Active Insights

User Guide

amtelco

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Additional Documentation

Amtelco offers a number of proprietary manuals describing the functions and features of its product lines. Further information and instructions concerning topics included in this publication can be found in several of Amtelco documents. If you do not have these documents on hand, contact Amtelco Telemarketing at 1-800-356-9148 between 8 a.m. and 5 p.m., Central Time.

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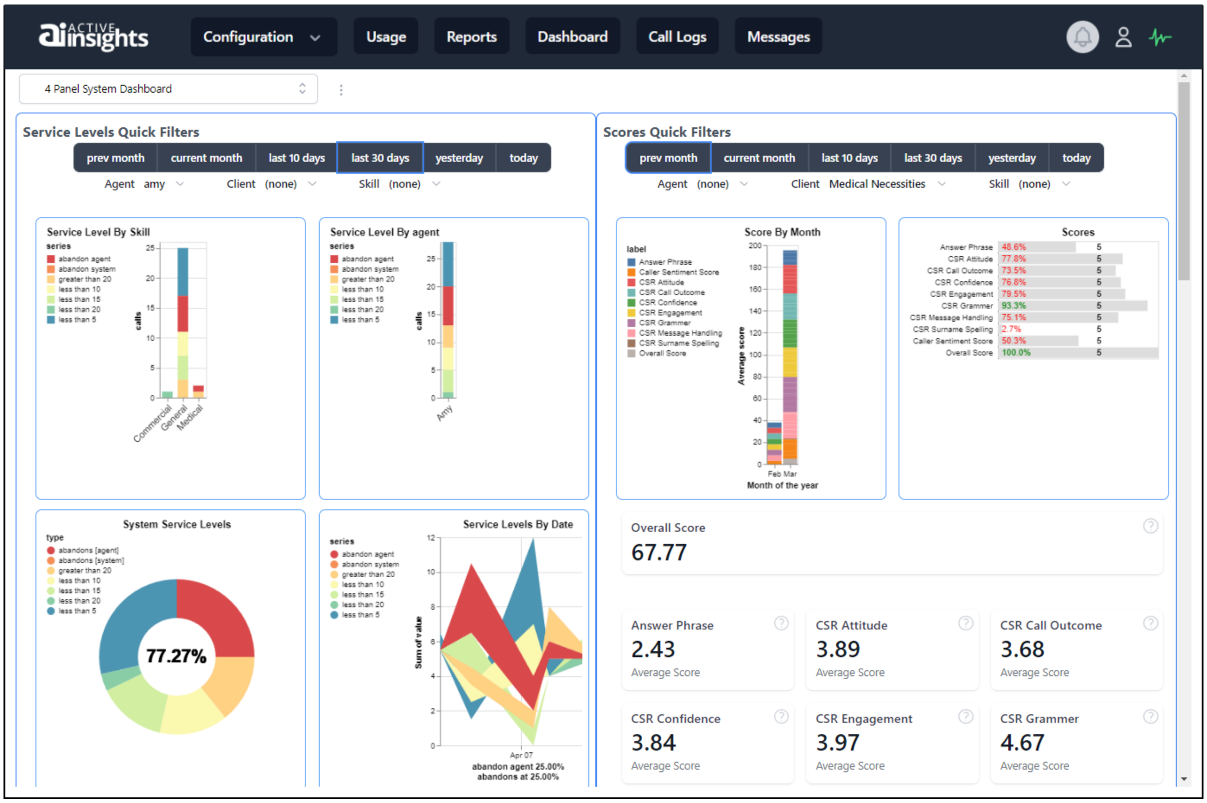
Contents

Active Insights

Amtelco's Active Insights platform provides access to Amtelco's collection of cloud-based products and features. The Active Insights platform provides access to recordings, messages, call service statistics, auto-generated call transcripts, and post call scores for Genesis Intelligent Series (IS) systems.



The Active Insights platform requires use of Amtelco's Cloud Storage service and displays information related to Cloud Storage data and usage.

The following topics are covered in this guide:

Configuration

- Decide what types of call recordings are stored in the Call Log.
- Activate Active Insights call transcription and script scoring for selected configurations.
- Create and assign unique scoring scripts to Client Groups and Agent Groups.

Usage

- View storage utilization by data type.
- View AI Unit usage.
- Browse client-specific storage usage.

Reports

- Filter and view statistics on agents, clients, and Service Levels.
- Export statistics as PDF reports.

Call Logs

- Search the Call Log by one or more search parameter at once.
- Access call details, recordings, associated messages, and auto-generated call transcriptions.

Messages

- View messages stored within Active Insights Cloud-based storage, including message history and tracker events.

Accessing Active Insights

The Active Insights platform can be accessed through any approved browser. Amtelco Web applications are tested with the latest release of the following browsers:

- Google Chrome
- Microsoft Edge

Ask your system administrator for the web address of your Active Insights Cloud Storage account.

Note: For the Active Insights platform to communicate with the IS Server, Transmission Control Protocol (TCP) port 50052 must be open. If this is not open, Active Insights will be unable to send data to the IS Server.

To access Active Insights, open an approved web browser.

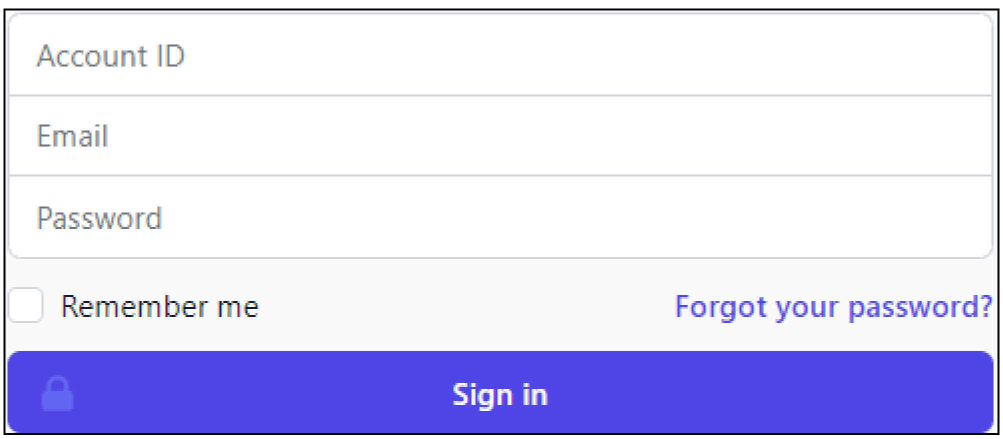
Type the web address of your Active Insights Cloud Storage account into the Address field.

Press the ENTER key.

The Active Insight Sign In page is displayed.

Signing In

To sign in to your Active Insights Cloud Storage account, you need your Active Insights Account ID, your work e-mail address, and your password. If you do not know what to enter in one or more of these fields, contact your system administrator.



Account ID

Type your unique Active Insights Account ID provided by Amtelco in the Account ID field.

Email

Type your e-mail address in the Email field.

Password

Type your password into the Password field.

Remember me

The Remember Me check box is used to skip the sign in process in the future when the user accesses the Active Insights platform from the same device.

To save your login credentials and skip the login process in the future, select the Remember Me check box

When the Sign In button is selected, your credentials are saved. The next time the Active Insights page is opened, the Login page is skipped, and the Dashboard page is displayed.

Sign In

The Sign In button is used to submit your credentials and log into the Active Insights Platform.

To sign in, click the Sign In button or press the ENTER key.

The Active Insights Dashboard Page and Title Bar are displayed.

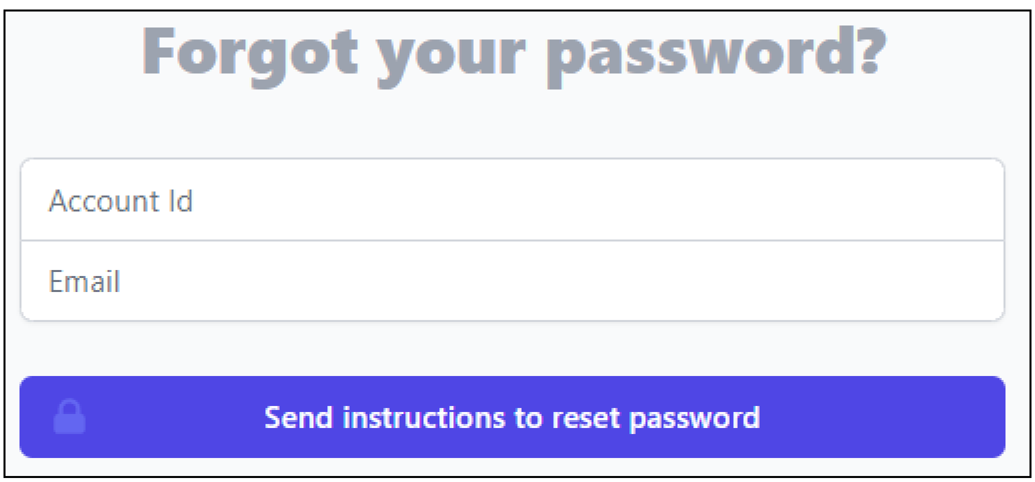
Forgot your password?

The “Forgot your password?” hyperlink is used to reset your password if you have lost or forgotten your password for your Active Insights login. To reset your password, you must have the Account ID and e-mail address associated with the account.

To reset your password, click the “Forgot your password?” hyperlink.

The “Forgot your password” page is displayed.

The “Forgot your password?” page is used to specify the e-mail address to which the reset password link will be sent and to verify the Account ID associated with the account. The “Forgot your password?” page contains the Account ID field and Email field.



Account ID

Your Account ID is a unique ID number provided to your organization by Amtelco with the Intelligent Series software.

Type your Active Insights Account ID in the Customer ID field.

Email

Your e-mail address is used to identity you when logging into Active Insights.

Type the e-mail address associated with your account in the Email field.

Note: If the e-mail address entered does not match an e-mail associated with the Account ID, a reset password link is not sent when the "Send instructions to reset password" button is clicked.

Send instructions to reset password

When the "Send instructions to reset password" button is clicked, an e-mail message is sent to the e-mail address entered. The e-mail message contains a link that can be followed to reset your password.

Click the "Send instructions to reset password" button.

If the e-mail address matches an e-mail address associated with the Customer ID, the reset password link is sent to the e-mail address.

Access your e-mail account, open the message from Amtelco Cloud Services, and click the reset password link.

The Reset Password page is opened in your default browser.

Reset Password

The Reset Password page is used to reset your password. A New Password and a Confirm New Password field are displayed.

New Password

Type a new password.

Note: Your new password must follow all Amtelco Cloud Services password requirements.

Confirm New Password

Re-type your new password.

To save your new password, click the Reset Password button.

- If the new password follows all password rules AND the New Password and Confirm New Password fields match, the password is saved.

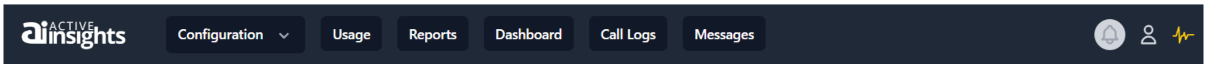
  The Sign In page is displayed.

- If the new password does not follow all password rules orthe New Password and Confirm New Password fields do not match, the needed correction is displayed.

Make any necessary corrections and click the Reset Password button.

Title Bar

When you are logged into the Active Insights application, the Active Insights Title Bar is displayed at the top of each page. The Active Insights Title Bar displays the Active Insights logo, a button for each section of the Active Insights platform, the Alerts icon, and the User icon.



The Active Insights Title Bar includes a button for each of the following sections:

- Configuration
- Usage
- Reports
- Dashboard
- Call Logs
- Messages

The Active Insights Title Bar also includes the following icons:

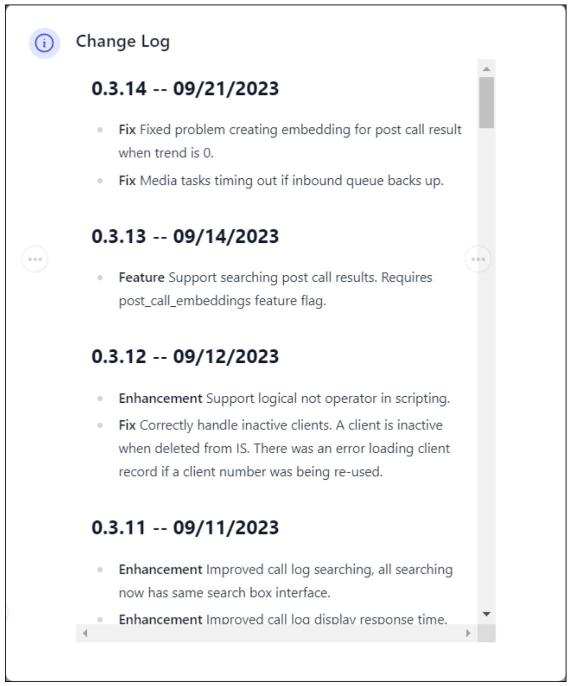
- The Alerts icon is used to display the Change Log
- The User icon is used to display the User Menu.
- The Connection Monitor icon displays the health of the connection to the IS server.

Change Log

The Change Log window displays the most recent changes and additions made to the Active Insights platform. Changes are displayed in chronological order starting with the most recent change. The Alerts icon is used to display the Change Log for Active Insights.

To display the Change Log window, click the Alerts icon.

The Change Log is displayed.



The Change Log displays Feature, Fix, Enhancement, and Active Insights changes.

Feature

Feature changes are changes that add new features to the Active Insights Platform.

Fix

Fix changes are changes made to make existing features work as intended.

Enhancements

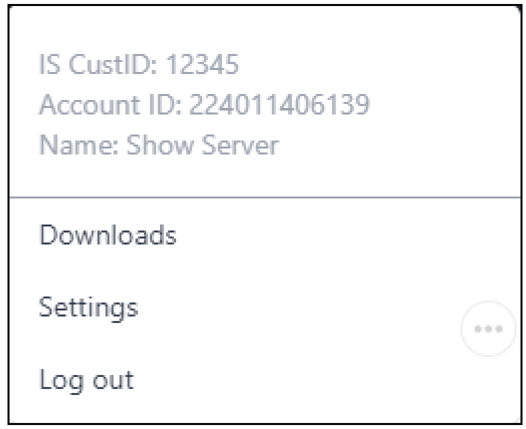
Enhancement changes are changes made that improve or expand the functionality of an existing feature.

Active Insights

Active Insights changes are broad changes made to the Active Insights platform.

To close the Change Log window, click anywhere outside of the Change Log window.

User Menu



The User Menu displays the Intelligent Series Customer ID number, the Active Insights Account ID number, and the Name of the Active Insights account. The User Menu also contains the Downloads command, Settings command, and Log Out command.

To display the User Menu, click the User icon.

The User Menu is displayed.

User Downloads

The User Downloads page displays exports that have been requested within Active Insights

To open the User Downloads page, click the Downloads command.

The User Downloads page is displayed.

User Downloads

User Downloads
Downloads for requested exports

Agent Score_export_-576460752302920687.csv	4d ago	Agent Score agent	Download
log_storage_export_-576460752302890095.csv	22d ago	Log Storage Export	Download
log_storage_export_-576460752302890335.csv	22d ago	Log Storage Export	Download
script_export-Score Transc--576460752302890751.export	22d ago	Score Transcript	Download
script_export-Emergency Ca--576460752302890799.export	22d ago	Emergency Call Script	Download
script_export-Advanced Sco--576460752303363375.export	152d ago	Advanced Scoring	Download
script_export-Advanced Sco--576460752303376558.export	152d ago	Advanced Scoring	Download

The User Downloads page displays each requested export in chronological order with the most recent export request appearing at the top of the list. For each requested export, the name of the export file, how long ago the request was made, the origin of the request, and the download hyperlink are displayed.

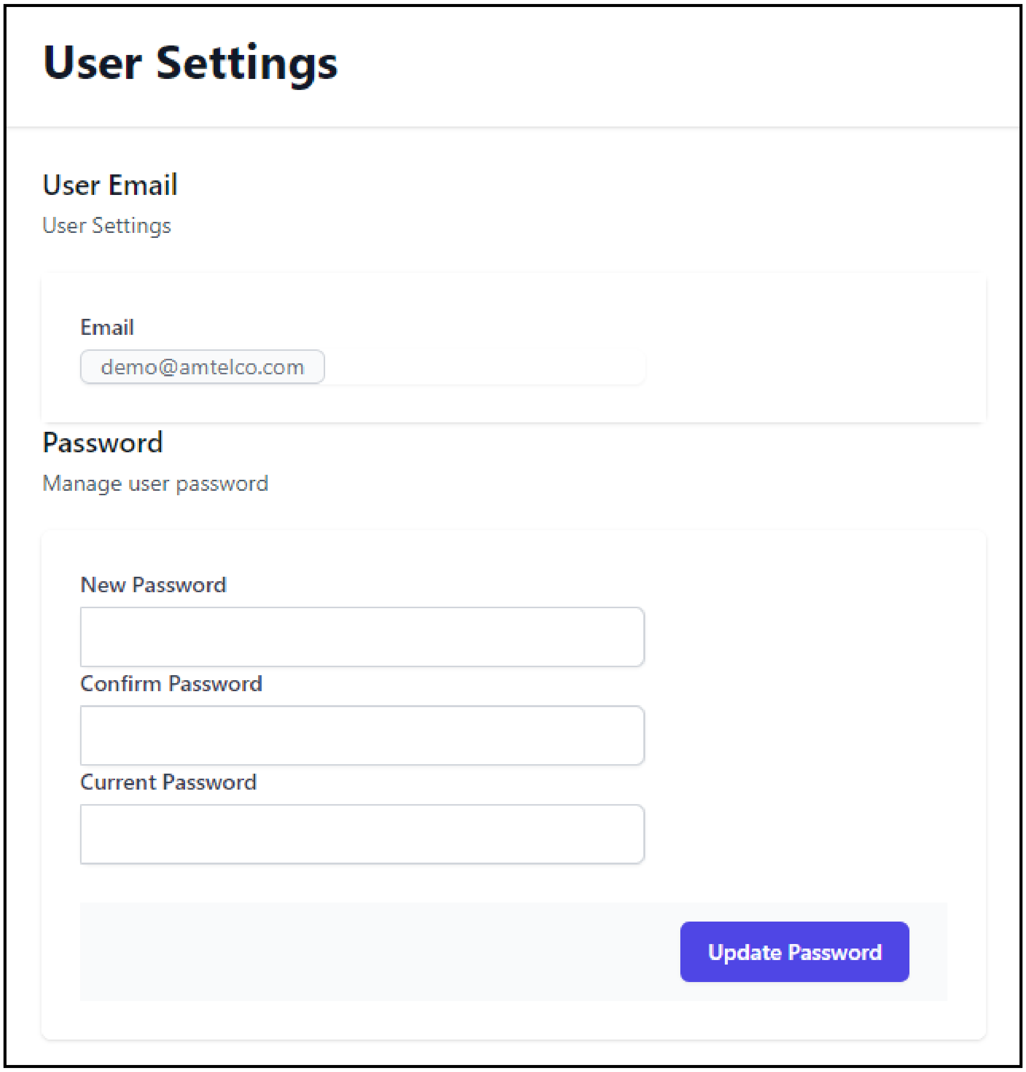
To download an export file, click the Download hyperlink next to the export you would like to download.

User Settings

The User Settings page enables users to view and edit their user information.

To open the User Settings page, click the Settings command.

The User Settings page is displayed.



The User Settings page displays the user's e-mail address and a section for updating the user's password.

User Email

The User Email section of the User Settings page displays the e-mail address used to log into Active Insights. The Email field is read only.

Password

The Password section of the User Settings page displays the New Password, Confirm Password, and Current Password fields, which are used to change the password used to log into Active Insights.

To update your password, the following conditions must be met:

- The new password must be 12 or more characters long.
- The password entered in the New Password and the Confirm Password fields must match.

- The password entered in the Current Password field must match the password saved to your Active Insights account.

To reset your password:

Enter the desired password in the New Password field.

Enter the desired password again in the Confirm Password

Enter your current password in the Current Password field.

When all information is entered, click the Update Password button.

If the necessary conditions are met, the new password is saved.

If an issue is preventing the password from being updated, the new password is not saved and the issue or issues needing correction are displayed.

- **Fix all necessary issues and click the Update Password button.**

If you do not know your current password, or if issues persist, contact your system administrator.

Log Out

The Log Out command is used to log out of the Active Insights platform.

To Log out of Active Insights, click the Log Out command.

The Active Insights session is closed, and the Login page is displayed.

Connection Monitor

The Connection Monitor icon is used to display the health of the connection between the Active Insights platform and the IS Server. The color of the heartbeat represents the health of the connection.

- If the heartbeat line is green, the Active Insights platform is receiving data from the IS Server normally.
- If the heartbeat line is yellow, the Active Insights platform is only receiving the heartbeat from the IS Server and no data.
- If the heartbeat line is red, the Active Insights platform is receiving neither the heartbeat nor data from the IS Server.

The Connection Monitor can also be used to access a menu of connection statistics.

To display the menu of connection statistics, click the Connection Monitor icon.

The Connection Monitor menu is displayed.

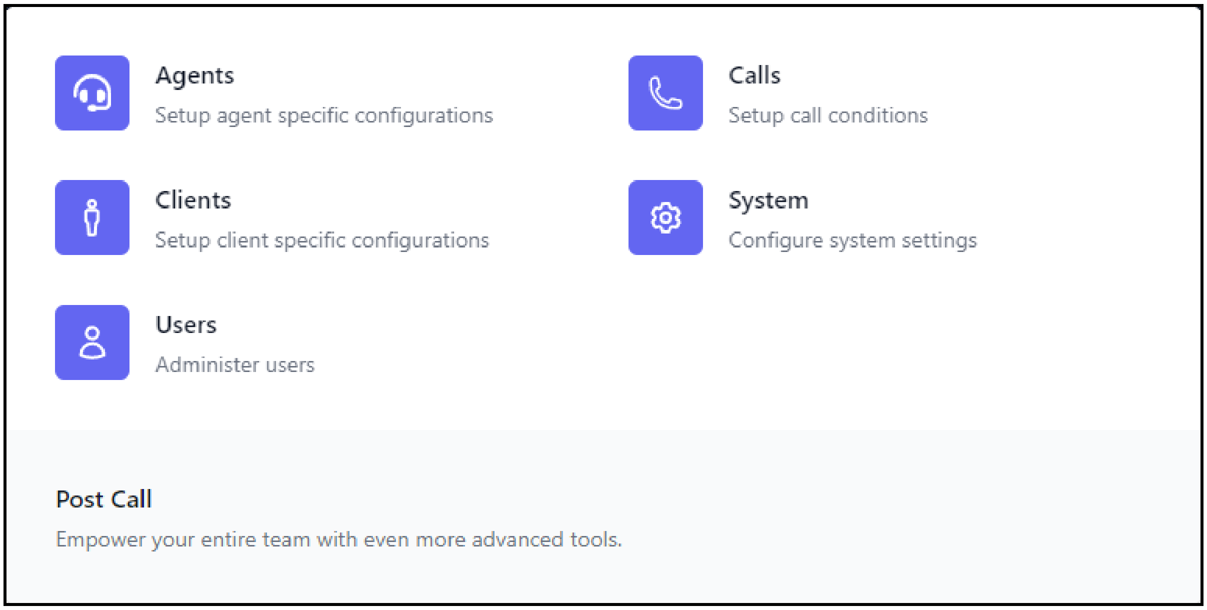
Connection Monitor Menu

The Connection Monitor menu displays the statistics related to the connection between the IS Server and the Active Insights platform. The following data is displayed for the last hour:

- The number of seconds ago that the most recent heartbeat was received
- The number of inbound packets received
- The number of voice recordings
- The number of screen recordings
- The date and time of the last update to the Connection Monitor in MM/DD/YYYY and *hh:mm:ss* format.

Configuration

The Configuration button is used to access the Client Settings page, Agent Configuration page, the System Settings page, and the Post Call Analytics page.



To navigate to a configuration page, click the Configuration button.

The Agents command, the Clients command, the Users command, the Calls command, the System command, and the Post Call command are displayed.

Click the command with the name of the page which you would like to view.

The selected page is displayed.

Configuration Sidebar

The Configuration Sidebar is displayed while viewing any Configuration page. The Configuration Sidebar contains icons used to navigate to different Configuration pages.

To navigate to a configuration page using the Configuration Sidebar, click on a sidebar icon.

The following icons are displayed in the sidebar:

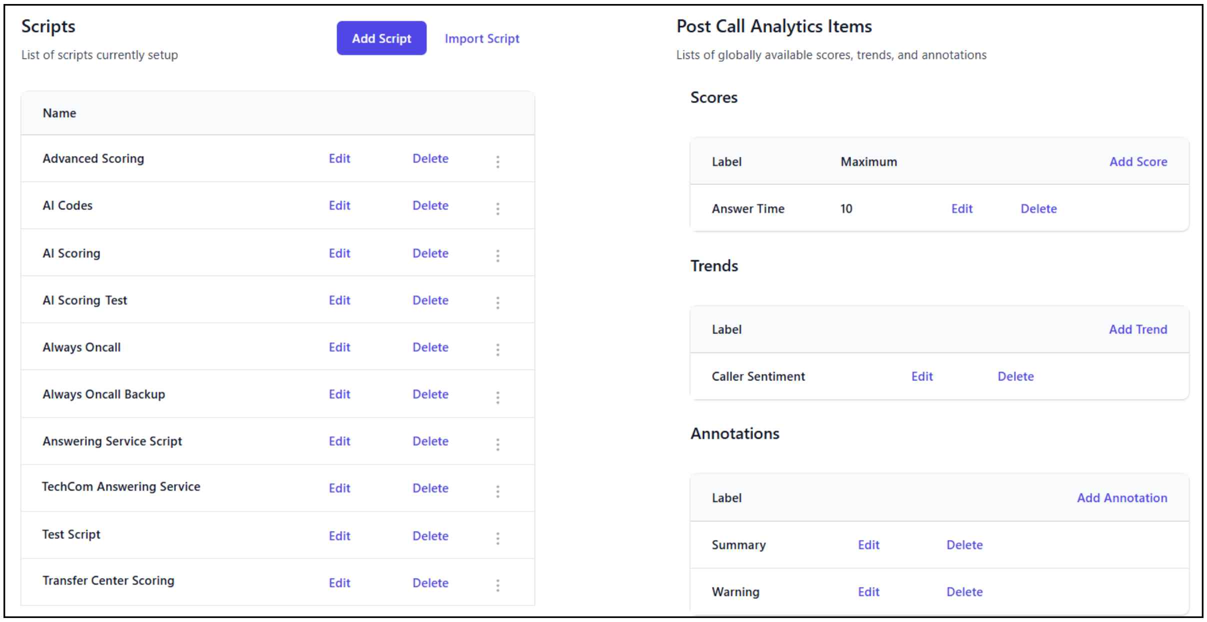
Icon	Description
	The Agents icon is used to navigate to the Agent Configuration page.
	The Calls icon is used to navigate to the Call Conditions page.
	The Clients icon is used to navigate to the Client Settings page.
	The Post Call icon is used to navigate to the Post Call Analytics page.
	The System icon is used to navigate to the System Settings page.

Icon	Description
	The Users icon is used to navigate to the User Configuration page.

The Configuration Sidebar contains the Agents icon, Calls icon, Clients icon, Post Call icon, System icon, and Users icon.

Post Call Analytics

The Post Call Analytics page enables users to add, edit, delete, and duplicate Post Call Scripts. Additionally, it allows users to create, manage, and remove Post Call Analytics items.



To navigate to the Post Call Analytics page, click the Configuration button and select the Post Call Analytics command.

OR

If a configuration page is already displayed, click the Post Call icon on the Configuration Sidebar.

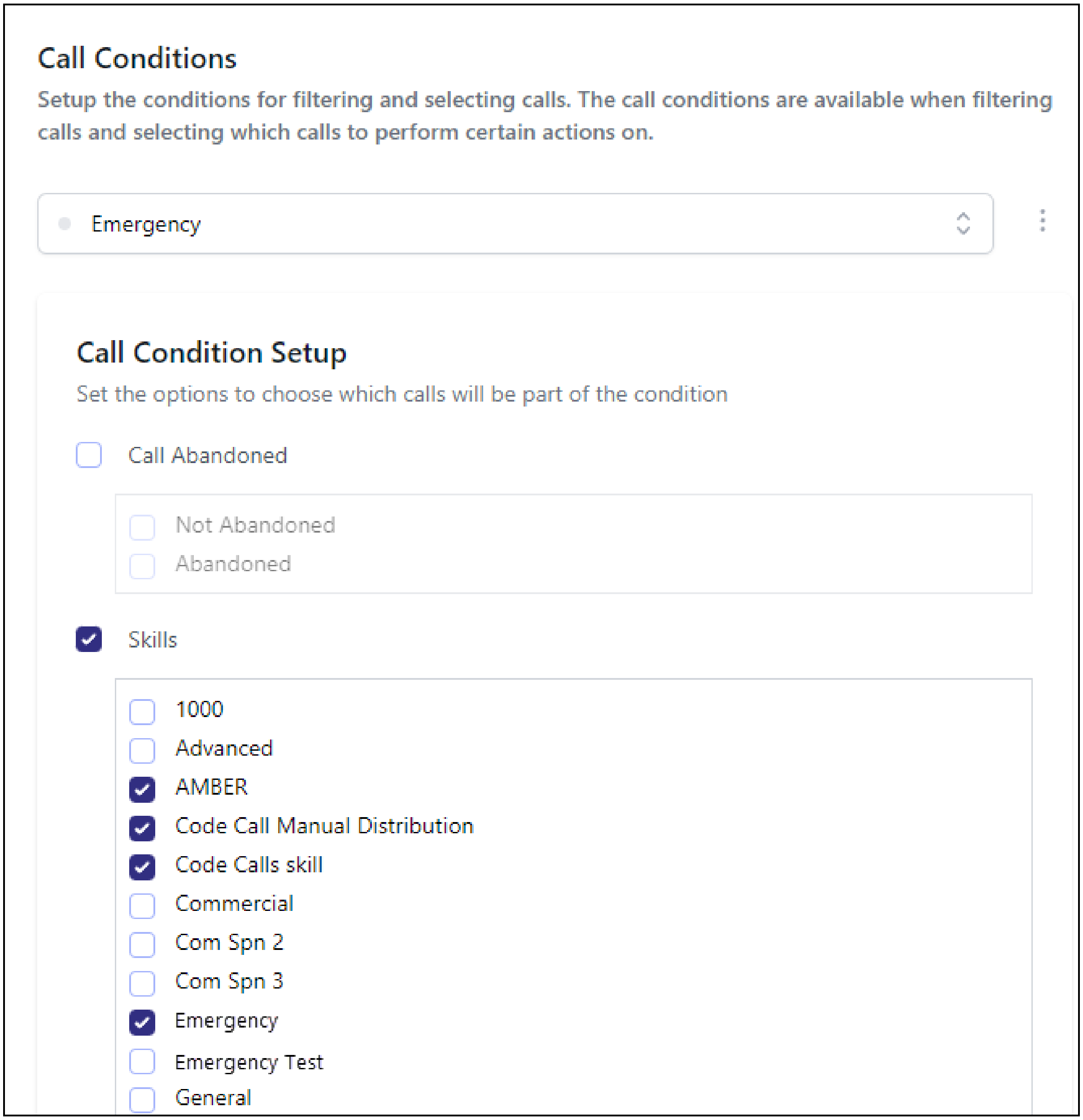
The Post Call Analytics page is displayed.

