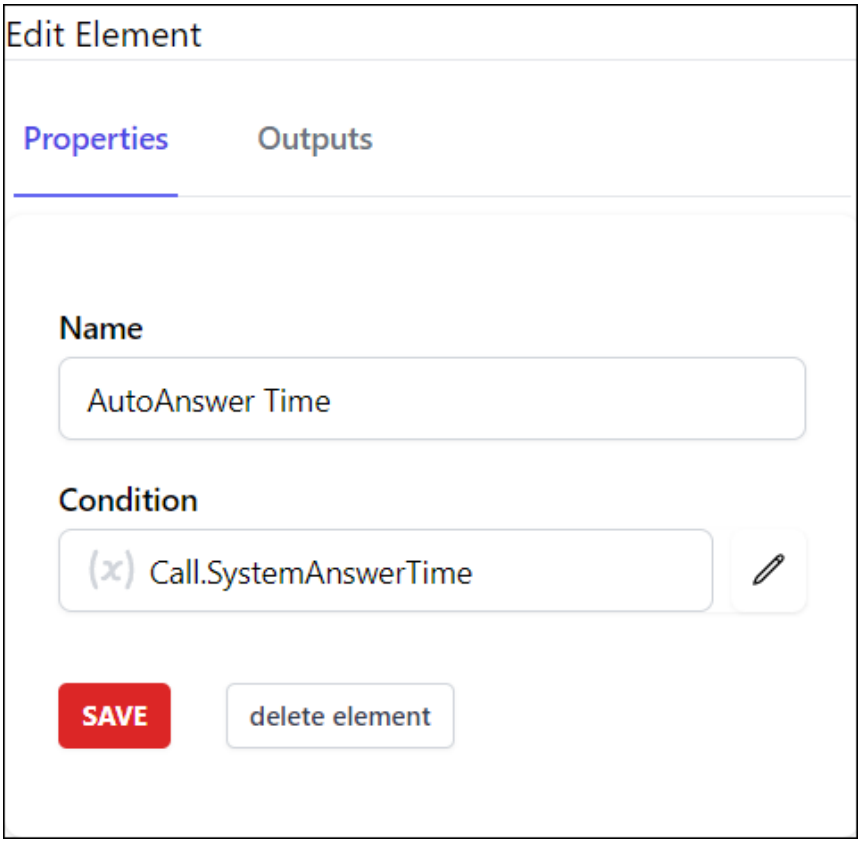
AI Prompt

The AI Prompt field contains the text or expression that is used to prompt the NLP model with the actions that it should perform. The text entered in the AI Prompt field is given to the NLP model, and the model follows the instructions entered in the AI Prompt field to perform the requested actions.

Enter the text or expression to use to prompt the NLP model to generate a score.

More information on writing expressions is provided in the “Building Expressions” section of this document.

Range



The Range element is a conditional element that outputs depending on the range of numerical values within which the Condition falls.

The Edit Element pane for the Range element contains the Properties and Outputs tabs.

Properties

The Properties page is displayed by default. The Properties page is used to configure settings for the Range element. The Properties page contains the Name field and the Condition field.

Name

The Name field is used to determine the name that is displayed for the element.

Enter the name that you would like used for the element.

Condition

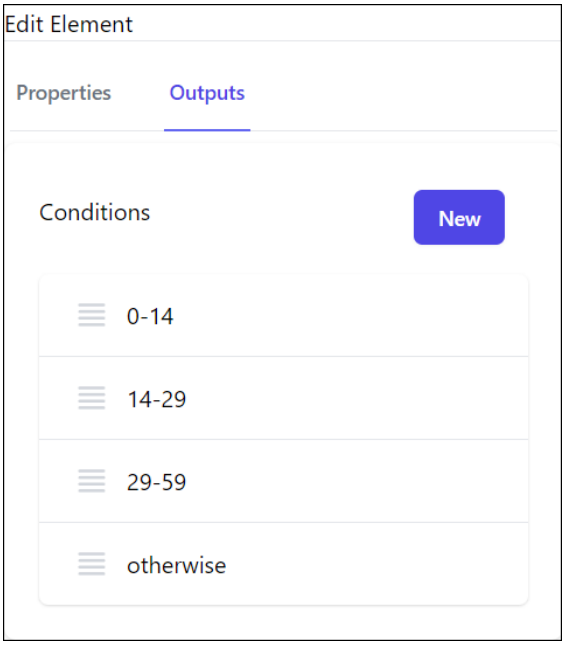
The Condition field is used to enter the expression that is evaluated to determine if the script activates the Output Node. If the variable or expression is evaluated as a value within the range of one of the Output Nodes, the element activates that Output Node.

Enter the expression that will be used to determine the element's output.

Note: If the Condition field is blank, the element behaves as if the condition is true.

More information on writing expressions is provided in the "Building Expressions" section of this document.

Outputs



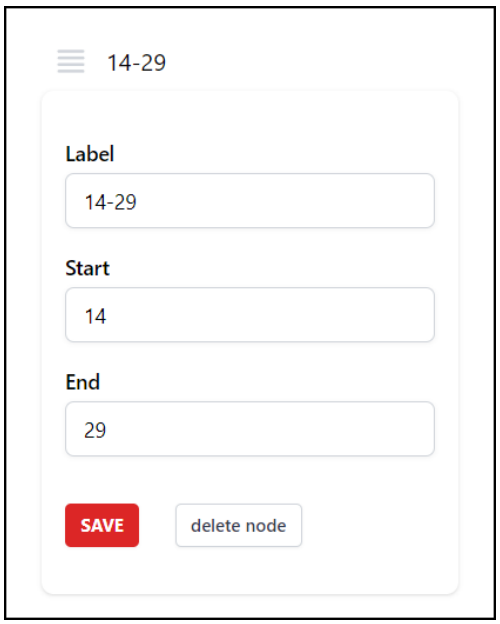
The Outputs page is used to manage Output Nodes for the element.

Click the Outputs tab to access the Outputs page.

The Outputs page contains a New button and an expandable pane for each Output Node currently created for the element.

To create a new Output Node, click the New button.

A new Output Node is created at the bottom of the Output Nodes list. The new Output node has the "new" label and a blank Condition field.



Output listings are used to configure the condition under which the element activates the Output Node.

To edit an existing Output listing, click the listing that you would like to edit.

The Output listing expands to display the Label field, the Condition field, a Save button and a Delete Node button.

Label

The label field is used to give a descriptive label to the Output Node. The text entered in the label field is displayed in the Output Node in the Element Box.

Enter the label you would like used for the Output Node.

Start

The Start field is used to set the first number of the number range used by the Output Node.

Enter the first number of the range to be used by the Output Node.

The element will activate the Output Node when the Condition is evaluated as any number equal to or greater than the number entered in the Start field and less than or equal to the number entered in the End field.

End

The End field is used to set the last number of the number range used by the Output Node.

Enter the last number of the range to be used by the Output Node.

The element will activate the Output Node when the Condition is evaluated as any number equal to or greater than the number entered in the Start field and less than or equal to the number entered in the End field.

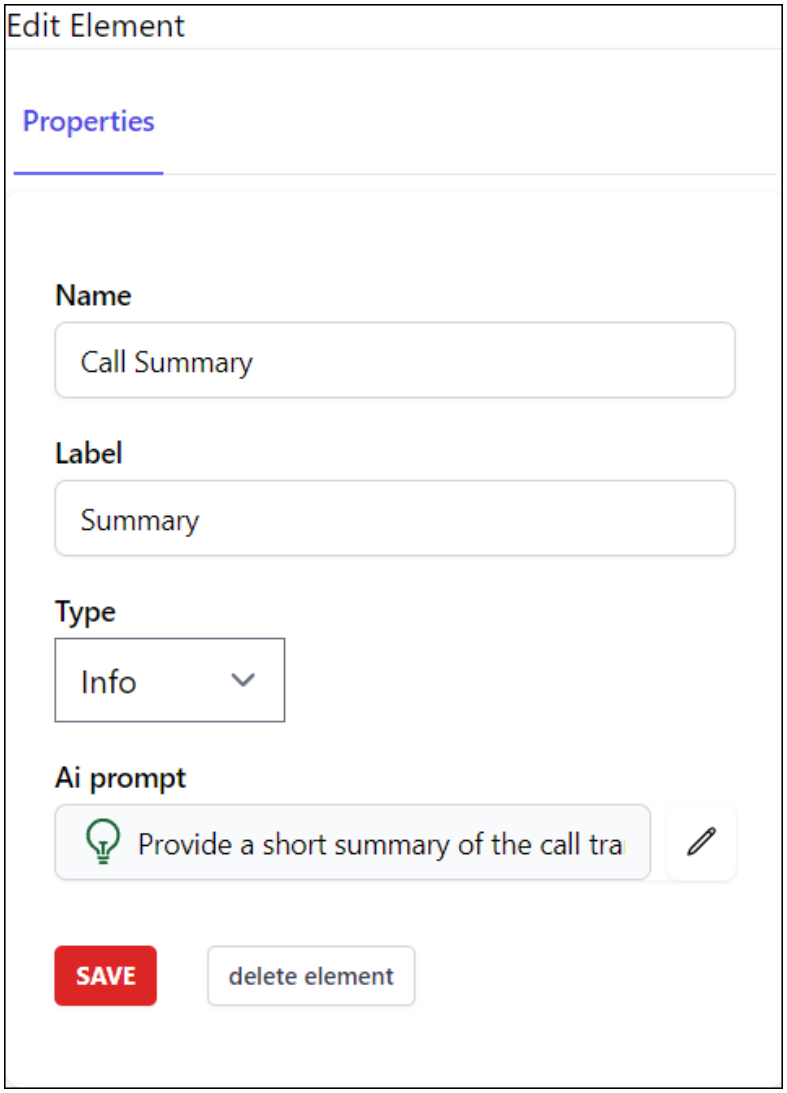
To save changes made to the Output Node, click the Save button.

All changes made to the Output Node are saved.

To delete the Output Node, click the Delete Node button.

The Output Node is removed from the list.

AI Annotation



The AI Annotation element type is a Scoring element type that prompts the Natural Language Processing (NLP) model to annotate the call based on the Artificial Intelligence (AI) Prompt. The AI Annotation element is intended to communicate important information about the call.

The annotation generated by the AI Annotation element is displayed under the Post Call Scoring section on the Call Information page for the call.

The Edit Element pane for the AI Annotation element contains the Properties tab.

Properties

The Properties page is displayed by default. The Properties page is used to configure settings for the AI Annotation element. The Properties page contains the Name field, Label field, Type menu, and the AI Prompt field.

Name

The Name field is used to determine the name that is displayed for the element.

Enter the name that you would like used for the element.

Label

The Label field is used to determine the name that is displayed for the annotation in the Call Information page.

Enter the label you would like used for annotations created by the element.

Type

The Type field is used to set the type of information being displayed by the annotation. The Type selected for the annotation determines the icon assigned to the annotation in the Call Information page. The Type menu can be set to “Info” or “Warning.”

Select the Type menu.

The Type menu is displayed.

Select the Type of annotation that the element will generate.

Info
If the Type field is set to “Info,” the Info icon ⓘ is displayed with the annotation on the Call Information page.

Warning
If the Type field is set to “Warning,” the Warning icon ⚠ is displayed with the annotation on the Call Information page. Additionally, the Warning icon ⚠ is displayed for the call listing in the Scoring column of the Call Log page.

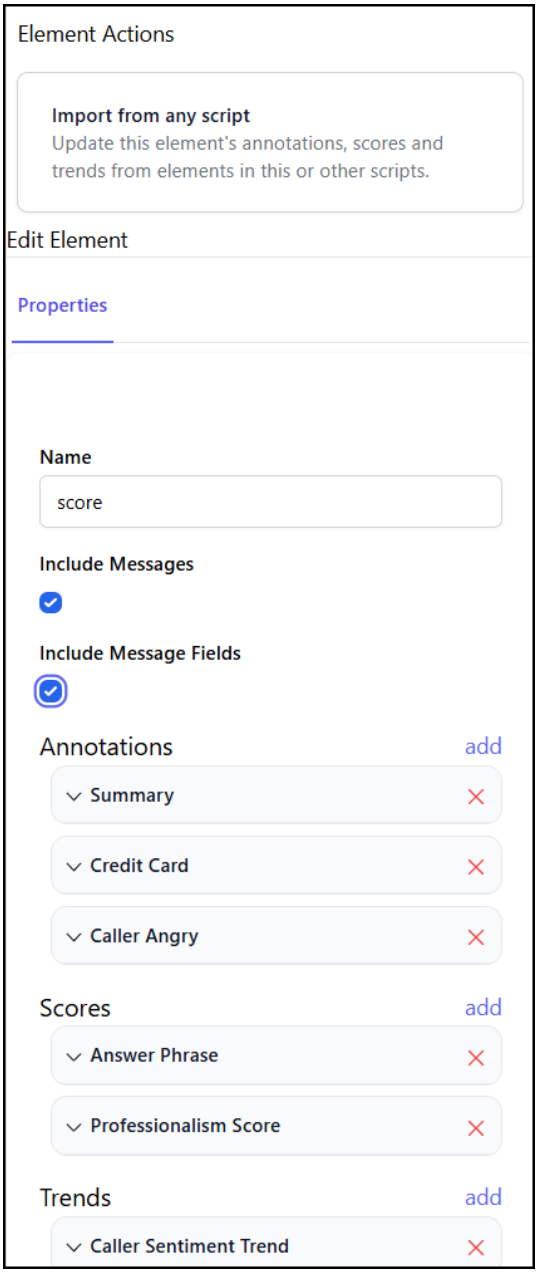
AI Prompt

The AI Prompt field contains the text that is used to prompt the NLP model to generate the annotation for the call. The text entered in the AI Prompt field is given to the NLP model, and the model produces an annotation based on the criteria provided by the AI Prompt.

