

# XTR Reporting and Scoring System Guide for XTR Reporter Pro

A comprehensive guide to the XTR Reporting System



June 2009

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## Introduction

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About the XTR Reporting System

Features at-a-glance

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## About the XTR Reporting System

The XTR Reporting System is a module available in XTR Reporter Pro . It is designed to provide administrators with a system to generate usage and performance metrics for analysis and monitoring of the call recording environment. The XTR Reporting System is a turnkey solution with a complete suite of features and tools to effectively manage all aspects of the reporting process.



### Gathering Data

The XTR Reporting System utilizes WYSIWYG (what-you-see-is-what-you-get) for greater reporting flexibility and maximum control over data compilation and output. This allows you to generate a report Reports utilize recordings in the Recordings List you are working with to gather data. This allows you to refine the Recordings List using the Copy/Paste or Drag & Drop controls to add additional recordings, Sort, Filter and Trim controls to remove recordings, Show/Hide control to omit data fields and generate a report with a simple mouse-click which contains precisely the data you need.

### Report Selection

Reports can be generated from the Recordings List you are working with by simply clicking the report option in the reports menus. Reports are organized into two primary report types; log reports and analysis reports.

Recordings Lists Reports are log reports which are particularly useful if you would like to create a snapshot of the archive for auditing or tracking as well as an interface to playback recordings directly from the report.

Analysis reports generate statistical data in a tabular and graphical format. These reports consider visible recordings in the Recordings List as a population and provide two key types of data analysis perspectives. Comparative Analysis Reports create a group from recordings created by each agent and provide comparative information between the agents. Agent Specific Analysis Reports create a group from recordings created by a specific agent and a group from recordings created by all other agents combined to provide a comparative analysis between the agent and the population.

Analysis reports generate statistics to help you analyze and interpret usage and performance in your call recording environment. Usage analysis provide data metrics on call volume, disk usage, average call length, longest calls, most called numbers, longest recorded time numbers, call volume distribution over date span, call volume distribution at hourly intervals\* and call volume distribution at call length intervals\*.

Performance analysis is derived from Call Score agent assessment data which are created in XTR Reporter Pro with the Call Score module. Analysis of this performance data provides metrics on cumulative average evaluation scores, agent specific detailed cumulative average scores by assessment point in each evaluation as well as agent specific performance trends over days, weeks, months, quarters or years.

## Viewing Reports

Reports are outputted to the Reports Viewer Window which provides a print preview and tools to work with the report like page navigation, zoom controls and search tools. Page layouts and backgrounds are fully controllable as well as printer settings. The Reports Viewer Window also provides tools to save and email the report directly.

## Saving, Printing and Sharing Reports

Reports can be printed or saved directly from the Recordings List you are working with or outputted to the Reports Viewer Window for a preview before printing or saving. Reports can be saved in various file formats. This allows you to share or integrate the report in other application documents.

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## Interfaces

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Gathering and Defining Report Data

Selecting Reports

Viewing, Customizing and Saving

## Gathering and Defining Report Data

Reports utilize the recording information from all recordings contained in the Recordings List you are working to gather and output data based on your report selection.

Recordings Lists are an interactive and fully customizable catalog interface to recordings in the sources or archives you are working with, and feature numerous tools to gather and define the report data.

### Gathering Recording Information

- Recordings Lists can be compiled from single or multiple archives with attribute queries to pre-filter the files retrieved.
- Recordings Lists can also be compiled from Hotlists (a user definable favorites list), Call Score Tree (a user definable list of only scored recordings in XTR Reporter Pro), or a saved Recordings List file which retrieves only specified recordings.

### Data Mining

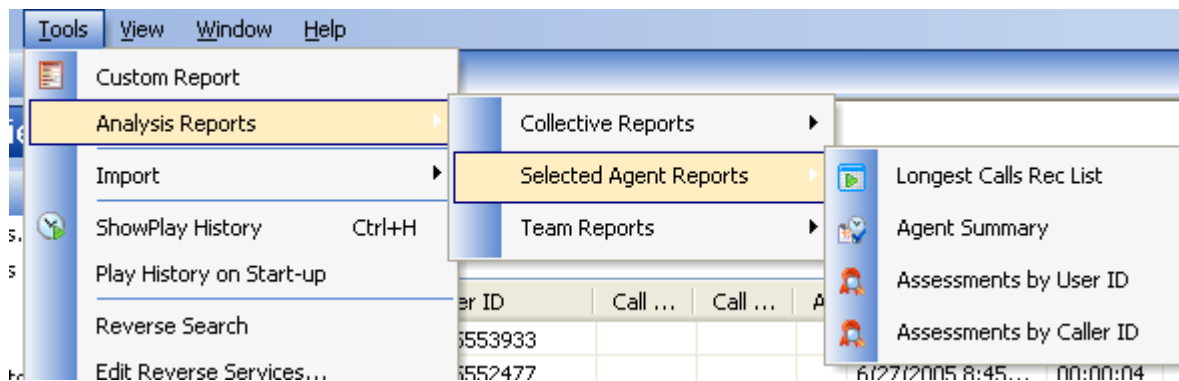
- Sort – order the Recordings List by data in any field.
- Group – create logical groups and subgroups of recordings by various criteria like User ID, Caller ID, Months or Days and more.
- Filter – hide recordings which do not match specific filter criteria in the filter field.
- Keyword Search – hide recordings which do not contain a keyword or phrase in a specific field or all fields.

### Defining Report Data

- Toggle and work with multiple Recordings Lists simultaneously to create custom Recordings Lists using Drag & Drop, Copy/Paste or Import controls.
- Further refine the data for the report by removing recordings from the Recordings List using Filter, Trim and Remove controls.

Recordings Lists are dynamic virtual documents which allow to use these add and remove tools without impacting the physical recorded file or recordings archive. This allows you to generate quickly and precisely the report you need with a simple mouse-click at anytime.

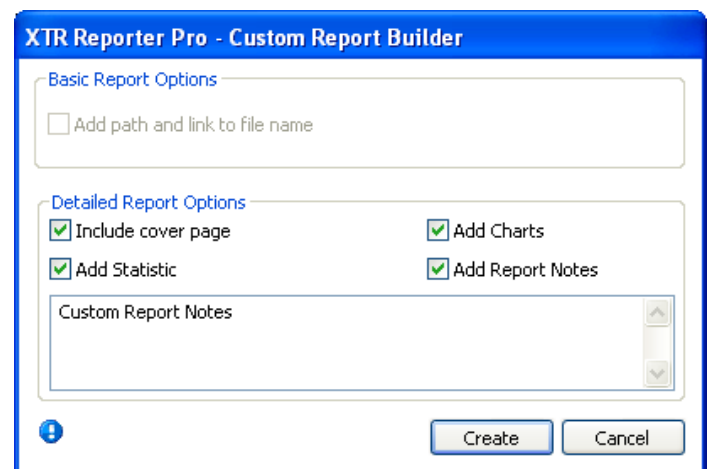
## Selecting Reports



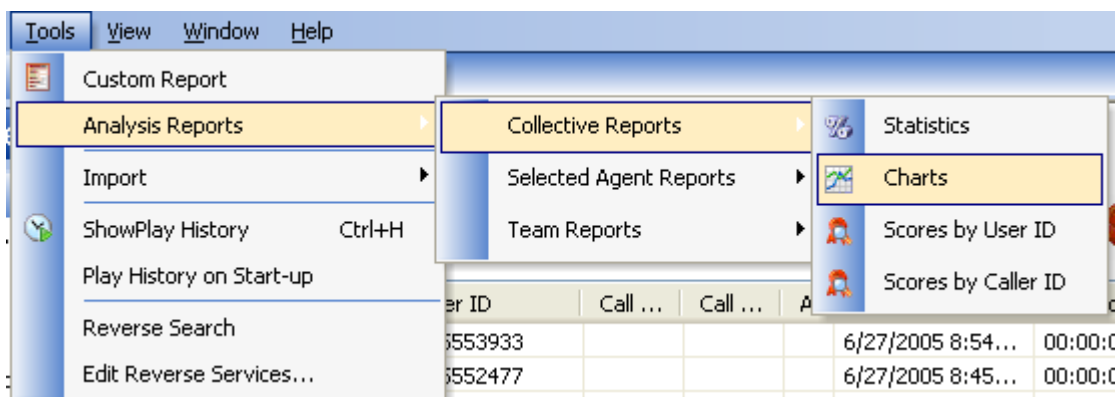
When ready to generate a report from the Recordings List you are working with, simply select the required report from the reports menus in the Tools area of the toolbar.

Recordings List Reports are accessible from the **Custom Report Menu (shown at right)**. Analysis Reports are accessible from the Analysis Reports Menu. Each menu provides a variety of report types and options.