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.

Post Call Analytics Items are score, trend, and annotations configurations that are used to maintain consistent definitions across all scripts.

More information about managing Active Insights Scripts and Post Call Analytics items can be found in the *Active Insights Script Editor Reference Guide*.

Call Conditions



The Call Conditions page is used to add, edit, and delete conditions that are used in Client Configurations. Each condition can be configured to be met when a call contains one or more characteristics. These characteristics are selected in the Call Condition Setup pane.

Note: If no call characteristics are selected, the condition is considered met when a call contains any characteristics.

To navigate to the Call Conditions page, click the Configuration button and select the Calls command.

OR

If a configuration page is already displayed, click the Calls icon in the Configuration Sidebar.

The Call Conditions page is displayed.

Conditions

Conditions contain options for the call characteristics that determine whether a call meets the condition. Conditions are used on the Client Configuration page to determine when created conditional settings are applied. For each condition, one or more options may be selected under the Call Condition Setup pane.

To display the settings for a condition, click the Condition field at the top of the Call Conditions page.

A menu containing all conditions is displayed.

Click the name of a condition you want to view.

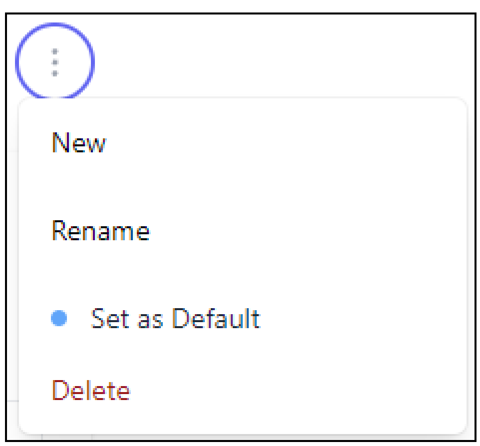
The condition and its Call Condition Setup selections are displayed.

Managing Conditions

The Menu icon ⋮ next to the Condition field is used to add a condition, to rename a condition, to delete the selected condition, or to set the selected condition as default.

Click the Menu icon. ⋮

The New, Rename, "Set as Default," and Delete commands are displayed.



New

To add a condition, click the New command.

The Create New Condition prompt is displayed.

Enter a name for the condition in the Name field.

To create the new condition, click the Save button.
OR
To cancel creating a new condition, click the Cancel button.

If Save was clicked, the new condition is created and selected.

Rename

To change the name of a condition, click the Rename command.

The Edit Condition window is displayed.

Enter the name you would like used for the condition.

Click the Save button to save the new name.
OR
Click the Cancel button to cancel saving the new name.

Set as Default

To set the selected condition as default, click the "Set as Default" command.

Setting a Condition as default currently has no effect.

Delete

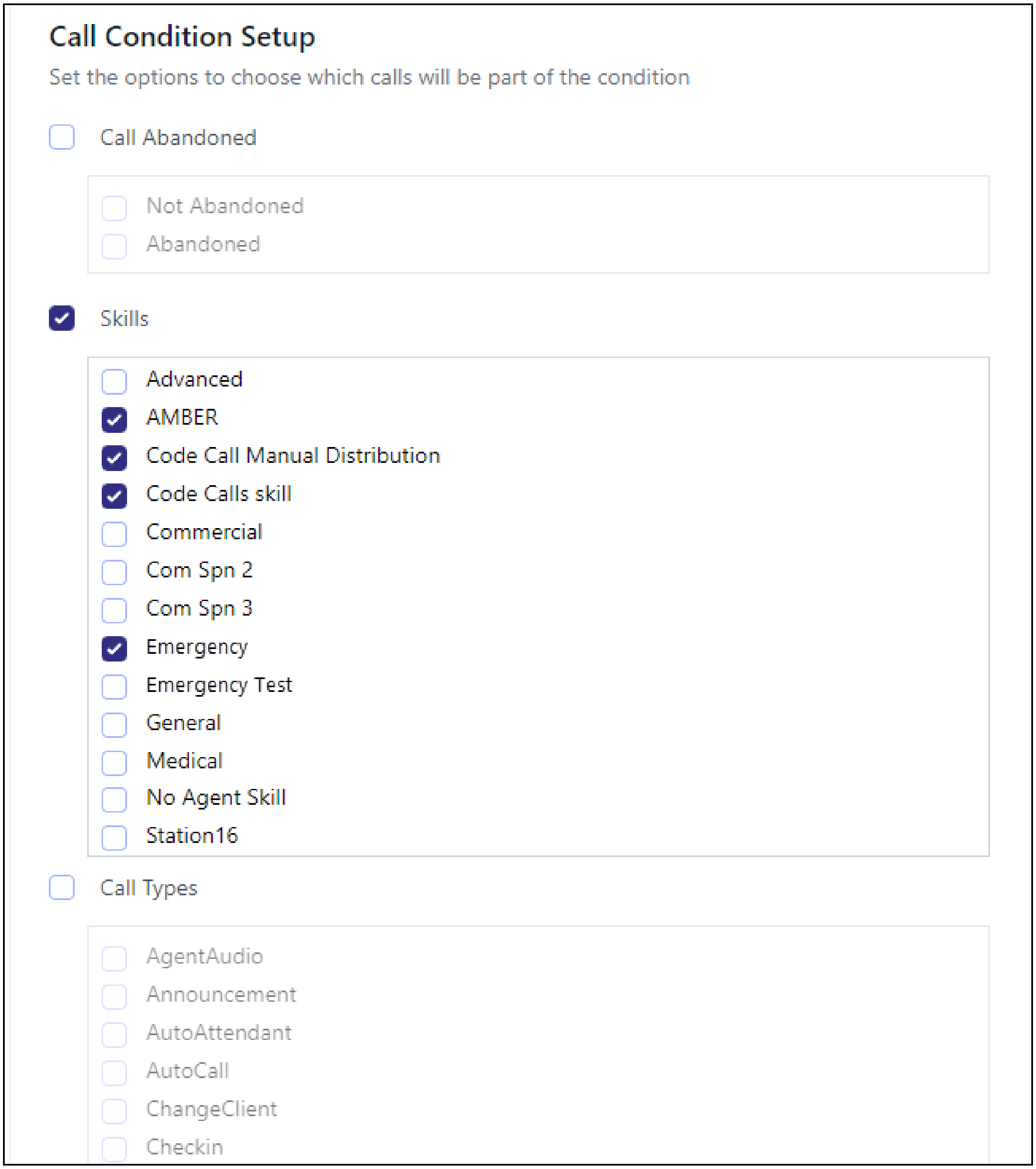
To remove the selected condition, click the Delete command.

The selected condition is removed.

Note: The Default Condition cannot be deleted. To delete a Default condition, set a different condition as default before deleting it.

Editing a Condition

The Call Condition Setup pane displays the call characteristics for the condition that is selected in the Condition field.



Call Condition Setup

The Call Condition Setup pane is used to select the characteristics under which the condition is met. The Call Condition Setup pane contains selectable call characteristics, and each characteristic contains selectable values. The values contained in a characteristic are disabled unless the characteristic is selected.

Note: If a call matches any one of the values selected for a characteristic, the characteristic is considered true. If all selected characteristics are true, the condition is met.

The Call Condition Setup contains the Message, Call Abandoned, Skills, and Call Types characteristics. Additionally, the Call Condition Setup contains Recording Duration settings.

To enable a characteristic, click the check box next to the characteristic name.

The possible values for the selected characteristic are enabled and can be selected.

To disable a characteristic, clear the check box next to the characteristic name.

The values for the selected characteristic are disabled and cannot be selected.

Note: If a characteristic with values selected is disabled, all selected values for the characteristic are disabled. If the characteristic is selected again before saving, the selected values are enabled again, but if the Save button is clicked while the characteristic is disabled, all values selected for the characteristic are cleared.

Message

The Message characteristic evaluates calls based on whether the message associated with the call was marked Delivered or not marked Delivered.

Call Abandoned

The Call Abandoned characteristic evaluates calls based on whether the call was abandoned, which occurs if the caller hangs up before the call is answered by an agent. The Call Abandoned characteristic contains the Not Abandoned and Abandoned values.

- **To set this condition to true for calls that were not abandoned, select the Call Abandoned check box and then select the Not Abandoned check box.**
- **To set this condition to true for calls that were abandoned, select the Call Abandoned check box and then select the Abandoned check box.**

Skills

The Skills characteristic evaluates calls based on which Automatic Call Distribution (ACD) Skill is used to distribute the call. The Skills characteristic contains check boxes for ACD Skills that have been found in the Call Log data. ACD Skills are configured in the System Setup pages of Web Supervisor and Intelligent Series (IS) Supervisor.

To set this condition to true for calls that were distributed using a specific ACD Skill, select the Skills check box and then select the check box next to each Skill that you want to consider a match.

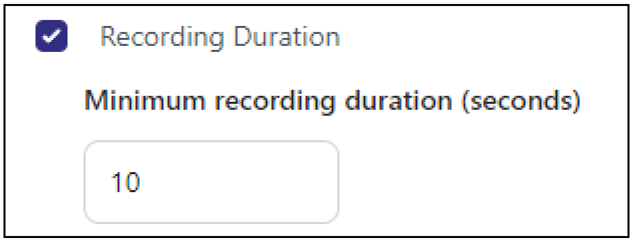
Call Types

The Call Types characteristic evaluates calls based on the Call Type associated with the call. Call Types are the categories assigned to calls by the IS Server based on how the call entered the IS system or how the call is affected by a behavior or action. The Call Types characteristic contains a check box for each possible Call Type. More information about Call Types is provided in the *Intelligent Series and Genesis Report Terminology* white paper.

To set this condition to true for calls that have a specific Call Type, select the Call Types check box and then select the check box next to each Call Type that you want to consider a match.

Recording Duration

The Recording Duration check box is used to set the condition to evaluate as true when the call’s duration meets or exceeds a certain number of seconds. When the Recording Duration check box is selected, the condition is only considered true for a call if the call’s duration is greater than the value entered in the Minimum Recording Duration field.



To set the condition to true when the call duration exceeds a threshold value, select the Recording Duration check box.

Minimum Recording Duration

The Minimum Recording Duration field is used to set the number of seconds that the call duration of a call must exceed for the condition to be true.

To set the minimum recording duration, click the Minimum Recording Duration field and enter the number of seconds that the call duration must meet or exceed.

Note: The Minimum Recording Duration is only used if the Recording Duration check box is selected.

Saving Condition Changes

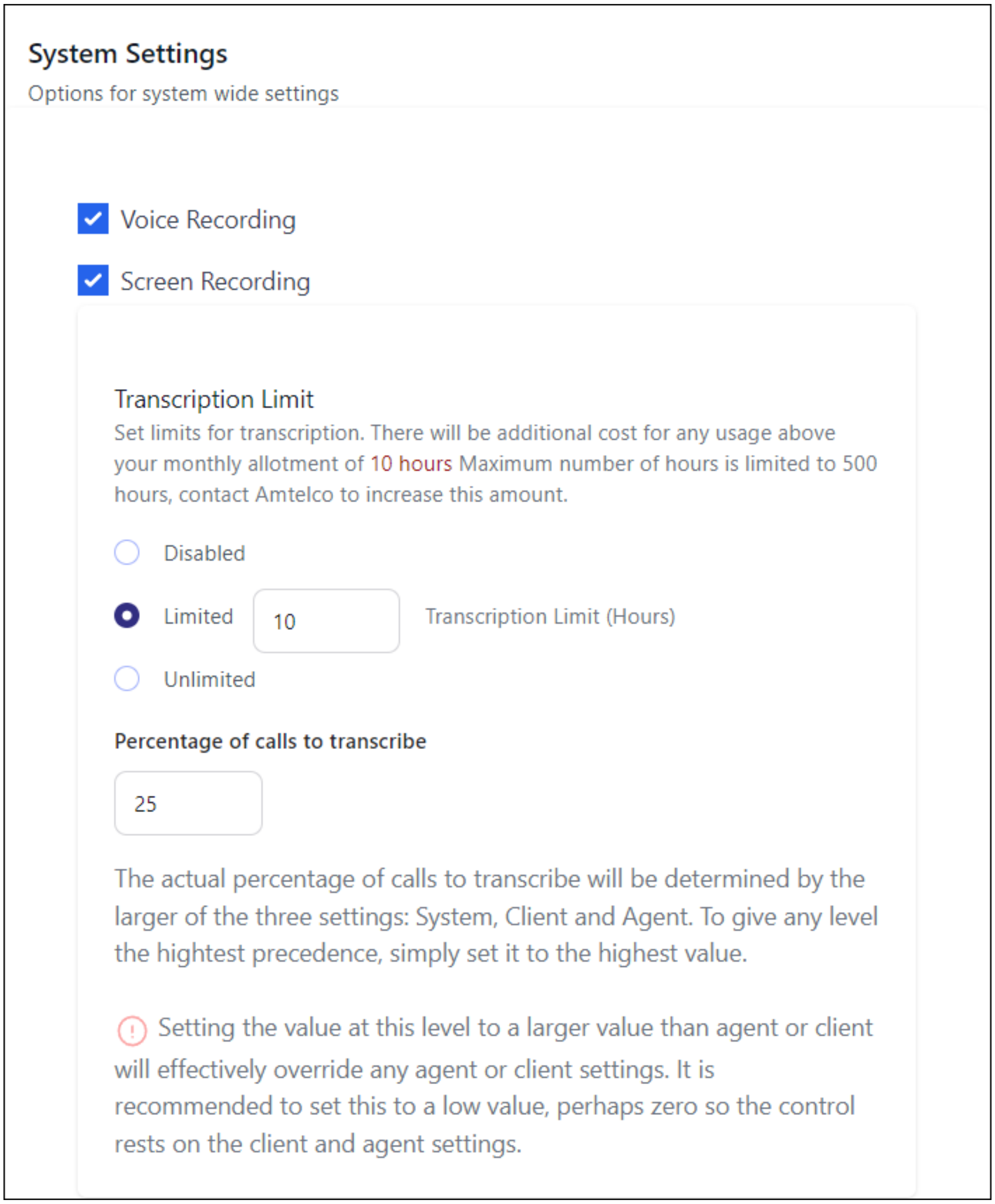
Changes made to a condition must be saved before they take effect. The Save button is located at the bottom of the Call Conditions page.

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

Any changes made to the condition are saved.

System Settings

The System Settings page enables users to decide what types of Call Log data are stored in Cloud Storage and to manage Transcription and Artificial Intelligence (AI) Token limits for the system. The System Settings page includes the Voice Recording check box, Screen Recording check box, the Transcription Limit options, and the AI Token Limit options.



Call Log data, including call states, call durations, call events, message history, and message data are always stored.

To navigate to the System Settings page, click the Configuration button and select the System command.

OR

If a configuration page is already displayed, click the System icon on the Configuration Sidebar.

☑ Voice Recording

The Voice Recording check box determines whether voice recordings are stored in Cloud Storage.

Note: Voice Recordings must be stored in Cloud Storage to playback audio recordings in the Call Log or to utilize the optional Active Insights Call Transcription feature.

To enable Voice Recordings to be stored to Cloud Storage, select the Voice Recordings check box.

Audio recordings associated with Call Logs are stored to Cloud Storage.

☑ Screen Recording

The Screen Recording check box determines whether screen recordings are stored in Cloud Storage.

Note: Screen Recordings must be stored in Cloud Storage to playback screen recordings in the Call Log.

To enable Screen Recordings to be stored to Cloud Storage, select the Screen Recordings check box.

Screen recordings associated with Call Logs are stored to Cloud Storage.

Transcription Limit

The Transcription Limit options are used to enable, disable, or limit transcription. The Transcription Limit options include the Disabled, Limited, and Unlimited options, and the Transcription Percentage field.

Note: A set of Transcription Limit options are included on each of the System, Client, and Agent levels. When an option is selected for multiple levels of configuration, the most restrictive option is applied. For this reason, it is recommended that a low level of restriction is selected at the System level.

◉ Disabled

If the Disabled option is selected, transcription is disabled for the system.

◉ Limited

If the Limited option is selected, transcription is enabled for the number of hours entered in the Transcription Limit (Hours) field.

Transcription Limit (Hours)
The Transcription Limit (Hours) field is used to determine how many hours of audio can be transcribed in the billing cycle for the system. Once the Transcription Limit is reached, transcription is disabled until the start of the next billing cycle.

◉ Unlimited

If the Unlimited option is selected, transcription is enabled for the system.

Transcription Percentage

The Transcription Percentage field is used to set the percentage of calls that are transcribed. The percentage entered in the Transcription Percentage field is applied randomly to calls. For example, if a percentage of 75 percent is entered, every call has a 75 percent chance of being transcribed, but streaks of transcriptions or skipped transcriptions may occur.

Enter the percentage of calls for the system that you would like transcribed.
OR
Set the percentage of calls using the selection arrows.

To save changes made to the System Settings page, click the Apply button.

The System Settings are saved.

AI Token Limit

Some script elements used in Post Call Scoring Scripts send information to a Natural Language Processing (NLP) model. AI Tokens are segments of data that the NLP model uses to interpret prompts and produce responses. When a prompt is provided to the NLP model, the prompt is tokenized and processed. Additionally, the response provided by the NLP model is produced in tokens and then detokenized into the original language.

The AI Token Limit options are used to enable, disable, or limit AI Token usage. The AI Token Limit options include the Disabled, Limited, and Unlimited options.

Note: A set of AI Token Limit options are included on each of the System, Client, and Agent levels. When an option is selected for multiple levels of configuration, the most restrictive option is applied. For this reason, it is recommended that a low level of restriction is selected at the System level.

Disabled

If the Disabled option is selected, AI analytics are disabled.

Limited

If the Limited option is selected, AI analytics are enabled for the number of tokens entered in the AI Token Limit field.

AI Token Limit (Token Count)
The AI Token Limit (Token Count) field is used to determine how many AI Tokens of data can be sent to and received from the NLP model in the billing cycle for the system. Once the AI Token Limit is reached, AI analytics is disabled until the start of the next billing cycle.

Unlimited

If the Unlimited option is selected, AI analytics is enabled for the system.

Saving Configuration Changes

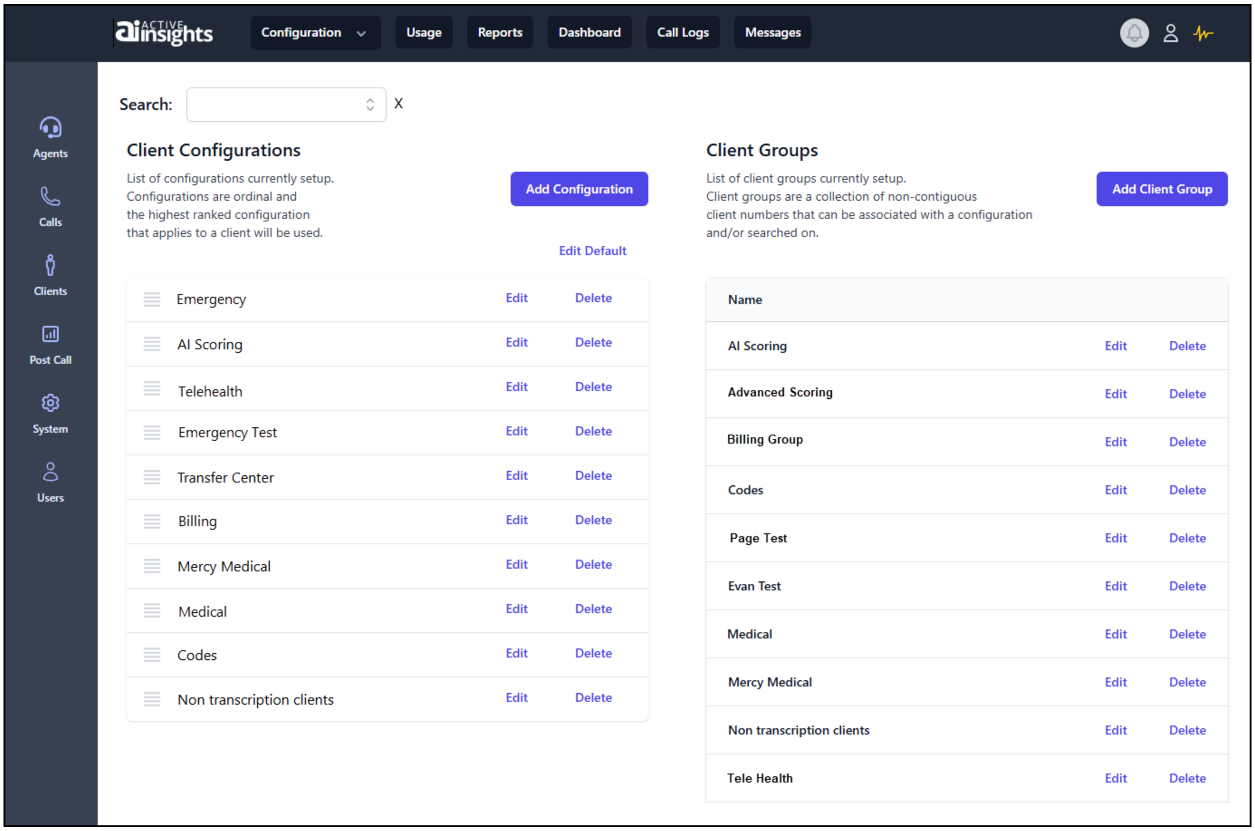
Changes made to the system settings must be saved before they take effect. The Apply button is located at the bottom of the System Settings pane.

To save changes made to the System Settings, click the Apply button.

The System Settings are saved, and the settings are used for the entire system.

Client Settings

The Client Settings page contains settings for managing Client Configurations and Client Groups. The Client Settings page contains a Search menu, a Client Configurations list, and the Client Groups list.



To navigate to the Client Settings page, click the Configuration button and select the Client command.

OR

If a configuration page is already displayed, click the Client icon on the Configuration Sidebar.

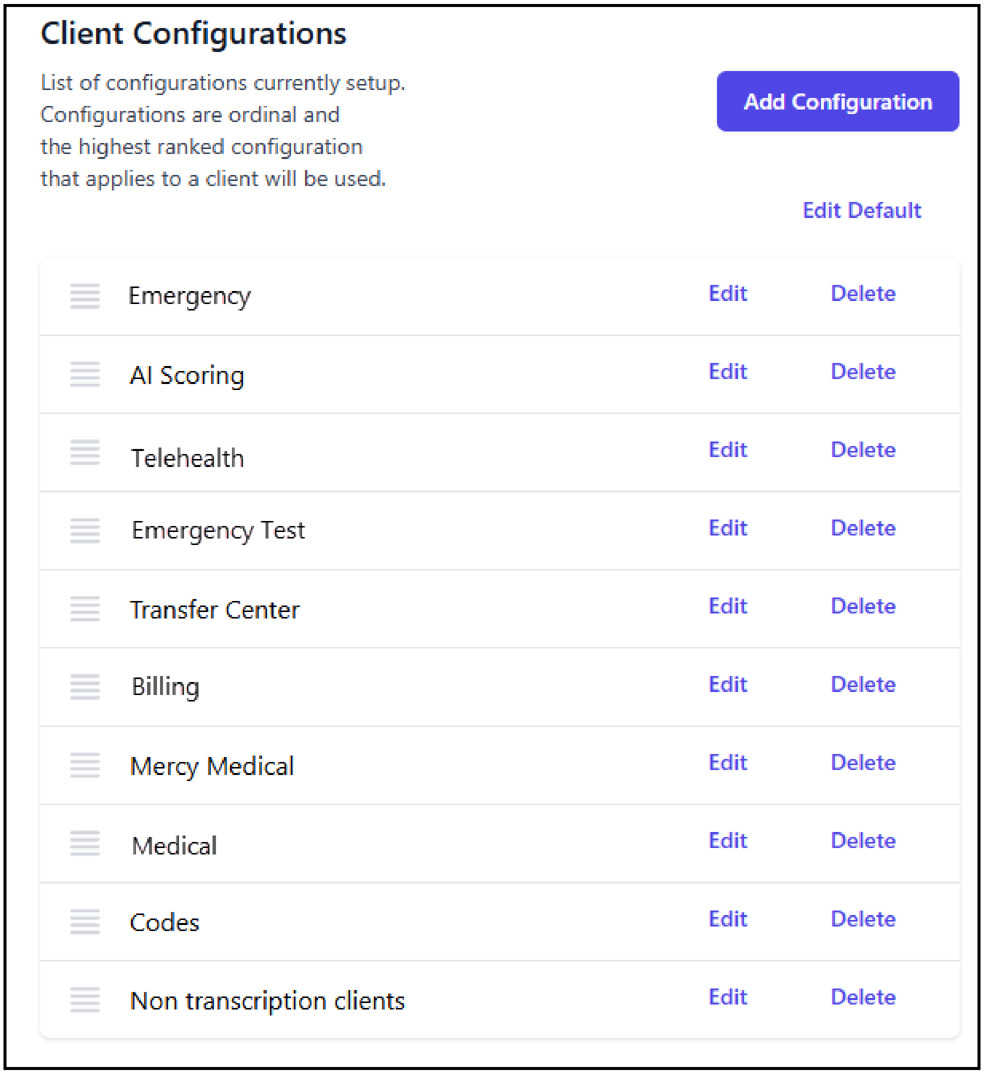
The Client Settings page is displayed.

Search

The Search field is used to filter the listings of the Client Configurations list and the Client Groups list. When a client is selected in the Search field, only the Client Configuration listings and Client Group listings which contain the client are displayed.

Client Configurations List

The Client Configurations list displays Client Configurations created for the system. Each Client Configuration listing displays the name of the Client Configuration, the Edit command, and the Delete command.



Additionally, the Client Configuration list displays the Add Configuration button and the Edit Default command.

Client Configurations

Client configurations are used to determine the Post-Call script, transcription and AI Token usage, call condition triggers, and data retention settings applied to specific clients. When a call ends, the Client Configuration is used to determine how the call is processed within the Active Insights. The Client Configuration is selected based on the client that received the call to determine the transcription and AI Token usage limitations and data retention settings. Additionally, the Call Conditions selected for the Client Configuration determine the script used for the call.

Default Client Configuration

The Default Client Configuration is the Client Configuration used for all clients not assigned to a Client Configuration. If a call was received for a client that is not part of a Client Group assigned to a Client Configuration, the Default Client Configuration is used.

Adding Client Configurations

By default, the Client Configurations list does not contain any Client Configurations listings.

To create a Client Configuration, click the Add Configuration button.

A prompt is displayed.

Enter a name for the new Client Configuration.

Click the Create Config button to create the Client Configuration.
OR
Click the Cancel button to cancel creating the new Client Configuration.

If the Create Config button was clicked, the new configuration is added to the Client Configurations list.

Removing Client Configurations

Client Configurations can be removed from the Client Configurations list.

To remove a configuration, click the Delete button next to the configuration you would like to delete.

A prompt is displayed asking to confirm deletion of the configuration.

Click the Delete button to delete the configuration.
OR
Click the Cancel button to cancel deleting the configuration.

If the Delete button was clicked, the configuration is removed from the Client Configurations list.

Ordering Client Configurations

The order in which Client configurations are displayed in the Client Configurations list is used to determine which Client Configuration is used for calls which were received for clients that are assigned to multiple Client Configurations. If a client belongs to one or more Client Groups that are assigned to multiple Client Configurations, the Client Configuration highest in the Client Configuration list is used for the client.

The Order icon is used to change the position of a Client Configuration in the Client Configuration list.

To reorder a Client Configuration, click the Order icon next to the name of the listing you would like to reorder, and drag the listing to the preferred position.

The Client Configuration listing is placed in the new position.

Note: Listings cannot be reordered if the Client Settings page is filtered by a client, and the Order icons are not displayed.

Editing Client Configurations

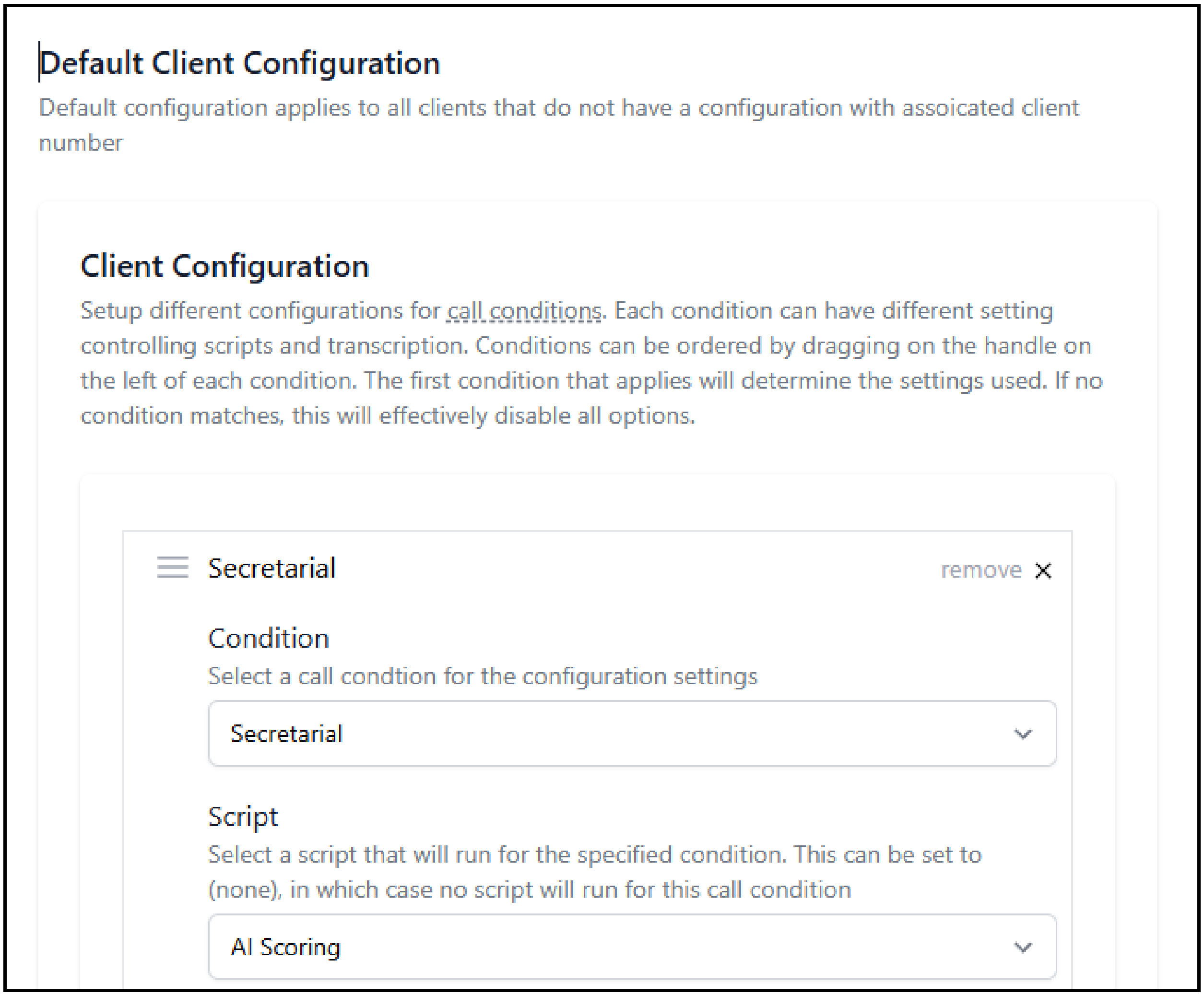
New Client Configurations must be edited before they can be used.