Enter the text to use to prompt the NLP model to generate the annotation.

AI Multi

The AI Multi element type is a Scoring element type that can query the Natural Language Processing (NLP) model with prompts similar to the AI Annotate element, AI Score element, and AI Trend element. The AI Multi element can condense post-call scoring scripts and reduce token usage by sending all prompts and call data to the NLP model in a single query.



- Annotations generated by the AI Multi element are displayed under the Post Call Scoring section on the Call Information page for the call.
- Scores generated by the AI Multi element are displayed under the Post Call Scoring section on the Call Information page for the call.
- Trend descriptions generated by the AI Multi element are displayed under the Post Call Scoring section on the Call Information page for the call, and either a Positive Trend icon or Negative Trend icon is displayed for the call listing in the Scoring column of the Call Log page.

The Edit Element pane for the AI Multi element contains the Properties tab.

Properties

The Properties page is used to configure settings for the AI Multi element. Properties page contains the “Import from Any Script” button, the Name field, the Include Messages check box, the Annotations list, the Scores list, and the Trends list.

Note: Entries for the Annotations list, Scores list, and Trends list use expressions to determine the conditions under which the entry is submitted to the NLP model and the content of the query submitted for the entry to the NLP model.

More information on writing expressions is provided in the “Building Expressions” section of this document.

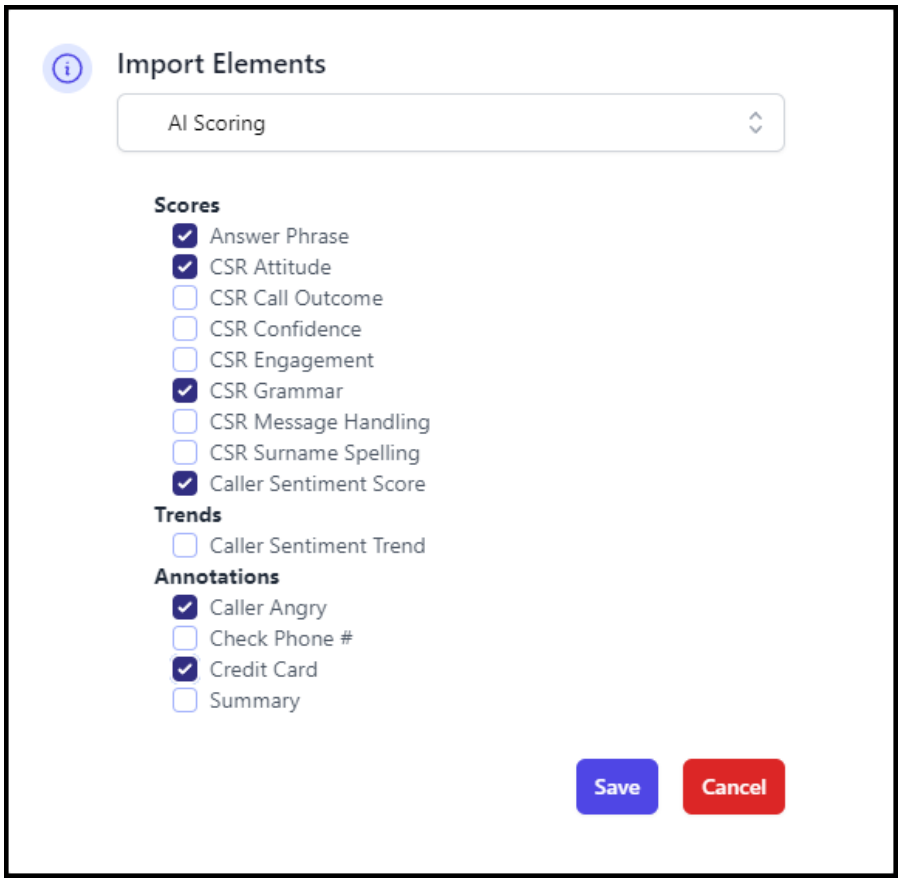
Import from Any Script

The “Import from Any Script” button is used to impot elements from any Post-Call Scoring Script into the AI Multi element.

To import elements from a script, click the “Import from Any Script” button.

The Import Elements window is displayed.

Import Elements



The Import Elements window is used to select the script from which elements are imported and what elements are imported into the AI Multi element as entries. 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.

Script

The Script menu is used to select the script for which elements are displayed.

To select a script, click the Script menu and select the desired script from the list.

Scores/Trends/Annotations

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.

Select the check box next to each item which you would like copied into the AI Multi element and click the Save button.

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:

- For scores, the Max Score value is copied.
- For annotations, the Type value is copied.

Note: If a Label value is not imported with the item, a label must be given before the item can be saved.

Name

The Name field is used to determine the name that is displayed for the element.

Enter the name that you would like used for the element.

Include Messages

The Include Messages check box is used to include Intelligent Series message data in the query to the NLP model.

To include message data in the query to the NLP model, select the Include Messages check box.

OR

To exclude message data from the query to the NLP model, clear the Include Messages check box.

Include Message Fields

The Include Message Fields check box is used to include Message Script Fields for Intelligent Series messages in the query to the NLP model.

To include Message Script Fields in the query to the NLP model, select the Include Message Fields check box.

OR

To exclude Message Script Fields from the query to the NLP model, clear the Include Message Fields check box.

Prompt Lists

The Prompt lists contain prompts that will be provided to the NLP model as part of the Multi AI's query. The Prompt lists include the Annotations list, Scores list, and Trends list. Each list includes an Add button and an entry for each prompt of that type to be included in the query to the NLP model.

To add an entry to the Prompt lists, click the Add hyperlink next to the type of prompt you would like added.

- **To add an entry to prompt the NLP model to produce an annotation, click the Add hyperlink next to the Annotations list.**
- **To add an entry to prompt the NLP model to produce a score, click the Add hyperlink next to the Scores list.**
- **To add an entry to prompt the NLP model to produce a trend, click the Add hyperlink next to the Trends list.**

The entry is displayed at the bottom of the list to which it was added. The new entry has the label "New Item" and the Alert Icon.

The Alert icon ❗ is displayed next to the Label of any entry that contains a field for which information has not been entered or has been entered incorrectly.

To remove an entry from a prompt list, click on the Delete icon ✕ in the Label Bar of the entry you would like deleted.

The entry is deleted.

To collapse an entry, click on the Label Bar at the top of the entry pane.

The entry is collapsed, and only the entry's Label Bar is displayed.

Note: When opening the Edit pane for an AI Multi element, all entries are collapsed by default.

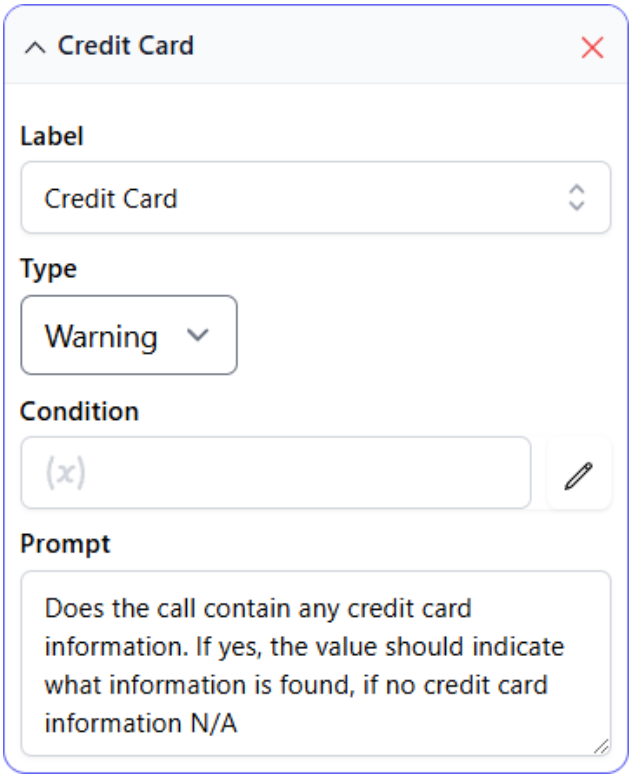
To expand an entry, click on the Label Bar for the entry.

The entry is expanded, and the fields used to edit the entry are displayed.

Note: Only one entry can be expanded at a time. If an entry is expanded while another is already expanded, the selected entry is expanded and the previous entry is collapsed.

The fields displayed for the entry depend on the entry's type.

Annotations



The Annotations list contains entries for annotation prompts to be included in the query to the NLP model. Annotation entries include the Label field, Type field, Condition field, and Prompt field.

Label

The Label field contains the name given to the entry.

Enter a unique name for the entry.

Type

The Type field is used to set the type of information being displayed by the annotation. The type selected for the annotation determines the icon assigned to the annotation in the Call Information page. The Type menu can be set to "Info" or "Warning."

Select the type of annotation that the element will generate.

- If the Type field is set to "Info," the Info icon is displayed with the annotation on the Call Information page.
- If the Type field is set to "Warning," the Warning icon is displayed with the annotation on the Call Information page. Additionally, the Warning icon is displayed for the call listing in the Scoring column of the Call Log page.

Condition

The Condition field is used to enter the expression that is evaluated to determine if the entry's prompt is sent as part of the AI Multi element's query. If the variable or expression is evaluated as true, the entry's prompt is included.

Enter the expression that will be used to determine if the entry is used to prompt the NLP model.

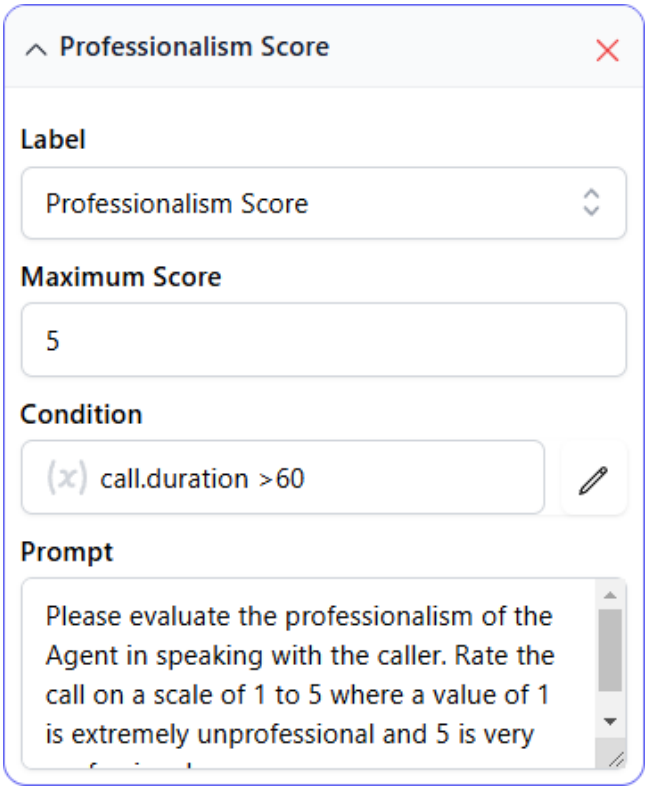
Note: If the Condition field is blank, the entry behaves as if the condition is true.

Prompt

The Prompt field contains the text or expression that is provided to the NLP model to generate the annotation for the call. The text entered in the Prompt field is given to the NLP model, and the model produces an annotation based on the criteria provided by the prompt.

Enter the text or expression to use to prompt the NLP model to generate the annotation.

Scores



The Scores list contains entries for scoring prompts to be included in the query to the NLP model. Score entries include the Label field, Maximum Score field, Condition field, and Prompt field.

Label
The Label field contains the name given to the entry.

Enter a unique name for the entry.

Maximum Score
The Maximum Score field is used to set the maximum possible score that the NLP model can assign to the call for the Score Label.

Note: By default, the Maximum Score field is set to 5.

Enter the maximum score value that the NLP model can assign to the call.

Condition
The Condition field is used to enter the expression that is evaluated to determine if the entry's prompt is sent as part of the AI Multi element's query. If the variable or expression is evaluated as true, the entry's prompt is included.

Enter the expression that will be used to determine if the entry is used to prompt the NLP model.

Note: If the Condition field is blank, the entry behaves as if the condition is true.