For **Individual Agent Reports**, Analysis Reports menu option would be utilized (Shown in above example)



**Group Reports** can also be generated to compare agent performance to the group as shown below:

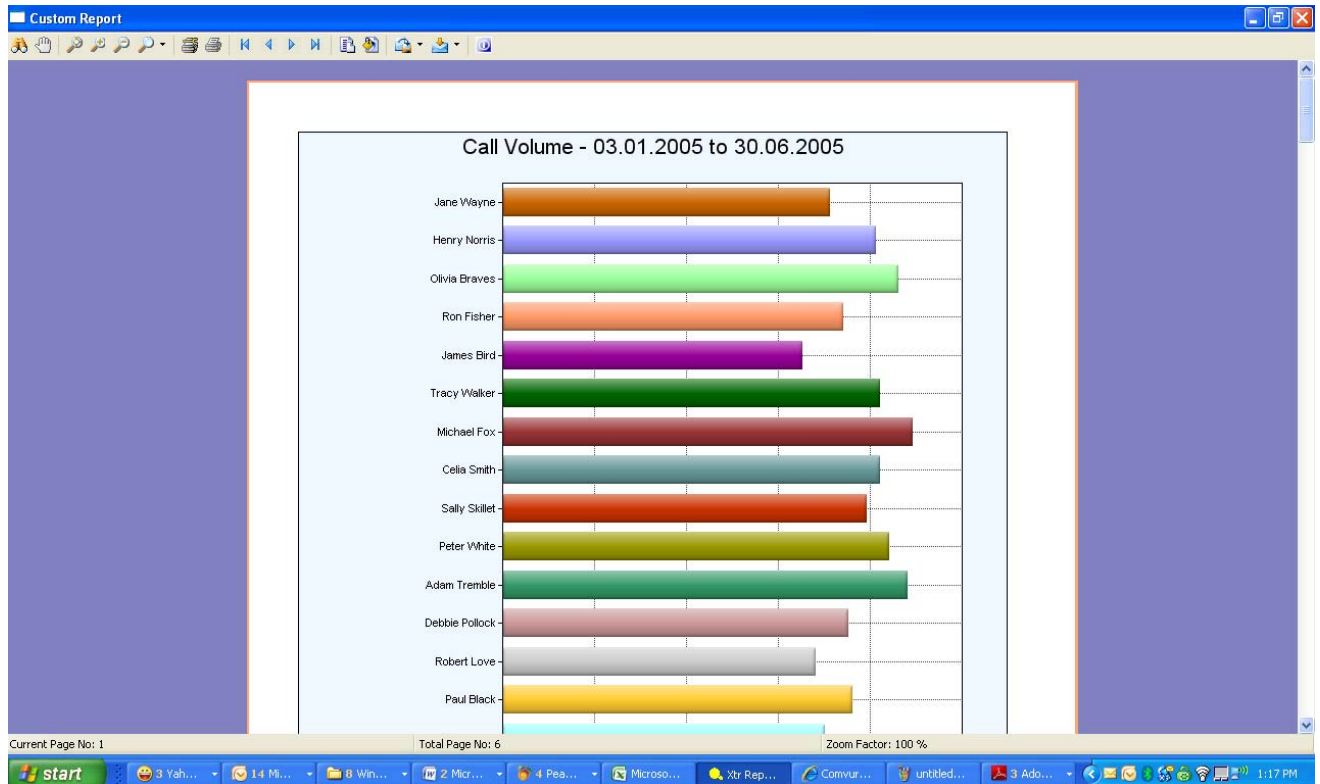


## Viewing, Customizing and Saving Reports

### Reports Viewer Window

Reports which are not exported or printed directly from the Recordings List (like Direct Export and Quick Print Recordings List Reports), are outputted to the Reports Viewer Window.

The Reports Viewer Window allows you to preview the generated reports (much like the Print Preview Window in Microsoft Office applications) and features additional tools like customize, print, export and email to directly work with the report.



### Reports Viewer Window Interface

- Main Menu** Provides all primary application Reports Viewer controls and settings.
  - Toolbar** Provides buttons and menu controls for quick access to Reports Viewer functions.
  - Report Preview** This is the large area which displays the report as a document image. You can preview the report information and layout before exporting or printing.
  - Summary Bar** This provides report navigation information:
    - Current Page Number - this displays the page number of the page in view.
    - Total Number of Pages - this displays the total number of pages in the report.
    - Zoom Factor - this displays the current zoom level at which the report is viewed.
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## Reports

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- About Analysis Reports
- Comparative Statistics Reports
- Comparative Charts Reports
- Agent Detailed Summary Reports
- Agent 20 Longest Calls Reports

## About Analysis Reports

Analysis Reports generate statistical data by analyzing recording information contained in the Recordings List.

Analysis Reports consider the visible recordings contained in the Recordings List as a population and provide two key types of data analysis perspectives.

**Comparative Analysis Reports** create a data group for each agent and provide comparative information between the agents within the population.

**Agent Specific Analysis Reports** create a data group for the specific agent and a data group for all other agents combined to provide a comparative analysis between the agent and the population.

Selected User IDs Analysis Reports analyze recording information in the Recordings List and present data on a comparative basis between the Selected User IDs and the entire population.

### Comparative Analysis Reports

- ✓ **Statistics Report** - the Statistics Report generates a statistical analysis in a tabular data format.
- ✓ **Charts Report** - the Charts Report generates a statistical analysis in a graphical data format.
- ✓ **Call Score by User ID** - the Call Score by User ID Report generate a statistical analysis of the call scores and assessment data in a tabular and graphical format.
- ✓ **Call Score by Caller ID** – Call Score by Caller ID reports are unique reports which switch the data reference from User ID/Agent value to Caller ID/value entered in the Caller ID field. Outside of this reference, the report data is identical to the one above where applicable.

### Agent Specific Analysis Reports

**20 Longest Calls Report** - the 20 Longest Calls Report analyzes the Recordings List to identify and create a new Recordings List of the twenty longest recordings created by the specified agent.

**Detailed Summary Report** – the Detailed Summary Report generates a statistical tabular and graphical report focused on the specific agent.

**Agent Detail Call Score by User ID** – the Agent Detail Call Score by User ID report generates a statistical analysis of the call scores and assessment data focused on the specific agent in detail. The output is a tabular and graphical format which provides performance metrics within each evaluation as well as trend statistics.

**Agent Specific Call Score by Caller ID** – the Agent Specific Call Score by Caller ID reports switch the data reference from User ID/Agent value to Caller ID/value entered in the Caller ID field. Outside of this reference, the report data is identical to the one above where applicable.

## Comparative Statistics Report

Statistics Reports provide a statistical analysis of all agents in the Recordings List comparatively and output the results in a tabular data format.

STATISTICS											
User ID	Call Volume		Disk Usage		Average Call Length		Caller ID	Caller ID Most Called		Caller ID Most Call Length	
User ID Count	Count	%	Volume (mb)	%	Length	% +/- Avg	Count	Caller ID	Count	Caller ID	Call Length
Victor Graves	73	4	526 KB	3	00.00.03	-1	73	5555551881	1	5555553269	00.00.07
Pam Rover	71	4	497 KB	3	00.00.03	-1	70	5555554364	2	5555554364	00.00.03
Susan daily	88	5	622 KB	4	00.00.03	-1	88	5555552655	1	5555552655	00.00.07
Mary Jackson	84	5	671 KB	4	00.00.03	-1	83	5555557651	2	5555553373	00.00.04
Natasha Davis	73	4	517 KB	3	00.00.03	-1	73	5555553495	1	5555553495	00.00.07
Oscar Sanderson	70	4	486 KB	3	00.00.02	-2	69	5555551529	2	5555557277	00.00.03
Paul Black	76	4	532 KB	3	00.00.03	-1	76	5555553937	1	5555553937	00.00.03
Robert Love	68	4	481 KB	3	00.00.03	-1	68	5555553443	1	5555553443	00.00.07
Debbie Pollock	75	4	1124 KB	7	00.00.08	4	75	5555552538	1	555555768	00.00.09
Henry Norris	82	5	1062 KB	7	00.00.06	2	82	9999999	1	5555551259	00.00.08
Adam Tremble	88	5	1826 KB	12	00.00.12	8	87	5555553722	2	5555554845	00.00.21
Peter White	84	5	588 KB	4	00.00.03	-1	84	5555555460	1	5555555460	00.00.03
Sally Skillet	79	5	553 KB	3	00.00.03	-1	79	5555552779	1	5555552779	00.00.03
Celia Smith	82	5	1333 KB	9	00.00.09	5	81	5555554379	2	5555554627	00.00.10
Michael Fox	89	5	712 KB	4	00.00.04	0	88	5555551275	2	5555551275	00.00.04