To edit a Client Configuration, click the Edit command next to the listing you would like to edit.

The Client Configuration page is displayed.

Editing the Default Client Configuration

The Default Client Configuration can be edited to change the call conditions, usage limits, and data retention settings for calls that are processed by the Default Client Configuration.



To edit the Default Client Configuration, click the Edit Default Client command.

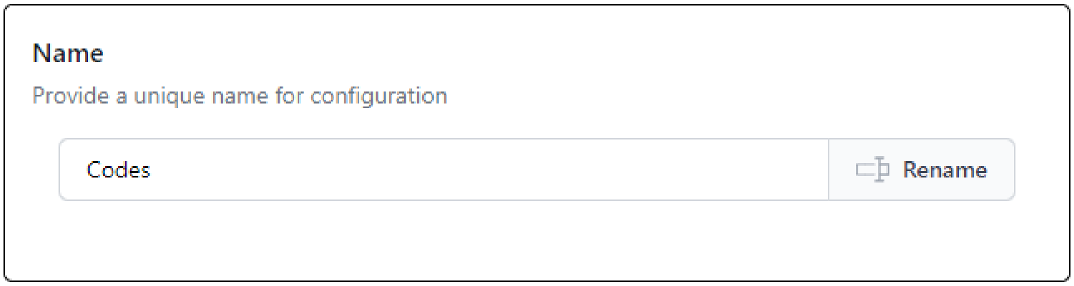
The Client Configuration page is displayed. The Client Configuration page displayed for the Default Client Configuration contains all settings for the Client Configuration page except for the Client Groups section, which is removed.

Client Configuration

The Client Configuration page is used to edit the name, Client Groups, Call Conditions, usage limits, and data retention settings for the Client Configuration. The Client Configuration page contains the Name field, Client Groups section, the Call Conditions section, and the data retention settings.

Name Field

The Name field determines the name given to the configuration selected in the Configuration field.



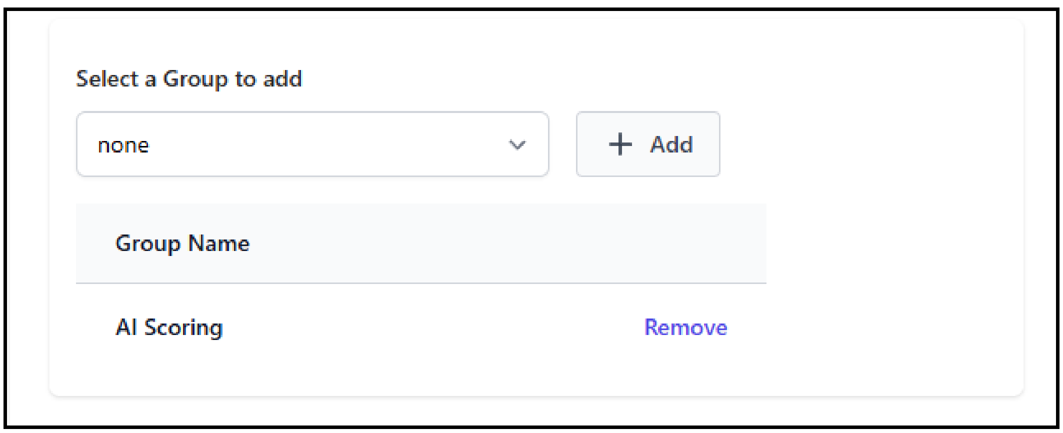
To change the name of the configuration, select the Name field.

Type the name for the configuration.

To save the name, click the Rename button.

Client Groups

The Client Groups section is used to add and remove Client Groups assigned to the Client Configuration. The Client Groups section contains the Client Group field and the Client Group list.



Client Group

The Client Group field is used to select a Client Group to be added to the Client Configuration.

To add a Client Group, click the Client Group field and select a Client Group.

Click the Add button.

The Client Group is added to the Client Group list.

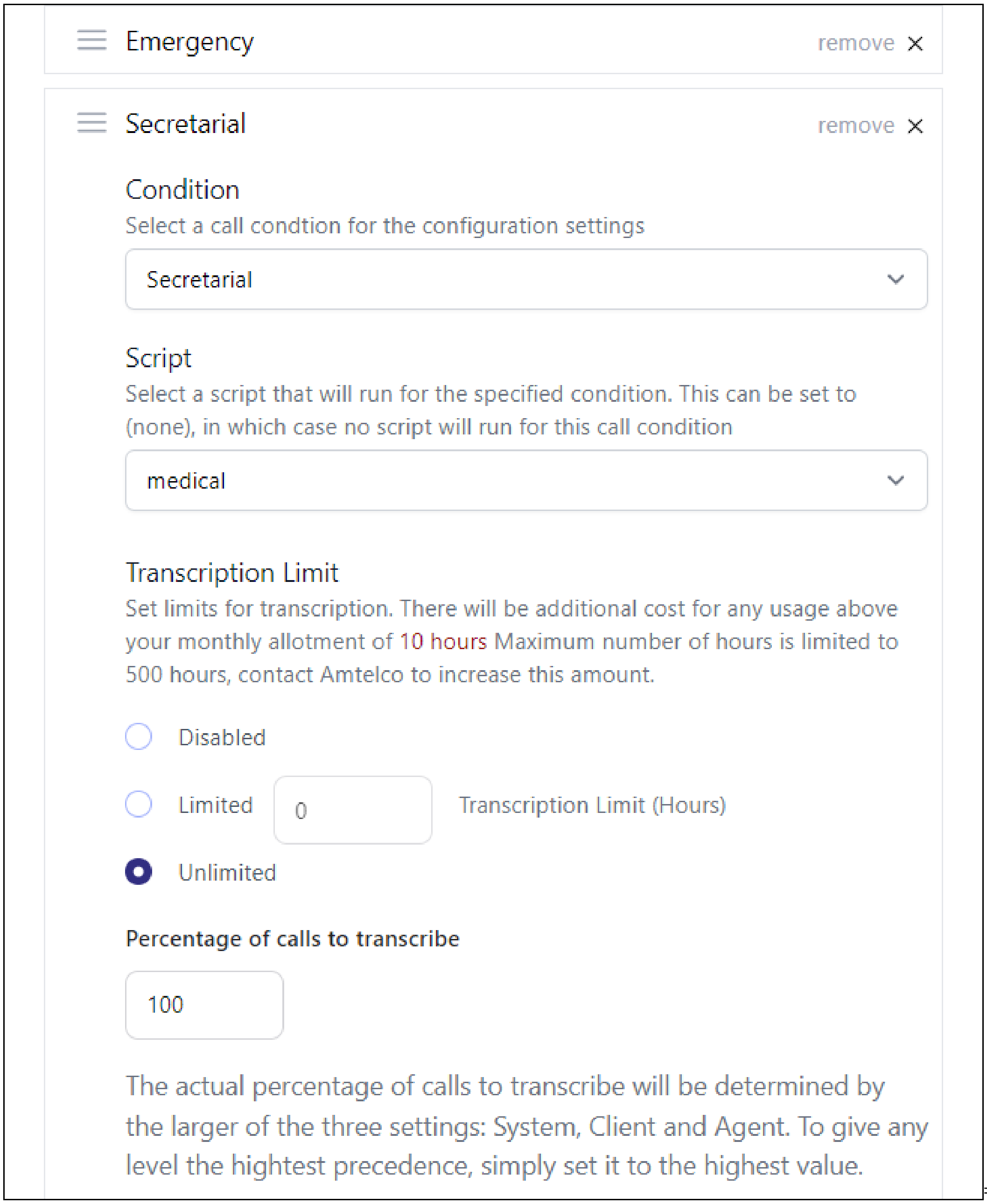
Client Group List

The Client Group list displays the Client Groups assigned to the Client Configuration. Each listing displays the name of the Client Group and the Remove command.

To remove a Client Group, click the Remove command next to the listing you would like removed.

The Client Group is removed.

Conditional Settings

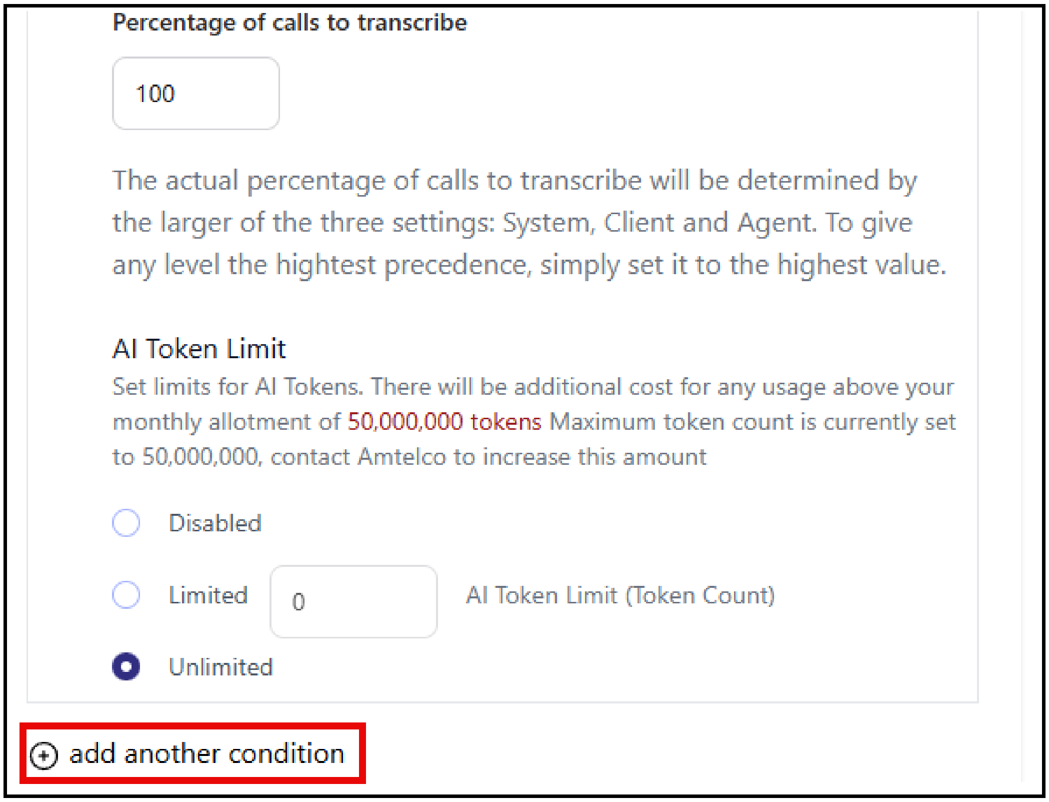


Conditional Settings are used to determine how call logs for clients associated with the configuration are handled depending on the conditions met by the call. The Client Configuration can contain different Conditional Settings for each configuration created on the Call Conditions page. The settings for the first condition that is met by the call is applied to the call log.

Conditional Settings include the Condition field, the Script field, the Transcription Limit section, and the AI Token Limit section.

Adding Conditional Settings

By default, the Client Configuration has no Conditional Settings. A condition must be added to determine what Conditional Settings are used for the configuration.



To add a condition, click the “add another condition” command.

A collapsed conditional setup is created below all other Conditional Settings for the configuration.

By default, the Condition field for the new conditional setup is set to the first condition in alphabetical order.

Ordering Conditional Settings

When two or more conditions are added to a Client Configuration, and a call meets more than one of the conditions, then the settings for the condition it meets that is highest on the list is used. For this reason, higher priority conditions should be placed above lower priority conditions.

To change a condition’s position in the order, click on the Order icon for the condition and drag the condition to the desired position.

The Conditional Settings for that condition are moved to the new position and are expanded.

Viewing and Editing Conditional Settings

Only one condition's settings may be expanded at once. If two or more conditions have been added to a Client Configuration, the Conditional Settings not being viewed are collapsed.

To select a conditional setup to view, click on the collapsed setup.

The Conditional Settings for that condition are expanded and the previously selected condition's settings are collapsed.

Condition

The Condition field is used to select the condition under which the Conditional Settings are used.

Note: Each condition can only be assigned to one conditional setup for each Client Configuration.

If the same condition is selected for two or more conditional setups for the Client Configuration, an alert is displayed for each setup that has a duplicate condition. While the setups share a condition, neither setup will be used for calls.

To resolve the duplicate condition, one of the conditions must be removed or an unused condition must be selected.

To change the condition under which the Conditional Settings are used, click the Condition field, and select a different condition.

Script

The Script field is used to select the Scoring Script that will be used to score new calls. Script Scores are displayed on the Call Details page for the associated Call Logs.

To change the Post Call Scoring Script used for the configuration, click the Script field.

All Post Call Scoring Scripts are displayed.

Select the Post Call Scoring Script that you would like to use for the configuration.

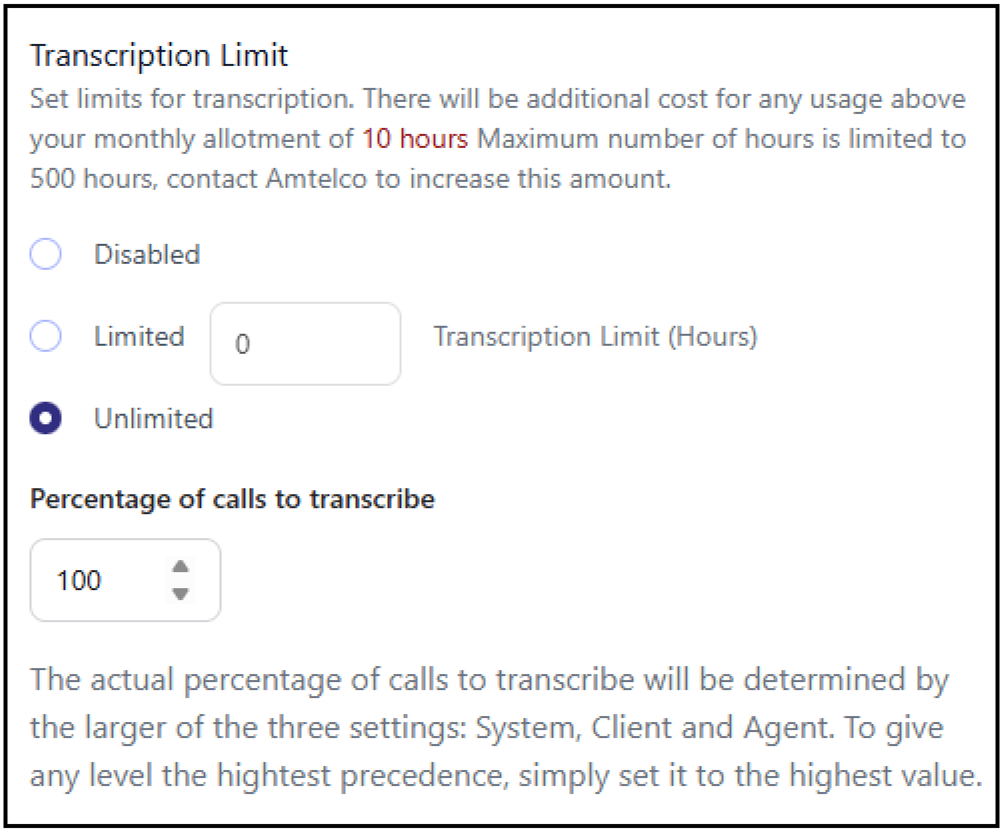
The name of the selected Post Call Scoring Script is displayed in the Script field.

Note: Changing the Post call Scoring Script does not change the scores assigned to Call Logs already in Cloud Storage.

Transcription Limit

The Transcription Limit options are used to enable, disable, or limit transcription. The Transcription Limit options include the Disabled, Limited, and Unlimited options, and the Transcription Percentage field.

Note: A set of Transcription Limit options are included on each of the System, Client, and Agent levels. When an option is selected for multiple levels of configuration, the most restrictive option is applied.



Disabled

If the Disabled option is selected, transcription is disabled for the Client Configuration.

Limited

If the Limited option is selected, transcription is enabled for the number of hours entered in the Transcription Limit (Hours) field.

Transcription Limit (Hours)

The Transcription Limit (Hours) field is used to determine how many hours of audio can be transcribed in the billing cycle for the Client Configuration. Once the Transcription Limit is reached, transcription is disabled until the start of the next billing cycle.

Unlimited

If the Unlimited option is selected, transcription is enabled for the Client Configuration.

Transcription Percentage

The Transcription Percentage field is used to set the percentage of calls that are transcribed for the Client Configuration. The percentage entered in the Transcription Percentage field is applied randomly to calls. For example, if a percentage of 75 percent is entered, every call has a 75 percent chance of being transcribed, but streaks of transcriptions or skipped transcriptions may occur.

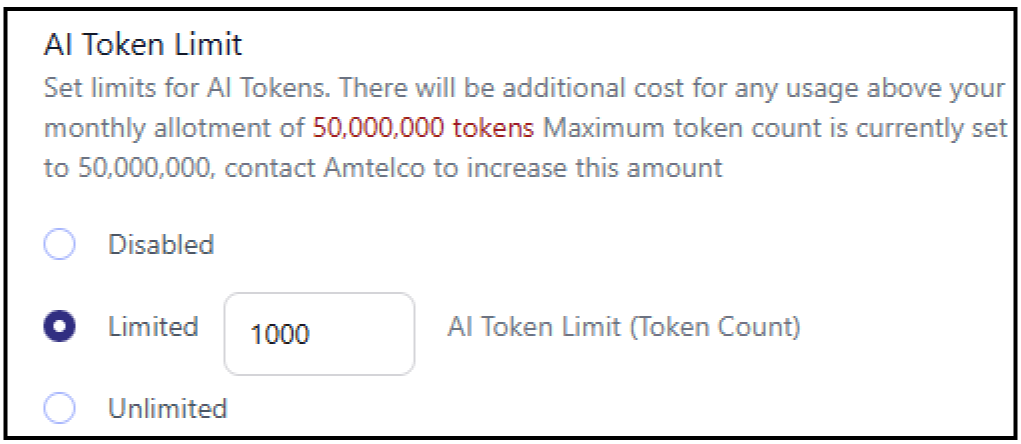
Enter the percentage of calls for the Client Configuration that you would like transcribed.
OR
Set the percentage of calls using the selection arrows.

AI Token Limit

Some script elements used in Post Call Scoring Scripts send information to a Natural Language Processing (NLP) model. AI Tokens are segments of data that the NLP model uses to interpret prompts and produce responses. When a prompt is provided to the NLP model, the prompt is tokenized and processed. Additionally, the response provided by the NLP model is produced in tokens and then detokenized into the original language.

The AI Token Limit options are used to enable, disable, or limit AI Token usage. The AI Token Limit options include the Disabled, Limited, and Unlimited options.

Note: A set of AI Token Limit options are included on each of the System, Client, and Agent levels. When an option is selected for multiple levels of configuration, the most restrictive option is applied.



Disabled

If the Disabled option is selected, AI analytics are disabled.

Limited

If the Limited option is selected, AI analytics are enabled for the number of tokens entered in the AI Token Limit (Hours) field.

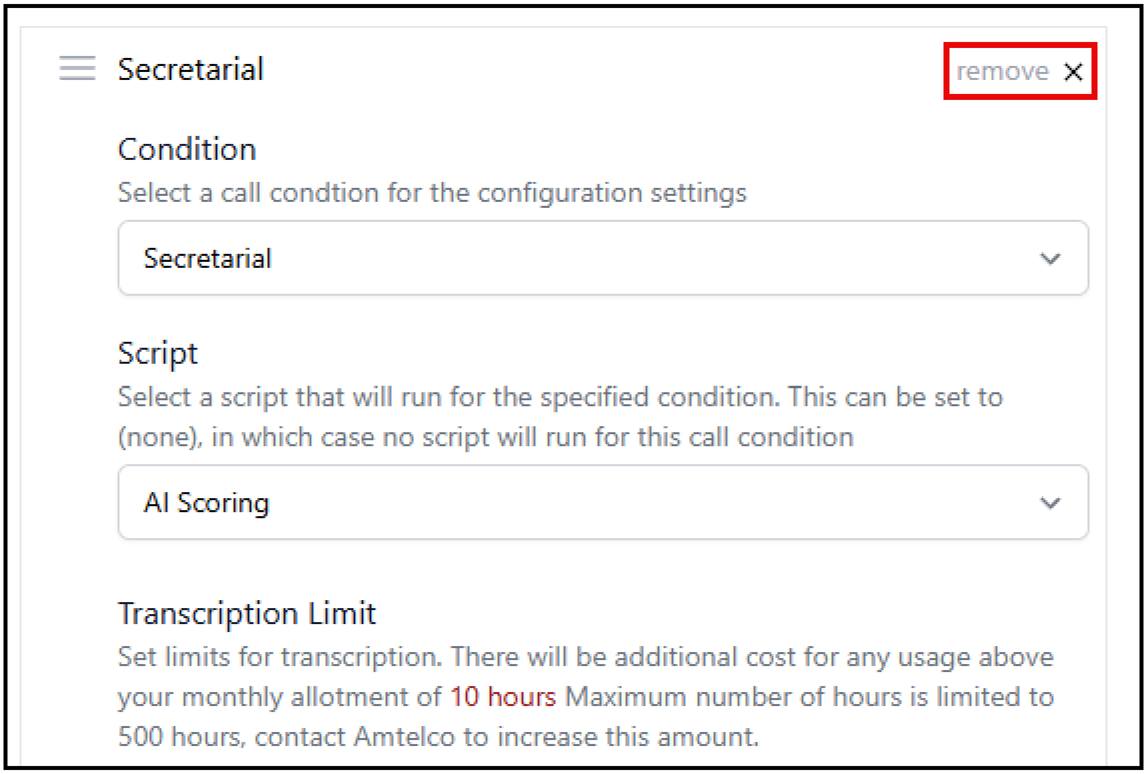
AI Token Limit (Token Count)

The AI Token Limit (Token Count) field is used to determine how many AI Tokens of data can be sent to and received from the NLP model in the billing cycle for the Client Configuration. Once the AI Token Limit is reached, AI analytics is disabled until the start of the next billing cycle.

Unlimited

If the Unlimited option is selected, AI analytics is enabled for the Client Configuration.

Removing Conditional Settings



To remove a condition from the Client Configuration, click the Remove command to the right of that condition.

The condition and its associated Conditional Settings removed from the Client Configuration.

Saving Conditional Settings Changes

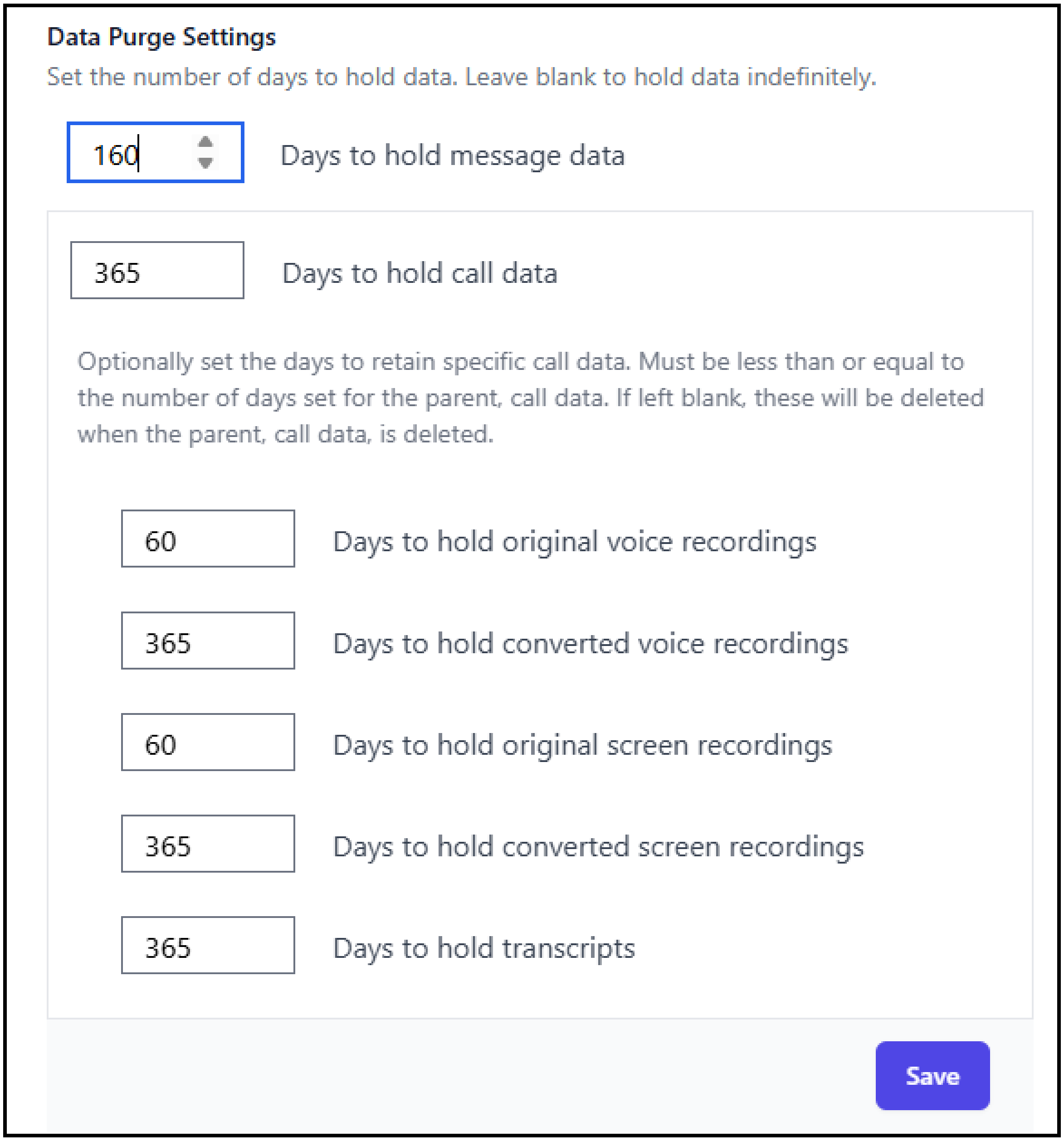
Changes made to Conditional Settings must be saved before they take effect. The Save button is located at the bottom of the Configuration Settings area.

To save changes made to the Conditional Settings, click the Save button.

The Conditional Settings are saved, and the settings are used for the clients associated with the Client Configuration.

Data Purge Settings

Data purge settings are used to determine how long data for calls and messages for the clients associated with the Client Configuration are held. The Data Purge settings contain the “Days to hold message data” field, the “Days to hold call data” field, and the subordinate fields of the “Days to hold call data” field.



Days to hold message data

The “Days to hold message data” field is used to determine how many days for which message data is held. The number entered in the “Days to hold message data” field determines how many days will pass between message data entering cloud storage and that message data being deleted from cloud storage.

Note: If the “Days to hold message data” field is blank, message data will be held indefinitely.

Enter the number of days for which message data should be held before being deleted.

Days to hold call data

The “Days to hold call data” field is used to determine how many days for which call data is held. The number entered in the “Days to hold message data” field determines how many days will pass between call data entering cloud storage and that call data being deleted from cloud storage.

Note: If the “Days to hold call data” field is blank, call data will be held indefinitely.

Enter the number of days for which call data should be held before being deleted.

The Data Purge Settings pane contains subordinate fields for the “Days to hold call data” field that enable the user to decide for how long specific call data types are held.

Note: The number entered each subordinate field must be smaller than the number entered in the “Days to hold call data” field. If a subordinate field is left blank, the call data type is deleted when the data for the “Days to hold call data” field is deleted.

For each field:

Enter the number of days you would for which you would like each call data type held.
OR
To hold the call data type until the general call data is deleted, leave the field blank.

The following subordinate fields are available:

Days to hold original voice recordings

The “Days to hold original voice recordings” field is used to determine for how long the original voice recording files are held.

Days to hold converted voice recordings

The “Days to hold converted voice recordings” field is used to determine for how long voice recordings that have been compressed into MP3 files are held.

Days to hold original screen recordings

The “Days to hold original screen recordings” field is used to determine for how long the original screen recording files are held.

Days to hold converted screen recordings

The “Days to hold converted screen recordings” field is used to determine for how long screen recordings that have been compressed into MP4 files are held.

Note: Converted screen recordings also contain the audio recording for the call, if one was recorded.