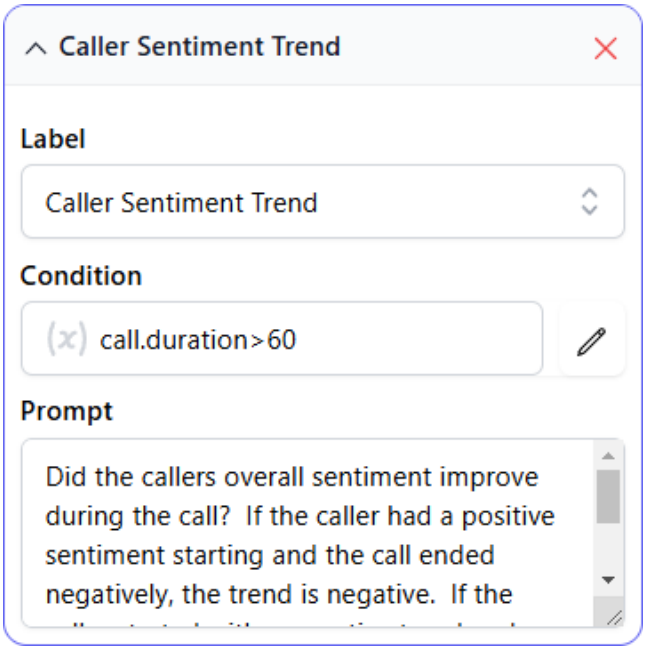
Prompt

The Prompt field contains the text or expression that is used to prompt the NLP model to generate the score for the call. The text entered in the Prompt field is given to the NLP model, and the model produces a score based on the criteria provided by the prompt.

Enter the text or expression used to prompt the NLP model to generate a score.

Note: Scores and score statistics presented on the Reports, Dashboard, and Call Log pages are generated with the assumption that the maximum possible score for each label is the desired score, and higher scores are presented positively. In order to maintain consistency in score statistics and presentation, Amtelco recommends prompting the NLP model to assign higher scores to calls that reflect desirable events or behavior. For example, when evaluating the answer time of calls, if a shorter answer time is preferred, shorter answer times should be assigned higher scores.

Trends



The Trends list contains entries for Trend prompts to be included in the query to the NLP model. Trend entries include the Label field, Condition field, and Prompt field.

Label

The Label field contains the name given to the entry.

Enter a unique name for the entry.

Condition

The Condition field is used to enter the expression that is evaluated to determine if the entry's prompt is sent as part of the AI Multi element's query. If the variable or expression is evaluated as true, the entry's prompt is included.

Enter the expression that will be used to determine if the entry is used to prompt the NLP model.

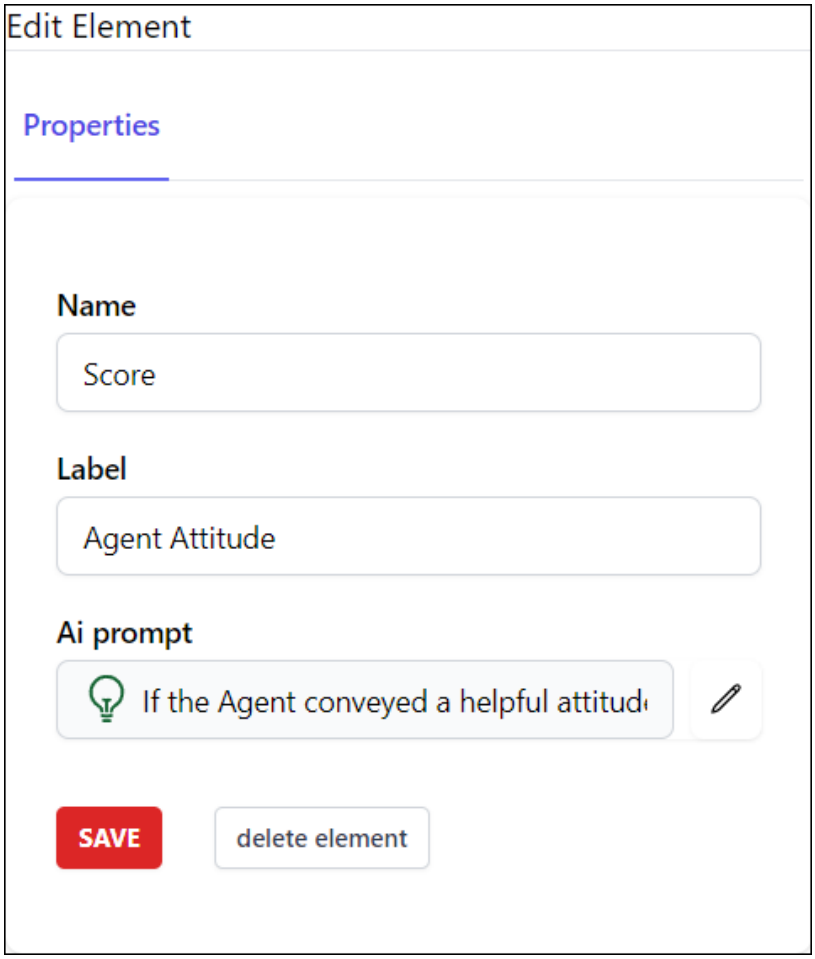
Note: If the Condition field is blank, the entry behaves as if the condition is true.

Prompt

The Prompt field contains the text or expression that is used to prompt the NLP model to generate the trend for the call. The text entered in the AI Prompt field is given to NLP model, and the model produces a trend based on the criteria provided by the prompt.

Enter the text or expression to use to prompt the NLP model to generate the trend.

AI Score



The AI Score element type is a Scoring element type that prompts the NLP model to give calls scores based on the criteria provided in the AI Prompt field.

The score generated by the AI Score element is displayed under the Post Call Scoring section on the Call Information page for the call.

The Edit Element pane for the AI Score element contains the Properties tab.

Properties

The Properties page is displayed by default. The Properties page is used to configure settings for the AI Score element. The Properties page contains the Name field, Label field, and the AI Prompt field.

Name

The Name field is used to determine the name that is displayed for the element.

Enter the name that you would like used for the element.

Label

The Label field is used to determine the name that is displayed for the score in the Call Information page.

Enter the label you would like used for scores created by the element.

AI Prompt

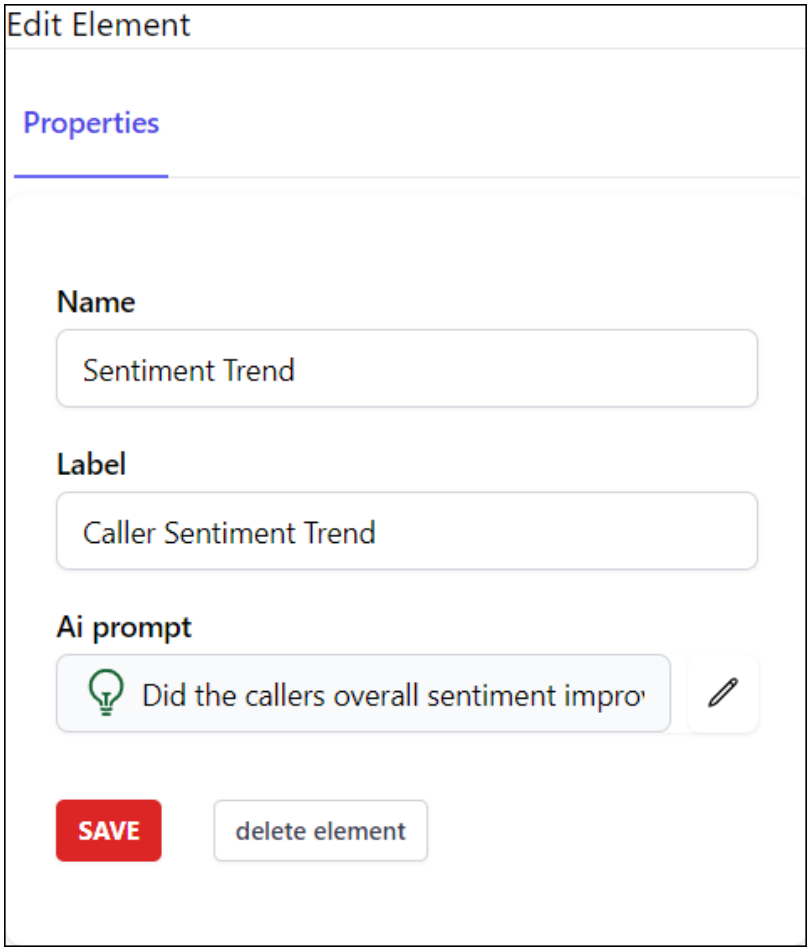
The AI Prompt field contains the text that is used to prompt the NLP model to generate the score for the call. The text entered in the AI Prompt field is given to the NLP model, and the model produces a score based on the criteria provided by the AI Prompt.

Enter the text to use to prompt the NLP model to generate a score.

More information on writing expressions is provided in the "Building Expressions" section of this document.

Note: Scores and score statistics presented on the Reports, Dashboard, and Call Log pages are generated with the assumption that the maximum possible score for each label is the desired score, and higher scores are presented positively. In order to maintain consistency in score statistics and presentation, Amtelco recommends prompting the AI Score element to assign higher scores to calls that reflect desirable events or behavior. For example, when evaluating the answer time of calls, if a shorter answer time is preferred, shorter answer times should be assigned higher scores.

AI Trend



The AI Trend element type is a Scoring element type that prompts the NLP model to evaluate the call for a trend regarding caller experience based on criteria provided in the AI Prompt.

The trend description generated by the AI Trend element is displayed under the Post Call Scoring section on the Call Information page for the call, and either a Positive Trend icon or Negative Trend icon is displayed for the call listing in the Scoring column of the Call Log page.

The Edit Element pane for the AI Trend element type contains the Properties tab.

Properties

The Properties page is displayed by default. The Properties page is used to configure settings for the AI Trend element. The Properties page contains the Name field, Label field, and the AI Prompt field.

Name

The Name field is used to determine the name that is displayed for the element.

Enter the name that you would like used for the element.

Label

The Label field is used to determine the name that is displayed for the trend in the Call Information page.

Enter the label you would like used for the trend created by the element.

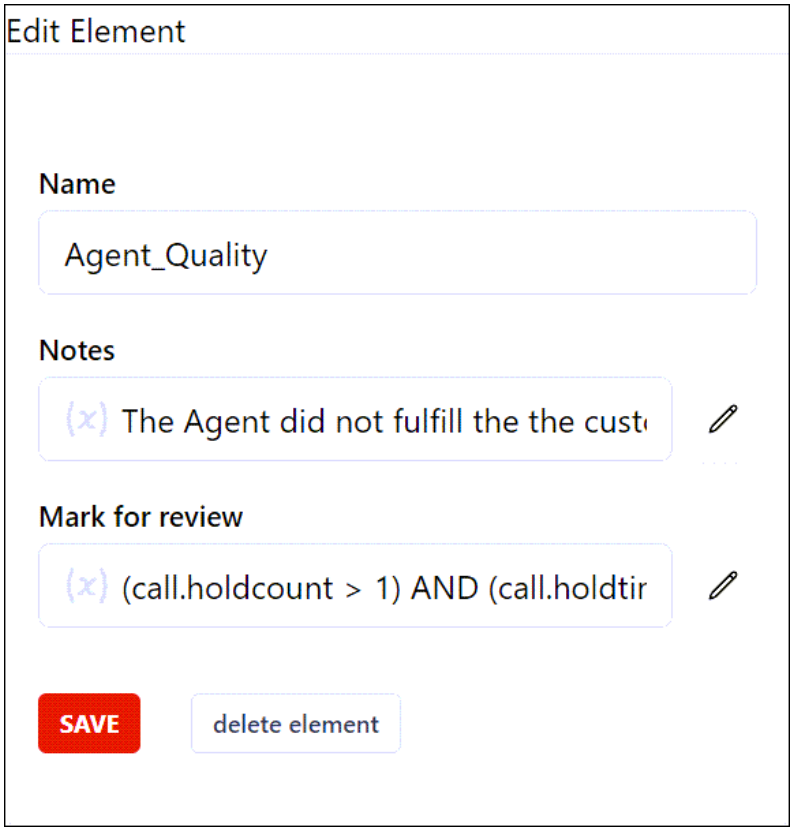
AI Prompt

The AI Prompt field contains the text that is used to prompt the NLP model to generate the trend for the call. The text entered in the AI Prompt field is given to NLP model, and the model produces a score based on the criteria provided by the AI Prompt.

Enter the text to use to prompt the NLP model to generate the trend.

More information on writing expressions is provided in the “Building Expressions” section of this document.

CallNotes



The CallNotes element type is a scoring element type that is used to add notes to the call and mark the call for review.

The Call Notes generated for the call are displayed at the top of the Call Information page for the call. If the call is marked for review, a red check mark is displayed on the Call Logs page in the Review column for the call.

The Edit Element pane for the CallNotes element contains the Properties tab.

Properties

The Properties page is used to configure settings for the CallNotes element. The Properties page contains the Name field, Notes field, and “Mark for Review” field.

Name

The Name field is used to determine the name that is displayed for the element.

Enter the name that you would like used for the element.

Notes

The Notes field is used to enter an expression that determines what text is displayed in the Notes field of the Call Information page.

Enter the text you would like displayed in the Notes field on Call Information page for the call.

More information on writing expressions is provided in the “Building Expressions” section of this document.