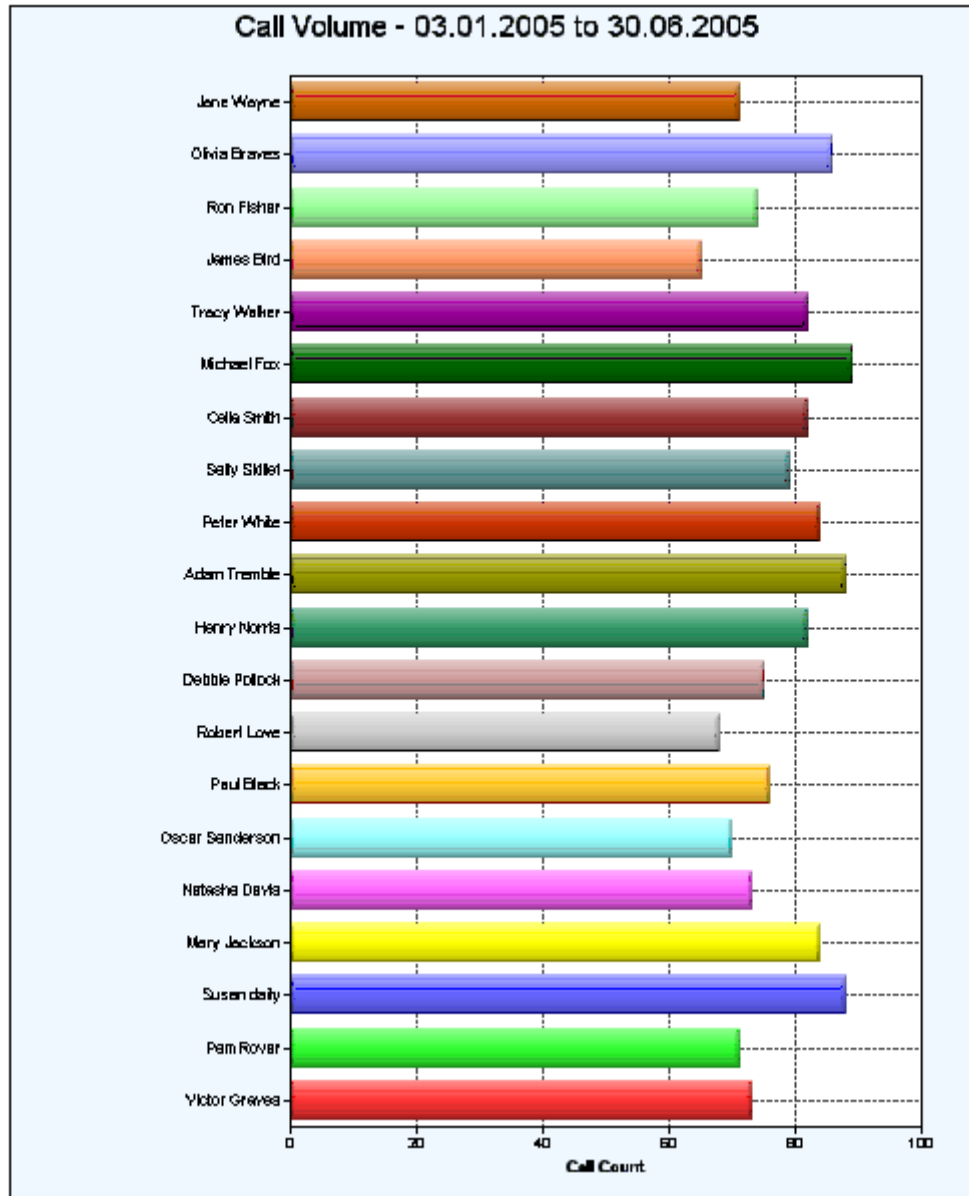
### Report Data

- User ID** . User ID Count - the number of agents analyzed in the report.  
User ID List – the list of agents which the data references.
- Call Volume** . Count - the total number of recordings created by agent.  
% - the call volume by this agent as a percentage of total call volume in this report.
- Disk Usage** . Volume - the amount of disk space used by agent.  
% - the disk usage by this agent as a percentage of total disk usage in this report.
- Average Call Length** . Length - the average recorded time by agent determined by an average of all recordings created by this agent in this report.  
% +/- AVG - the percentage above or below the report total average recording length of this agent's
- Caller ID Count** The number of unique Caller IDs and Numbers Dialed in all recordings created by this agent
- Caller ID Most Called** The most frequently recurring Caller ID or Number dialed in recordings created by this agent
- Caller ID Most Called Length** - the Caller ID and Number dialed which has the longest total cumulative recording time

## Comparative Charts Report

### Call Volume Chart

Recording Volume is a bar chart which provides comparative information about the number of recordings created by each agent in the Recordings List over a date range spanning from the earliest created recording to the most recent.



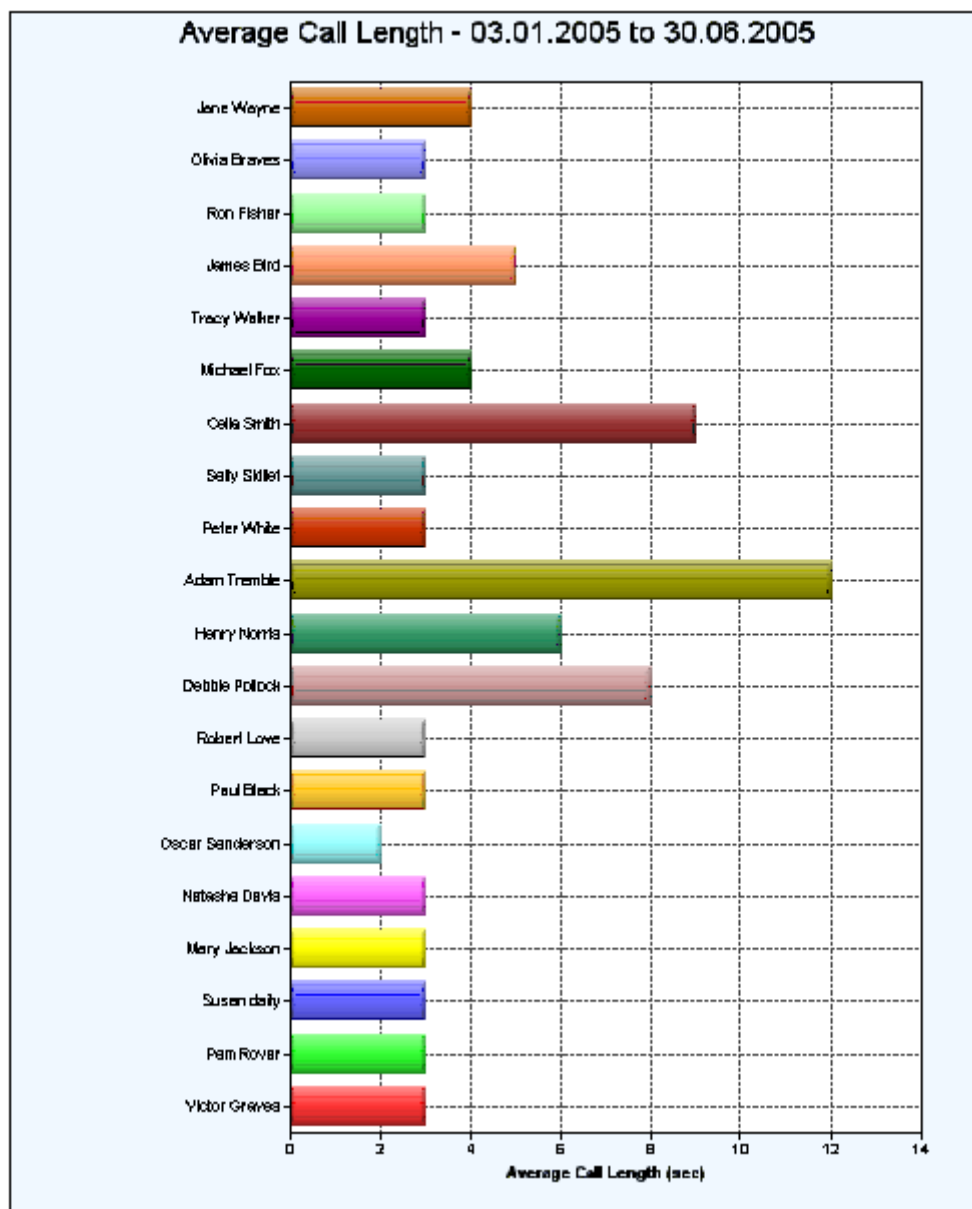
## Average Call Length Chart

Average Call Length is a bar chart which provides comparative information about the average length of recordings created by each agent in the Recordings List over a date range spanning from the earliest created recording to the most recent.

X Axis Data - The X Axis represents each agent

Y Axis Data - The Y Axis represents the average call length.

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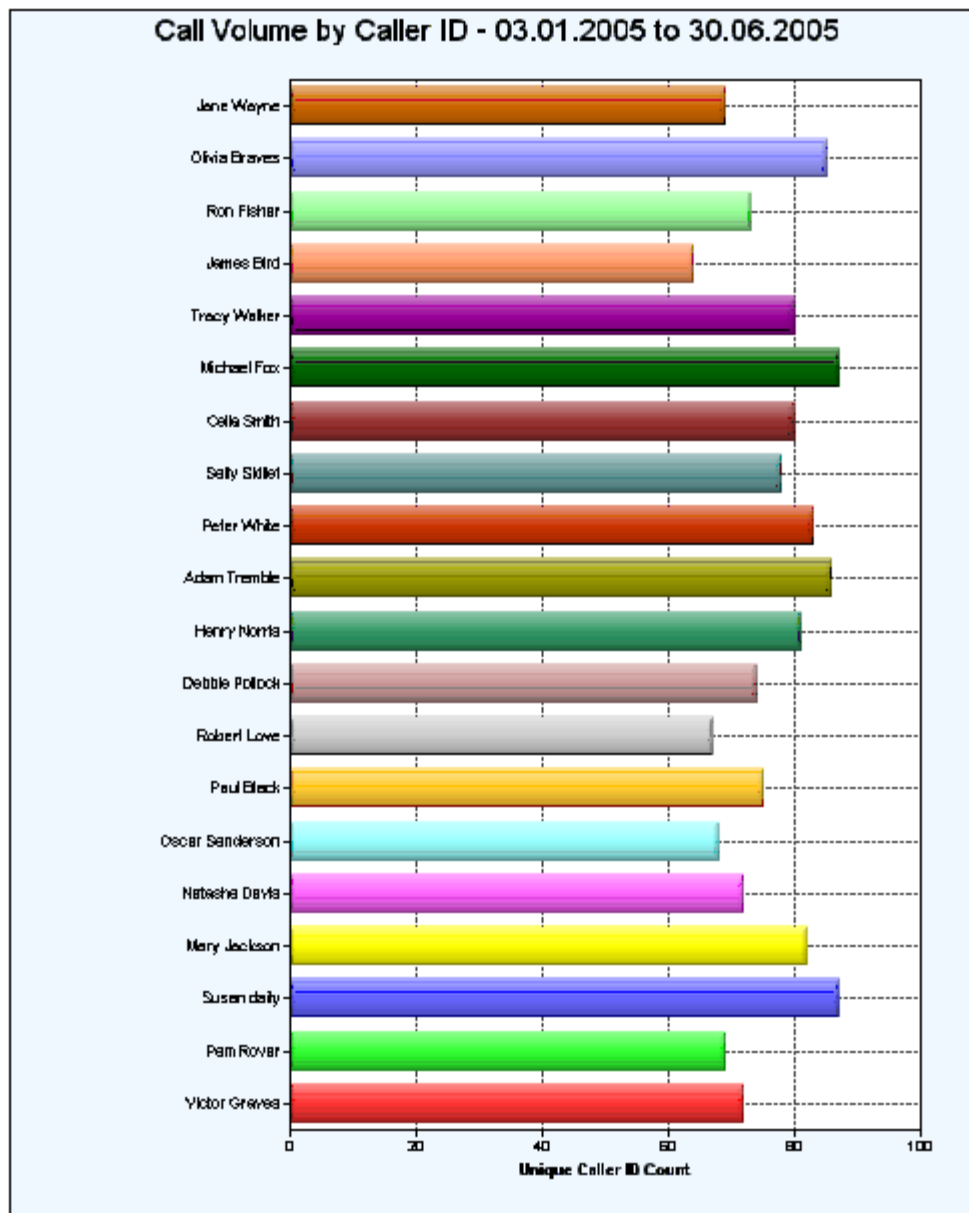