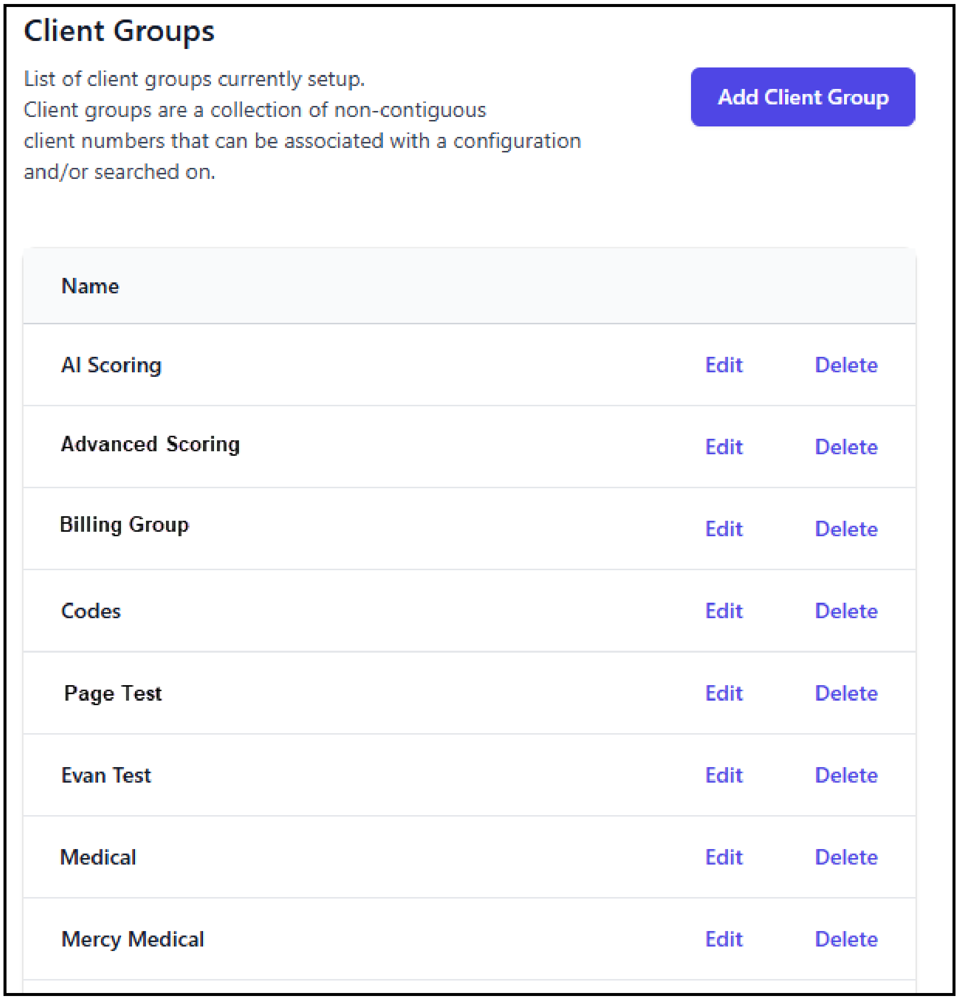
Days to hold transcripts

The “Days to hold transcripts” field is used to determine for how long transcript data is held.

To save changes made to the Data Purge settings pane, click the Save button.

Client Groups List

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



Client Groups

Client Groups are used to create a collection of one or more non-contiguous Client Numbers that can be associated with a configuration or be used in a search filter.

Creating Client Groups

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

To Add a Client Group to the Client Groups list, click the Add Client Group button.

A prompt is displayed.

Enter a name for the new Client Group.

Click the Create Group button to create the Client Group
OR
Click the Cancel button to cancel creating the new Client Group.

The new Client Group is added to the Client Groups list and the Client Group Configuration page for the new Client Group is displayed.

Deleting Client Groups

Client Groups can be removed from the Client Groups list.

To remove a Client Group from the Client Groups list, click the Delete command next to the Client Group listing you would like to delete.

Editing Client Groups

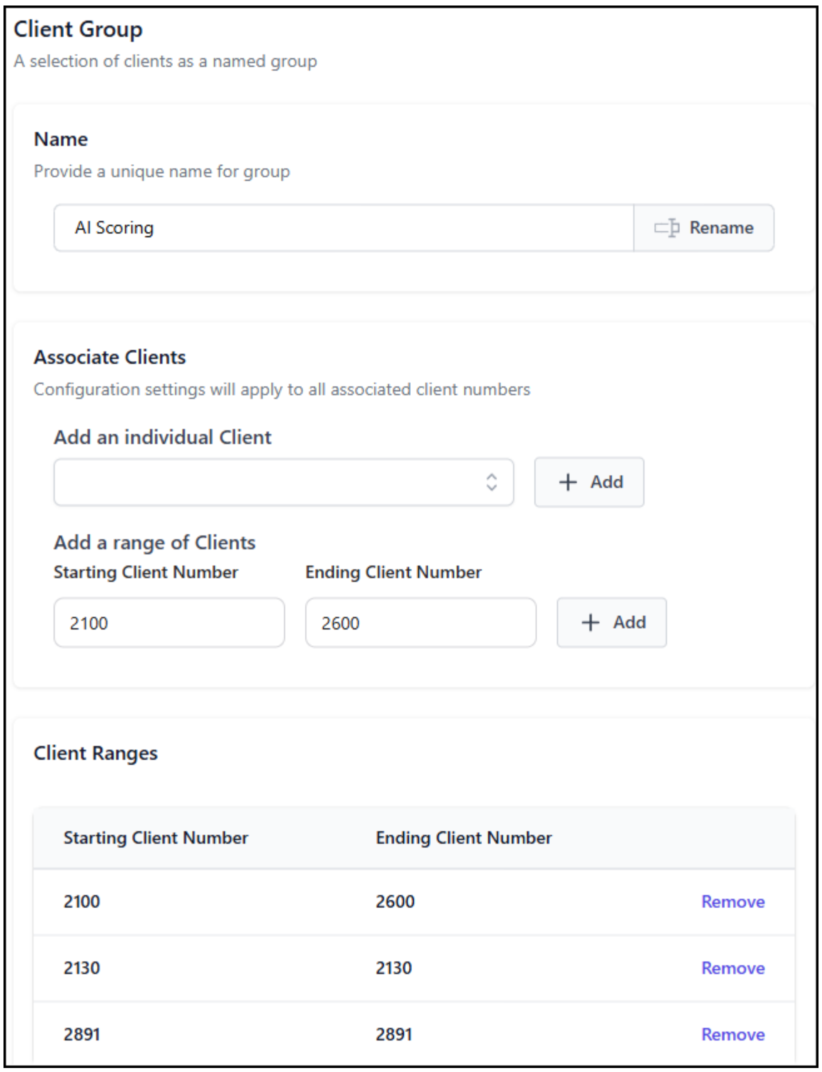
Clients can be added and removed from the Client Group.

To edit a Client Group, click the Edit command next to the Client Group listing you would like to edit.

The Client Group Configuration page is displayed.

Client Group Configuration

The Client Group Configuration page is used to add and remove clients from the Client Group. The Client Group Configuration page contains the Name field, the Associated Clients section, and the Client Ranges list.



Name

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

To change the name of the group, select the Name field.

Type the name for the group.

To save the name, click the Rename button.

Associated Clients

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

Add an individual Client

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

To add an individual client to the Client Group, select the “Add an Individual Client” field.

The Client Menu is displayed.

To filter the Client Menu, enter one or more characters in “Add an individual Client” field.

Select the client which you would like added to the Client Group, and click the Add button next to the “Add an individual Client” field.

The client is added to the Client Ranges list as a listing.

Add a range of Clients

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

To add a range of clients:

- **Enter the Client Number of the first client in the range in the Starting Client Number field.**
  OR
  Use the selection arrows ⬍ to select the Client Number of the first client in the range in the Starting Client Number field.
- **Enter the Client Number of the last client in the range in the Ending Client Number field.**
  OR
  Use the selection arrows ⬍ to select the Client Number of the last client in the range in the Ending Client Number field.
- **Click the Add button next to the “Add a Range of Clients” fields.**

The range of clients is added to the Client Ranges list as a listing.

Client Ranges

The Client Ranges list displays a list of client ranges and individual clients added to the Client Group. Each listing displays the starting Client Number of the range, the ending Client Number of the range, and the Remove command. All clients included in ranges on the Client Ranges list are included in the Client Group.

Note: Client numbers can be contained within multiple client ranges. A client is included in the Client Group if it is included in one or more client ranges.

Starting Client Number

The Starting Client Number for each listing displays the lowest Client Number of the range.

Ending Client Number

The Ending Client Number for each listing displays the highest Client Number of the range.

Note: Listings for individual clients that have been added display the Client Number for the client in the Starting Client Number column and the Ending Client Number column.

To remove a client range from the Client Ranges list, click Remove command next to the client range you would like removed.

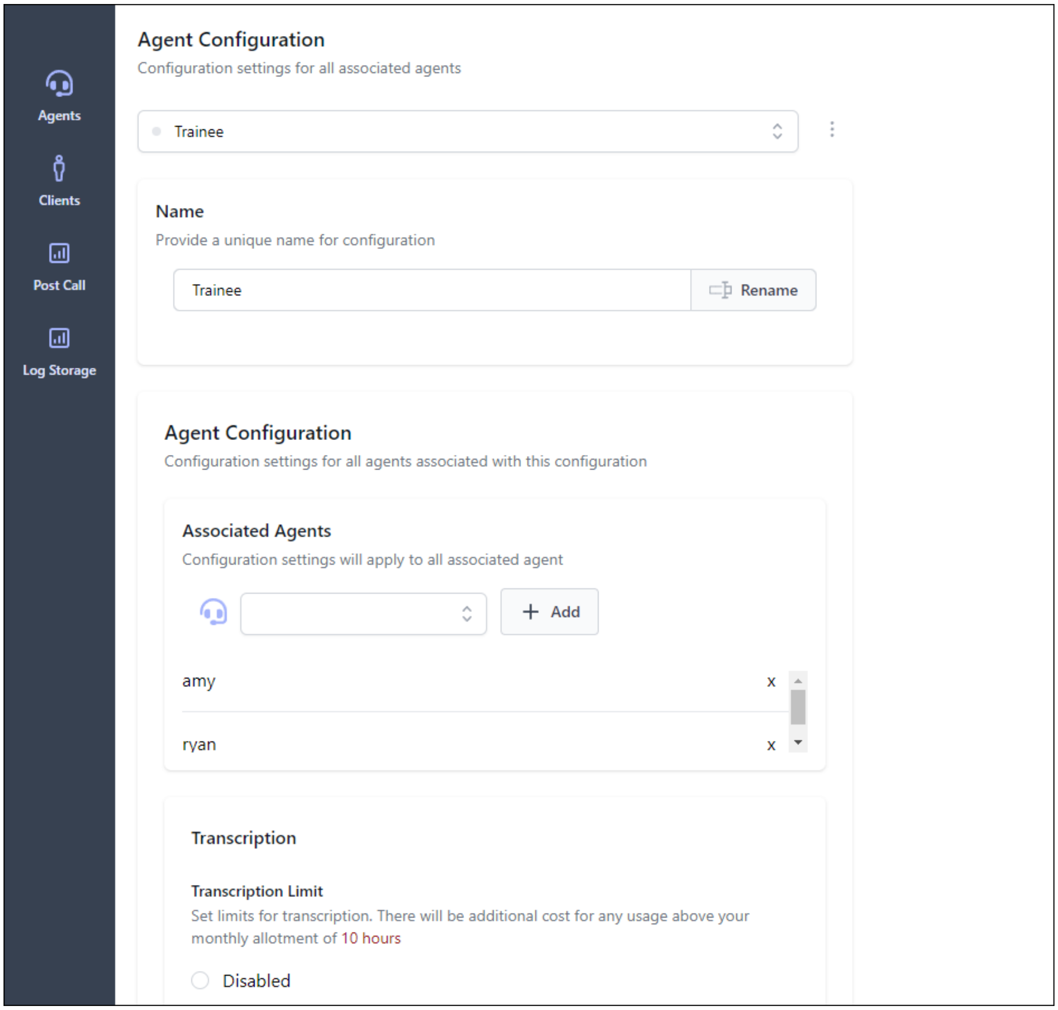
A confirmation prompt is displayed.

Click the Delete button.
OR
To cancel deleting the client range, click the Cancel button.

The client range is removed from the Client Range list.

Agent Configuration

The Agent Configuration page enables users to create custom configurations, add and remove agents from configurations, and change settings for each configuration.



To navigate to the Agent Configuration page, click the Configuration button and select the Agents command.

OR

If a configuration page is already displayed, click the Agents icon  **on the Configuration Sidebar.**

Agent Configurations

Agent Configurations contain settings for various groups of agents within the Active Insights platform. The Configuration field displays the configuration currently being viewed.

Note: Settings configured on the Agent Configurations page override settings configured on the System Settings page and Client Settings page.

To display an Agent Configuration, click the Configuration field.

A menu containing all Agent Configurations is displayed.

Click the name of an Agent Configuration you want to view.

The configuration's name and assigned agents are displayed.

Default Configuration.

The Default Configuration is the configuration that is used by all agents that are not assigned to a configuration. The Default Configuration is marked with the Default icon in the Configurations menu.

The Default Configuration cannot have any agents assigned to it, and only one configuration may be set as the Default Configuration at a time.

The Default Configuration can be set using the Menu icon. ⋮

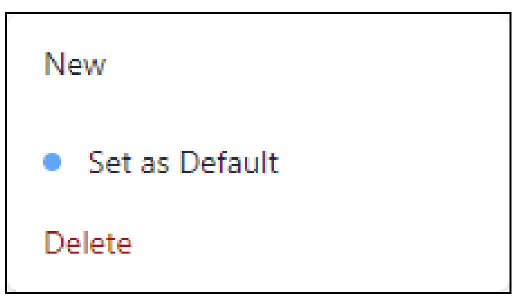
Managing Configurations

The Menu icon ⋮ next to the Configuration field is used to add an Agent Configuration, to delete the selected configuration, or to set the selected configuration as default.

Note: The selected configuration may only be set as the Default Configuration if no agents are assigned to it.

Click the Menu icon. ⋮

The New, "Set as Default,", and Delete commands are displayed.



New

To add an Agent Configuration, click the New command.

A new Agent Configuration is generated and is named with a randomly generated string of characters.

Set as Default

To set the selected Agent Configuration as default, click the “Set as Default” command.

If the selected Agent Configuration has no agents assigned to it, the configuration is set as default.

If another Agent Configuration was set as default, that configuration is set as normal when the selected configuration is set as default.

Delete

To remove the selected Agent Configuration, click the Delete command.

The selected Agent Configuration is removed.

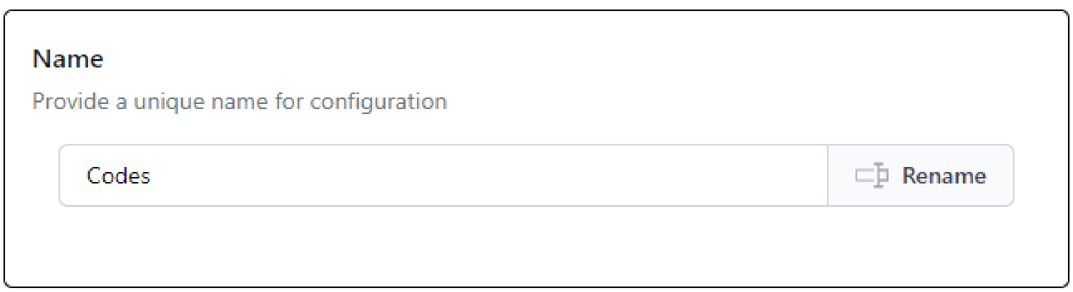
Note: The Default Configuration cannot be deleted. To delete a Default Configuration, set a different Agent Configuration as default before deleting it.

Renaming a Configuration

The Name field is displayed for the configuration that is selected in the Configuration field. If the selected Configuration is not set as default, the Associated Agents field is also displayed.

Name

The Name field determines the name given to the configuration selected in the Configuration field.



To change the name of the configuration, select the Name field.

Type the name for the configuration.

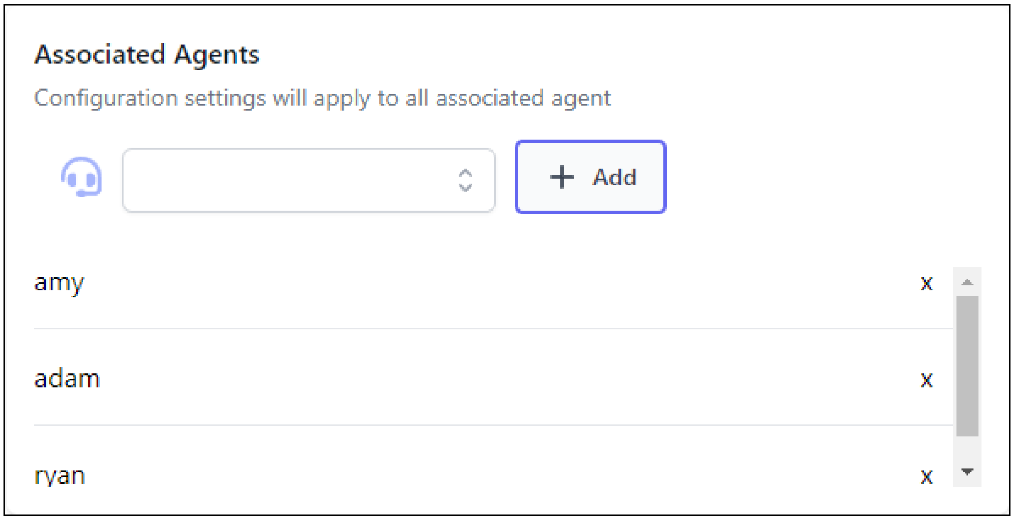
To save the name, click the Rename button.

Editing a Configuration

The Agent Configuration pane is used to add associated agents to the Configuration, and to manage the Transcription and AI Token settings for associated agents.

Associated Agents

When an Agent is associated with the configuration, the configuration’s setting are applied to calls taken by the agent.

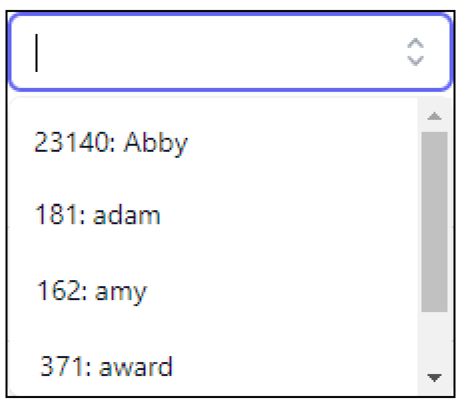


The Associated Agents field is used to add agents to the selected configuration. A list of Agent IDs that are associated with the configuration is displayed below the Associated Agents field. A delete icon X is displayed to the right of each Agent ID associated with the configuration.

Note: The Associated Agents field is not displayed if the selected configuration is set as default.

To add an agent to the configuration, click the Associated Agents field.

The Agents list is displayed.



The Agents list displays the agent number and Login Name of each agent. Agents are displayed in alphabetical order by Login Name.

To filter the Agents list, enter one or more characters from the start of the Login Name for which you are looking.

The Agent list is updated to display only agents with Login Names that start with the string of characters entered. The Agent list updates after each new character is added.

Select the agent that you would like added to the Associated Agents list.

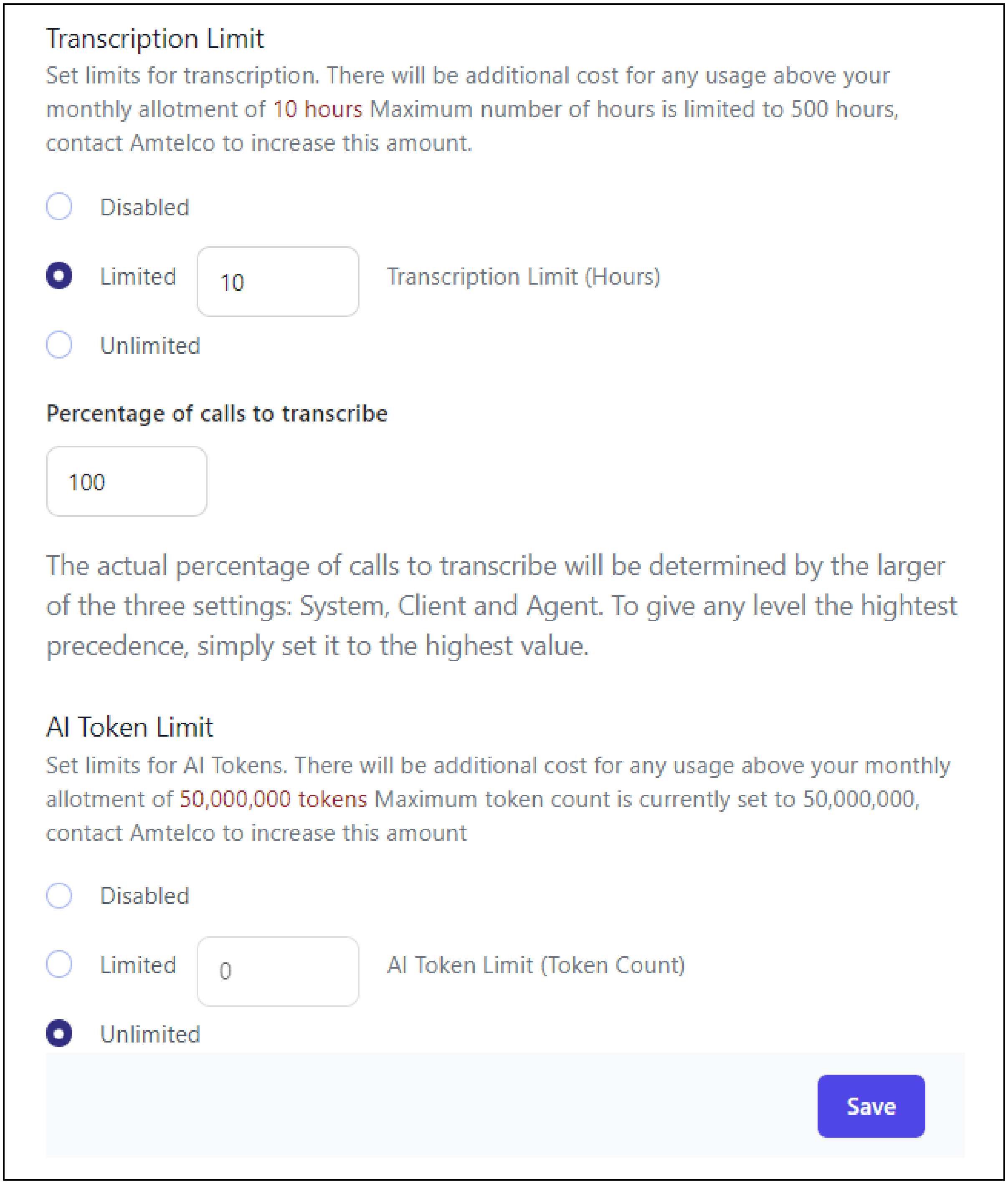
Click the Add button.

The agent Login Name is displayed below the Associated Agents field, and the agent is added to the Associated Agents list.

To remove an agent from the configuration, click the Delete icon X next to that agent Login Name.

The Agent Login Name is no longer displayed, and the agent is no longer included in the Associated Agents list.

Transcription Limit



The Transcription Limit options are used to enable, disable, or limit transcription. The Transcription Limit options include the Disabled, Limited, and Unlimited options, and the Transcription Percentage field.

Note: A set of Transcription Limit options are included on each of the System, Client, and Agent levels. When an option is selected for multiple levels of configuration, the most restrictive option is applied.

Disabled

If the Disabled option is selected, transcription is disabled for the Agent Configuration.

Limited

If the Limited option is selected, transcription is enabled for the number of hours entered in the Transcription Limit (Hours) field.

Transcription Limit (Hours)
The Transcription Limit (Hours) field is used to determine how many hours of audio can be transcribed in the billing cycle for the Agent Configuration. Once the Transcription Limit is reached, transcription is disabled until the start of the next billing cycle.

Unlimited

If the Unlimited option is selected, transcription is enabled for the Agent Configuration.

Transcription Percentage

The Transcription Percentage field is used to set the percentage of calls that are transcribed for the Agent Configuration. The percentage entered in the Transcription Percentage field is applied randomly to calls. For example, if a percentage of 75 percent is entered, every call has a 75 percent chance of being transcribed, but streaks of transcriptions or skipped transcriptions may occur.

Enter the percentage of calls for the Agent Configuration that you would like transcribed.
OR
Set the percentage of calls using the selection arrows.

AI Token Limit

Some script elements used in Post Call Scoring Scripts send information to a Natural Language Processing (NLP) model. AI Tokens are segments of data that the NLP model uses to interpret prompts and produce responses. When a prompt is provided to the NLP model, the prompt is tokenized and processed. Additionally, the response provided by the NLP model is produced in tokens and then detokenized into the original language.

The AI Token Limit options are used to enable, disable, or limit AI Token usage. The AI Token Limit options include the Disabled, Limited, and Unlimited options.

Note: A set of AI Token Limit options are included on each of the System, Client, and Agent levels. When an option is selected for multiple levels of configuration, the most restrictive option is applied. For this reason, it is recommended that a high level of restriction is selected at the Agent level.

◉ Disabled

If the Disabled option is selected, AI analytics are disabled.

◉ Limited

If the Limited option is selected, AI analytics are enabled for the number of tokens entered in the AI Token Limit (Hours) field.

AI Token Limit (Token Count)

The AI Token Limit (Token Count) field is used to determine how many AI Tokens of data can be sent to and received from the NLP model in the billing cycle for the Agent Configuration. Once the AI Token Limit is reached, AI analytics is disabled until the start of the next billing cycle.

◉ Unlimited

If the Unlimited option is selected, AI analytics is enabled for the Agent Configuration.

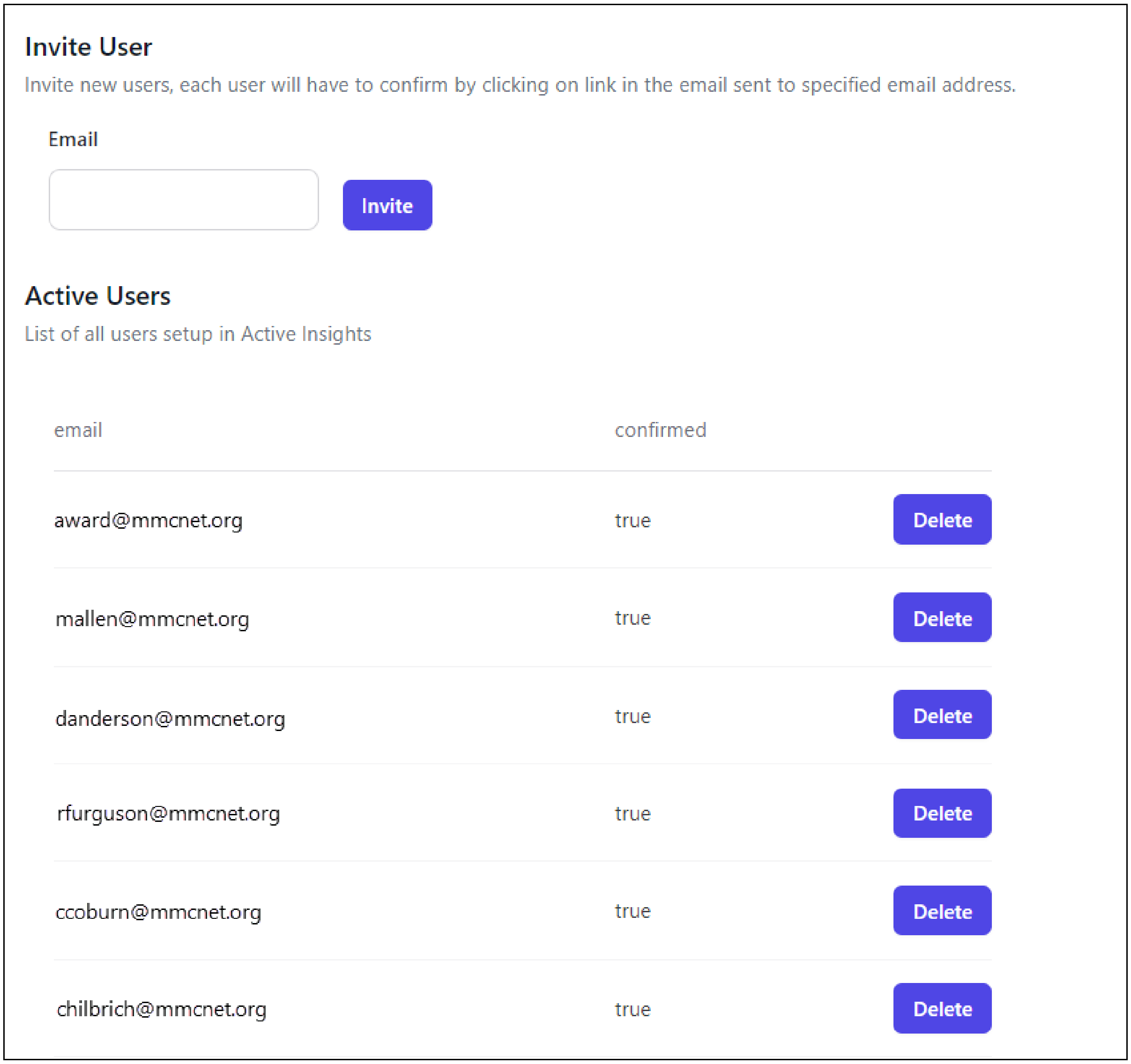
Saving Configuration Changes

Changes made to an Agent Configuration's settings must be saved before they take effect. The Save button is located at the bottom of the Agent Configuration screen.

To save changes made to the Agent Configuration settings, click the Save button.

The Agent Configuration settings are saved, and the settings are used for the agents associated with the Configuration.

Users



The Users page is used to invite users to be able to access the Active Insights platform and view a list of all active users set up in Active Insights. The User page contains the Invite User section and Active Users list.

Adding Users

The Users page can be used to add users to the Active Insights platform. Users that are added to the Active Insights platform must be invited, registered, and confirmed.

Invite User

The Invite User section is used to send invitations to users using an e-mail message. The Invite User section contains the Email field and Invite button.

Email

The Email field is used to enter the e-mail address to which the invitation is sent.

Enter the e-mail address to which the invitation will be sent.

Invite

The Invite button is used to send the invitation link to the e-mail address entered in the Email field.

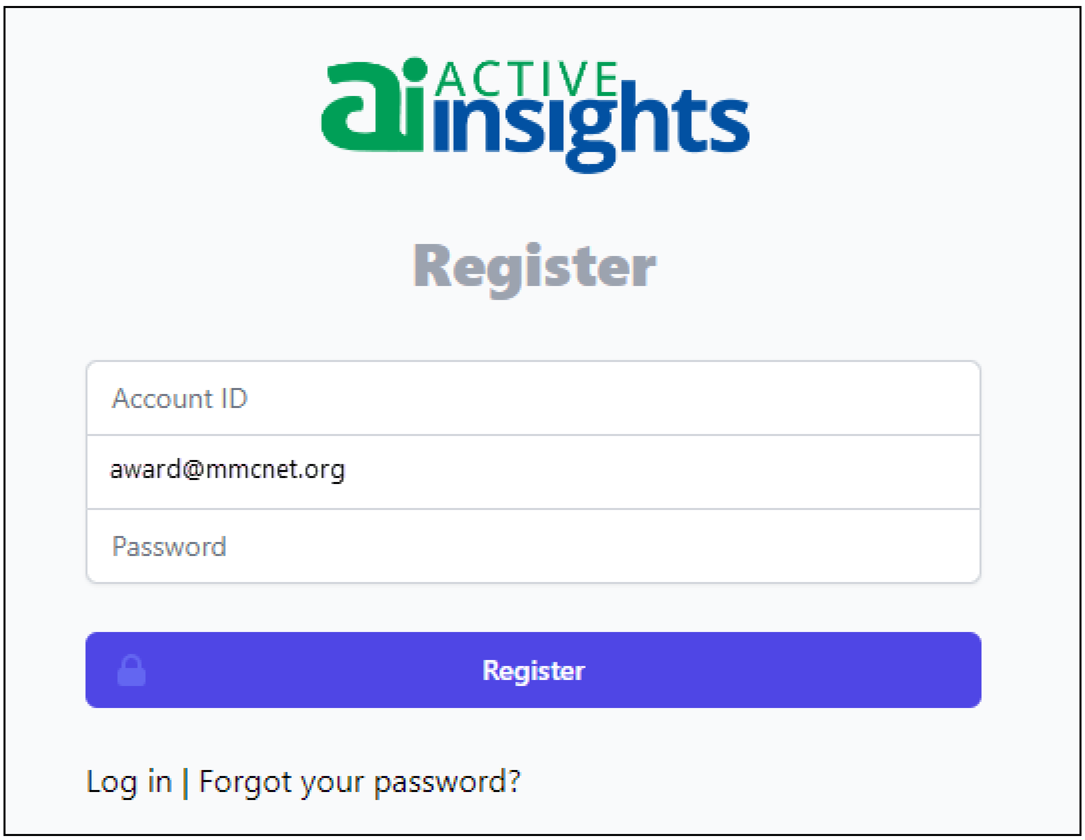
To send an invitation e-mail message to the e-mail address, click the Invite button.