Mark for Review

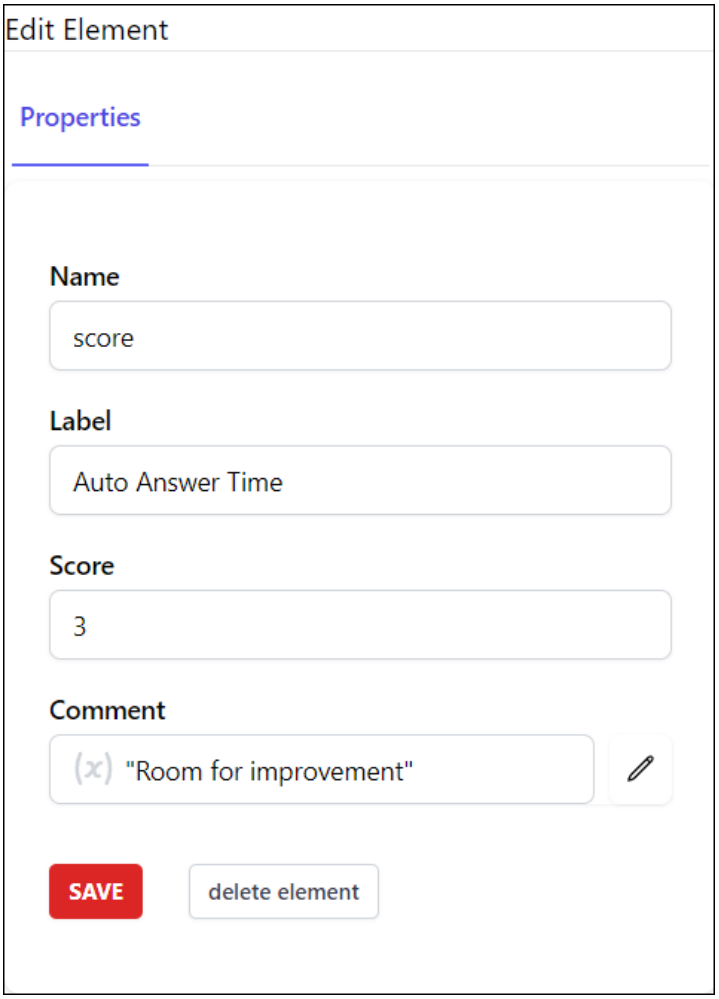
The Mark for Review field is used to determine if the call will be marked for review on the Call Logs page.

- The call is marked for review if the expression entered in the Mark for Review field is true.
- The call is not marked for review if the expression entered in the Mark for Review field is any value except true.

Enter the expression you would like used to determine if the call should be marked for review.

More information on writing expressions is provided in the “Building Expressions” section of this document.

Score



The Score element type is a scoring element type that is used to create a Score Label and to assign a score to the call for the Score Label.

The Score Label and the score generated by the Score element are displayed under the Post Call Scoring section on the Call Information page for the call.

The Edit Element pane for the Score element contains the Properties tab.

Properties

The Properties page is displayed by default. The Properties page is used to configure settings for the Score element. The Properties page contains the Name field, Label field, Score field, and Comment field.

Name

The Name field is used to determine the name that is displayed for the element.

Enter the name that you would like used for the element.

Label

The Label field is used to set the name that is used to differentiate scores for a call. On the Call Information page, the Score Label is displayed above the score that is assigned to it.

To determine the name of the Score Label to which each score generated by the element is assigned, enter the name of the label in the Label field.

When the element is activated, the label entered will be used to label the score assigned by the Score element to the call.

The label to which a score is assigned is used to calculate and categorize the data presented on the Reports and Dashboard pages. For a score to be associated with other scores of the same Score Label, the label must be entered in the Label field must be an exact match for each Score element which is being used to assign a score to the Score Label.

Note: Multiple scores can be assigned to a call, but each Score Label can only accept one score when the script is run. If multiple Score elements assign scores to the same label on a single run of the script, only the last score to be assigned to the label is saved.

Score

The Score field is used to set the score value for the call for the Score Label indicated in the Label field. On the Call Information page, the score is displayed below the label to which it is assigned.

To set the score that is assigned to the Score Label by the Score element, enter the score in the Score field.

When the element is activated, the score entered in the Score field is assigned to the Score Label indicated in the Label field.

Note: Scores and score statistics presented on the Reports, Dashboard, and Call Log pages are generated with the assumption that the maximum possible score for each label is the desired score, and higher scores are presented positively. In order to maintain consistency in score statistics and presentation, Amtelco recommends using Score elements to assign higher scores to calls that reflect desirable events or behavior. For example, when evaluating the answer time of calls, if a shorter answer time is preferred, shorter answer times should be assigned higher scores.

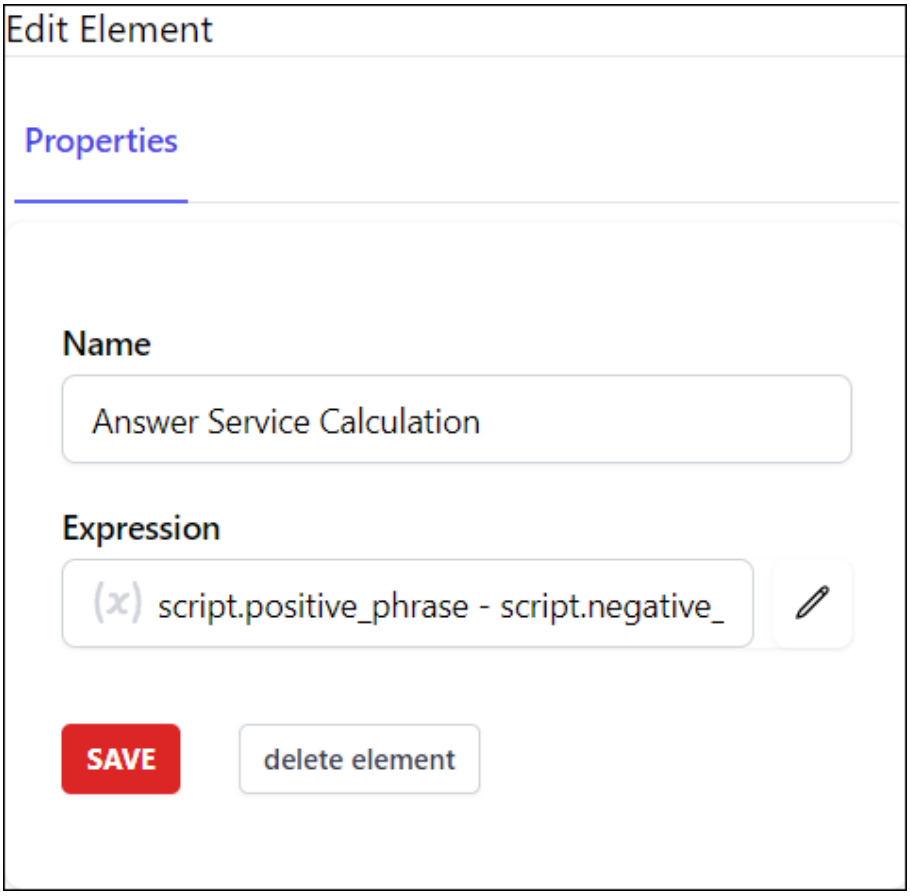
Comment

The Comment field is used to enter an expression that determines what text is displayed below the score on the Call Information page.

Enter the text you would like displayed with the score and label on the Call Information page for the call.

More information on writing expressions is provided in the “Building Expressions” section of this document.

Set Field



The Set Field element type is a script element type that is used to name and assign an expression to a field for use in the Script. The Edit Element pane for the Set Field element contains the Properties tab.

Properties

The Properties page is displayed by default. The Properties page is used to configure settings for the Set Field element. The Properties page contains the Name field and Expression field.

Name

The Name field is used to determine the name that is displayed for the element and is used to refer to the element in expressions.

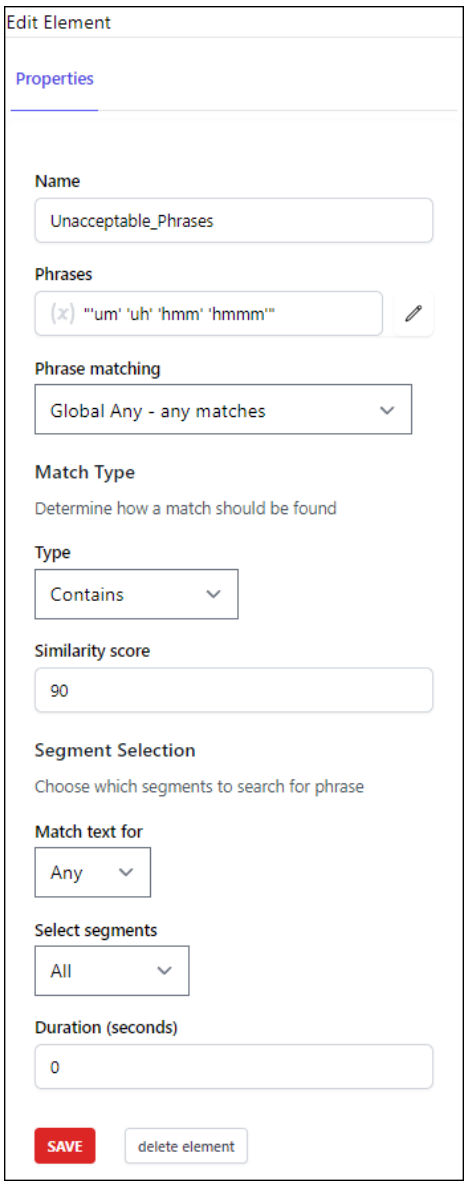
Enter the name that you would like used for the element.

Expression

The Expression field is used to set the expression that the element represents. When the Name of the element is called in the expression for a different element, the expression entered in the Expression field is inserted in place of the Name.

Enter the expression that will be inserted whenever the element is called.

Transcript Phrase



The Transcript Phrase element type is a transcription element type that is used to search the call transcript for one or more phrases. The Transcript Phrase element can be customized to search for one or more custom phrases and can be configured to search specific sections of the transcript. The Edit Element pane for the Transcript Phrase element contains the Properties tab.

Properties

The Properties page is displayed by default. The Properties page is used to configure settings for the Transcript Phrase element. The Properties page contains the Name field, Phrases field, Phrase Matching field, Match Type section, and Segment Selection section.

Name

The Name field is used to determine the name that is displayed for the element.

Enter the name that you would like used for the element.

Phrases

The Phrases field is used to determine the phrases for which the transcript is searched. The phrases parsed from the transcription are determined by an expression created in the Phrases field.

Enter the expression that determines what phrases are parsed from the transcription.

More information on writing expressions is provided in the “Building Expressions” section of this document.

Phrase Matching

The Phrase Matching setting is used to determine the type of value that is saved to the Transcript Phrase element.

Click the Phrase Matching menu and select the type of phrase matching to use.

The Phrase Matching setting contains the following commands:

Count
If “Count” is selected, the Transcript Phrase element records the number of matches found throughout the entire transcript.

Global All
If "Global All" is selected, the Transcript Phrase element is evaluated as true only if a match is found anywhere in the transcript for each phrase entered in the Phrases field. If a match is not found for one or more of the phrases, the element is evaluated as false.

Global Any
If "Global Any" is selected, the Transcript Phrase element is evaluated as true if a match is found anywhere in the transcript for any of the phrases entered in the Phrases field. If no matches are found, the element is evaluated as false.

Segment All
If "Segment All" is selected, the Transcript Phrase element is evaluated as true if a match is found for each phrase entered in the Phrases field in each segment of the call. If a match is not found for one or more phrases in any segment of the call, the element is evaluated as false.

Segment Any
If "Segment Any" is selected, the Transcript Phrase element is evaluated as true if any of the phrases entered in the Phrases field is found in each segment of the call. If no matches are found in any segment of the call, the element is evaluated as false.

Type

The Type setting is used to configure whether matches found in the transcript must be exact or whether they can be inexact. The Type setting includes the "Contains" and "Inexact Contains" commands.

Contains
If "Contains" is selected, the Transcript Phrase element only finds a match if the transcript text exactly matches one of the phrases entered in the Phrases field.

Inexact Contains
If "Inexact Contains" is selected, the Transcript Phrase element finds a match if the transcript text matches or is similar to the one of the phrases entered in the Phrases field. The Inexact Contains type can find matches even if there are variations in spelling.

To set the Type, click the Type menu and select the match type that you would like used to match the text in the Phrases field to the transcript text.

Similarity Score

The Similarity Score determines how similar the transcript text must be to the text being searched for the transcript text to be counted as a match.

The Similarity Score field must contain a value between 1 and 99. The higher the value, the more similar that the text must be to be counted as a match.

Enter the Similarity Score to use to determine matches.

Match text for

The "Match text for" setting is used to select the party of the call for which text is searched. The "Match text for" setting includes the Any, Agent, and Caller commands.

To select the parties for which text is searched, click the "Match text for" menu and select for whom text will be searched.

Any
If the Any command is selected, the Transcript Phrase element searches transcript text of both the agent and the caller for matching phrases.

Agent
If the Agent command is selected, the Transcript Phrase element only searches transcript text for the agent for matching phrases.