## Call Volume by Caller ID Chart

Call Volume by Caller ID is a bar chart which provides comparative information about the number of unique Caller ID/number dialed or entered values in recordings created by each agent in the Recordings List over a date range spanning from the earliest created recording to the most recent.

X Axis Data - The X Axis represents each agent

Y Axis Data - The Y Axis represents the number of unique Caller IDs.

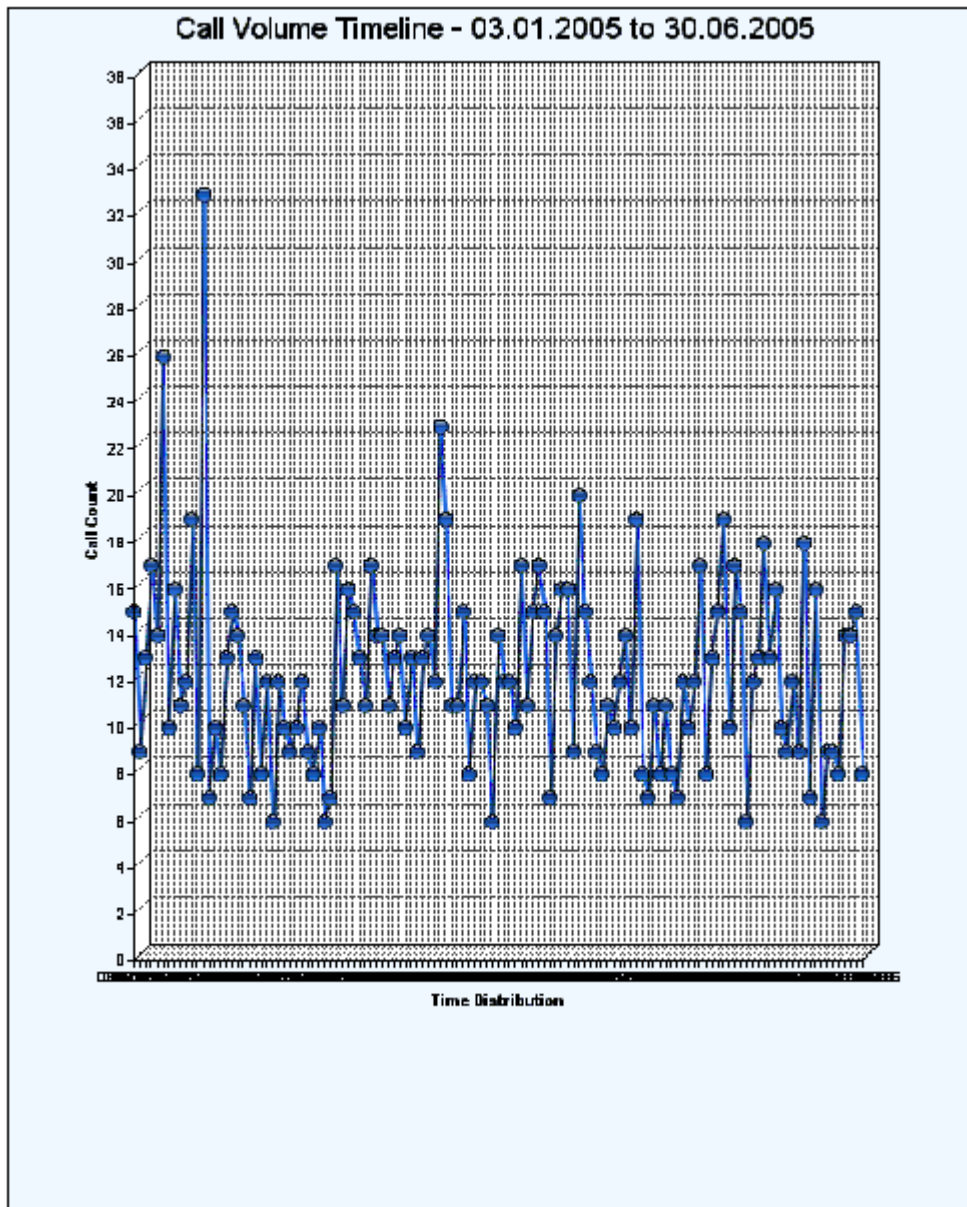


## Call Volume Time-line Chart

Call Volume Time-line is a line chart which provides the call volume distribution of all recordings in the Recordings List over a date range spanning from the earliest created recording to the most recent.

X Axis Data - The X Axis represents a time period which is calculated dynamically depending on the span.

Y Axis Data - The Y Axis represents the number of recordings.

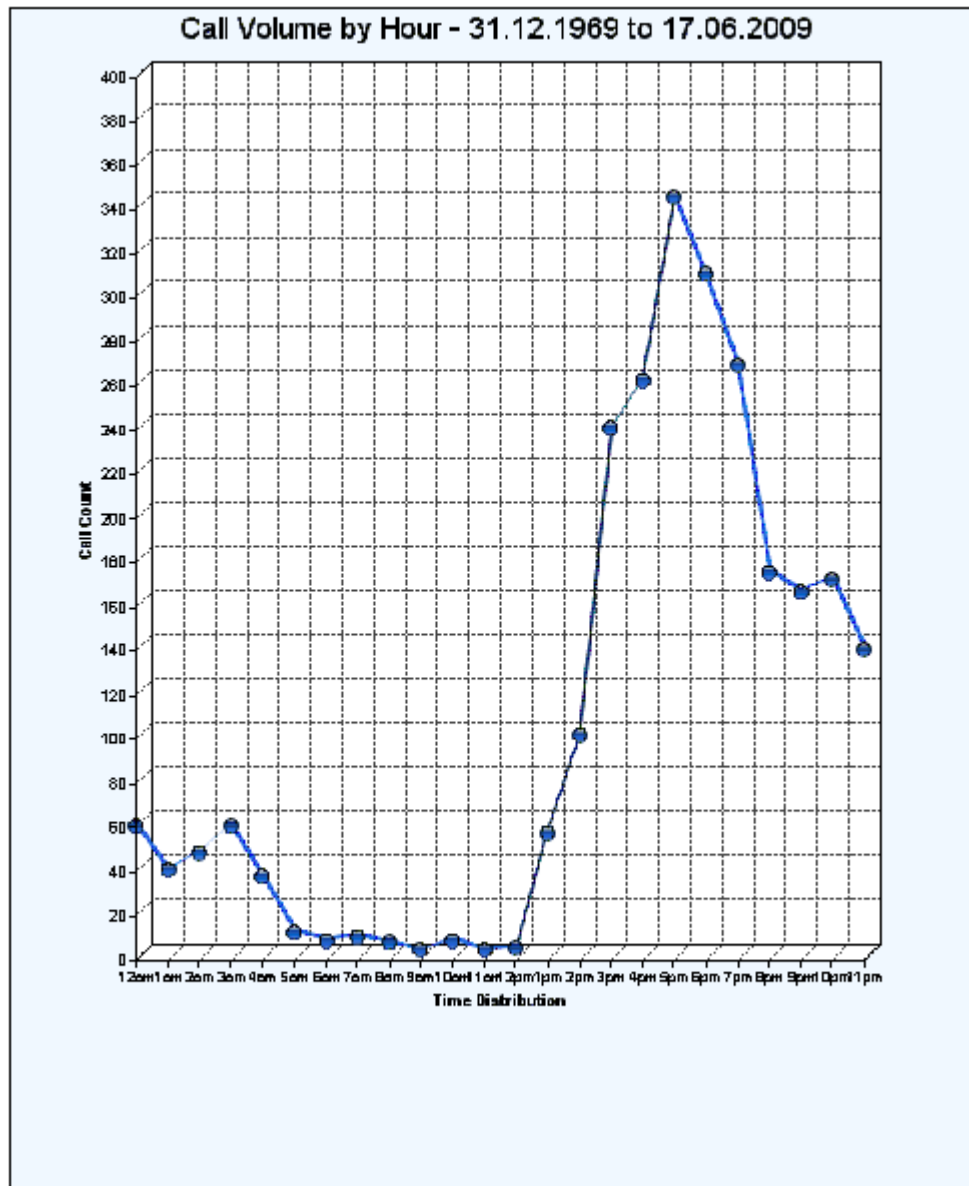


## Call Volume by Hour Chart

Call Volume by Hour is a line chart which provides an hourly call volume distribution of all recordings in the Recordings List over a 24 hour period at hourly intervals.