An invitation link is sent via an e-mail message to the e-mail address entered in the Email field.

The invitation link is used to create an account for the Active Insights platform using the e-mail to which the invitation link was sent.

To create an account for the Active Insights platform, click the invitation link.

The Registration Page is displayed. The Email field is prepopulated with the e-mail address to which the invitation link was sent.



Note: The e-mail address to which the invitation link was sent must be used to register. If a different e-mail address is entered, the registration process will fail.

Account ID

Your Account ID is a unique ID number provided to your organization by Amtelco with the Intelligent Series software.

Enter the Account ID number for your organization.

Password

The password that you enter will be used to verify your identity when accessing the Active Insights platform.

Enter a secure password that you will use each time you access the Active Insights platform.

Click the Register button.

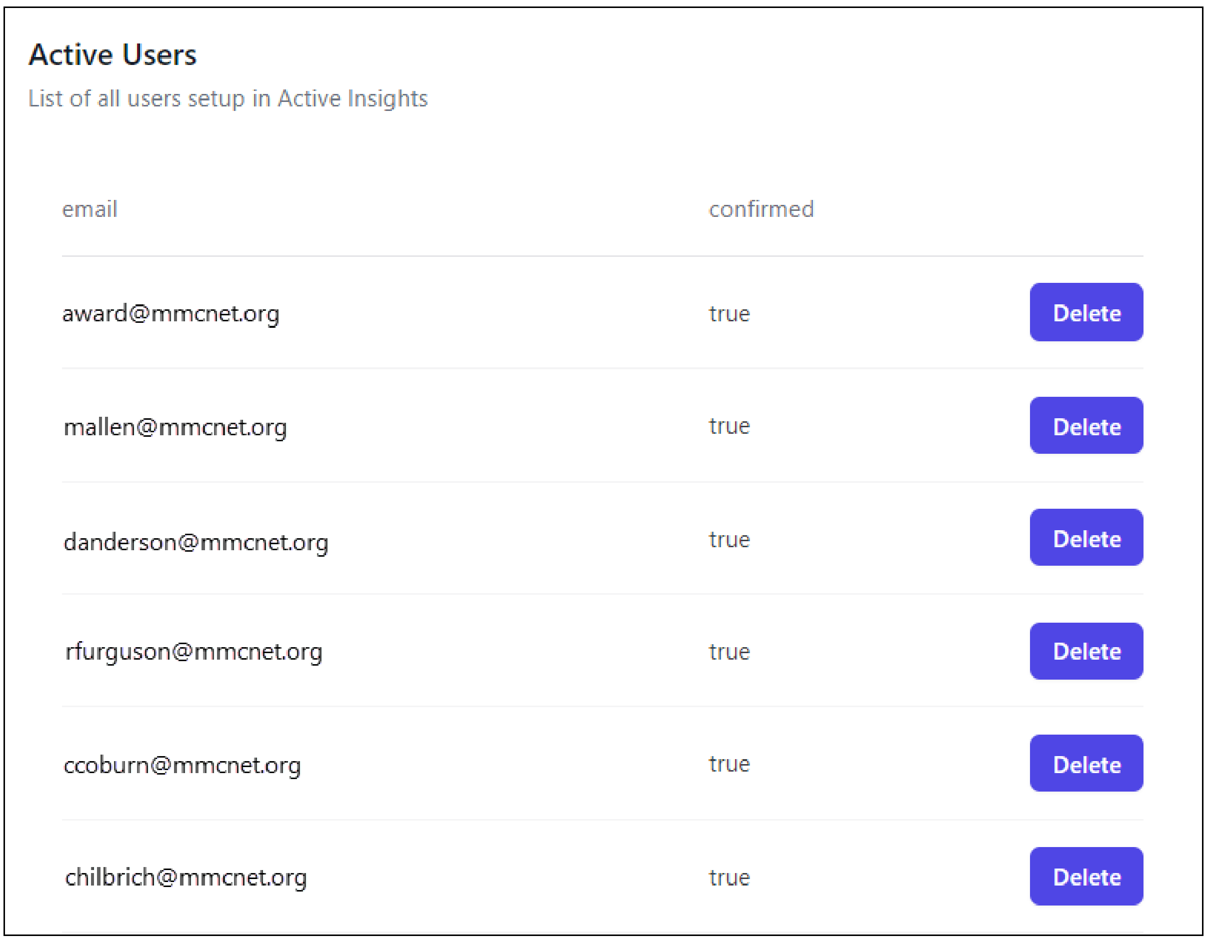
If the account is successfully registered, a banner is displayed at the top of the page stating that a confirmation link has been sent to the e-mail.

To confirm the account created using the invitation link, access the e-mail account and click the confirmation link.

The Active Insights login page is displayed. The Active Insights account is confirmed.

Active Users

The Active Users list contains a list of all users registered to the Active Insights platform. The Active Users list contains the email column and the confirmed column.



Email

The Email column displays the e-mail address which each user uses to login to the Active Insights platform.

Confirmed

The Confirmed column displays whether the listed user has been confirmed.

- The Confirmed column displays “True” if the listed user has been confirmed.
- The Confirmed column display “False” if the listed user has been created but has not yet been confirmed.

Delete

The rightmost side of each row also contains the Delete button for the listed user. The Delete button enables administrators to delete users who should no longer have access to the Active Insights platform.

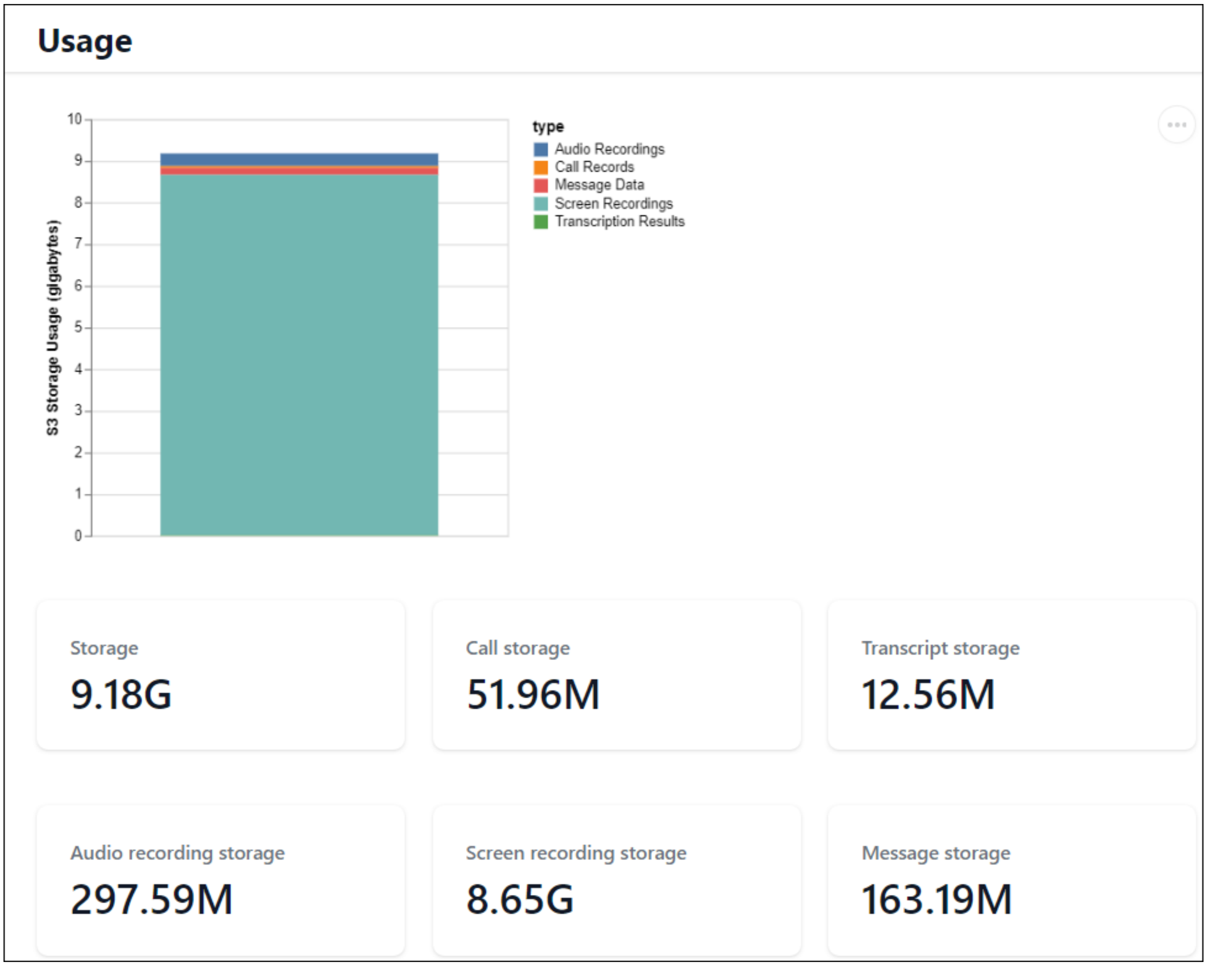
To remove a user from the Active Insights platform, click the Delete button next to the listing for the user.

The user is removed from the Active Insights platform and is no longer displayed in the Active Users list.

Note: The Delete button next to the user who is currently being used to view the Users list is grayed out and cannot be clicked.

Usage

The Active Insights Usage page is used to view data regarding utilization of the Call Logs storage. The Usage page contains a Storage Usage chart and statistics of storage usage for different types of data.



To access the Usage page, click the Usage button in the Active Insights title bar.

The Usage page is displayed.

The Usage page displays information for the following types of data.

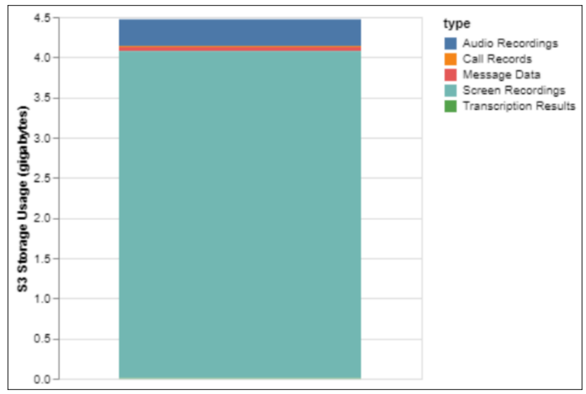
Data Type	Description
Audio Recordings	The Audio Recording data type represents storage used by audio sound recordings
Call Records	The Call Records data type represents storage used for basic call record data, such as associated clients, agents, call events, start time, and the Call ID.
Message Data	The Message Datadata type represents storage used for messages associated with calls.

Usage

Data Type	Description
Screen Recordings	The Screen Recordings data type represents storage used for Screen Capture recordings.
Transcription Results	The Transcription Results data type represents storage used for auto-generated call transcripts.

Storage Usage Chart

The Storage Usage chart displays the storage usage of each type of data against the total amount of storage being used. Each section’s color indicates the type of data it represents as shown in the key. Each section’s height indicates the amount of storage that data type currently utilizes in gigabytes.



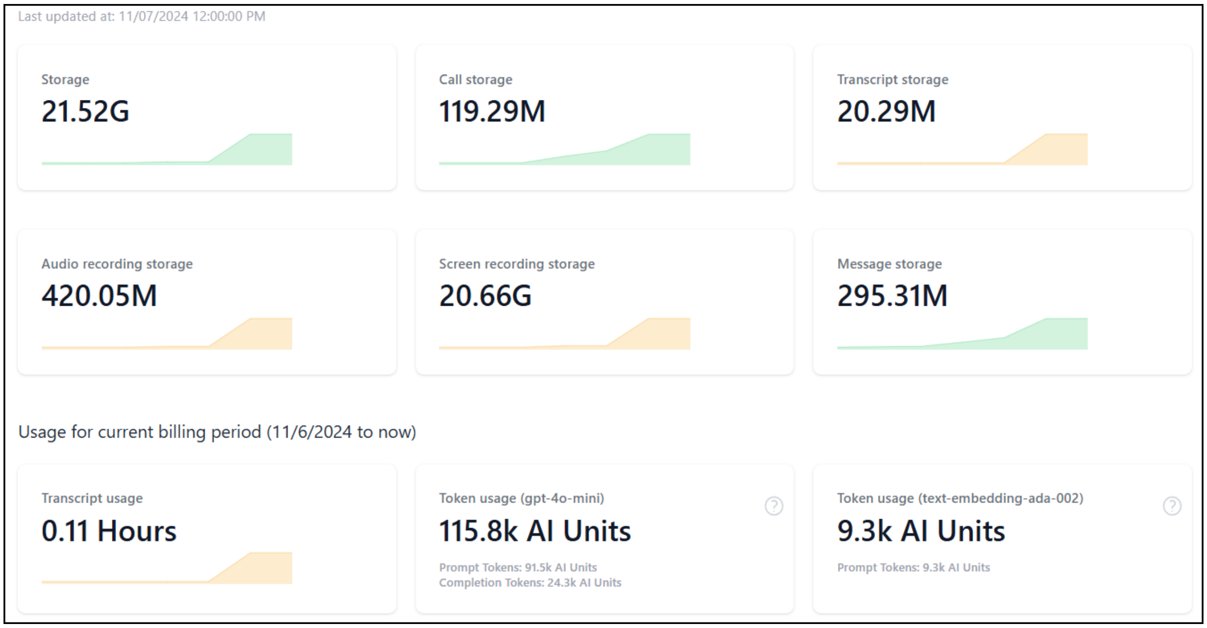
Storage Usage Breakdown

The Storage Usage Breakdown widgets display the numerical value of storage usage for each data type. Each data type’s storage usage is displayed as the largest unit of data of which the data type occupies at least one unit. The amount of storage is displayed to the second decimal place. The letter following each value represents the unit size of the information being displayed. The abbreviations represent the unit size as follows:

- The abbreviation “k” represents kilobytes (1,000 bytes).
- The abbreviation “M represents megabytes (1,000,000 bytes).
- The Abbreviation G represents gigabytes (1,000,000,000 bytes).
- The Abbreviation T represents terabytes (1,000,000,000,000 bytes).

For example, a data type occupying 1,560,000,000 bytes of data is displayed as “1.56G,” and a data type occupying 174,150,000 bytes is displayed as “174.15M.”

Storage Usage Sparkline History



Each widget also contains a sparkline history that shows storage usage for that data type for the last seven days. The color of each sparkline graph represents a trend in data storage for that data type based on whether more data entered storage or was deleted from storage during the last seven days.

- If more data entered storage than was deleted from storage, the sparkline history is green.
- If more data was deleted from storage than entered storage, the sparkline history is red.
- If data was added and deleted in equal amounts, the sparkline history is amber.

Usage for Current Billing Period

The “Usage for current billing period” Breakdown displays accumulated transcription and AI Token usage for the current billing period. The Range of the Current Billing Period is displayed in parentheses next to the section title.

The Usage for Current Billing section displays the Transcript usage widget, and the Token usage widgets.

Transcript Usage

The Transcript Usage widget displays the number of hours of transcription used in the system for the current billing period. The Transcript Usage widget displays the number of hours to the nearest second decimal place.

The Transcript Usage widget also contains a color-coded sparkline history representing the trend for the number of hours of transcription used in the last seven days.

Token Usage (GPT-4o-mini)

The Token Usage (GPT-4o-mini) widget displays the AI Units used by the various components of the Natural Language Processing (NLP) model for the billing cycle. The large number displayed in the Token Usage widget indicates the total number of AI Units used. The total number of tokens used is determined by adding the number of Prompt Tokens used and the number of Completion Tokens used.

Note: Each AI Unit represents 1000 tokens.

Prompt Tokens

The Prompt Tokens field displays the number of AI Units used to prompt the NLP model. The Prompt Tokens usage includes all tokens sent to the NLP model as part of a request, such as prompt expressions and transcript text.

Completion Tokens

The Completion Tokens field displays the number of AI Units used by the NPL model to provide a response. Completion Tokens usage includes information received from the NLP model, such as scores, summaries, and trends.

Token Usage (Text-embedding-ada-002)

The Token Usage (Text-embedding-ada-002) widget displays the tokens used by post-call scoring scripts to embed data in the text sent to the NLP model. Text-embedding is a process that adds semantic meaning to words sent to the NLP model to improve the model's ability to detect intention, emotion, and meaning.

Note: Each AI Unit represents 1000 tokens.

Prompt Tokens

Prompt Tokens are tokens used to add meaning to the prompt that is sent to the NLP model.

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Reports

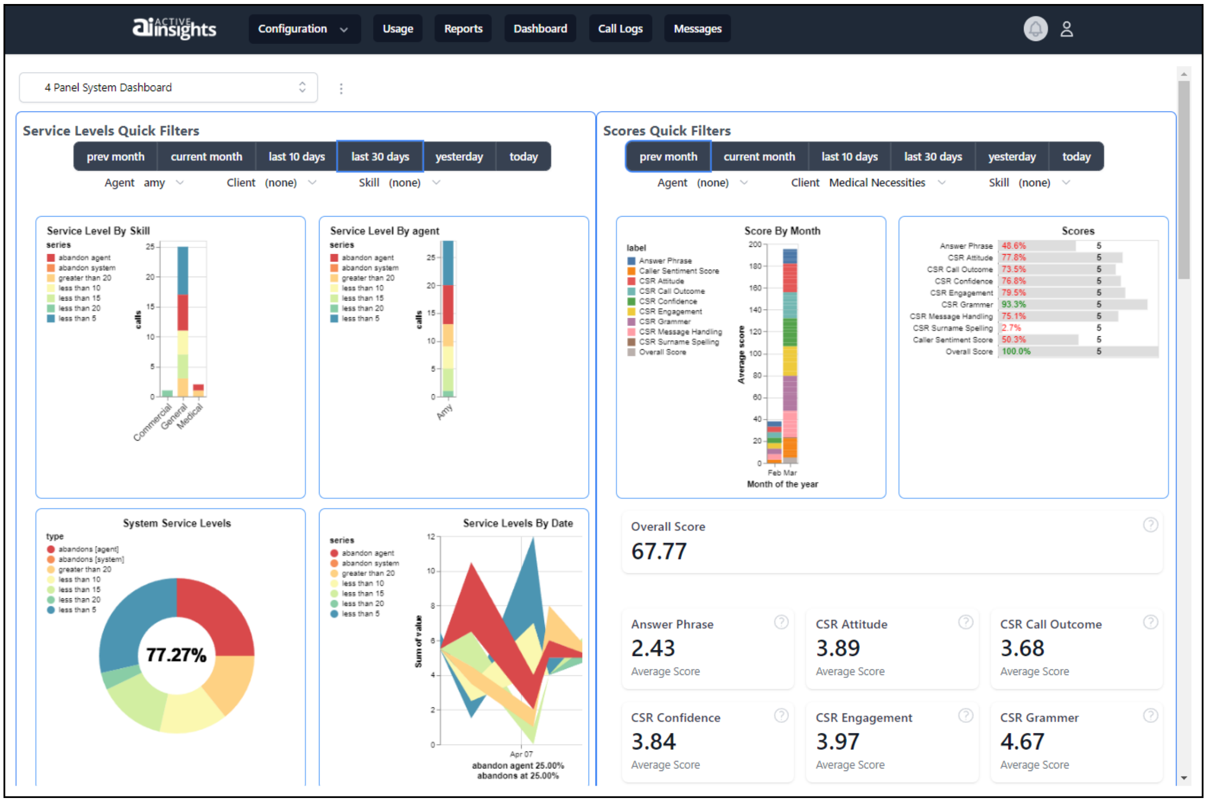
The Reports page is used to filter, view, and export reports on call and service statistics. The Reports page can display either the Agent Reports or System Reports.

To access the Reports page, click the Reports button in the Active Insights title bar.

The Reports page is displayed.

More information about the Active Insights Reports page can be found in the *Active Insights Reports Guide.*

Dashboard



The Dashboards page is used to access, manage, edit, and view customizable dashboards. Customizable dashboards are used to display an array of call statistics and data, and the structure of dashboards can be managed and filtered at multiple levels.

More information on using the Dashboard page can be found in the *Active Insights Dashboards Reference Guide*.

Call Logs

The Active Insights Call Logs display a list of calls stored in the Amazon S3 Cloud. The Call Logs enable users to filter stored calls by various parameters at once. Additional call details can be viewed for each stored call.

START TIME	SCORING	DURATION	CLIENT NUMBER	CLIENT NAME	ANI	CALL	AGENT	MEDIA	
10/31/2023 10:04:36 AM	67.0%	39	7004	Medical Necessities	390	3523627	winop4		Show
10/25/2023 04:48:38 PM	80.0%	33	7004	Medical Necessities	154	3523598	winop4		Show
10/25/2023 03:59:04 PM	60.0%	136	7004	Medical Necessities	154	3523585	winop4		Show
10/25/2023 03:54:51 PM	91.0%	132	7004	Medical Necessities	154	3523584	winop4		Show
10/18/2023 01:40:21 PM		12	7004	Medical Necessities		3523419	winop4		Show
10/12/2023 02:37:02 PM	73.0%	210	7004	Medical Necessities	7115554533	3523323	winop4		Show
10/12/2023 02:35:58 PM		49	7004	Medical Necessities	7115554533	3523322	winop4		Show

To access the Call Logs, click the Call Logs button in the Active Insights title bar.

The Call Logs open to the Calls page.

Export

The Export hyperlink is used to export call log data in the form of a comma separated values (CSV) file.

To export the call log data, click the export hyperlink.

The Call Export window is displayed.

Call Export

The Call Export window is used to select which data from the call log to export. The Call Export window displays the number of calls in the selected range and the search criteria used to filter the selected range.

The Call Export window also enables users to select which call data to export.

To select a type of call data to export, select the check box next to the call data type.

The following call data types are available to include or exclude from the call log export:

☑ Call Start/End

The Call Start/End check box is selected to export basic call data, such as the Start time and date, end time and date, and call ID.

The Call Start/End check box is always selected and cannot be unselected.

Call data is exported as CSV file.

☑ Messages

When the Messages check box is selected, Messages data such as the message ID, Call ID, and Summar will be exported.

Select the Message check box to export message data.

Message data is exported as a CSV file.

☑ Call Trackers

When the Call Trackers check box is selected, Call Tracker data such as Call States, Call Tracker Types, and Call Tracker values will be exported.

Select the Call Trackers check box to export message data.

Call Tracker data is exported as a CSV file.

☑ Voice Recordings

When the Voice Recordings check box is selected, Voice Recordings for the calls will be exported.

Select the Voice Recordings check box to export voice recordings.

Voice Recordings for the calls are exported as MP3 files.

☑ Screen Recordings

When the Screen Recordings check box is selected, Voice Recordings for the calls will be exported.

Select the Screen Recordings check box to export screen recordings.

Screen Recordings are exported as MP4 files.

☑ Transcripts

When the Transcripts check box is selected, transcript data for the calls will be exported.

Select the Transcripts check box to export transcript data.

Transcript data is exported as a CSV file.

☑ PDF View

When the PDF View check box is selected, exported call information is compiled as a Portable Document Format (PDF) file.

Select the PDF View check box to compile data into a PDF file.

Call data is exported as a PDF file where possible. The PDF file can contain the contents of the Notes field, the Call Details section, the Messages section, the transcript, and the Post-Call Scoring Script results.

☑ Table View

When the Table View check box is selected, exported call information is compiled as a CSV file. The layout of data in the CSV file is similar to the layout of the Call Log.

Select the Table View check box to compile data into a CSV file with a layout similar to the Call Log table.

Call Log data is exported as a CSV file.

Export

The Export button is used to export the selected call log data.

When the preferred Call Log filters have been made and the preferred data types have been selected, click the Export button.

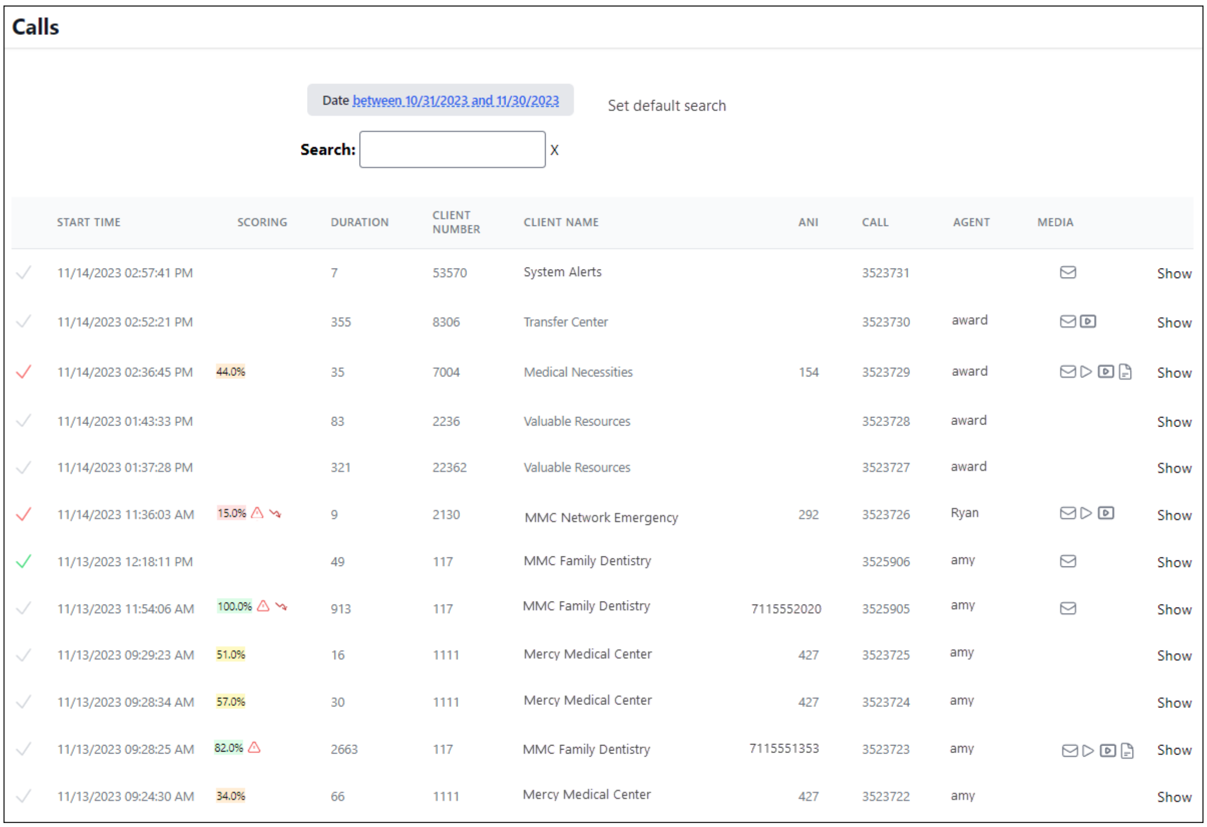
The data is exported as a zip file and prepared for download.

When the file is prepared, an e-mail is sent to the e-mail address associated with the Active Insights account saying the file is ready for download. The file can be downloaded from the Downloads page in Active Insights.

Calls Table

The Calls table displays call listings within the Active Insights Call Logs that meet all active search filters.

Note: By default, the table displays data filtered by its Default Search. More information about Default Searches is provided in Appendix C: Default Search.



Calls

Date between 10/31/2023 and 11/30/2023 Set default search

Search: X

	START TIME	SCORING	DURATION	CLIENT NUMBER	CLIENT NAME	ANI	CALL	AGENT	MEDIA	
	11/14/2023 02:57:41 PM		7	53570	System Alerts		3523731			Show
	11/14/2023 02:52:21 PM		355	8306	Transfer Center		3523730	award		Show
	11/14/2023 02:36:45 PM	44.0%	35	7004	Medical Necessities	154	3523729	award		Show
	11/14/2023 01:43:33 PM		83	2236	Valuable Resources		3523728	award		Show
	11/14/2023 01:37:28 PM		321	22362	Valuable Resources		3523727	award		Show
	11/14/2023 11:36:03 AM	15.0%	9	2130	MMC Network Emergency	292	3523726	Ryan		Show
	11/13/2023 12:18:11 PM		49	117	MMC Family Dentistry		3525906	amy		Show
	11/13/2023 11:54:06 AM	100.0%	913	117	MMC Family Dentistry	7115552020	3525905	amy		Show
	11/13/2023 09:29:23 AM	51.0%	16	1111	Mercy Medical Center	427	3523725	amy		Show
	11/13/2023 09:28:34 AM	57.0%	30	1111	Mercy Medical Center	427	3523724	amy		Show
	11/13/2023 09:28:25 AM	82.0%	2663	117	MMC Family Dentistry	7115551353	3523723	amy		Show
	11/13/2023 09:24:30 AM	34.0%	66	1111	Mercy Medical Center	427	3523722	amy		Show

The Calls table has the following columns.