Caller
If the Caller command is selected, the Transcript Phrase element only searches transcript text for the caller for matching phrases.

Select Segments

The Select Segments setting is used to select which segments of the call are searched by the element.

Segments are any section of audio recorded for the call. The system starts recording audio when the call starts and when the call is taken off hold, and the system stops recording audio when the call ends and when the call is put on hold.

To select the segments that are searched by the element, click the Select Segments menu and select which segments to be searched.

All
If "All" is selected, the Transcript Phrase element searches all segments of the call, regardless of the number of segments or if the call was put on hold.

First
If "First" is selected, the Transcript Phrase element searches only the first segment of the call. If only one segment was recorded, the entire call will be searched.

Last
If "Last" is selected, the Transcript Phrase element searches only the last segment of the call. If only one segment of the call was recorded, the entire call will be searched.

To Hold
If "To Hold" is selected, the Transcript Phrase element searches only segments of the call that ended with the call being placed on hold. If the call was not placed on hold, the Transcript Phrase element does not search any segments of the call.

From Hold
If "From Hold" is selected, the Transcript Phrase element searches only segments of the call that started after the call was taken off hold. If the call was not placed on hold, the Transcript Phrase element does not search any segments of the call.

Duration (seconds)

The Duration field is used to set how long into the call that the Transcript Phrase element will search for matching phrases.

- If the Duration field is set to a positive number, the Transcript Phrase element searches for matches at the beginning of the call. The call is searched starting at the beginning of the call and ending at the number of seconds into the call as is entered in the Duration field.

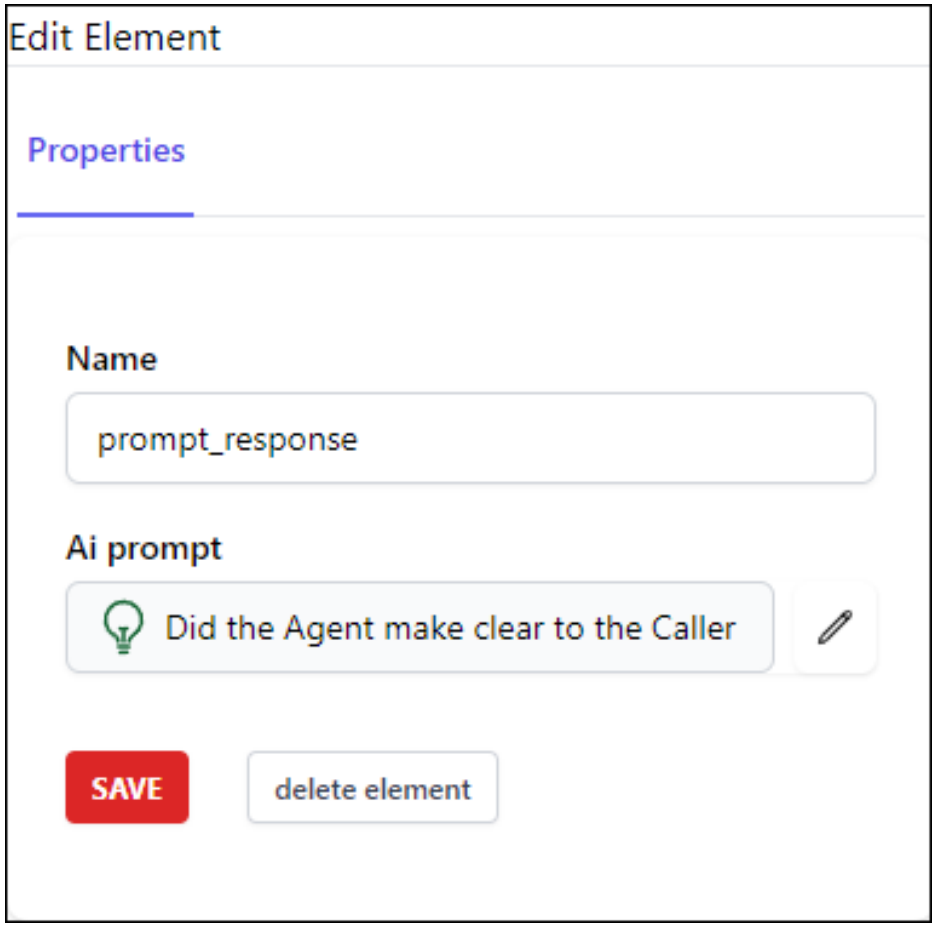
- If the Duration field is set to a negative number, the Transcript Phrase element will search for matches at the end of the call. The call is searched starting at the number of seconds before the end of the call as is entered in the Duration field and ending at the end of the call.
- If the Duration field is set to 0 (zero), the entire call is searched.

Enter the number of seconds to search at the beginning of the call.

OR

Enter a minus sign (-) and the number of seconds at the end of the call to search.

Transcript Prompt AI



The Transcript Prompt AI element type is a transcript element type that prompts the NLP model to analyze the call transcript and answer the request presented in the AI Prompt.

The Transcript Prompt AI produces one or more script variables based on the AI Prompt request. The script variables created by the Transcript Prompt AI can be used elsewhere in the script.

The Edit Element pane for the AI Score element contains the Properties tab.

Properties

The Properties page is displayed by default. The Properties page is used to configure settings for the AI Score element. The Properties page contains the Name field and the AI Prompt field.

Name

The Name field is used to determine the name that is displayed for the element.

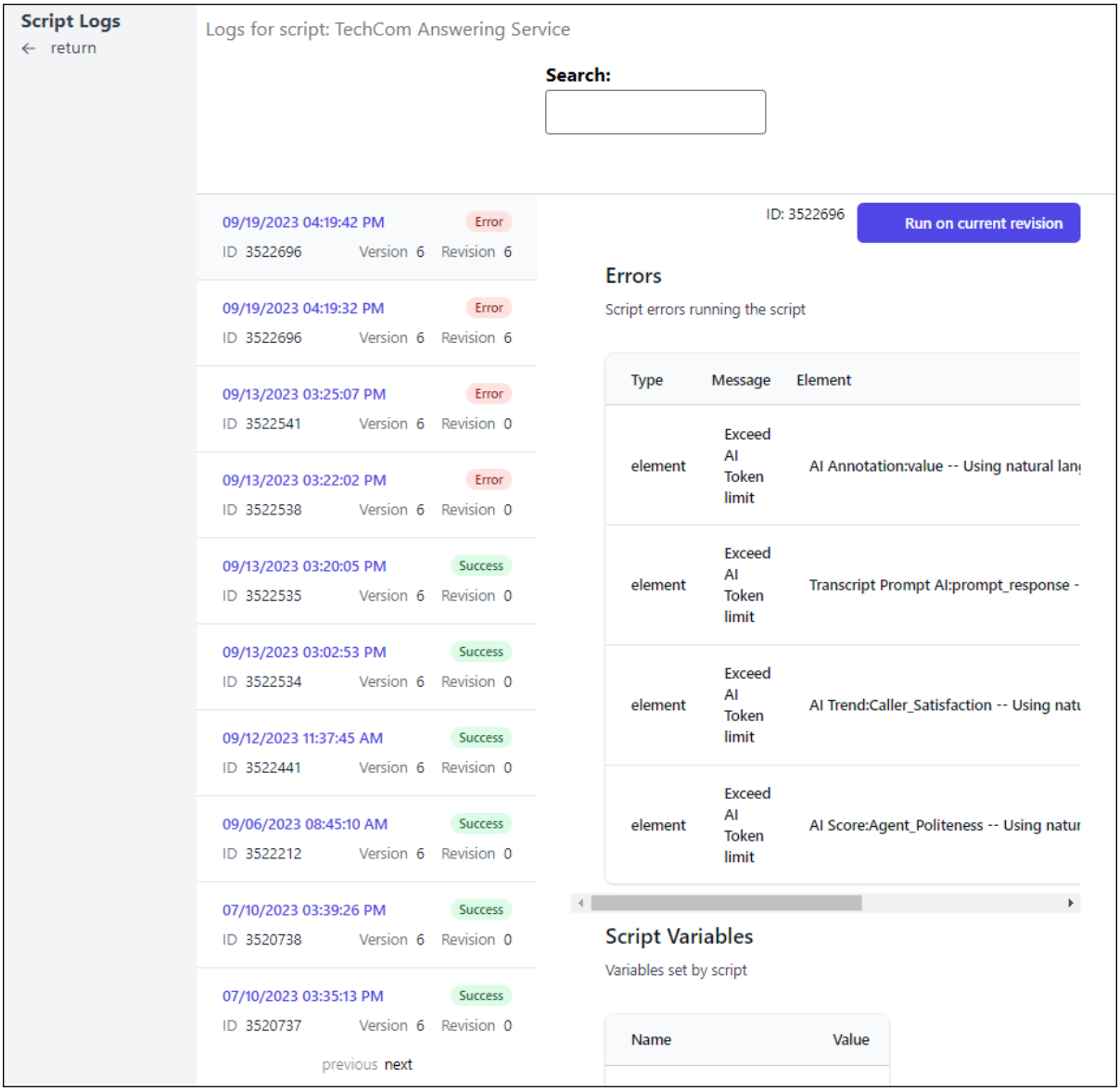
Enter the name that you would like used for the element.

AI Prompt

The AI Prompt field contains the text that is used to prompt the NLP model to generate the answer to the request for the call. The text entered in the AI Prompt field is given to the NLP model, the model produces one or more fields based on the criteria provided by the AI Prompt.

Enter the text to use to prompt the NLP model to generate the answer.

Script Logs



The Script Logs page contains a record of each time the script was run and can be used to rerun the script on the same call using a newer version of the script.

The Script Logs page can be accessed using the Logs command on the Script Editor page or the View Logs command on the Call Information page for any call for which a Post-Call Script was run.

- **Click the Logs command on the Script Editor page to display the logs for a script.**

  The Script Logs page displays the script logs for the script that was being edited.

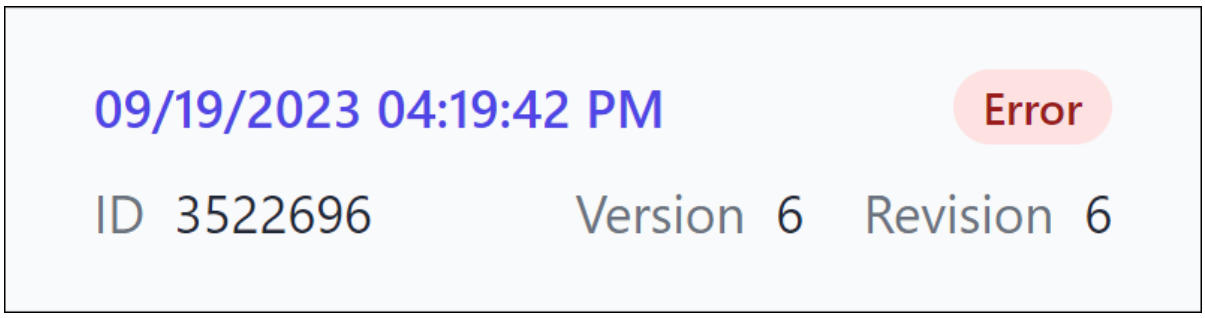
- **Click the View Logs command on the Call Information page to display the logs for a call.**

  The Script Logs page displays the script logs for the script that was run on the call.

The Script Logs page contains the Log list and the Log pane.

Log List

The Log list displays a listing for each log and enables the user to select which script log to display in the Log pane. The Log list displays the listings in chronological order by most recent.



Each listing displays the following information about the run of the script:

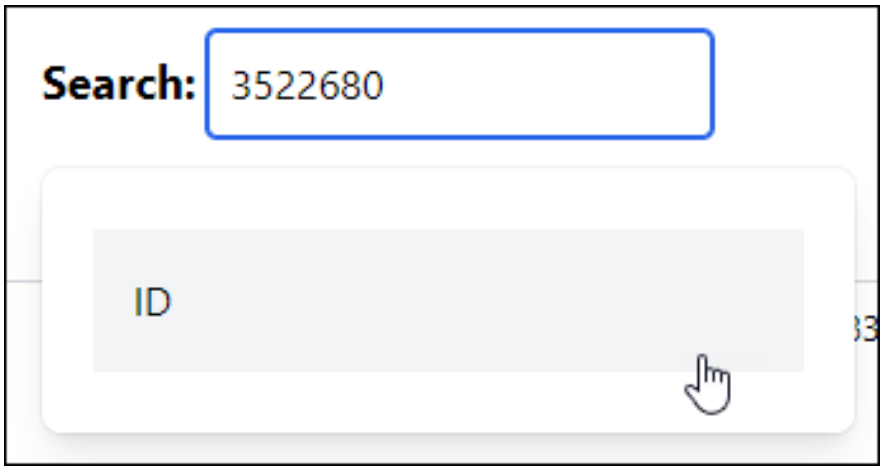
- The date and time of the script run
- Whether the script run succeeded or an error occurred
- The unique ID number of the script run
- The version number of the script that was used
- The revision number of the script that was run

Searching the Log List

The Search field is used to select a search parameter by which you would like the Log list filtered.

To add a search parameter to the Log list, select the Search field.

The Search Parameter menu is displayed. The Search Parameter menu contains the ID parameter.