X Axis Data - The X Axis represents the time of day/hour.

Y Axis Data - The Y Axis represents the number of recordings created.



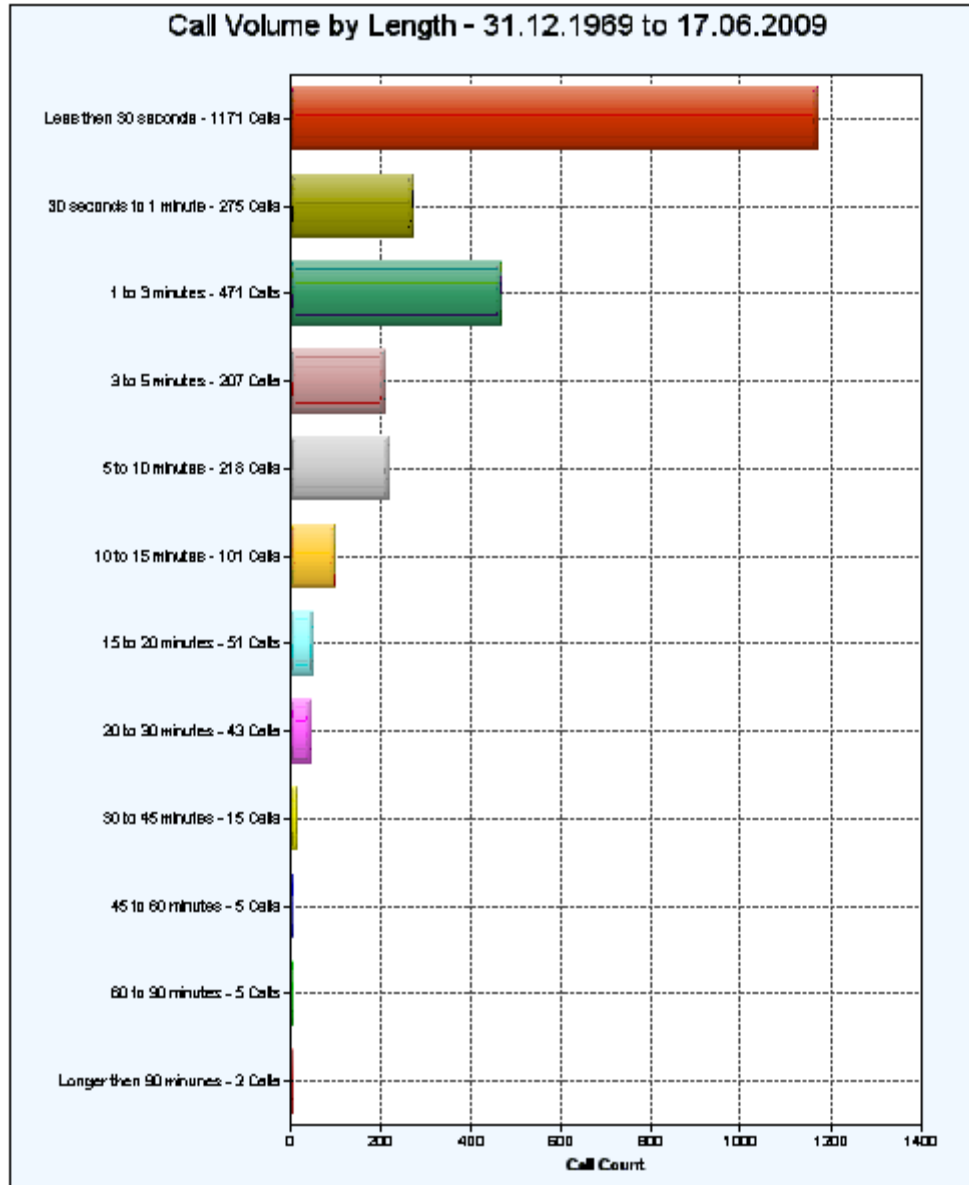


## Call Volume by Length

Call Volume by Length is a bar chart which provides the call length distribution of all recordings in the Recordings List. The call length is distributed over 12 pre-set ranges starting from less than 30 seconds to longer than 90 minutes.

X Axis Data - The X Axis represents the number of recordings.

Y Axis Data - The Y Axis represents the call length range.



## Agent Detailed Summary Report

The Detailed Agent Summary Report generates a statistical analysis of the Recordings List focused on the selected agent. All recording in the Recordings List are analyzed and split into two groups; all recordings created by this agent and all recording created by all other agents combined to create a population. The data is then presented in a tabular statistics and graphical charts format.

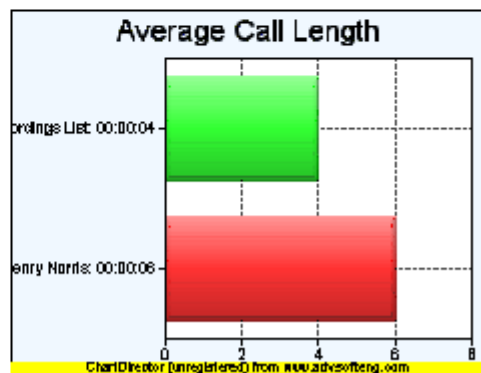
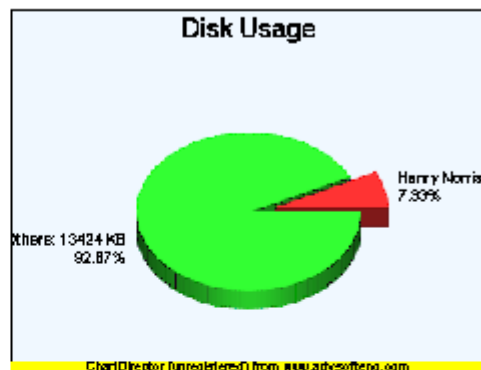
### Summary Charts

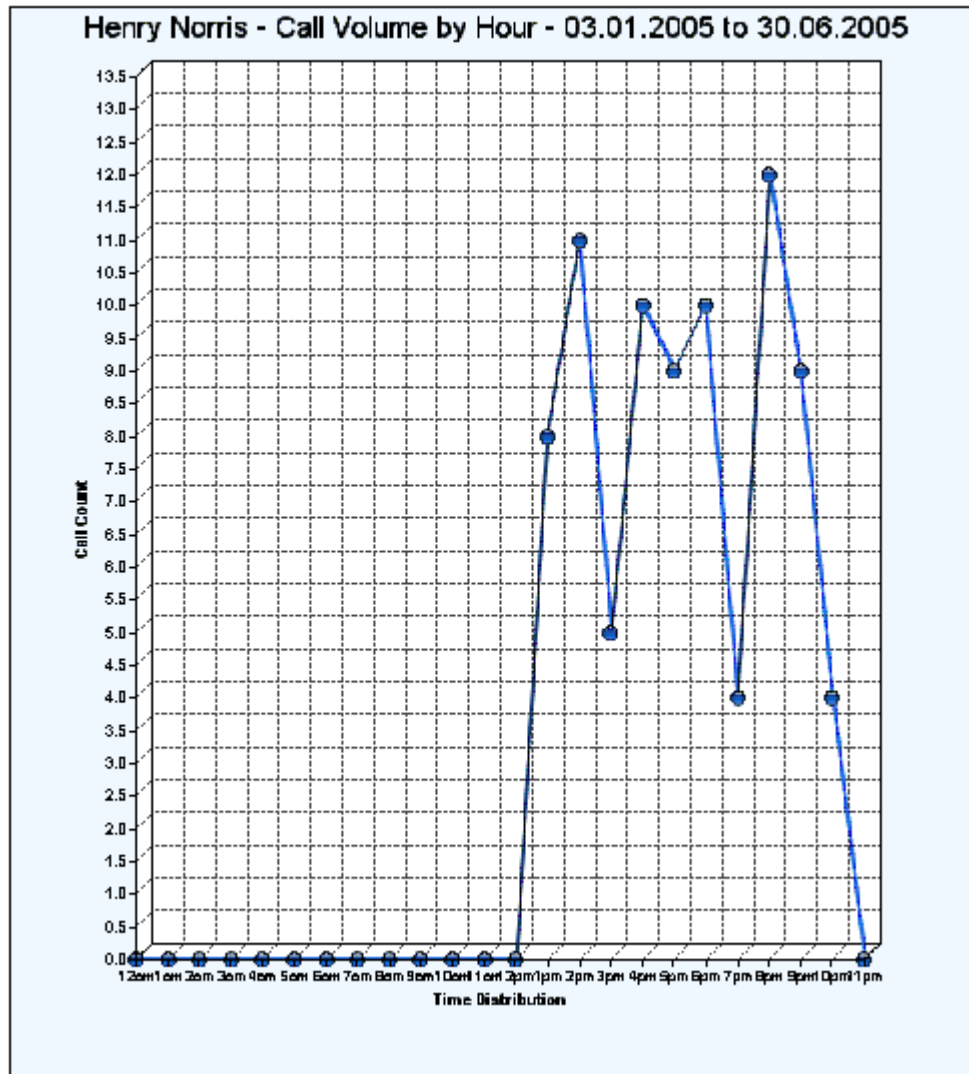
#### Disk Usage Pie Chart

The Disk Usage pie chart shows the total disk space used by all recordings in the Recordings List as a ratio between the specific agent and the total population (all other agents combined).

#### Call Volume by Unique Caller ID Bar Chart

The Call Volume by Unique Caller ID bar chart shows the total number of Unique Caller ID values contained within all recordings in the Recordings List as a ratio between the specific agent and the total population (all other agents combined).