Column	Description
Review	The Review column displays a check mark. The color of the check mark changes depending on the review status of the call. • **If the call has not been marked for review, the check mark is grey.** • **If the call has been marked for review, the check mark is red.**

Column	Description
	• **If the call has been reviewed, the check mark is green.**
Start Time	The Start Time column displays the date and time that each call began. If the call started less than 24 hours ago, the Start Time column displays the amount of time that has passed since the call started it *hhh:mm:ss* format. If the call started more than 24 hours ago, the Start Time column displays the date and time at which the call started in MM/DD/YYY *hhh:mm:ss* format.
Scoring	The Scoring column displays information about the Post Call Analytics for the call. The Scoring Column displays the score total of all scores assigned to the call as a percentage of the maximum possible score total. The highlight around the percentage is different depending the value of the percentage. • The highlight is green if the percentage is greater than or equal to 75. • The highlight is yellow if the percentage is greater than or equal to 50 and less than 75. • The highlight is orange if the percentage is greater than or equal to 25 and less than 50. • The highlight is red if the percentage is less than 25. The Scoring Column also displays icons related to the Post Call Analytics for the call. • If the call was given a warning using an AI Annotation element, the Warning icon is displayed. • If the call was given a trend using an AI Trend element, a trend icon is displayed. The Positive Trend icon is displayed if the trend was positive, and the Negative Trend icon is displayed if the trend was negative.
Duration	The Duration column displays the length of time it took for the call to connect to the system, be processed, and be disconnected in seconds.
Client Number	The Client Number column displays the Client Number to which the call was placed.
Client Name	The Client Name column displays the Client Name associated with the Client Number.

Column	Description
ANI	The ANI column displays the Automated Number Identification (Caller ID) phone number of the caller.
Call	The Call column displays the unique identification number assigned to each call.
Agent	The Agent column displays the Login Name of the agent who took the call.
Media	The Media column displays the types of media associated with the call. • The Message icon is displayed if one or more messages are associated with the call. • The Audio icon is displayed if the call has an audio recording. • The Video icon is displayed if the call has a screen capture recording. • The Transcript icon is displayed if one or more transcripts were generated for the call.

The right-most column displays the Show command for each call listing. The Show command enables users to view information and recordings related to the call.

A listing range and navigation bar are shown below the Calls table.

More information about listing ranges and navigation bars is provided in Appendix A: Table Navigation.

Searching the Calls Table

The Search field is used to select a search parameter by which you would like the Calls table filtered. The Search field can be used to create filters that can be applied to the Calls table simultaneously.

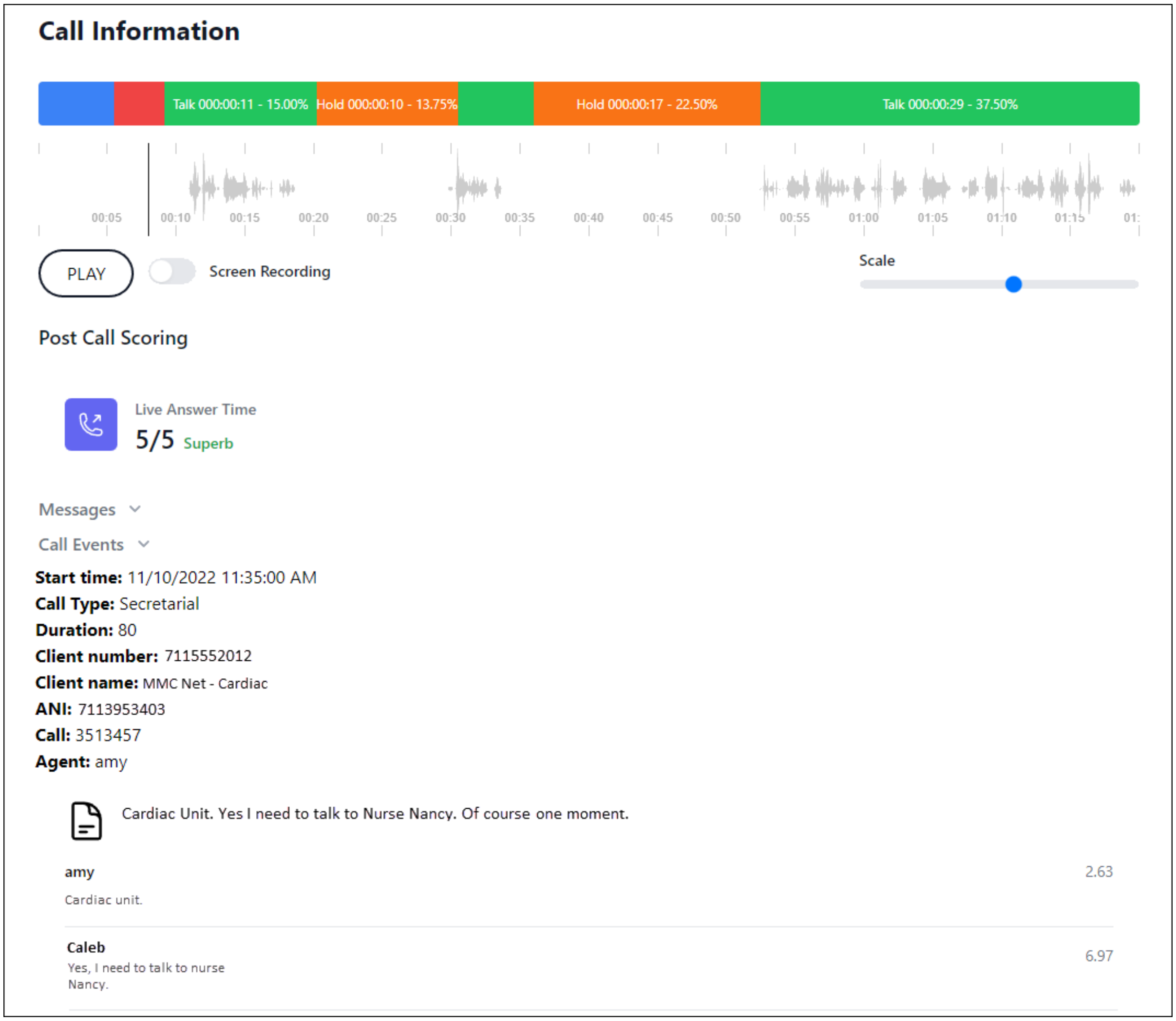
More information on search parameters is provided in Appendix B: Filters.

Call Information

The Call Information page of the Calls Logs is used to view detailed call information, Post Call Scoring, and associated messages, recordings, and transcripts for the call.

To display the Call Information page for a call, click the Show command to the right of the call listing in the Calls table.

The Call Information page is displayed.



Call Notes

The Call Notes pane is displayed at the top of the Call Information page. The call Notes pane displays notes that have been added to the call and enables users to add and edit the contents of the comment field. The Call Notes contains the Notes field, the Reviewed button, and the Save button.

Notes

The Notes field is used to add notes to the call information page for the call and displays notes that were previously added to the call, either by a post-call scoring script or by an Active Insights user.

Select the Notes field and make any necessary additions or edits.

Review

The Review button displays the review status of the call.

- If the call has not been marked for review, the check mark is grey, and "not reviewed" is displayed next to the check mark.
- If the call has been marked for review, the check mark is red, and "not reviewed" is displayed next to the check mark
- If the call has been reviewed, the check mark is green, and the e-mail address of the Active Insights user that mark the call as reviewed is displayed.

The Review button is used to set the review status of the call as reviewed.

To make the call as reviewed, click the Review button.

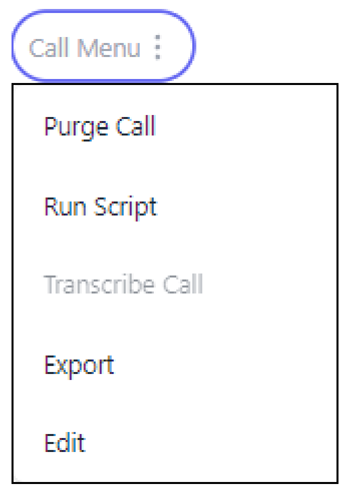
The check mark is displayed in green, and the e-mail address you used to log into Active Insights is displayed next to the check mark.

Save

The save button is used to make changes to the Notes pane.

To save changes made to the Notes pane, click the Save button.

Call Menu



The Call Menu is used to display a menu of options for the call.

To display the Call Menu, click the Call Menu command or click the Menu icon.

The Call Menu is displayed.

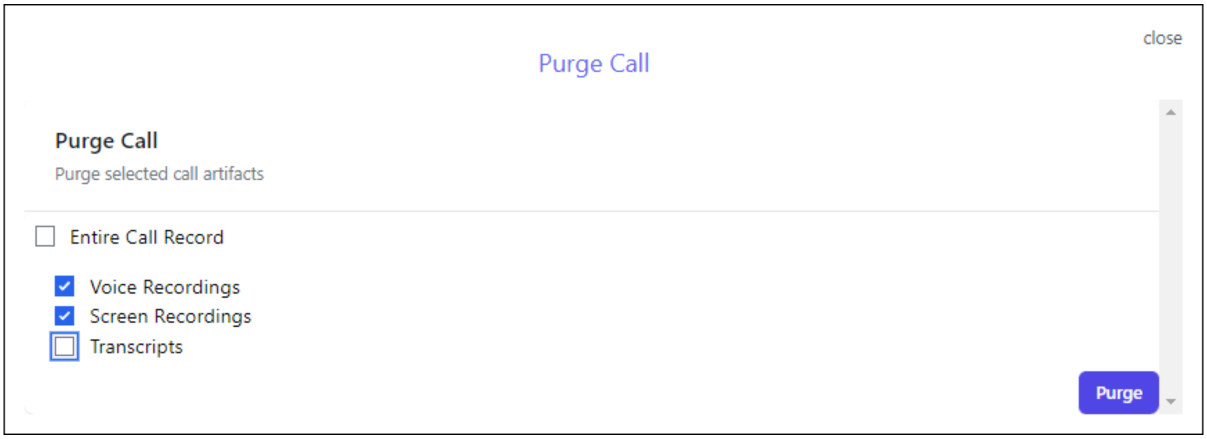
The Call Menu contains the Purge Call, Run Script, Transcribe Call, Export, and Edit commands.

Purge Call

The Purge Call command is used to select call data to be purged.

To purge call data, click the Purge Call command.

The Purge Call window is displayed.



The Purge Call window is used to select what types of data for the call should be purged. The Purge Call window contains check boxes to determine what data will be purged and the Purge button to purge the selected data. The following data types can be selected:

☑ Entire Call Record

If the Entire Call Record check box is selected, purging will purge all information related to the call, including data related to the other Purge Call check boxes, the Call Log listing, and peripheral data.

Note: If the Entire Call Record check box is selected, the Voice Recordings, Screen Recordings, and Transcripts check boxes are selected and cannot be cleared.

☑ *Voice Recordings*

If the Voice Recordings check box is selected, voice recordings for the call will be purged.

☑ *Screen Recordings*

If the Screen Recordings check box is selected, screen recordings for the call will be purged.

☑ *Transcripts*

If the Transcript check box is selected, transcripts for the call will be purged.

Purge

The Purge button is used to purge the selected call data.

When the preferred data types have been selected, click the Purge button.

The selected data is purged from the call. If the “Entire Call Record” check box was selected, the call no longer appears in the Call Log.

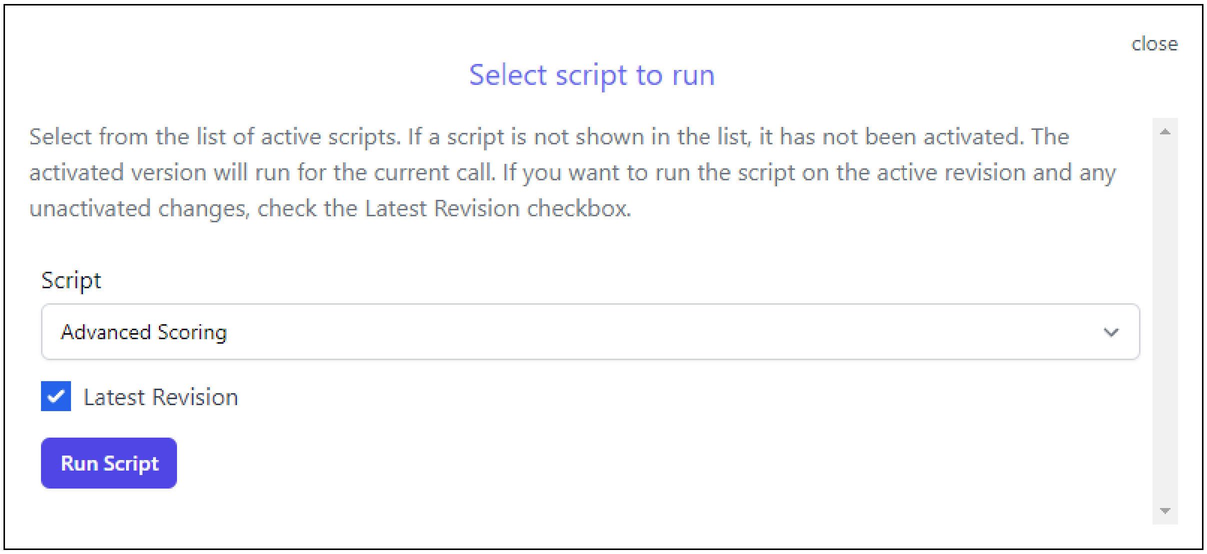
Run Script

The Run Script command is used to run the call through a Post-Call Scoring Script.

To run a script on the call, click the Run Script command.

The “Select script to run” window is displayed.

The “Select script to run” window contains the Script field and the Latest Revision check box.



Script

The Script field is used to select which Post Call Scoring Script you would like run on the call.

Select the script you would like to run on the call.

☑ Latest Revision

If the Latest Revision check box is selected, the most recent script version is used, even if the version has unactivated changes. If the Latest Revision check box is cleared, the current active version of the selected script is used.

To use the latest revision of the script, select the Latest Revision check box.
OR
To use the current activated version of the script, clear the Latest Revision check box.

Run Script

To run the selected script on the call, click the Run Script button
OR
To cancel running the selected script on the call, click the Close command in the top right corner.

Transcribe Call

The Transcribe Call command is used to produce a transcript for the call if it does not currently have a transcript. If the call currently has a transcription or does not have an audio recording to transcribe, the Transcribe Call command is grayed out and cannot be clicked.

To produce a transcription for the call, click the Transcribe Call command.

A transcription is produced for the call.

Export

The Export command is used to export call data.

To export call data, click the Export command.

The Call Export window is displayed.

The Call Export window is used to select which data from the call to export.

To select a type of call data to export, select the check box next to the call data type.

The following call data types are available to include or exclude from the call export:

☑ Call Start/End

The Call Start/End check box is selected to export basic call data, such as the Start time and date, end time and date, and Call ID.

The Call Start/End check box is always selected and cannot be unselected.

Call data is exported as CSV file.

☑ Messages

When the Messages check box is selected, Messages data such as the Message ID, Call ID, and Summary will be exported.

Select the Message check box to export message data.

Message data is exported as a CSV file.

☑ Call Trackers

When the Call Trackers check box is selected, Call Tracker data such as Call States, Call Tracker Types, and Call Tracker values will be exported.

Select the Call Trackers check box to export message data.

Call Tracker data is exported as a CSV file.

☑ Voice Recordings

When the Voice Recordings check box is selected, voice recordings for the calls will be exported.

Select the Voice Recordings check box to export voice recordings.

Voice recordings for the calls are exported as MP3 files.

☑ Screen Recordings

When the Screen Recordings check box is selected, screen recordings for the calls will be exported.

Select the Screen Recordings check box to export screen recordings.

Screen recordings are exported as MP4 files.

☑ Transcripts

When the Transcripts check box is selected, transcript data for the calls will be exported.

Select the Transcripts check box to export transcript data.

Transcript data is exported as a CSV file.

Export

The Export button is used to export the selected Call Log data.

When the preferred Call Log filters have been made and the preferred data types have been selected, click the Export button.

The data is exported as a zip file and prepared for download.

When the file is prepared, an e-mail is sent to the e-mail address associated with the Active Insights account saying the file is ready for download. The file can be downloaded from the Downloads page in Active Insights.

Edit

The Edit command is used to edit any of the Post Call Script results and view a history of Post Call Script results for the call.

To edit the Call Information page, click the Edit command.

The Edit pane is displayed.

The Edit pane contains the Edit Results tab and the History tab.

Edit Results

The Edit Results tab is selected by default. The Edit Results page is used to edit the Post Call Script results for the call. The Edit Results page contains the Clear All command, the “Reason for edit” field, the Scores list, the Trends list, and the Annotations list.

Clear All

The Clear All command is used to clear all Post Call Script results from the call. When the Post Call Script results are removed from the call, the call no longer counts towards score calculations. The Clear All command can be used to remove anomalous calls from call statistics.

To clear the Post Call Script results from the call, click the Clear All command.

The Post Call Script results are cleared.

Reason for edit

The "Reason for edit" field is used to enter the reason for any edits made to the Post Call Script results.

Enter the reason for the edits made to the Post Call Script results.

All Post Call Score results are contained in the Scores list, Trends list, and Annotations list. By default, results listings are collapsed and only the label of the result is displayed.

Note: The Total Score score is not displayed in the Edit pane and cannot be edited. The values displayed for the Total Score score are recalculated when the Save button is clicked.

A results listing must be expanded to be edited.

To expand a results listing, click the expand icon.

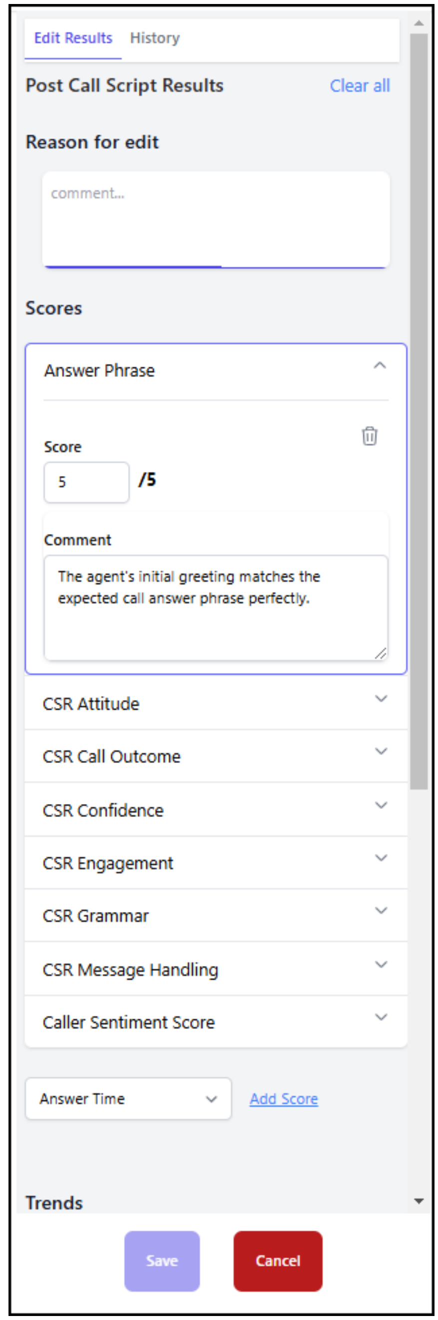
The results listing is expanded, and the values related to the results listing are displayed.

Make any edits to the results listing.

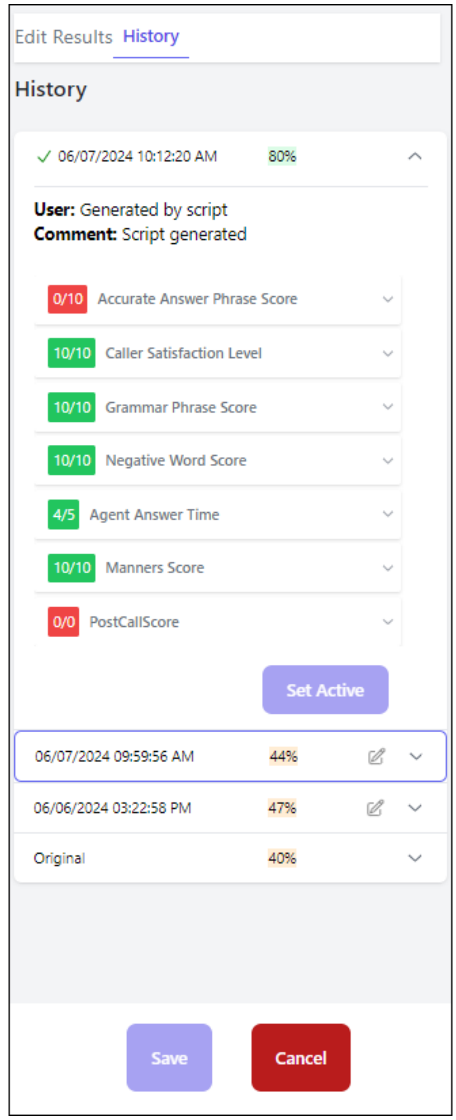
The changes made to the results listing will be reflected on the Call Information page when the changes are saved.

To collapse the results listing, click the collapse icon.

The listing is collapsed.



History



The History page is used to view all versions of the Call Information page for the call.

Click the History tab to access the History page.

A version listing is displayed for each version saved for the call. Each listing title displays the following:

- A check mark if the version is currently active
- The Date and Time at which version was created
- The Total Score percentage assigned to the Post Call Script results for the version
- An Edited icon if the version was created via the Edit command
- Either an Expand icon or Collapse icon.

Note: The first version of Post Call Scoring results that was generated when the call first entered the Active Insights system does not have a date and time label. Instead, it is labeled "Original."

Viewing Version Listings

By default, all version listings under the History tab are collapsed.

To view a version listing, click the Expand icon for the listing.

The listing pane is displayed.

To collapse a version listing, click the Collapse icon for the listing.

The listing pane is collapsed.

The listing pane displays a summary of the version. The listing pane displays the User field, the Comment field, and a score listing for each score present in the version.

User

The User field displays the username of the user who created the version.

Comment

The Comment field displays the comment entered in the "Reason for edit" field for the version.

Note: If the version was generated by a script, the User field displays "Generated by script," and the Comment field displays "Script generated."

Score Listings

Each Score Listing is used to view the contents of score for the history. Each listing title displays the following:

- An Info icon for Trend, Summary, and Annotation listings.
- A color-coded score depiction showing the assigned score next to the maximum possible score. The color displayed matches the color assigned to the score on the Call Information page.
- The Label of the listing.
- Either an Expand icon ∨ or Collapse icon. ∧

By default, all score listings under the History tab are collapsed.

To view a score listing, click the Expand icon ∨ for the listing.

The Result pane is displayed.

The Result pane displays the contents of the Post Call Script result.

To collapse a score listing, click the Collapse icon ∧ for the listing.

The score pane is collapsed.

Set Active

Any existing version for the Call Information page can be set as active. When a version is set as active, the Post Call Score results for that version are displayed on the Call Information page.

To set a version as active, select a version and click the Set Active button.

When changes made to the Edit pane are saved, the selected version is displayed on the Call Information page.

Saving Changes

Changes made to the Post Call Script results must be saved before they are displayed on the Call Information page.

To save changes made to the Post Call Script results, click the Save button.
OR
To cancel changes made to the Post Call Script results, click the Cancel button.

If the Save button was clicked, the Edit pane is closed and the Call Information page is updated to reflect the changes made.

Call Stage

The Call Stage bar displays the stages that the call entered throughout its progression. Each colored section represents a stage that the call entered. The size of the section represents the portion of consecutive call time that the call was in that call stage. If the size of a display section is large enough, the section displays the following information:

- The type of call stage
- The duration of the call stage
- The percentage of the total call duration for which the call was in the call stage.

Each section is color-coded based on the call stage.

Color	Call Stage	Description
Blue	**Announcement**	In the Announcement stage, the call was playing a greeting to the caller.
Red	**Answer Time**	In the Answer Time stage, the call was in the system and waiting to be answered.
Green	**Talk**	In the Talk stage, an agent was actively connected to the caller in a two-way audio connection.
Orange	**Hold**	In the Hold stage, the call was placed on hold. The call was still active, but the agent was not actively speaking with the caller.
Yellow	**Fetch**	In the Fetch stage, the call was generated by an agent pulling up a client from the Sandbox in Soft Agent, the Sandbox Search in Web Agent, the toolbar, or the Client List Sidebar component.
Yellow	**Disc**	In the Disc stage, the call was disconnected. Common ways a Disc state occurs is when a caller hangs-up or the agent disconnects the call with the Disconnect keyboard command.

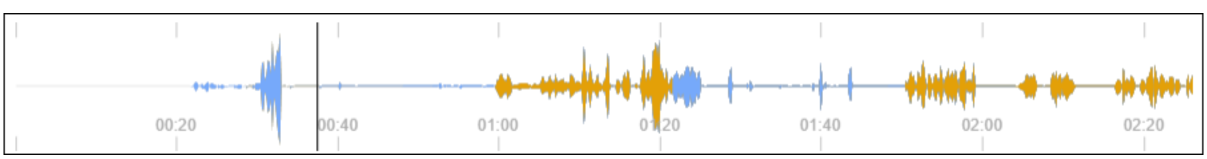
To view details about each call stage, hover over the section about which you would like to know more.

A tooltip is displayed.

The tooltip shows the call stage, call duration, and percentage of the total call duration that the section occupies. The tooltip also displays any Call Events that occurred during the call stage.

More information about Call Events is provided in the *Intelligent Series and Genesis Report Terminology* white paper.

Audio Playback



If an audio recording is associated with the call, an audio progress bar is displayed as a waveform graph.

A vertical line marks the progress of the audio playback along the waveform graph.

To start or pause the audio recording playback, click the Play button.

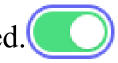
- If the audio recording is not playing, the audio recording playback begins.
- If the audio recording is playing, the audio recording playback is paused.

To change where the playback recording starts, click the point within the progress bar where you want the playback to begin.

Screen Recording

The Screen Recording slider is used to toggle the Screen Capture display.

If the slider is greyed, the Screen Capture is not displayed. 

If the slider is highlighted, the Screen Capture is displayed. 

To toggle whether the Screen Capture is displayed, click the slider.

The Screen Capture playback progress matches the Audio Playback progress, and it is started, paused, and moved with the same functions as used for Audio Playback

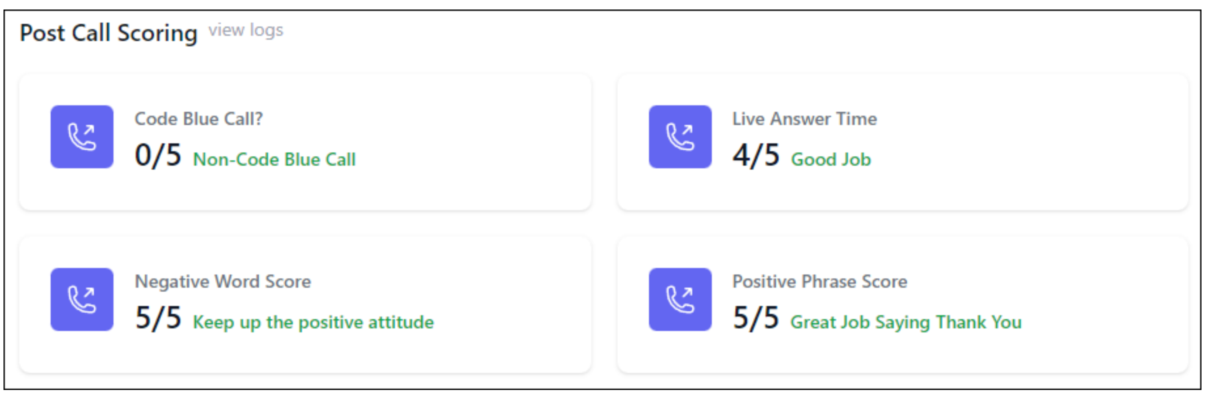
Scale

The Scale slider is used to adjust the vertical scale of the Audio Playback waveform graph.

To increase the vertical scale of the waveform graph, move the slider to the right.
OR
To decrease the vertical scale of the waveform graph, move the slider to the left.

Post Call Scoring

The Post Call Scoring pane displays the final scores outputted by the Post Call Scoring Script. The contents of the Post Call Scoring pane depends on the elements used by the script used to score the call.



Messages

The Messages pane is used to display information about all messages associated with the call.

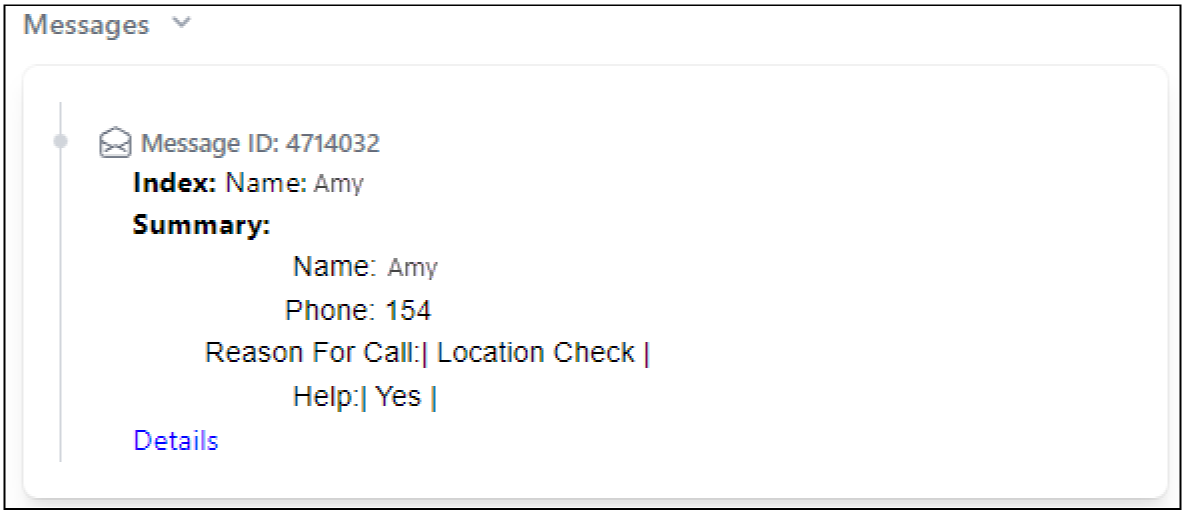
To display the messages associated with the call, click the Messages command.

The Messages pane is displayed.

The messages pane displays the Message ID, the message subject, and the message Summary for each message associated with the call, and a Details hyperlink. Messages are displayed in chronological order with earlier messages appearing higher than older messages.

Message ID

The Message ID displays the unique sequential serial number assigned to the message.



Index

The Index displays the Intelligent Series (IS) Message Subject of the message.

Summary

The message summary displays the content of the message saved as the IS Message Summary. What is displayed in the summary is determined by the settings in the Intelligent Messaging script that was used to take the message.

Details

The Details hyperlink is used to view additional details about the message.

To display additional details about the message, click the Details hyperlink.

The Message Details window is displayed.

The Message Details window displays the same information as is shown in the Message Information page.

To close the Message Details window, click the Close command.

The Message Details window is closed.

Call Events

The Call Events pane displays the Call Events that occurred during the call.

To display the Call Events pane, click the Call Events command.

The Call Events pane displays information about each Call Event that occurred during the call. Call Events are displayed in the order that they occurred in the call, with Call Events that occurred at the beginning of the call appearing highest.