ID

The ID parameter is used to filter the Script Log list to only show the log with the entered ID number.

Enter the ID number by which you would like Log list filtered in the Search field.

Select the ID command.

Only the Script Log listing that has the entered ID number is displayed.

Next/Previous

The Log list displays up to 10 listings at once. By default, the Log list displays the 10 most recent script log listings.

The Next and Previous hyperlinks are used to change which 10 listings are displayed. The Next and Previous hyperlinks are displayed below the Log list.

To view the next 10 older listings, click the Next hyperlink.

The next 10 older listings are displayed.

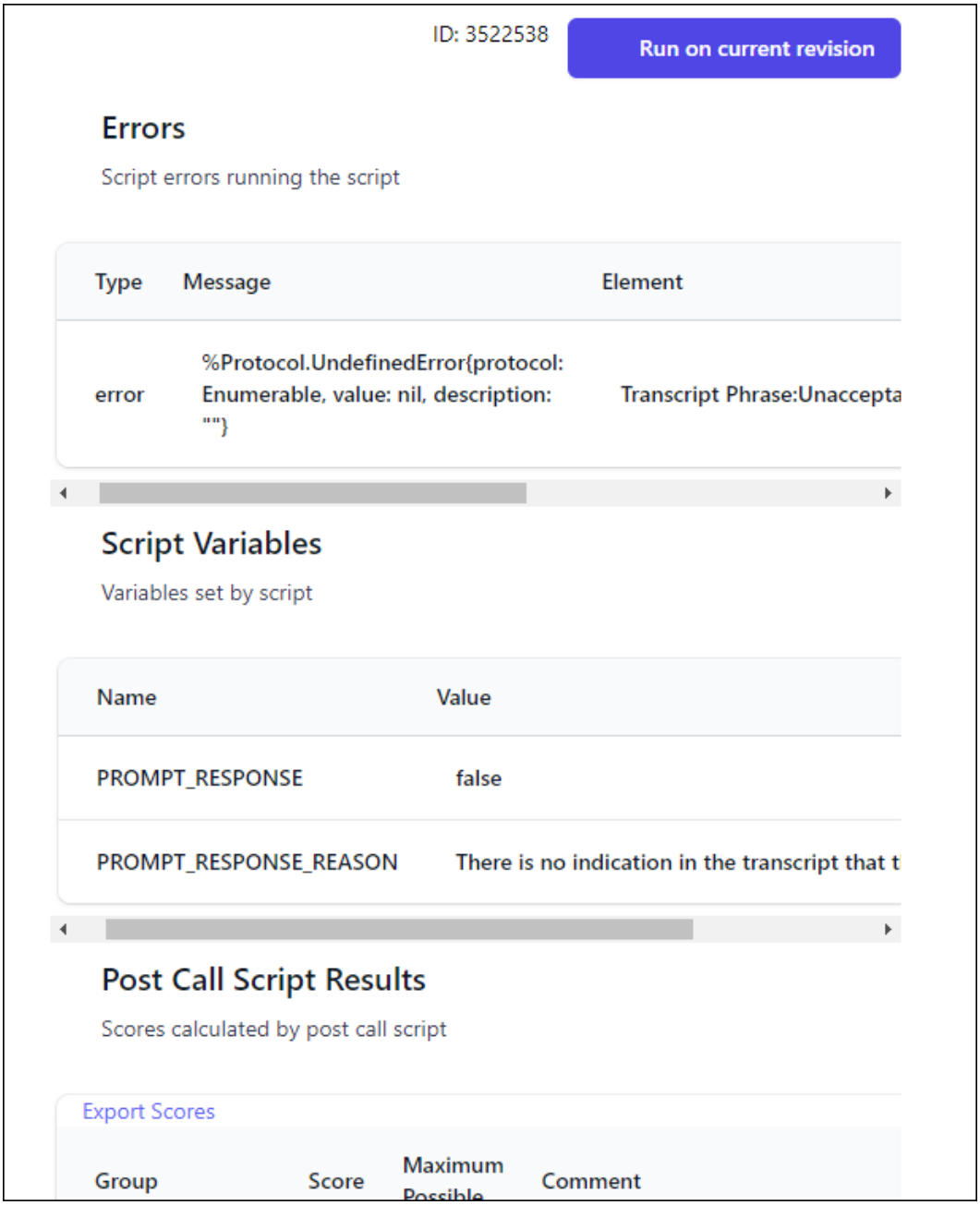
If the oldest listings are already displayed, the Next hyperlink is disabled.

To view the previous 10 newer listings, click the Previous hyperlink.

The previous 10 newer listings are displayed.

If the newest listings are already displayed, the Previous hyperlink is disabled.

Log Pane



The Log pane displays information about the script log selected in the Log list. The Log pane contains the “Run on Current Revision” button and can also contain the Errors list, the Script Variables list, and the Post Call Script Results list depending on the content of the log.

Run on current version

The “Run on current version” button is used to rerun the call through scoring using an updated script. When the “Run on current version” button is clicked, the current script version, including all unactivated revisions, is run on the call data for the call. This can be

used to check the scoring results of calls after updating a script or to test a script's revisions before activating the script.

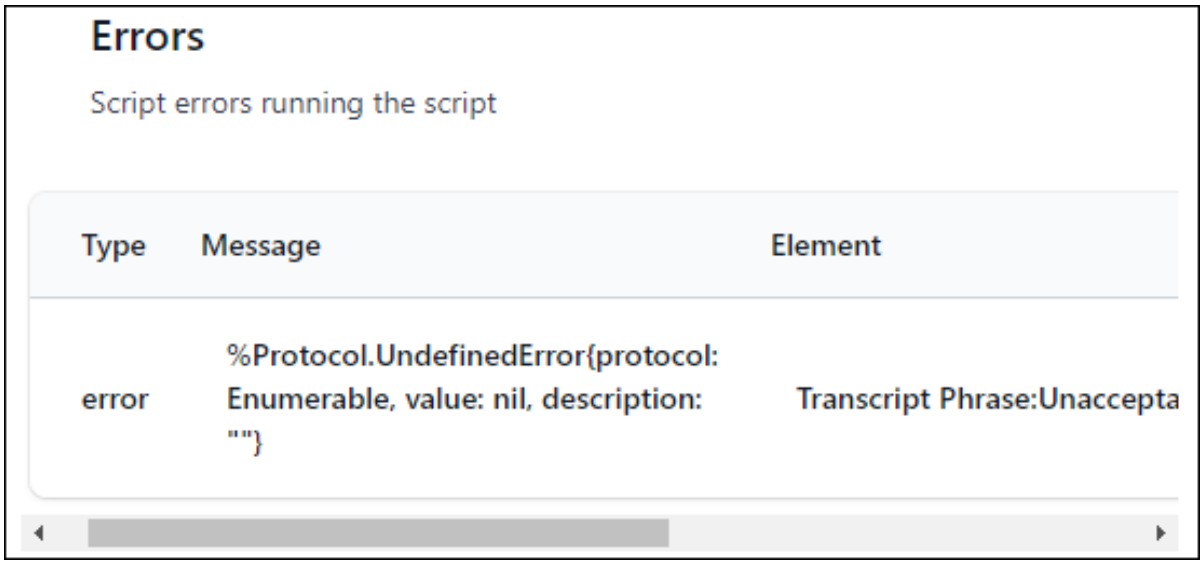
To run the current version of a script on the call, click the "Run on current version" button.

The Active Insights Platform attempts to queue and run the script.

When the script is finishing running, a new log is generated.

Note: Running the script using the "Run on current version" button does not change or replace any post-call analytics results displayed for the call on the Call Information page.

Errors



The Errors list is displayed if one or more errors occurred during the run of the script. The Errors list displays the Type, Message, and Element columns.

Type

The Type column displays the type of error that occurred.

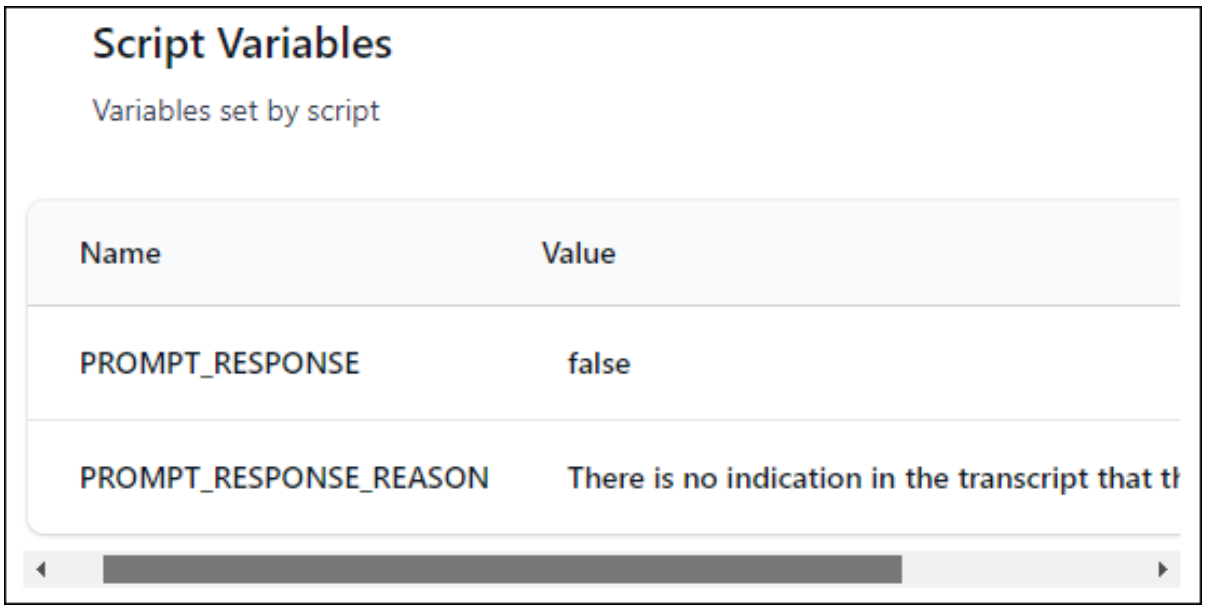
Message

The Message column displays the message associated with the error.

Element

The Element column displays the element type, element name, and description of the script element that caused the error.

Script Variables



The Script Variables list is displayed if the script assigned a value to one or more script variables. The Script Variables list displays the Name and Value columns.

Note: If a Script Variable is not assigned any value for the run of the script, it is not displayed in the Script Variables list.

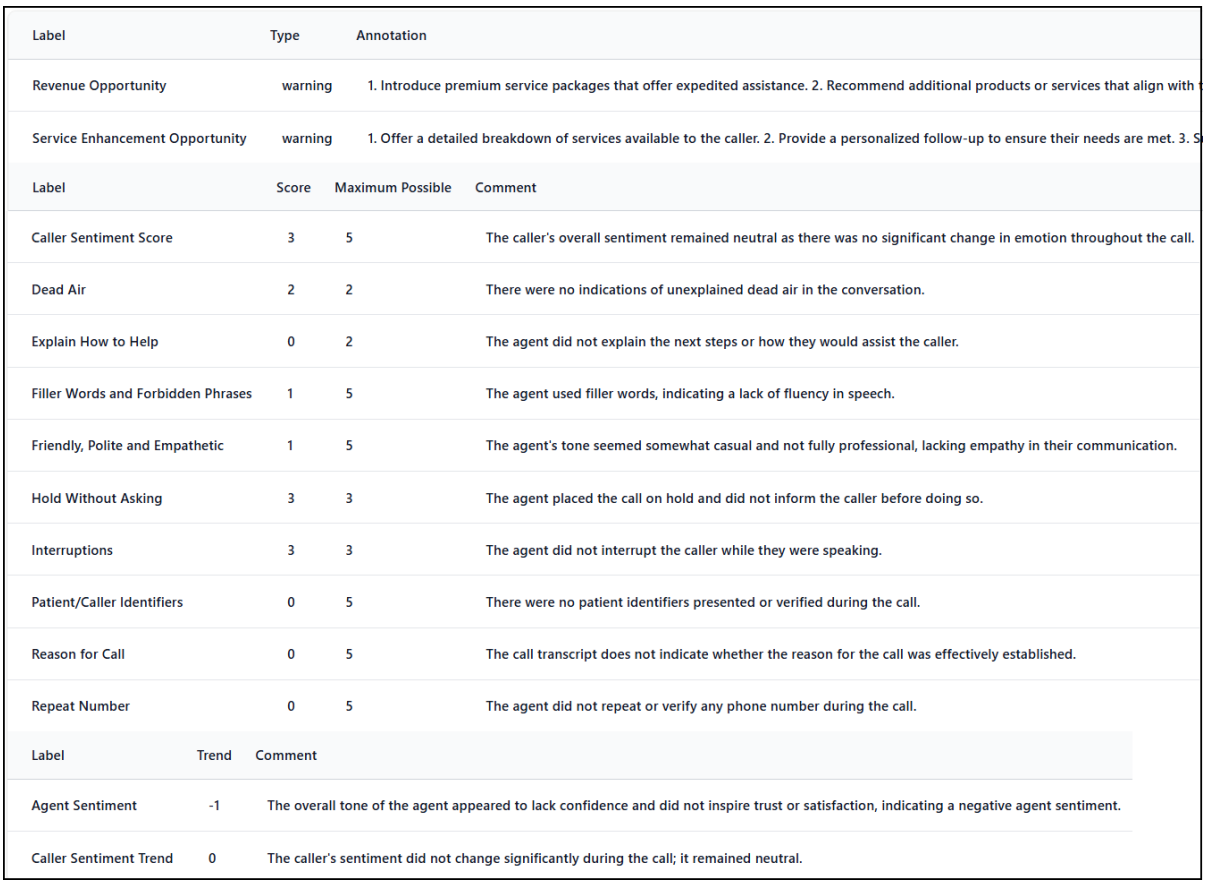
Name

The Name column displays the name of the variable that was used by the script.