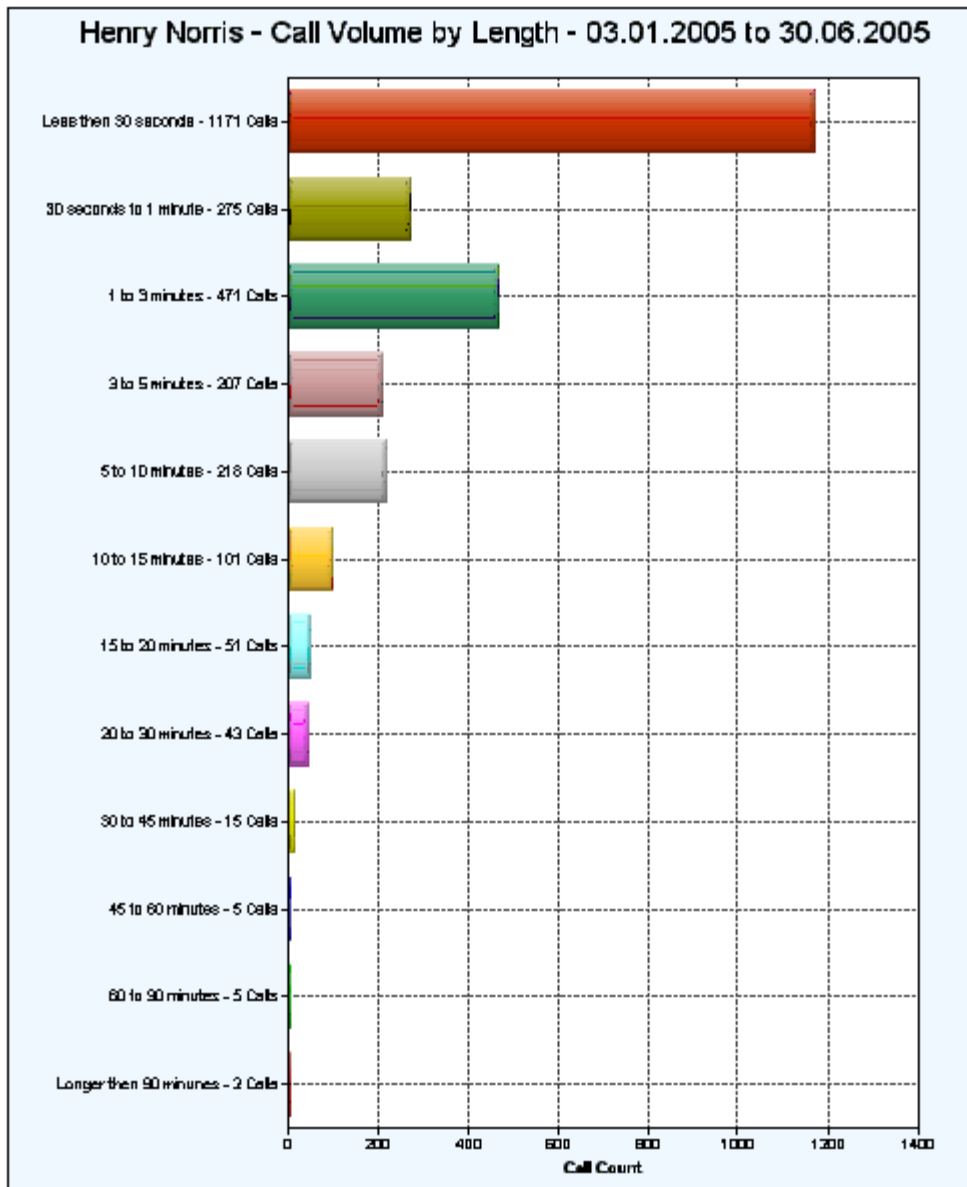


### Call Volume by Hour

Call Volume by Hour is a line chart which provides an hourly distribution of all recordings the Recordings List created by the specific agent over a 24 hour period hourly intervals.

X Axis Data - The X Axis represents the time of day/hour.

Y Axis Data - The Y Axis represents the number of recordings created.



### Call Volume by Length

Call Volume by Length is a bar chart which provides the call length distribution of all recordings created by the Specific agent in the Recordings List. The call length is distributed over 12 pre-set ranges starting from less than 30 seconds to longer than 90 minutes.

X Axis Data - The X Axis represents the number of recordings.

Y Axis Data - The Y Axis represents the call length range.

## Selected Agent 20 Longest Calls Reports

The Agent Specific 20 Longest Calls List report provides a listing of all recordings in the Recordings List created by the selected agent to obtain the top 20 longest recordings for the selected Agent/User ID.

**Xtr Reporter Pro 3 - [20 Longest Calls\*]**

File Edit Settings Tools View Window Help

Access Panel x

My Shortcuts

- Don - Ext 2012
- Phil - Ext 2010
- Julie - Ext 2013
- Customer Service
- Dawn - Ext 2020
- Clifford - ext 201
- Gary - Ext 2014
- Ian - Ext 2017
- Mary - Ext 2022
- Paul - Ext 2016
- My Calls
- My Calls
- Scored Recording

My Shortcuts

My Calls for Review

My Explorer

My Call Score

My Calls\* | My Calls\* | Scored Recordings\* | 20 Longest Calls\*

### 20 Longest Calls - Adam Tremble - 6/29/2009 8:06:00 AM

!	User ID	Caller ID	Call ...	Call ...	A.	Date + T...
	Adam Tremble	5555554845				1/13/2005 2:43...
!	Adam Tremble	5555555038				3/2/2005 1:30 PM
	Adam Tremble	5555553984				3/7/2005 9:22 AM
!	Adam Tremble	5555557639				3/18/2005 10:5...
!	Adam Tremble	5555554361				5/20/2005 1:05...
!	Adam Tremble	5555553879				3/25/2005 11:0...
!	Adam Tremble	5555554776				5/31/2005 9:21...
!	Adam Tremble	5555553732				6/29/2005 10:1...
	Adam Tremble	5555554630				6/9/2005 9:41 AM
	Adam Tremble	5555553524				6/20/2005 10:0...
!	Adam Tremble	5555552227				4/26/2005 6:03...
!	Adam Tremble	5555555733				5/20/2005 8:11...
	Adam Tremble	5555557179				3/22/2005 8:10...
!	Adam Tremble	5555557305				5/25/2005 8:45...
	Adam Tremble	5555554674				5/20/2005 8:45...
	Adam Tremble	5555556221				6/15/2005 10:4...
	Adam Tremble	5555556424				4/7/2005 7:43 AM
!	Adam Tremble	555555305				5/27/2005 11:1

Calls: 20      Important: 11      Duration: 00:03:14      Scored C...

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## Call Scoring System

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Call Scoring System Overview

Setting Up Scoring Forms

Scoring Calls

Scoring Reports- Collective

Scoring Reports – By Agent

Scoring Reports – By Caller ID

## Call Scoring System Overview

The Call Score System is comprised Call Score Forms which contain a series of user definable questions with weighted values, a Scoring interface to view, enter and edit the Scores for each question, the resulting total Score for each Scored Call, and Call Score Reports which provide analysis of the results.

### Call Score Forms Features

- Any number of Call Score Forms can be created.
- Each Call Score Form can contain 1 to 10 questions.
  - Each question can be of a Scale or Yes/No type.
  - Scale type questions provide a gradient value which ranges from 0 to 10 with a Not Applicable value which effectively removes the question entirely from the assessment without skewing the results.
  - Yes/No type questions provide a value of 0 or 10 with a Not Applicable value which effectively removes the question entirely from the assessment without skewing the results.
- Each Call Score Form is an independent assessment which can result in a total minimum Score of 0% or maximum Score of 100%.
  - The total Score is the sum of the each question Score multiplied by the weight bias assigned to the question.
  - The weight bias of each question is user definable and can have a value from 1% to 100%.
    - The weight bias method provides a way to simplify and maintain a uniform scoring system with greater control on how each question will impact the assessment overall.
    - A greater weight can be assigned to questions which are more critical while a lesser weight can be assigned to questions which may be less important.

### Scoring Calls Features

Any call can be scored with one or more assessments simultaneously.

- Scale questions can be awarded a value of:**
  - Failed** - Equal to a value of 0.
  - Poor** - Equal to a value of 2.
  - Fair** - Equal to a value of 4.
  - Passed** - Equal to a value of 6.
  - Good** - Equal to a value of 8.
  - Excellent** - Equal to a value of 10.
  - N/A** - Equal to a value of Not Applicable which effectively removes the question and redistributes the weight bias of the question evenly to the remaining questions.
  - Blank** - Indicates the question has not been scored. Partially Scored assessments cannot be saved to prevent erroneous data.
- Yes/No questions can be awarded a value of:**
  - Yes** - Equal to a value of 10.
  - No** - Equal to a value of 0.
  - N/A** - Equal to a value of Not Applicable which effectively removes the question and redistributes the weight bias of the question evenly to the remaining questions.
  - Blank** - Indicates the question has not been scored. Partially Scored assessments cannot be saved to prevent erroneous data.

The screenshot shows a software window titled "Score Call - Call file name". It displays a list of 10 questions for scoring. Each question has a radio button for "N/A", a star rating (1-5 stars) for scale questions, and radio buttons for "Yes" and "No" for Yes/No questions. The total score is 84.80. The window also shows the user "Adam Tremble" and the date/time "1/27/2005 11:34 AM".