Time

The number at the top of each Call Event listing displays the amount of time into the call's duration the Call Event occurred in hours, minutes, and seconds (in *hhh:mm:ss* format). Call Events with a time listing of 0 (zero) occurred at the time that the call was first recognized in the system.

Call Event and Value

The second line displays the Call Event Type. If the Call Event has a value associated with it, the value is displayed after the Call Event Type in a softer color. More information about Call Events is provided in the *Intelligent Series and Genesis Report Terminology* white paper.

Type

The Type line displays the Call Type that was assigned to the call by the Intelligent Series system. More information about Call Types is provided in the *Intelligent Series and Genesis Report Terminology* white paper.

State

The State line displays the Call State at the time of the Call Event. More information about Call States is provided in the *Intelligent Series and Genesis Report Terminology* white paper

Client Number

The Client Number line displays the Client Number of the client on which the call came into the system.

Agent initials

The Agent Initials line displays the Agent Initials of the agent who took the call.

Station

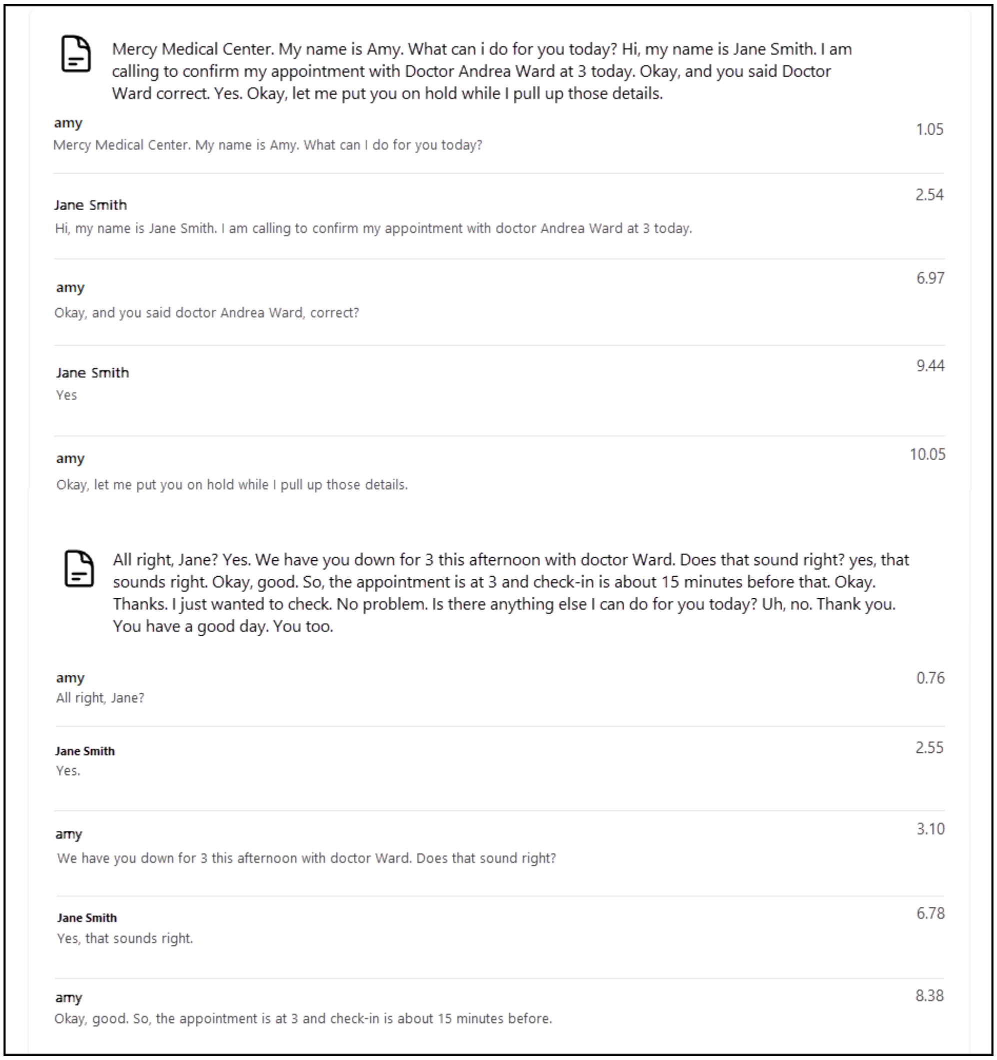
The Station line is only displayed for certain types of Call Events. The Station line displays the type of station and the Station Number of the station at which the call was taken.

Call Details

The Call Details section displays the main details about the call itself. The Call Details section displays the same information found in the Calls table, with the exception of the media column.

Transcriptions

The Transcription section displays all software-generated transcripts for the call. Each transcript displays a Transcript icon, a combined transcript, and a detailed transcript.



Combined Transcript

The Combined Transcript displays the auto-generated text from all parties in a conversation as a single paragraph of text. A Combined Transcript is created for each segment of the call that is in a state in which the parties can talk to each other. If the call is placed in the Hold state, the segment ends, and when the call is answered from the Hold state, another segment begins.

Detailed Transcript

A Detailed Transcript is displayed for each transcript segment. The Detailed Transcript displays the transcript text for the segment, separated by speaker and marked by the number of seconds into the call at which the listed text was spoken. A new section of text is displayed each time the speaker switches.

Each section of text displays the name of the speaker.

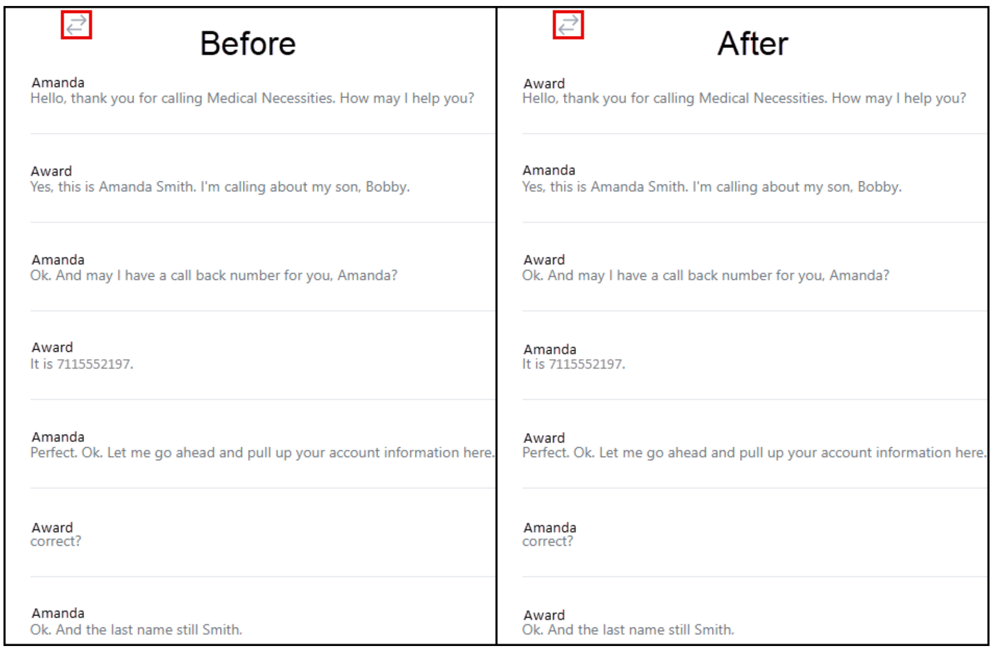
- If the agent spoke, the agent's Login Name is displayed.

- If a caller spoke, their subscriber name is displayed as passed to IS via the Automatic Number Identification (ANI). If their subscriber name is not available, the phone number provided by ANI is displayed.

Note: The NLP model used by Active Insights attempts to determine the speaker for each segment of the detailed transcript by analyzing the Combined Transcript and comparing it to the timing between speakers.

Swap

The Swap icon is displayed below the Combined Transcript and above the Detailed Transcript. The Swap icon is used to swap the speaker assigned to each section of the transcript segment.



To change the speaker assigned to each section of the transcript segment, click the Swap icon.

The agent and caller names are swapped for the transcript segment.

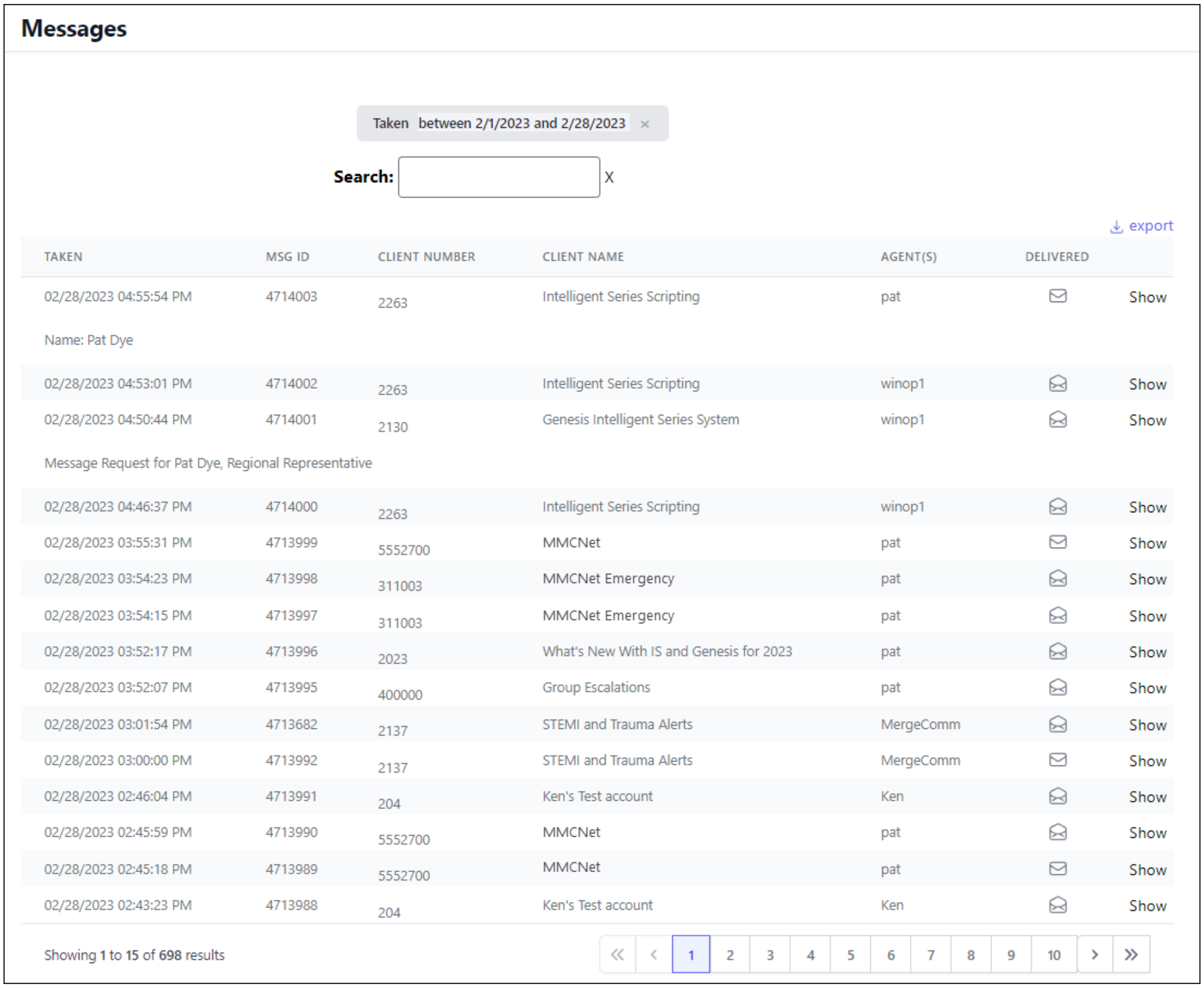
When the speakers are swapped for one or more segments of the transcript, the transcript can be rerun through a Post-Call Scoring Script to correct any scoring errors produced by the speaker being misidentified in the original scoring.

To rerun the call through a Post-Call Scoring Script, click the Menu icon, select the Run Script command, and select the script which you would like to run on the call.

The Call Information page displays the updated Post-Call Scoring results.

Messages

The Active Insight Messages page displays a list of messages stored in the Amazon S3 Cloud. The Message page enables users to filter stored calls by various parameters at the same time. Additional details can be viewed for each stored message.


Messages

Taken between 2/1/2023 and 2/28/2023 ×

Search: X

export

TAKEN	MSG ID	CLIENT NUMBER	CLIENT NAME	AGENT(S)	DELIVERED	
02/28/2023 04:55:54 PM	4714003	2263	Intelligent Series Scripting	pat		Show
Name: Pat Dye						
02/28/2023 04:53:01 PM	4714002	2263	Intelligent Series Scripting	winop1		Show
02/28/2023 04:50:44 PM	4714001	2130	Genesis Intelligent Series System	winop1		Show
Message Request for Pat Dye, Regional Representative						
02/28/2023 04:46:37 PM	4714000	2263	Intelligent Series Scripting	winop1		Show
02/28/2023 03:55:31 PM	4713999	5552700	MMCNet	pat		Show
02/28/2023 03:54:23 PM	4713998	311003	MMCNet Emergency	pat		Show
02/28/2023 03:54:15 PM	4713997	311003	MMCNet Emergency	pat		Show
02/28/2023 03:52:17 PM	4713996	2023	What's New With IS and Genesis for 2023	pat		Show
02/28/2023 03:52:07 PM	4713995	400000	Group Escalations	pat		Show
02/28/2023 03:01:54 PM	4713682	2137	STEMI and Trauma Alerts	MergeComm		Show
02/28/2023 03:00:00 PM	4713992	2137	STEMI and Trauma Alerts	MergeComm		Show
02/28/2023 02:46:04 PM	4713991	204	Ken's Test account	Ken		Show
02/28/2023 02:45:59 PM	4713990	5552700	MMCNet	pat		Show
02/28/2023 02:45:18 PM	4713989	5552700	MMCNet	pat		Show
02/28/2023 02:43:23 PM	4713988	204	Ken's Test account	Ken		Show

Showing 1 to 15 of 698 results

« ‹ 1 2 3 4 5 6 7 8 9 10 › »

To access the Messages page, click the Messages button in the Active Insights title bar.

The Messages page is displayed.

Messages Table

The Messages table displays message listings in Cloud Storage that meet all active filters.

Note: By default, the table displays data filtered by its Default Search. More information about Default Searches is provided in Appendix C: Default Search.

The Messages table has the following columns.

Column	Description
Taken	The Taken column displays the date and time that each message was taken.

Messages

Column	Description
Msg ID	The Msg ID column displays the unique sequential serial number assigned to the message.
Client Number	The Client Number column displays the Client Number of the client on which the message is saved.
Client Name	The Client Name columns displays the Client Name assigned to the Client Number in the Client Setup pages of Web Supervisor or Intelligent Series (IS) Supervisor.
Agent(s)	The Agent(s) column displays the Login Name of the agent or agents that edited or annotated the message.
Delivered	The Delivered column displays an icon indicating whether the message is delivered. • If the message is delivered, the Opened icon is displayed. • If the message is not delivered, the Closed icon is displayed.

A listing range and navigation bar are shown below the Messages table.

More information about listing ranges and navigation bars is provided in Appendix A: Table Navigation.

The right-most column of the Messages table displays the Show hyperlink for each message listing. The Show hyperlink enables the user to view message information for the message listing.

To display the Message Information page for a message, click the Show command to the right of the Message listing.

The Message Information page is displayed.

Searching the Message Table

The Search field is used to select a search parameter by which you would like the Messages table filtered. The Search field can be used to create filters that can be applied to the Messages table simultaneously.

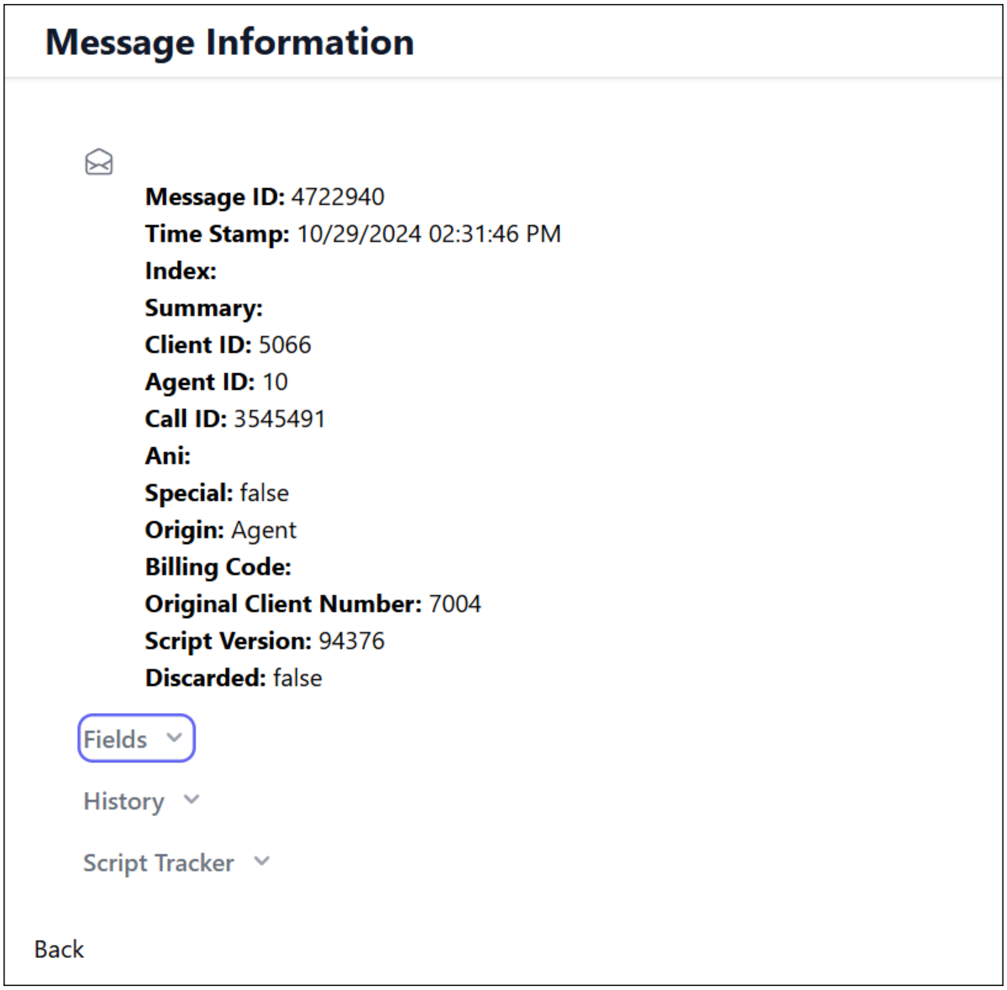
More information about the search parameters is provided in Appendix B: Filters.

Message Information

The Message Information page is used to view detailed message information. Either a Closed icon or an Opened icon is displayed at the top of the Message Information page, depending on whether the message is marked as Delivered. The Message information page displays the base information about the message, a Fields section, a History section, and a Script Tracker section.

To display the Message Information page for a call, click the Show command to the right of the Message listing in the Messages table.

The Message Information page is displayed.



Fields

The Fields section is hidden by default.

To expand the Fields section, click the Fields command.

The Fields section is expanded.

The Fields section contains the Annotations field, the Fields field, and the Revisions field.

Annotations

The Annotations field displays the text of all annotations entered for the message.

Fields

The Fields field displays a list of all Message Script Fields contained within the Intelligent Messaging Script used to create the message. The Fields field contains the name of the Message Script Field and the value it contains for the message.

Revisions

The Revisions field contains the number of revisions made to the message.

To hide the Fields section, click the Fields command again.

The Fields section is hidden.

History

The History section is hidden by default.

To expand the History section, click the History command.

The History section is expanded.

The History section displays the IS Message History for the message.

To hide the History section, click the History command again.

The History section is hidden.

Script Tracker

The Script Tracker section is hidden by default.

To expand the Script Tracker section, click the Script Tracker command.

The Script Tracker section is expanded.

The Script Tracker section displays Script Events that occurred for the Intelligent Messaging script that was used to create the message.

The Script Tracker pane displays information about each Script Event that occurred for the message. Script Events are displayed in the order that they occurred, with Script Events that occurred first appearing highest.

Date and Time

The date and time that each Script Event occurred is displayed at the top of the data for that Script Event.

Agent ID

The Agent ID line displays the unique ID number assigned to the agent involved in the Script Event.

Agent Name

The Agent Name line displays Login Name of the agent involved in the Script Event.

List ID

The List ID line displays the unique ID number assigned to the IS Directory Listing associated with the Script Event. If no Listing is associated with the event, a 0 (zero) is displayed.

Station Type

The Station Type line displays the type of station involved in the Script Event.

Station Number

The Station Number line displays the Station Number of the station involved in the Script Event.

Client Number

The Client Number line displays the Client Number of the client on which the script was running.

Type

The Type line displays the type of Script Event that occurred.

Value

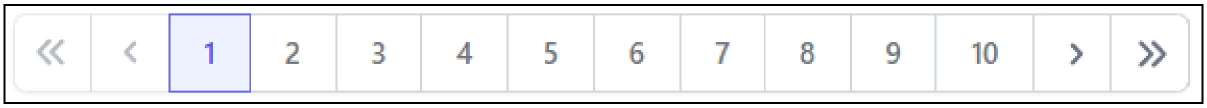
The Value line displays the value associated with the Script Event, if any.

To hide the Script Tracker section, click the Script Tracker command again.

The Script Tracker section is hidden.

Appendix A—Table Navigation

Table navigation bars are used to change which page of listings you are viewing. Each table navigation bar includes a First (<<) button, a Previous (<) button, a Next (>) button, a Last (>>) button, and a series of Page buttons determined by the amount of listings, up to a maximum of 10.



Page

The Page buttons are used to select what page of results you would like to view. The number of Page buttons displayed is determined by the number of pages of available listings, up to a maximum of 10 Page buttons. Page buttons are labeled in ascending order with a number representing the page of listings to which it navigates.

To display a specific page of listings, click the corresponding page number.

First (<<)

The First button is used to display the first page of results. This button has no effect if you are currently viewing the first page of listings.

To display the first page of listings, click the First (<<) button.

Previous (<)

The Previous button is used to display the page of search results with a page number one lower than the current page. This button has no effect if you are currently viewing the first page of listings.

To display the previous page of listings, click the Previous (<) button.

Next (>)

The Next button is used to display the page of search results with a page number one higher than the current page. This button has no effect if you are currently viewing the last page of listings.

To display the next page of listings, click the Next (>) button.

Last (>>)

The Last button is used to display the last page of results. This button has no effect if you are currently viewing the last page of listings.

To display the last page of listings, click the Last (>>) button.

Return to Usage

Return to Call Logs

Return to Messages

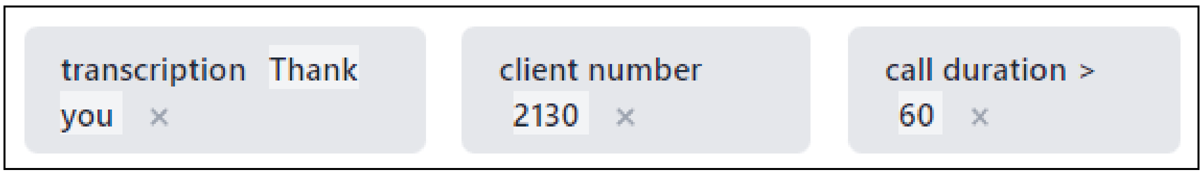
Appendix B—Filters

Filters are used to limit the information displayed in the Client Usage table, the Dashboard, the Call Logs, and the Messages page. Filters are created by selecting a search parameter and adding a value or values to allow through the filter. Some search parameters have unique methods for selecting one or more values.

Multiple filters can be active at one time, but each search parameter can only be used by one active filter for the table. Attempting to create a filter with a search parameter that is already used by an active filter will remove the active filter and replace it with the new filter.

Active Filters

All active filters are applied cumulatively, and only results that meet all active filters are displayed.



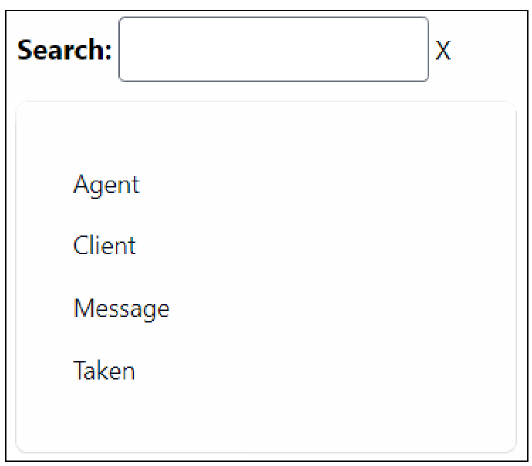
A Filter pane is displayed near the Search field for each filter that is active for the list. Each Filter pane displays the search parameter, the value, and a Remove icon.

Adding a Filter

Each filter requires a search parameter and a value. The search parameter determines what data type is being filtered. The value determines what value of the data type is allowed through the filter.

To create a filter, click the Search field.

A menu of available search parameters for the data is displayed.



Select a search parameter.

A menu is displayed for the search parameter. The menu displays one or more fields for setting values for the search parameter. Some search parameters have more than one method of setting values.

Enter the value or values according to the search parameter. The filter is applied to the data, and a Filter pane for the filter is displayed.

Removing a Filter

A filter limits the listings displayed in a table as long as it is active. Filters can be deactivated and removed using the Remove icon. ✕

To remove a filter, click the Remove icon. ✕

The filter is removed, and the data is no longer limited by the removed filter.

Modifying a Filter

Filters that contain a hyperlink can be modified without deleting the filter.

To modify a filter, click the hyperlink on the filter.

The filter pane is displayed.

Edit the filter similar to how the filter would be added.

The Filter pane is updated to display the new search parameters.

Search Parameters

Search parameters are used to filter call listings in the Calls table, message listings in the Messages table, and storage listings in the Client Storage table. Some search parameters have unique methods for adding values or filtering data.

Only certain search parameters are available for each table in the Active Insights platform. If a search parameter is available for more than one table, the methods for adding a value or values to the search parameter are the same.

The following search parameters may be used to filter a table in Active Insights:

Parameter	Description
ANI	The ANI search parameter is used to display dashboard data or call listings associated with the selected Automatic Number Identification (Caller ID) phone number.
Agent	The Agent search parameter is used to display dashboard data, call listings, or message listings associated with the selected agent Login Name.
Agent Abandon	The Agent Abandon search parameter is used to display call listings based on whether the caller hung up after the call was assigned to an agent but before the agent answered the call.
Agent Abandon Duration	The Agent Abandon Duration search parameter is used to display call listings based on the number of seconds between when the call was assigned to an agent and when the caller hung up before the call was answered.
Answer Time	The Answer Time search parameter is used to display dashboard data or call listings based on how long it took for the call to be answered.
Call ID	The Call ID search parameter is used to display the call listing with the unique Call ID number entered.

Parameter	Description
Client	The Client search parameter is used to display storage listings, dashboard data, call listings, or message listings associated with the selected client or any client in the selected range.
Date	The Date search parameter is used to display storage listings, dashboard data, or call listings for clients that have stored call information within the selected date range.
Duration	The Duration search parameter is used to display call listings based on the duration of the call.
Marked For Review	The Marked For Review search parameter is used to display call listings based on whether the listing has been marked for review.
Media	The Media search parameter is used to display call listings based on whether the listing includes specific types of media.
Message	The Message search parameter is used to display call listings with associated messages or message listings that contain the entered text.
Post Call	The Post Call search parameter is used to display call listings based on a Post Call Analytics information.
Reviewed Scores	The Reviewed Scores search parameter is used to display call listings based on whether the listing has been reviewed.
Skill	The Skill search parameter is used to display dashboard data and call listings that were assigned to the selected Automated Call Distribution (ACD) Skill.
System Abandon	The System Abandon search parameter is used to display call listings based on whether the caller hung up when the call was not assigned to an agent.
Transcription	The Transcription search parameter is used to display call listings with call transcriptions that contain the entered text.
Taken	The Taken search parameter is used to display messages listings for messages taken within the selected date range.

Instructions for creating a filter for each search parameter are provided below.

To cancel creating a filter at any point in the process, click the Cancel icon X next to the Search field.

The search parameter menu is closed and the Search field is cleared.

Note: Clicking the Cancel icon X in the Search field does not remove any filters that have already been created.

ANI

The ANI search parameter is used to display dashboard data or call listings associated with the selected Automatic Number Identification (Caller ID) phone number.

To create a filter using the ANI search parameter, select the ANI search parameter.

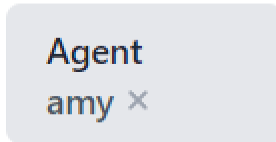
An ANI field is displayed.

Enter the phone number that you would like used with the ANI search parameter.

A Filter pane is displayed for the filter.

Only listings of calls associated with the selected ANI are displayed.

Agent



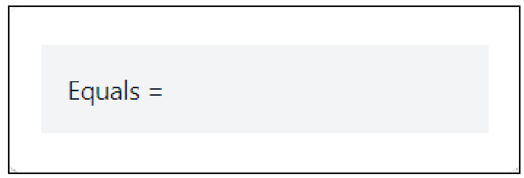
The Agent search parameter is used to display dashboard data, call listings, or message listings associated with the selected Agent.

To create a filter using the Agent search parameter, select the Agent search parameter.

The “Equals =” modifier is displayed.

Select the “Equals =” modifier.

An equals (=) sign is added to the Search field, and a list of agents is displayed.

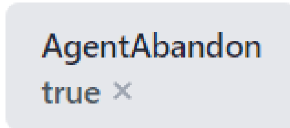


Select the Login Name of the agent that you would like used with the Agents search parameter.

A Filter pane is displayed for the filter.

Only listings associated with selected agent are displayed.

Agent Abandon



The Agent Abandon search parameter is used to display call listings based on whether the caller hung up after the call was assigned to an agent but before the call was answered by the agent.

To create a filter using the Agent Abandon search parameter, select the Agent Abandon search parameter.

The “Equals =” modifier is displayed.

Select the “Equals =” modifier.

The Search field is selected.

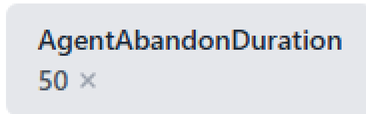
To display calls that were agent abandons, type “true.”
OR
To display calls that were not agent abandons, type “false.”

Press the ENTER key.

A Filter pane is displayed for the filter.

Only listings for calls that either were or weren’t agent abandons are displayed.

Agent Abandon Duration



The Agent Abandon Duration search parameter is used to display call listings based on the number of seconds between when the call entered the system and when the caller hung up for calls which were distributed to an agent but the caller hung up before the call was answered.