Value

The Value column displays the value that was assigned to the variable during the script run.

Post Call Script Results



Label	Type	Annotation
Revenue Opportunity	warning	1. Introduce premium service packages that offer expedited assistance. 2. Recommend additional products or services that align with t
Service Enhancement Opportunity	warning	1. Offer a detailed breakdown of services available to the caller. 2. Provide a personalized follow-up to ensure their needs are met. 3. S

Label	Score	Maximum Possible	Comment
Caller Sentiment Score	3	5	The caller's overall sentiment remained neutral as there was no significant change in emotion throughout the call.
Dead Air	2	2	There were no indications of unexplained dead air in the conversation.
Explain How to Help	0	2	The agent did not explain the next steps or how they would assist the caller.
Filler Words and Forbidden Phrases	1	5	The agent used filler words, indicating a lack of fluency in speech.
Friendly, Polite and Empathetic	1	5	The agent's tone seemed somewhat casual and not fully professional, lacking empathy in their communication.
Hold Without Asking	3	3	The agent placed the call on hold and did not inform the caller before doing so.
Interruptions	3	3	The agent did not interrupt the caller while they were speaking.
Patient/Caller Identifiers	0	5	There were no patient identifiers presented or verified during the call.
Reason for Call	0	5	The call transcript does not indicate whether the reason for the call was effectively established.
Repeat Number	0	5	The agent did not repeat or verify any phone number during the call.

Label	Trend	Comment
Agent Sentiment	-1	The overall tone of the agent appeared to lack confidence and did not inspire trust or satisfaction, indicating a negative agent sentiment.
Caller Sentiment Trend	0	The caller's sentiment did not change significantly during the call; it remained neutral.

The Post Call Script Results section contains the Export Scores hyperlink, and the Post Call Script Results table.

The Post Call Script Results table is displayed if the script assigned a score to one or more Score Labels. The Post Call Script Results table is divided into subsections for Annotations, Scores, and Trends. Each subsection displays different columns. The start of each subsection is marked by a table header for the section.

Export Scores

The Export Scores hyperlink is used to export the information displayed in the Post Call Script Results list as a comma-separated values (CSV) file.

To export the Post Call Script Results information, click the Export Scores hyperlink.

A CSV file is created from the Post Call Script Results data and is downloaded.

Annotations

The Annotations subsection of the Post Call Script Results table displays information about Annotations generated by the script for the call. The Annotations subsection contains the Label column, the Type column, and the Annotation column.

Label

The Label column displays the Annotation Label for which the annotation was generated.

Type

The Type column displays the type of Annotation generated for the Annotation.

- If the “Info” option was selected for the Type field for the Annotation element, “Info” is displayed in the Type column.
- If the “Warning” option was selected for the Type field for the Annotation element, “Warning” is displayed in the Type column.

Annotation

The Annotation column displays the text generated by the AI Annotation element for the Annotation label.

Scores

The Score subsection of the Post Call Script Results table displays information about Scores generated by the script for the call. The Scores subsection contains the Label column, the Score column, the Maximum Possible column, and the Comment column.

Label

The Label column displays the Score Label to which the score was assigned.

Score

The Score column displays the value assigned to the Score Label.

Maximum Possible

The Maximum Possible column displays the maximum score that could have been assigned to the Score Label.

Comment

The Comment column displays the text generated by the Score or AI Score element’s Comment field.

Trends

The Trends subsection of the Post Call Script Results table displays information about Trends generated by the script for the call. The Trends subsection contains the Label column, the Trend column, and the Comment column.

Label

The Label column displays the Trend Label for which a Trend was generated.

Trend

The Trend column displays the value of the Trend generated for the trend label.

- The Trend column displays a value of -1 (negative one) for calls in which the sentiment of the caller at the end of the call was worse than it was at the beginning of the call.
- The Trend column displays a value of 0 (zero) for calls in which the sentiment of the caller at the end of the call was similar to the sentiment at the beginning of the call.

- The Trend column displays a value of 1 (one) for calls in which the sentiment of the caller at the end of the call was better than at the beginning of the call.

Comment

The Comment column displays the text generated by the AI Trend element for the Trend. Label.

Building Expressions

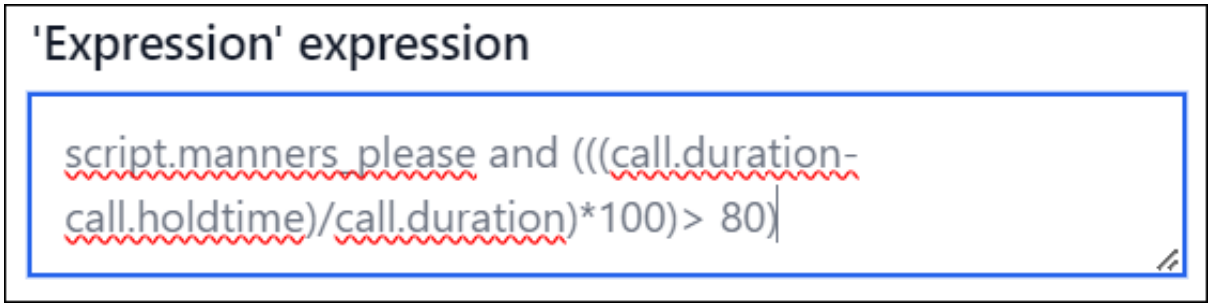
Many elements in the Script Editor make use of expression fields to configure the effect of the element's function. Expression fields appear as Comment expression fields, Condition expression fields, and Prompt expression fields.

Non-Prompt expression fields are used to produce comments, select words by which to search the transcript, and perform operations on call statistics.

Prompt expression fields are used to enter the prompt provided to the Natural Language Processing (NLP) model by the element.

Building Non-AI Expressions

Non-AI expression fields utilize variables and text to create score comments, determine values, and specify searched text. Non-AI expressions include string expressions and variable expressions.



Non-AI expression fields include the following fields:

- The Condition fields used by the Case, If, and Range element types.
- The Comment field used by the Score element type.
- The Expression field used by the Set Field element type.
- The Phrases field used by the Transcript Phrase element type.

Each expression can only have a final value of one data type. The final data type can be string, numeric, or Boolean.

String
String values represent a string of text.

Numeric
Numeric values represent numbers. Numeric values include integers and decimals.

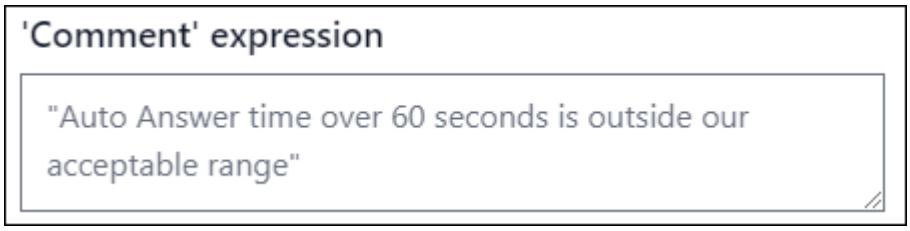
Boolean
Boolean values represent true and false values.

String Expressions

Strings are used in expressions to determine what text is presented or represented by the expression. Double quotation marks and single quotation marks are used to define how the text is interpreted.

Double Quotation Marks

Double quotation marks (“ ”) are used to differentiate text strings from variables in the expression builder. Any text contained within double quotation marks is interpreted as text.



To mark a string as text, enter a double quotation mark before the text.

Enter another double quotation mark after the text.

Note: All text which you would like interpreted as a text string must be enclosed in double quotation marks.

Single Quotation Marks

Single quotation marks are used to group words together into phrases. If multiple words are contained within a set of single quotation marks, all words within the single quotation marks will be interpreted as a single phrase.

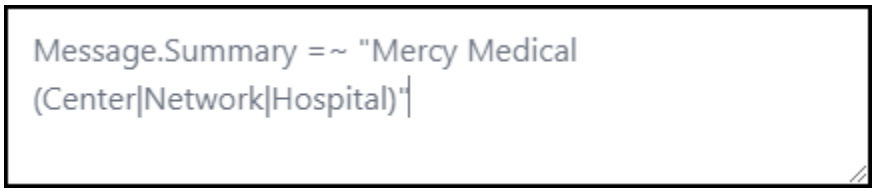
To mark two or more words as a single phrase, enter a single quotation mark before the first word.

Enter another single quotation mark after the last word.

Note: When words are contained in single quotation marks in the Phrases field, a match is only found if the words are found as a single phrase in the transcript. Individual occurrences of each word are ignored.

Vertical Bar

The vertical bar character (|) is used to signify alternate values accepted within an expression. Vertical bars are usable for comparing string values with the Comparison operator. (=~)



To mark two or more characters or strings as alternatives within an expression, enter a vertical bar between each alternative value.

Note: Vertical bars do not work with numeric expressions or the Equals operator.

Variable Expressions

Variables Expressions utilize variables and logical operators to produce and modify values that may change between calls.

Note: Variables and operators cannot be contained within double quotation marks. If a variable is contained within double quotation marks, it will be interpreted as a text string and the value or function will be ignored.

Script variables, call variables, and operators are available for use in expressions.

Script Variables

Script variables are variables that are created and configured within the script. Script variables represent the output value of an element in the script.

To use a script variable in the expression, enter "script" and a period (.) followed by the name of the element as it is entered in the element's Name field.

Note: The element in which a script variable is used must be activated chronologically after the element which creates the script variable. Amtelco recommends making elements that require a script variable dependent on the element that creates the script element or adding the dependent element to the Finalize node of the Start element.

Script variables are produced by the Set Field element and the Transcript Phrase element. The data type of the script variable is determined by the configuration of the element.

Transcript Phrase

The Transcript Phrases element type produces a script variable value based on its transcript search. The data type of the Transcript Phrase script variable is determined by the command selected for the Phrase Matching field.

Numeric
If "Count – Matching Phrases" is selected, the Transcript Phrase element produces a script variable with the numeric value. The script variable represents the number of matching phrases found in the transcript.

Boolean
If "Count – Matching Phrases" is not selected, the Transcript Phrase element produces a script variable with the Boolean value. The script variable represents whether the conditions specified in the Phrase Matching field were met.

Set Field

The Set Field element type produces a script variable dependent on the expression entered in the Expression field. The Set Field script variable can contain a numeric, Boolean, or string value.

IS Variables

Intelligent Series (IS) variables are variables created outside the script editor that contain information about the call, IS messages associated with the call, or other IS information related to the call. IS variables have the same name for each call, but the values may vary by call.

To use a call variable in the expression, enter the name of the call variable.

The following call variables are available:

Call Variable	Description
Call.Agent	The Call.Agent variable contains the name of the Agent who took the call.
	The Call.Agent variable contains a string value.
Call.AgentAnswerTime	The Call.AgentAnswerTime variable contains the length of time in seconds that it took the Agent to answer the call after the call appeared on their screen.
	The Call.AgentAnswerTime variable contains a numeric value.
Call.AnswerPhrase	The Call.AnswerPhrase variable contains the answer phrase for the current call, as contained in the Intelligent Series (IS) Client record for the call.
	The Call.AnswerPhrase variable contains a string value.
Call.AutoAnswered	The Call.AutoAnswered variable represents whether the call was auto answered.
	The Call.AutoAnswered variable contains Boolean value.
Call.Duration	The Call.Duration variable contains the length of time in seconds that the call was on the operator's screen.
	The Call.Duration variable contains a numeric value.
Call.HasTranscript	The Call.HasTranscript variable represents whether the call has an associated transcript.
	The Call.HasTranscript variable contains a Boolean value.
Call.HoldCount	The Call.HoldCount variable contains the number of times the call was put into the Hold state.
	The Call.HoldCount variable contains a numeric value.
Call.HoldTime	The Call.HoldTime variable contains the length of time in seconds that the call was in the Hold state.
	The Call.HoldTime variable contains a numeric value.
Call.SystemAnswerTime	The Call.SystemAnswerTime variable contains the length of time in seconds that the call was in the system before being answered or disconnected.