Question	Scale	Yes/No	Score
1. GREETING - How positive was the greeting and introduction?	5 stars		Good
2. RAPPORT - How well did we build a rapport with the prospect?	5 stars		Good
3. QUALIFYING - How well was the prospect qualified?	5 stars		Excellent
4. UNDERSTANDING - How well did we demonstrate an understanding of the prospect needs?	5 stars		Fair
5. PRESENTATION - How well was the product presented in relation to the circumstances?	5 stars		Passed
6. KNOWLEDGE - What was the ability to answer and satisfy questions?	5 stars		Passed
7. MOTIVATION - What was the ability to motivate prospect and advance sales process?	5 stars		Passed
8. CONTACT INFO - Was contact information gathered?		Yes	
9. OFFER - Was an evaluation version offered?		Yes	
10. WON/LOST - Did the sale close?		Yes	

Scored by: Unknown - 1/1/1970 3:06:33 AM Total Score: 84.80





Next Cancel

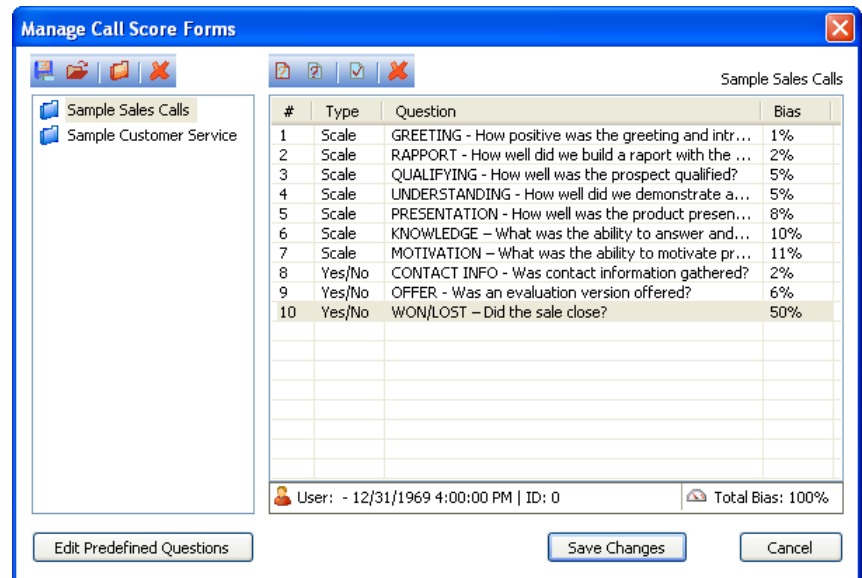
## Creating Call Score Forms

The Call Score Forms Manager allows you to create, view and delete Call Score Forms and can be accessed from Main Menu > Settings > Forms Manager option.

### Call Score Forms Manager Toolbar Functions

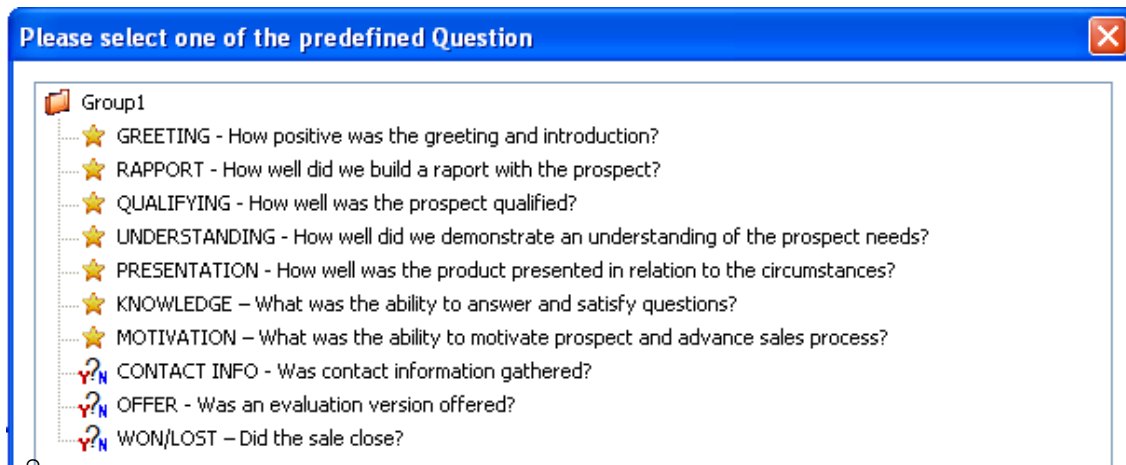
- **Form Menu:**

- **New** -  Create a new Call Score Form.
- **Import** -  Import a saved Call Score Forms.
- **Export** -  Export the current Call Score Forms.
- **Delete** -  Delete the current Call Score Form.






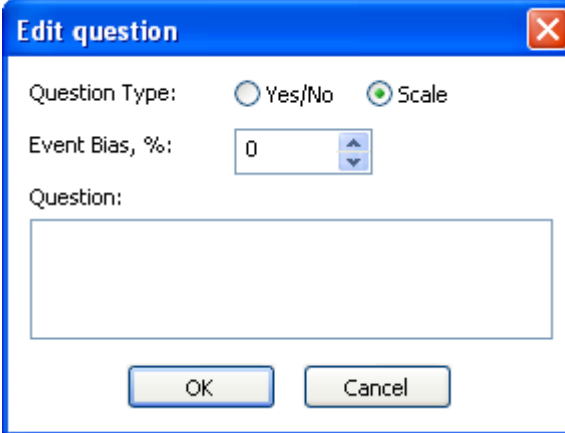
- **Question Menu:**

- **Add Predefined Question** -  Adds Question from Predefined List:





- **Add New Question** : 
  - **Scale Question** - Add a Scale question to the new Call Score Form.
  - **Yes/No Question** - Add a Yes/No question to the new Call Score Form.
- **Event Bias** – determines the value or weight of each question.
- **Delete** -  Delete the selected question.
- **Edit Question** -  Opens Edit Question Dialog Box to Edit selected question.




**Edit question**

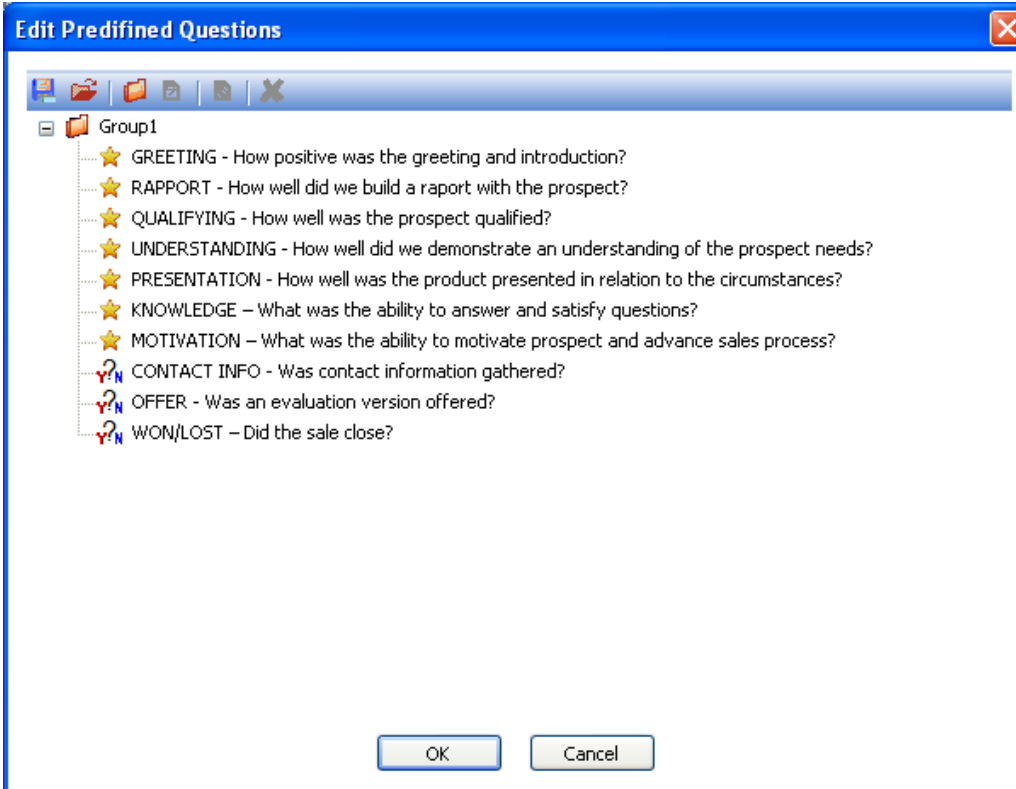
Question Type: ☐ Yes/No ☒ Scale

Event Bias, %:

Question:

OK Cancel

- **Edit Predefined Questions**  Opens Predefined Questions List. Allows adding and Editing of Predefined Questions. The same Menu options are available as when creating any new questions:



**Edit Predefined Questions**

Group1

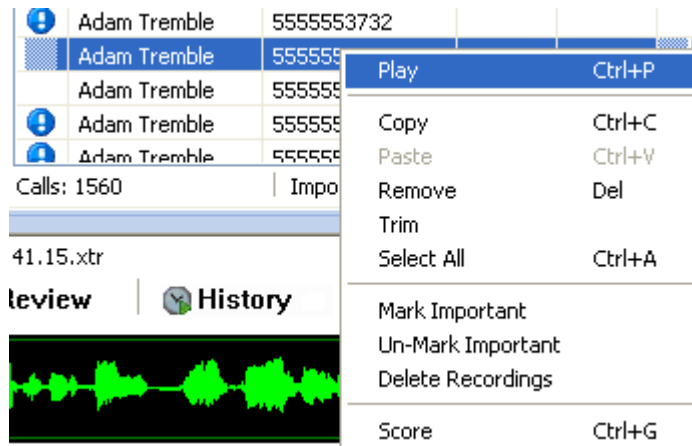
- ★ GREETING - How positive was the greeting and introduction?
- ★ RAPPORT - How well did we build a rapport with the prospect?
- ★ QUALIFYING - How well was the prospect qualified?
- ★ UNDERSTANDING - How well did we demonstrate an understanding of the prospect needs?
- ★ PRESENTATION - How well was the product presented in relation to the circumstances?
- ★ KNOWLEDGE - What was the ability to answer and satisfy questions?
- ★ MOTIVATION - What was the ability to motivate prospect and advance sales process?
- Y/N CONTACT INFO - Was contact information gathered?
- Y/N OFFER - Was an evaluation version offered?
- Y/N WON/LOST - Did the sale close?