To create a filter using the Agent Abandon Duration search parameter, select the Agent Abandon Duration search parameter.

The “Less than <” and “Greater than >” modifiers are displayed.

To search for calls with an agent abandon duration less than a certain value, select “Less than <.”
OR
To search for calls with an agent abandon duration greater than a certain value, select “Greater than >.”

A Less-Than sign (<) or a Greater-Than sign (>) is displayed in the Search field, and the Search field is selected.

Enter the value to which you would like the agent abandon duration compared.

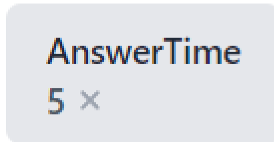
Press the ENTER key.

A Filter pane is displayed for the filter.

Only listings or call data for calls with an agent abandon duration greater than or less than the entered value are displayed.

Note: Agent abandon duration values equal to the selected value are not displayed.

Answer Time



The Answer Time search parameter is used to display dashboard data and call listings based on how long it took for the calls to be answered.

Note: The Dashboard uses the Answered filter. The Answered filter has the same functionality.

To create a filter using the Answer Time search parameter, select the Answer Time search parameter.

A list of modifiers is displayed.

The “Less than <” and “Greater than >” modifiers are displayed

To search for calls with an answer time less than a certain value, select “Less than <.”
OR
To search for calls with an answer time greater than a certain value, select “Greater than >.”

A Less-Than sign (<) or a Greater-Than sign (>) is displayed in the Search field, and the Search field is selected.

Enter the value to which you would like the call answer times compared.

Press the ENTER key.

A Filter pane is displayed for the filter.

Only listings or call data for calls with an answer time greater than or less than the entered value are displayed.

Note: Answer time values equal to the selected value are not displayed.

Call ID

The Call ID search parameter is used to display the call listing with the unique Call ID number entered.

To create a filter using the Call ID search parameter, select the Call ID search parameter.

A Call ID field is displayed.

Enter the Call ID number that you would like used with the Call ID search parameter.

A Filter pane is displayed for the filter.

Only the listing with the matching Call ID is displayed.

Client

The Client search parameter is used to display storage listings, report listings, dashboard data, call listings, or message listings associated with an individual client, a client within a range of clients, or client belonging to a client group.

To create a filter using the Client search parameters, select the Client search parameter.

The Client pane is displayed

The Client pane contains the Single Client tab, the Client Range tab, and the Client Group tab. The Single Client tab is selected by default.

Single Client

The Single Client tab is used to select and create a filter for an individual client. The Single Client tab contains the Client field.

To display listings associated with an individual client listings:

- **Select the Client field.**

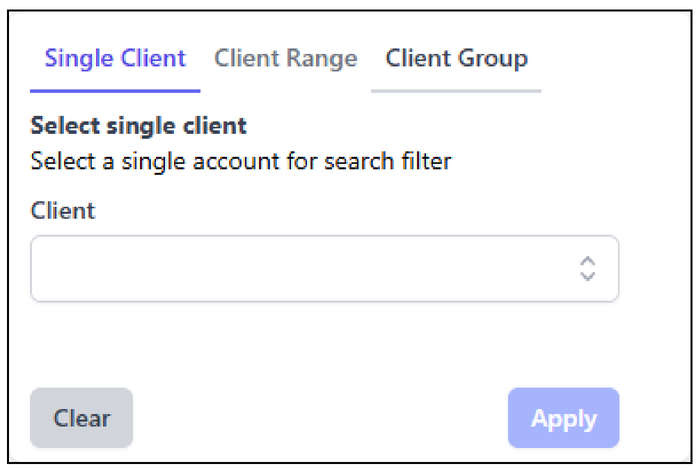
  The Client list is displayed.

- **Select the desired client.**

- **To create a filter for the client, click the Apply button below the Client field.**
  OR
  To cancel creating a client filter, click the Clear button.

  If Apply was selected, a Filter pane is displayed for the filter.

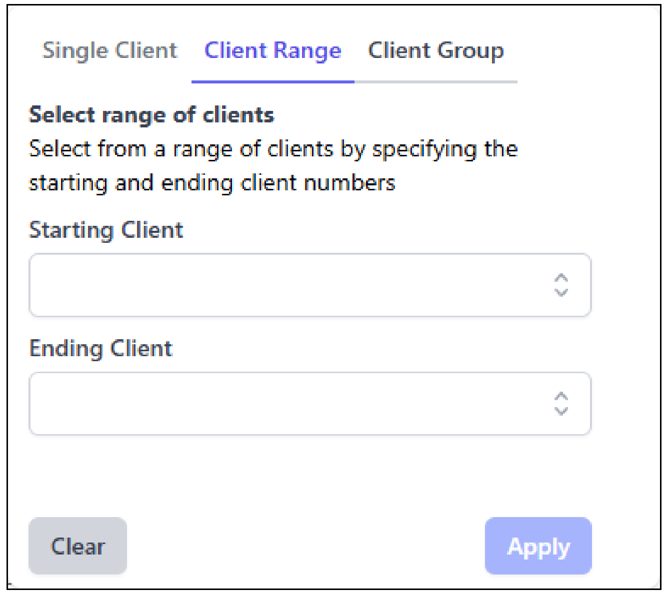
  Only listings associated with the selected client are displayed.



Client Range

The Client Range tab is used to select and create a filter for a range of clients. The Client Range tab contains the Starting Client field and the Ending Client field.

To display listings or data associated with any clients within a range of Client Numbers:



- **Select the Start Client field.**

  The client list is displayed.

- **Select the first client in the range of clients you would like displayed.**

- **Select the End Client field.**

  The client list is displayed.

- **Select the last client in the range of clients you would like displayed.**

- **To create a filter for the client range, click the Apply button below the Client field.**
  OR
  To cancel creating a client filter, click the Clear button.

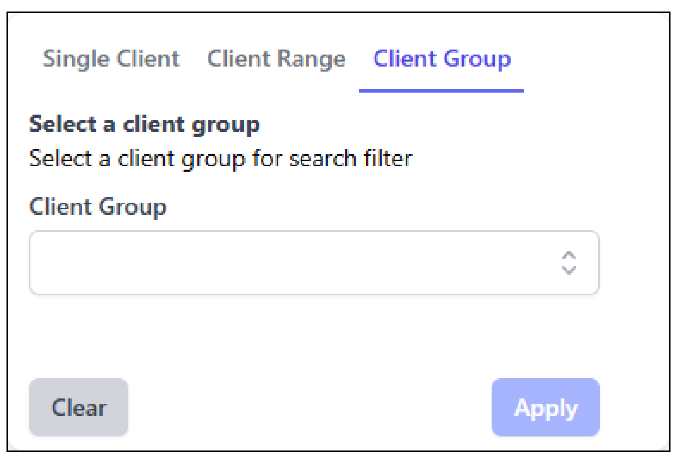
  If Apply was selected, a Filter pane is displayed for the filter.

  Only listings associated with clients within the selected client range are displayed.

Client Group

The Client Group tab is used to select and create a filter for a Client Group created on the Client Settings page. The Client Group tab contains the Client Group field.

To display listings or data associated with clients included in a Client Group:



- **Select the Client Group field.**

  The Client Group list is displayed.

- **Select the desired Client Group.**

- **To create a filter for the Client Group, click the Apply button below the Client field.**
  OR
  To cancel creating a client filter, click the Clear button.

  If Apply was selected, a Filter pane is displayed for the filter.

  Only listings associated with the clients included in the selected Client Group are displayed.

Date

The Date search parameter is used to display storage listings, dashboard data, or call listings for clients that have stored call information within the selected date range.

To create a filter using the Date search parameter, select the Date search parameter.

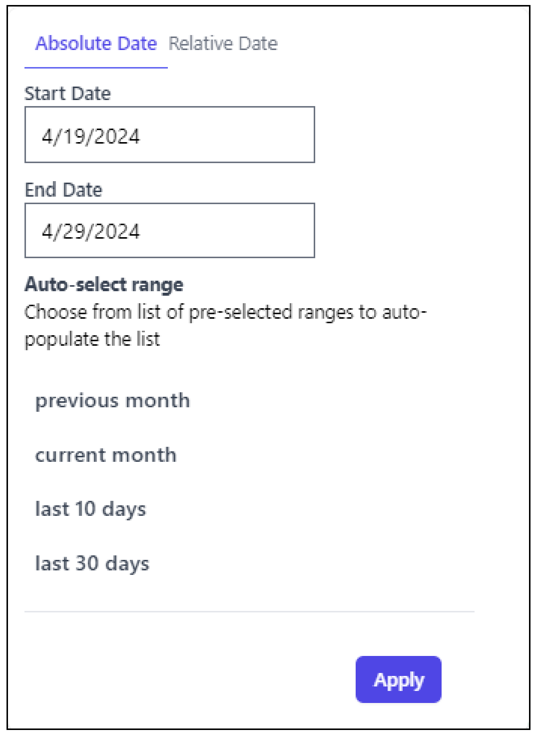
The Date parameter contains an Absolute Date tab and a Relative Date tab.

Absolute Date

The Absolute Date tab is used to display listings for a set date or date range. The Absolute Date tab contains the Start Date field, the End Date field, and the Auto-Select Range section.

To manually set a date range:

- **Enter the first date of the desired date range in the Start Date field in MM/DD/YYYY format.**
- **Enter the last date of the desired date range in the End Date field in MM/DD/YYYY format.**



To use an Auto-Select Range:

- **Click a hyperlink in the Auto-Select Range section.**
- If "Previous Month" is selected, the Start Date is populated with the first date of the previous month and the End Date is populated with the last date of the previous month.
- If "Current Month" is selected, the Start Date is populated with the first date of the current month, and the End Date is populated with the last date of the current month.
- If "Last 10 days" is selected, the Start Date is populated with the date that occurred 10 days previous, and the End Date is populated with the current date.
- If "Last 30 days" is selected, the Start Date is populated with the date that occurred 30 days previous, and the End Date is populated with the current date.

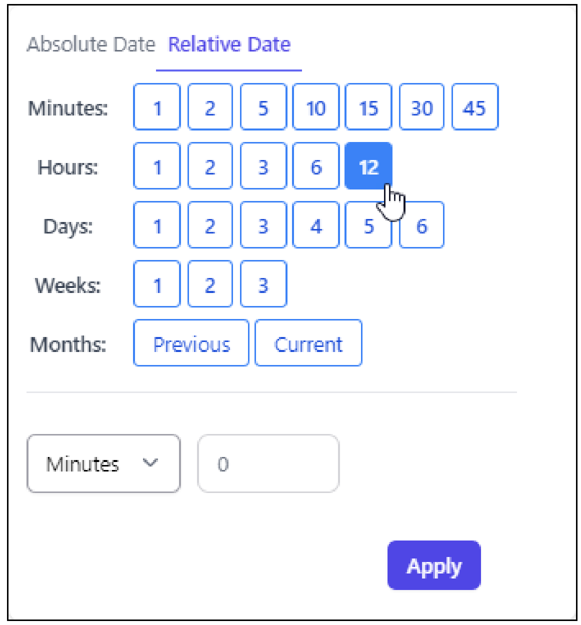
Click the Apply button.

The date range is displayed in the filter, and only information for the entered date range is displayed.

Relative Date

The Relative tab is used to display listing for an amount of time relative to the current day. The Relative Date tab contains a series of preset relative date and time buttons, a Units menu, and a Value field.

To choose a preset relative date or time, select the button with the number of the unit of time by which you would like the panel filtered.



The amount of time selected is displayed, and the panel is filtered to display information for that amount of time before the current date or time up to the present.

To manually set a relative date or time:

- **Select a unit of time in the Units menu.**
- **Enter the number of the selected units for which you would like information displayed previous to the current date or time.**
- **Click the Apply button.**

  The amount of time selected is displayed, and only listings or data that occurred within that amount of time before the current date or time up to present are displayed.

Duration

The Duration search parameter is used to display call listings depending on the call's duration.

To create a filter using the Duration search parameter, select the Duration search parameter.

A list of modifiers is displayed.

The "Less than <" and "Greater than >" modifiers are displayed

To search for calls with a duration in sections less than a certain value, select "Less than <."
OR
To search for calls with a duration in sections time greater than a certain value, select "Greater than >."

A Less-Than sign (<) or a Greater-Than sign (>) is displayed in the Search field, and the Search field is selected.

Enter the value to which you would like the call answer times compared.

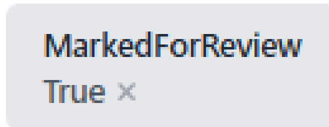
Press the ENTER key.

A Filter pane is displayed for the filter.

Only listings for calls with a duration greater than or less than the entered value are displayed.

Note: Duration values equal to the selected value are not displayed.

Marked For Review



The Marked For Review search parameter is used to display call listings that have been marked for review.

To create a filter using the Marked For Review search parameter, select the Marked For Review search parameter.

The “Equals =” modifier is displayed.

Select the “Equals =” modifier.

The “MarkedForReview =” prefix is displayed in the Search field, and the “True” and “False” values are displayed.

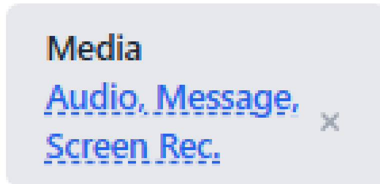
To display calls that are marked for review, select “True.”
OR
To display calls that are not marked for review, select “False.”

Note: Calls which were marked for review but were then marked as Reviewed are displayed when the Marked For Review filter is set to False.

A Filter pane is displayed for the filter.

Only listings that either are or are not marked for review are displayed.

Media



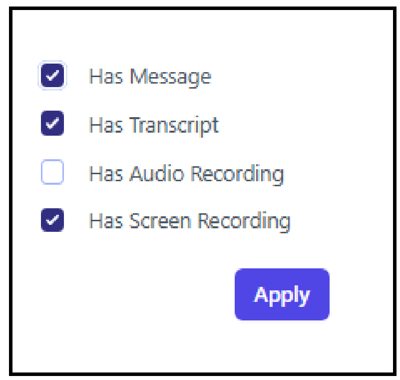
The Media search parameter is used to display call listings that contain specific types of media.

To create a filter using the Media search parameter, select the Media search parameter.

The "Media" modifier is displayed, and a check box is displayed for each type of media by which the listings can be filtered.

Select the check box next to each media type you would like displayed call listings to include.

The following check boxes are available:



Has Message

If the "Has Message" check box is selected, only call listings which have messages are displayed.

Has Transcript

If the "Has Transcript" check box is selected, only call listings which have transcripts are displayed.

Has Audio Recording

If the "Has Audio Recording" check box is selected, only call listings which have audio recordings are displayed.

Has Screen Recording

If the "Has Audio Recording" check box is selected, only call listings which have screen recordings are displayed.

To create the filter, click the Apply button.

A Filter pane is displayed for the filter.

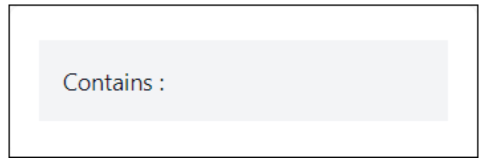
Only call listings that contain all of the selected media types are displayed.

Message

The Message search parameter is used to display call listings or message listings with associated messages that contain the entered text.

To create a filter using the Message search parameter, select the Message search parameter.

The “Contains :” modifier is displayed



Select the “Contains :” modifier.

The “Message :” prefix is displayed in the Search field, and the Search field is selected.

Enter the text you would like used with the Message search parameter in the Search field after the “Message :” prefix.

Press the ENTER key.

A Filter pane is displayed for the filter.

Only listings with associated messages that contain the entered text are displayed.

Message ID

The Message ID search parameter is used to display the message listing with the unique Message ID number entered.

To create a filter using the Message ID search parameter, select the Message ID search parameter.

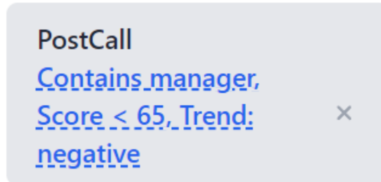
A Message ID field is displayed.

Enter the Message ID number that you would like used with the Message ID search parameter.

A Filter pane is displayed for the filter.

Only the listing with the matching Message ID is displayed.

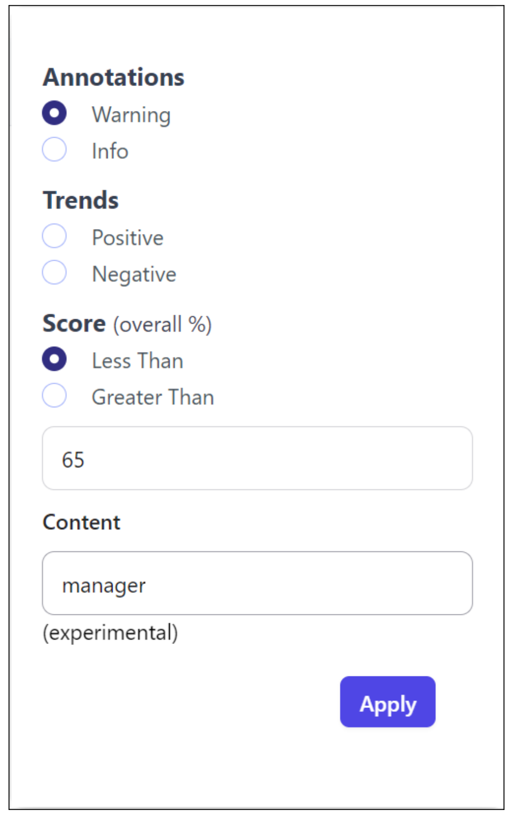
Post Call



The Post Call search parameter is used to display call listings based on the Post Call Analytics data given to the call.

To create a filter using the Post Call search parameter, select the Post Call search parameter.

The Post Call menu is displayed.



The Post Call menu contains options that determine how the Post Call search parameter filters call listings. The filter pane contains the Annotations, Trends, Score and Content categories.

Multiple categories can be customized for the filter. When values are selected or entered for multiple categories, only call listings for calls that match all categories are displayed.

Select options or enter values for any categories by which you would like call listings filtered.

Annotations

The Annotations category is used to filter call listings based on whether an annotation was given to the call and the type of annotation. Only one Annotations option can be selected.

To filter call listings by the annotation given to the call, select an option under the Annotations category.

Warning

If “Warning” is selected, only call listings for calls which were given a warning annotation are displayed.

Info

If “Info” is selected, only call listings for calls which were given an info annotation are displayed.

Trends

The Trends category is used to filter call listings based on whether a trend was given to the call and the type of trend. Only one Trends option can be selected.

To filter call listings by trend given to the call, select an option under the Trends category.

Positive

If “Positive” is selected, only call listings for calls which were given a positive trend are displayed.

Negative

If “Negative” is selected, only call listings for calls which were given a negative trend are displayed.

Content

The Content field is used to only display call listings which contain one or more words entered in the Content field. A call listing is displayed if a match is found in the post call analytics section, the call and message data lists, or the call transcript.

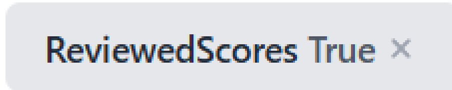
Note: Multiple words may be entered in the Content field, separated by spaces. If multiple words are entered in the Content field, call listings are displayed if call data for the call contains any of the words entered.

To apply the filter with the configurations made to the Annotations, Trends, Score, and Content categories, click the Apply button.

A Filter pane is displayed for the filter.

Only listings that meet the configured criteria are displayed.

Reviewed Scores



The Reviewed Scores search parameter is used to display call listings based on whether they have been reviewed.

To create a filter using the Reviewed Scores search parameter, select the Reviewed Scores search parameter.

The “Equals =” modifier is displayed.

Select the “Equals =” modifier.

The “ReviewedScores =” prefix is displayed in the Search field, and the “True” and “False” values are displayed.

To display calls that have are marked as reviewed, select “True.”
OR
To display calls that are not marked as reviewed, select “False.”

A Filter pane is displayed for the filter.

Only listings that either are or are not marked as Reviewed are displayed.

Skill

The Skill search parameter is used to display dashboard data or call listings for calls that were assigned to a specific Automated Call Distribution (ACD) Skill.

To create a filter using the Skill search parameter, select the Skill search parameter.

The “Equals =” modifier is displayed.

Select the “Equals =” modifier.

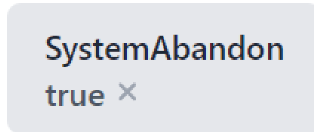
An equals sign is added to the Search field, and a list of ACD Skills are displayed.

Select the ACD Skill by which you would like call listings filtered.

A Filter pane is displayed for the filter.

Only call listings or data for calls assigned to the selected ACD Skill are displayed.

System Abandon



The System Abandon search parameter is used to display call listings based on whether the caller hung up when the call was not assigned to an agent.

To create a filter using the System Abandon search parameter, select the System Abandon search parameter.

The “Equals =” modifier is displayed.

Select the “Equals =” modifier.

An equals sign (=) is added to the Search field, and the Search field is selected.

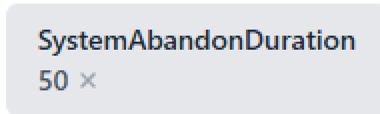
To display calls that were disconnected by the system, type “true.”
OR
To display calls that were not disconnected by the system, type “false.”

Press the ENTER key.

A Filter pane is displayed for the filter.

Only listings for calls that either were or weren’t system abandons are displayed.

System Abandon Duration



The System Abandon Duration search parameter is used to display call listings based on the number of seconds between when the call entered the system and when the caller hung up before the call was distributed to an agent.

To create a filter using the System Abandon Duration search parameter, select the System Abandon Duration search parameter.

The “Less than <” and “Greater than >” modifiers are displayed.

To search for calls with a system abandon duration less than a certain value, select “Less than <.”
OR
To search for calls with a system abandon duration greater than a certain value, select “Greater than >.”

A Less-Than sign (<) or a Greater-Than sign (>) is displayed in the Search field, and the Search field is selected.

Enter the value to which you would like the system abandon duration compared.

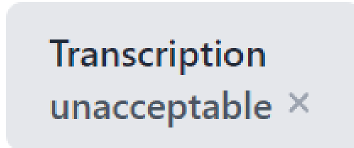
Press the ENTER key.

A Filter pane is displayed for the filter.

Only listings or call data for calls with a system abandon duration greater than or less than the entered value are displayed.

Note: System abandon duration values equal to the selected value are not displayed.

Transcription



The Transcription search parameter is used to display call listings with associated transcriptions that contain the entered text.

To create a filter using the Transcription search parameter, select the Transcription search parameter.

A list of modifiers is displayed.

Currently only the Contains modifier can be used with the Transcription search parameter.

Select the Contains modifier.

The "Transcription :" prefix is displayed in the Search field.

Enter the text you would like used with the Transcription search parameter in the Search field after the "Transcription :" prefix.

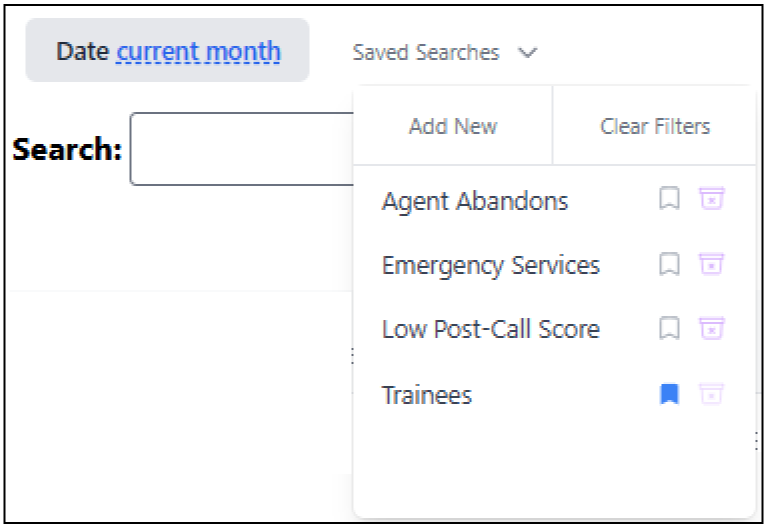
Press the ENTER key.

A Filter pane is displayed for the filter.

Only listings with associated transcriptions that contain the entered text are displayed.

Return to Usage
Return to Reports
Return to Call Logs
Return to Messages

Appendix C—Saved Searches



The Saved Searches pane is used to access, manage, and select Saved Searches. One or more filters are saved to each Saved Search. When a Saved Search is selected, the filters saved to the Saved Search are applied, and a Filter pane is displayed for each filter.

To open the Saved Searches pane, click the Saved Searches command.

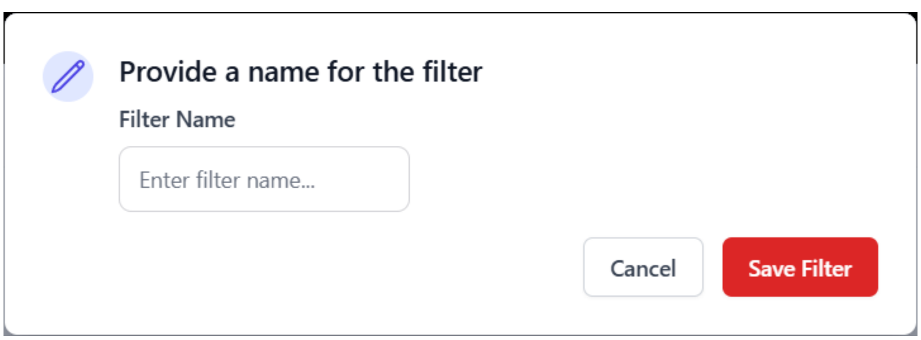
The Saved Searches pane contains a list of Saved Searches for the Call Log page and Messages page.

The Saved Searches pane contains the Update command, the Add New button, the Clear Filters button, and the Saved Searches list.

Adding a New Saved Search

The Add New button is used to create a new Saved Search. The Add New button creates a new Saved Search based on the currently applied filters.

To create a new Saved Search, create any filters you would like contained by the Saved Search, and then click the Add New button.



A Filter Name prompt is displayed.

Enter a name for the Saved Search in the Filter Name field.

Click the Save Filter button.
OR
To cancel creating the filter, click the Cancel button.

If the Save Filter button was clicked, the Saved Search is created.

Selecting a Saved Search

Saved Searches are used to quickly apply a saved set of filters.

To apply a Saved Search, click a Saved Search listing.

The filters saved to the Saved Search are applied.

Updating a Saved Search

Saved Searches can be assigned different filters using the Saved Searches pane.

To update the filters saved to a Saved Search, select a Saved Search.

The filters saved to the Saved Search are applied.

Add, remove, and edit the displayed filters.

Click the Saved Searches command.

The Saved Searches pane is displayed.

Click the Update command.

The current filters are saved to the selected Saved Search.

Clearing Filters

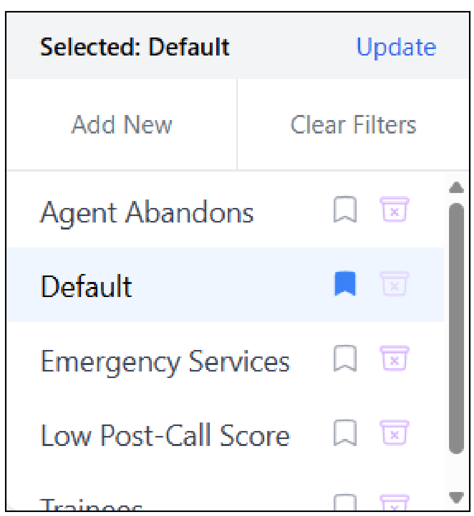
The Clear Filters button is used to clear the current filters.

To clear the current filters, click the Clear Filters button.

All filters except for the Date filter are removed.

Saved Searches

The Saved Searches list displays a list of Saved Searches. Each Saved Search listing contains a Default icon and a Remove icon.



Default

The Default icon is used to mark the Saved Search as default. If a Saved Search is marked as default, the filters contained by the Saved Search are loaded by default when the page containing the associated Search field is displayed.

Only one Saved Search can be marked as default at once. If another Saved Search is marked as default, the original Saved Search is no longer marked as default, and the new Saved Search is marked as default.

To mark a Saved Search as default, click the Default icon next to a Saved Search.

The Default icon is filled and the Remove icon is disabled.

Remove

The Remove icon is used to remove the Saved Search from the Saved Searches list.

To remove a Saved Search from the Saved Searches list, click the Remove icon.

The Saved Search is removed from the Saved Search list.

Note: The Saved Search marked as default cannot be removed, and when a Saved Search is marked as default, the Remove icon for the Saved Search is disabled. To enable the Remove icon for the default Saved Search, mark a different Saved Search as default.

Documentation Change Log

Software Version	Document Section	Changes	Published Date
0.3.95	Usage Page	Removed Client Usage table from the Usage Page.	6/27/2025
0.3.89	Appendix B	Updated the Client filter and added Agent Abandon Duration and System Abandon Duration	6/27/2025
0.3.89	Client Settings	Changed and added documentation for the Client settings rework.	6/27/2025
0.3.86	Appendix C	Removed Default Search documentation and added Saved Searches documentation.	6/27/2025
0.3.73	Call Information	NLP model helps assign the speaker and caller to transcript.	11/11/2024
0.3.74	Call Information	Transcript Swap Button.	11/11/2024
	Usage	AI Usage column added to the Usage Table.	11/11/2024
0.3.70	Appendices	Appendix C—Default Search added.	11/11/2024
0.3.64	Message Information	Added Message Fields section	11/11/2024
0.3.62	Call Export	PDF View check box added to the Call Export window.	11/11/2024
0.3.63	Usage	Active Insights now uses GPT-4o-mini.	11/11/2024
0.3.61	Call Information Edit Pane	Added Clear All command documentation.	11/11/2024
0.3.61	Appendix B	Added ReviewedScores Filter	11/11/2024
0.3.61	Appendix B	Added MarkedForReview Filter	11/11/2024
0.3.58	Script Editor	Mention of Post-Call Analytic Items	11/11/2024
0.3.57	Call Conditions	Added Messages section	11/11/2024
0.3.45	Appendix B	Added Media Filter	11/11/2024
0.3.32	Call Conditions	Added Recording Duration section	11/11/2024

Software Version	Document Section	Changes	Published Date
N/A	Script Editor	Removed Script Editor documentation to avoid overlap with *Script Editor Reference Guide.*	11/11/2024
N/A	Full Document	Replaced "NLP" with "NLP model."	11/11/2024
N/A	Notes and Change Log	Corrected page count issue	6/24/2024
N/A	Call Information	Updated description of Run Script command and documented Purge Call, Transcribe Call, Export, and Edit commands.	6/13/2024
N/A	Date Search Parameter	Added documentation for the Relative and Absolute tabs in the Date Search Parameter menu	6/13/2024
N/A	Full Document	Alt text added to images and icons	6/13/2024

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

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