Call Variable	Description
	The Call.SystemAnswerTime variable contains a numeric value.
Call.TranscriptLanguage	The Call.TranscriptLanguage variable contains the language of the transcript as determined by the transcription service. The language of the transcript can be English, Spanish, or French Canadian.
	The Call.TranscriptLanguage variable contains a string value.
Client.Name	The Client Number variable contains the name assigned to the Client in the IS system for the Client which received
Client.Number	The Client.Number variable contains the unique ID number assigned to the Client in the IS system for the Client which received the call.
	The Client.Number variable contains a string value.
Message.Summary	The Message.Summary variable contains the summary of the message associated with the call that was created first.
	The Message.Summary variable contains a string value.
Message.Subject	The Message.Subject variable contains the subject of the message associated with the call that was created first.
	The Message.Subject variable contains a string value.
Message.Count	The Message.Count variable contains the number of messages associated with the call.
	The Message.Count variable contains a numeric value.
Message.Annotations	The Message.Annotations variable contains the contents of the annotations created for the messages for the call.

Message Script Variables

Message Script Fields can be referenced in expressions for both AI and non-AI expressions. The expression fields available will vary depending on what fields are created by the Intelligent Series message script.

To use a message script variables in the expression, enter "message.fields." followed by the name of the field as it is titled by the Intelligent Series message script.

The Message Script Field will be referenced in the expression.

Note: Message Script Fields created for a message by the Intelligent Series message script are displayed in the fields section on the Message Information page.

For more information about the Message Information page can be found in the *Active Insights User Guide.*

AI Prompt Variables

AI Prompt variables are variables that can be read and interpreted by the NLP model used for Artificial Intelligence (AI) prompts. When these AI Prompt variables are included in a

prompt, the NLP model can access the data in these variables to produce results or provide data.

To use an AI Prompt variable in the expression, enter the name of the AI Prompt variable.

The following AI Prompt variables are available:

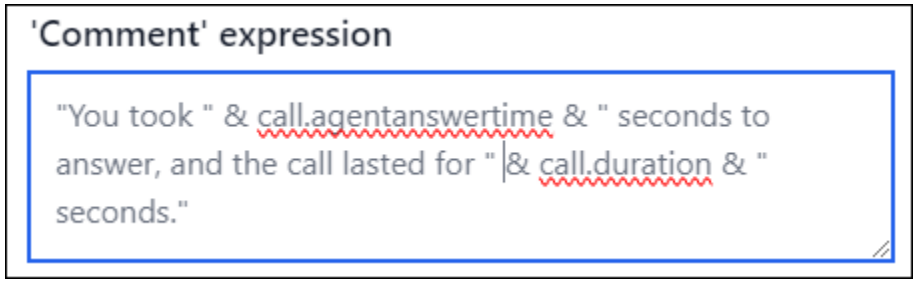
AI Prompt Variable	Description
answer_phrase	The answer_phrase variable contains the answer phrase for the current call, as contained in the Intelligent Series (IS) Client record for the call. The answer_phrase variable contains a string value.
answer_time	The answer_time variable contains the length of time in seconds that it took for the Agent to answer the call after the call appeared on their screen. The answer_time variable contains a numeric value.
auto_answered	The auto_answered variable represents whether the call was auto-answered. The auto_answered variable contains a Boolean value.
client_name	The client_name variable contains the name of the Client to which the call was routed. The client_name variable contains a string value.
client_number	The client_number variable contains the Client Number to which the call was routed. The client_number variable contains a string value.
duration	The duration variable contains the length of the call in seconds. The duration variable contains a numeric value.
hold_count	The hold_count variable contains the number of times the call was put in the Hold state. The hold_count variable contains a numeric value.
hold_time	The hold_time variable contains the length of time in seconds that the call was placed in the Hold state. The hold_time variable contains a numeric value.
link_to_call	The link_to_call variable contains the Universal Resource Locator (URL) for the call's Call Information page. The link_to_call variable contains a string value.
overall_score	The overall_score variable contains the average of all scores that were assigned to the call at the moment the current element is run. The overall_score variable contains a numeric value.

Operators

Operators are characters or words used to perform logical operations using text and the value of variables. Operators function by comparing or applying actions to the operand on both sides of the operator.

- The value to the left of the operator is the left operand.
- The value to the right of the operator is the right operand.

Concatenate Operator (&)

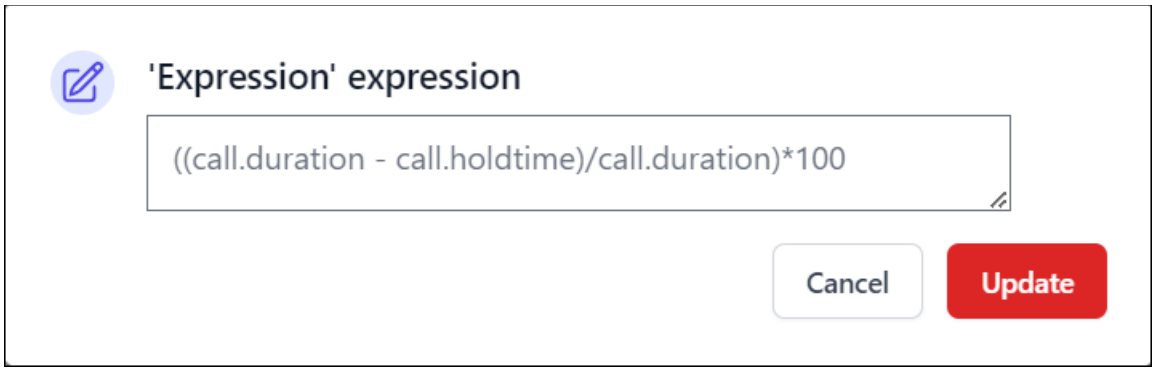


The Concatenate operator is used to convert the value of both operands into string values and combine them into a single string. The Concatenate operator can be used to include the value of a variable in a comment expression.

To concatenate a value or variable, enter an ampersand (&) between both operands.

The value of both operands are converted to string values and joined.

Mathematical Operators



Mathematical operators are used to perform mathematical operations or comparisons on numeric values. Mathematic operators do not function on string or Boolean values.

The following mathematical operators can be used:

Operator	Description
Parentheses ( )	Parentheses are used to establish operator precedence. Any mathematical operations contained between an opening parenthesis a closing are evaluated first. **Enter an opening parenthesis (before the expression section you want to have precedence.**

Operator	Description
	Enter a closing parenthesis) after the expression section you want to have precedence. The expression section contained within the parenthesis will be performed before any operators outside the parentheses. **Note:** If multiple sets of parentheses are used in an expression, the expressions are evaluated from innermost to outermost.
Add (+)	The Add (+) operator is used to add the operands together. **Enter a plus sign (+) between the operands.** The Add (+) operator produces a numeric value.
Subtract (-)	The Subtract (-) operator is used to subtract the right operand from the left operand. **Enter a minus sign (-) between the operands.** The Subtract (-) operator produces a numeric value.
Divide (/)	The Divide (/) operator is used to divide the left operand by the right operand. **Enter a foreslash (/) between the operands.** The Divide (/) operator produces a numeric value.
Multiply (*)	The Multiply (*) operator is used to multiply the operands together. **Enter an asterisk (*) between the operands.** The Multiply (*) operator produces a numeric value.
Modulo (mod)	The Modulo (mod) operator is used to obtain the remainder of the left operand after it has been divided by the right operand. **Enter "mod" between the operands.** The Modulo (mod) operator produces a numeric value.
Less Than (<)	The Less Than (<) operator returns a true value if the left operand has a lesser value than the right operand. **Enter the Less-Than symbol (<) between the operands.** The Less Than (<) operator produces a Boolean value.
Less Than or Equal To (<=)	The Less Than or Equal To (<=) operator returns a true value if the left operand has a value that is equal to or less than the right operand. **Enter a Less-Than sign and an Equals sign (<=) between the operands.** The Less Than or Equal To (<=) operator produces a Boolean value.

Operator	Description
Greater Than (>)	The Greater Than (>) operator returns a true value if the left operand has a greater value than the right operand. **Enter a Greater-Than sign (>) between the operands.** The Greater Than (>) operator produces a Boolean value
Greater Than or Equal To (>=)	The Greater Than or Equal To (>=) operator returns a true value if the left operand has a value that is equal to or greater than the right operand. **Enter a Greater-Than sign and an Equals sign (>=) between the operands.** The Greater Than or Equal To (>=) operator produces a Boolean value.
Equals (=)	The Equals (=) operator returns a true value if the left and right operand have the same value. **Enter an Equals sign (=) between the operands.** The Equals (=) operator produces a Boolean value.
Not Equals (<>)	The Not Equals (< >) operator returns a true value if the left and right operands have a different value from each other. **Enter a Less-Than sign and a Greater-Than sign (<>) between the operands.** The Not Equals (< >) operator produces a Boolean value.

Logical Operators

Logical operators are used to perform logical operations on expression sections that produce Boolean values. Logical operators do not function on string or numeric values.

The following operators can be used with Boolean values:

Operator	Description
And	The And operator returns a true value if the left and right operands are both true. **Enter "and" between the operands.** The And operator returns a Boolean value.
Or	The Or operator returns a true value if either the left operand or the right operand are true.

Operator	Description
	Enter “or” between the operands.
	The Or operator returns a Boolean value.
Not	The Not operator returns a true value if the right operand is false. The Not operator only accepts a right operand.
	Enter “not” before the operand.
	The Not operator returns a Boolean value.
Comparison (=~)	The Comparison (=~) operator returns a true value if the left operand contains the value in the right operand.

Building Prompts

Elements that utilize a Natural Language Processing (NLP) model contain a Prompt expression field. The Prompt expression field is used to enter the prompt that is provided to the NLP model. The function of a prompt expression may vary, from requesting a score for the call to requesting the NLP model perform multiple actions as outlined by the prompt.

The following are tips and guidelines that may help you avoid errors and achieve desirable results more consistently.

Note: NLP models do not require any absolute rules to produce a response, and following specific guidelines does not guarantee the ideal result will be produced every time.

Make the Prompt Understandable

Make the prompt understandable by using full sentences. Where possible, replace complex sentences with simple sentences. NLP models can process language in much the same way a person can. If a new hire couldn't understand the prompt, then the NLP model may not either.

Sample Prompt: Analyze the call based on how well the agent answered the caller's concerns. Did the Agent properly greet the caller? Did the agent address the caller's original concern? Did they address all additional concerns the caller had?

Provide a Specific Request

Do not expect the NLP model to understand what you want based on context. Give the NLP model a specific request, starting with an action verb. Anything that you want in the response should be specifically explained. The more specific the request, the more specific the answer.

When prompting the NLP model with multiple requests, specifically state each request, and do not assume the NLP model understands your intentions. It can help to put the desired requests in a numeric list.

If a request is dependent on a certain condition or trigger being met, clearly describe the condition or trigger of the request.

Sample Prompt: Provide a summary of the call. The summary should include any requests made by the caller and how the agent responded.

Give Context

Provide necessary context for the request. If asking for a score, define each possible score and don't expect the NLP model to fill in the gaps. If asking for a trend, define what should result in a positive trend and what should result in a negative trend.

Sample Prompt: Provide a trend for the call. Provide a positive trend if the caller has a more positive sentiment at the end of the call than the start of the call. Provide a negative trend if the caller has a more positive sentiment at the start of the call than at the end of the call.

Use Quotation Marks

Use Quotation marks to focus specific words or phrases where the NLP model may interpret them broadly.

Sample Prompt: Does the Agent inform the caller that they have called “Medical Necessities”?

Manage Response Length

Specify the desired length of the response. Prompting the NLP model to provide a longer response will often result in more specific details, while prompting the NLP model to provide a shorter response can reduce the amount of response AI Tokens used.

Sample Prompt: Provide a summary of the call that is 200 words. The Summary should include what the caller called about and how well the Agent handled the request.

Structure Responses

You may want a complex response from the NLP model to have a specific structure and content, such as when an e-mail is created using the AI Prompt Actions element. To assure that the response has the desired structure, it is important to specify the structure you would like the response to take. This can be done by describing the structure you would like or providing the NLP model with an outline of the structure you would like.

Sample Prompt: Send a text formatted email to call center supervisors found in the script fields. The subject should be “Urgent – Active Insights Call Alert”.

The Email should be made using the template that is inside the delimiters ===. Replace values contained within the delimiters {} with the actual values.

===

Client Name: {client_name}

Client Number: {client_number}

Link: {link_to_call}

A call had a poor customer sentiment trend that with an average score of {overall_score}.

===

Documentation Change Log

Software Version	Document Section	Changes	Published Date
N/A	Expression Building	Removed Call.Name variable.	
N/A	Expression Building	Added Client Name, Client Number, Message Fields, Message annotations variables	
0.3.74	AI Multi	Added AI Multi Import	11/11/2024
0.3.74	AI Multi	Added AI Multi Max Score documentation for Score entries.	11/11/2024
0.3.74	AI Multi	Added AI Multi Conditions documentation	11/11/2024
0.3.73	Expression Building	Added Call.Name Variable	11/11/2024
0.3.64	Expression Building	Message Script Fields added.	11/11/2024
0.3.64	Expression Building	Added Comparison operator.	11/11/2024
0.3.58	Introduction	Added Post Call Analytic Items documentation	11/11/2024
N/A	Full Document	Replaced “NLP” with “NLP model.”	11/11/2024
N/A	Notes and Change Log	Added Notes section and corrected page count issue	6/24/2024
N/A	Title Page	Updated Active Insights Logo	6/24/2024

N/A = Not applicable. This change is not related to a specific version of the software.

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