OK Cancel

## Scoring a Call

Once the Call Score Forms have been created, Calls can be Scored or Graded by Right-Clicking on the call being played and selecting Score from the menu provided or by using the short-cut Ctrl-G to Grade the call. This will pop forward the Scoring Forms so you can utilize them while listening to the live call.

Calls are scored by simply clicking on the desired value next to the question. Values are as follows:



**Scale Questions** - Displayed inside a drop down control to the right of each question.

**Score Call - Call file name**

C:\...\Administrator-2008-Mar-29-11.26.44.xtr Date/Time: 3/29/2008 11:26 AM | Length: 00:00:10

Sample Sales Calls | Sample Customer Service

1. GREETING - How positive was the greeting and introduction? ☐ N/A ☒ ★★★★★ Excellent
2. RAPPORT - How well did we build a rapport with the prospect? ☐ N/A ☒ ★★★★★ Excellent
3. QUALIFYING - How well was the prospect qualified? ☐ N/A ☒ ★★★★★ Good
4. UNDERSTANDING - How well did we demonstrate an understanding of the prospect needs? ☐ N/A ☒ ★★★★★ Good
5. PRESENTATION - How well was the product presented in relation to the circumstances? ☐ N/A ☒ ★★★★★ Good
6. KNOWLEDGE - What was the ability to answer and satisfy questions? ☐ N/A ☒ ★★★★★ Good
7. MOTIVATION - What was the ability to motivate prospect and advance sales process? ☐ N/A ☒ ★★★★★ Good
8. CONTACT INFO - Was contact information gathered? ☐ N/A ☒ Yes ☐ No
9. OFFER - Was an evaluation version offered? ☐ N/A ☒ Yes ☐ No
10. WON/LOST - Did the sale close? ☐ N/A ☒ Yes ☐ No

Scored by: Unknown - 1/1/1970 3:06:34 AM Total Score: 92.20

Next Cancel

**Failed** - Equal to a value of 0 Stars.

**Poor** - Equal to a value of 1 Star.

**Fair** - Equal to a value of 2 Stars.

**Passed** - Equal to a value of 3 Stars.

**Good** - Equal to a value of 4 Stars.

**Excellent** - Equal to a value of 5 Stars.

**N/A** - Equal to a value of Not Applicable which effectively removes the question and redistributes the weight bias of the question evenly to the remaining questions.

**Blank** - Indicates the question has not been scored. **Partially Scored assessments cannot be saved to prevent erroneous data.**

- **Yes/No Questions:** - Displayed inside a drop down control to the right of each question.
  - **Yes** - Equal value of bias assigned to question.
  - **No** - Equal to a value of 0.
  - **N/A** - Equal to a value of Not Applicable which effectively removes the question and redistributes the weight bias of the question evenly to the remaining questions.
  - **Blank** - Indicates the question has not been scored. **Partially Scored assessments cannot be saved to prevent erroneous data.**
- **Next** - Once completed, if more forms are to be scored select NEXT to Score from another form. Once done, select OK and scores will be stored and the **Recording marked as 'Important'** which prevents an auto-deletion of a Scored Call.

## Call Score Reports

Collective Call Score Reports analyze the scores of all recordings in the Recordings List created over a date range spanning the earliest created recordings to the most recent. This report generates a statistical tabular and graphical report which provides cumulative average scores by each User ID and each Call Score Form.

## Collective Call Score Report Statistics

Call Score Results by Agent				Date Range: 1/1/2005 - 12/31/2005
Rec Count	Agent Name	Total Avg	Score Calls	Customer Service
87	Adam Fendley	52.0%	52.0%	52.0%
82	Colin Smith	51.2%	51.0%	51.4%
75	Chadwick Foltz	51.0%	50.7%	50.7%
82	Imre Nemes	51.0%	51.0%	50.0%
85	James Reid	51.4%	51.0%	51.7%
71	John Warner	51.0%	51.2%	52.0%
86	Mark Jernstedt	51.0%	50.7%	50.4%
80	Michael Fox	50.0%	50.0%	50.0%
72	Nathalie Davis	50.0%	50.0%	50.0%
88	Olivia Brown	50.0%	50.0%	50.0%
70	Orion Sanderson	51.0%	50.0%	50.0%
71	Paul Roper	51.7%	52.0%	50.0%
76	Paul Black	50.0%	50.0%	50.0%
86	Paul White	51.0%	51.0%	51.0%
86	Robert Lane	50.0%	50.0%	50.0%
76	Russ Fisher	51.0%	50.0%	51.2%
80	Sally Smith	49.0%	49.0%	49.0%
87	Susan Bell	50.0%	50.0%	50.0%
82	Travis Walker	51.0%	51.0%	51.0%
72	Victor Owens	50.0%	50.0%	50.0%
1580	Agent Count: 20	Avg	50.7%	50.0%

### Comparative Call Score Report Statistics

<b>Rec Count</b>	The Rec Count column shows the number of recordings analyzed for the corresponding agent in the Agent Name Column.
<b>Agent Name</b>	The Agent Name Column lists all the User IDs in the Recordings List.
<b>Total Average</b>	The Total Average Column provides a cumulative average score value for all recordings created by the corresponding User ID for all Call Score Forms shown in the Call Score Form Columns.
<b>Scores</b>	The score columns represent each Call Score Form and provide the cumulative average score value for the corresponding User ID for this Call Score Form.
<b>Summary Totals</b>	The summary totals row provides total counts and total averages for the corresponding columns.

## Comparative Call Score Report Charts



### Comparative Call Score Report Charts

- Comparative Call Score Report Charts present the total cumulative average score by each agent in a comparative chart for each Call Score Form over a date range determined by the earliest created recording in the Recordings List to the most recent.
- The data is presented as a Bar Chart where the X Axis represents the cumulative average score and the Y Axis represents each User ID/agent.

## Selected User ID Call Score Reports (XTR Reporter Pro only)

Selected User ID Call Score Reports analyze the scores of recordings in the Recordings List created by the selected User ID only. The report generates a statistical tabular and graphical report within a date range spanning the earliest created recordings to the most recent organized into 3 sections.

### Selected User ID Call Score Report Statistics by Evaluation Question

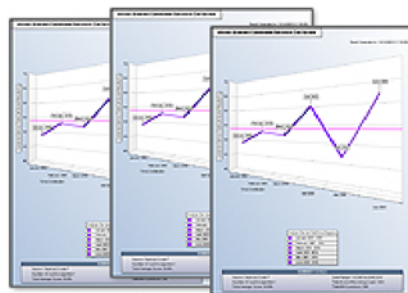
Customer Service		Date Range: 10/2006 - 6/30/2008		
Question	Rec Count	Score	N/A Count	Ratio
GREETING - How positive was the greeting and introduction?	41	5%	5	7.5%
PROFICIENCY - How well did we build a rapport with the prospect?	44	8%	10	18.1%
CONFIDENCE - How well did we manage client hesitation?	43	6%	6	8.1%
UNDERSTANDING - How well did we demonstrate an understanding of the problem?	45	10%	10	16.1%
SOLUTIONING - What was our ability to answer questions and resolve issues?	45	11%	12	23.0%
ASSURANCE - Were correct and satisfactory solution assurances offered to the client?	43	11%	13	23.0%
ESCALATION - If escalation was required, how sufficient was the information gathered?	40	13%	13	23.0%
PERCEPTION - What was the perceived level of client satisfaction overall?	62	19%	19	25.8%
OFFER - Were other products offered to the client?	56	19%	19	25.9%
RESULT - Was the problem satisfied?	70	17%	17	20.9%
Recordings Scored: 72		Avg: 56.5%	Total: 125	Avg: 23.8%

#### Average Score by Question by Call Score Form

The report shows the cumulative average scores of the selected User ID broken down by Question and grouped by Call Score Form arranged into four columns with the following data fields.

<b>Question</b>	The Question column lists each question contained in the Call Score Form.
<b>Score</b>	The Score column shows the cumulative average Score value of all recordings in the Recordings List for this question.
<b>N/A Count</b>	The N/A Count Column shows the number of times the question value was equal to 'Not Applicable'.
<b>N/A Ratio</b>	The N/A Ratio shows the number of times the question value was equal to 'Not Applicable' as a ratio to the number of times the question was scored.
<b>Summary Totals</b>	The summary totals row provides total counts and total averages for the corresponding columns.

### Selected User ID Call Score Report Trend Charts



#### Call Score Form Trend Charts

- Trend Charts are line charts for each Call Score Form which presents the cumulative average score by of all scored recordings for the selected User ID over a date range determined by the earliest created recording in the Recordings List to the most recent.
- The data is distributed over an equal dynamically determined time period (days, weeks, months, quarters or years) based on the data set. The X Axis represents the cumulative average Score and the Y Axis represents each date range.

## Selected User ID Call Score Report Trend Statistics

Trend Report		Date Range: 1/1/2005 - 6/30/2005										
Rec Count	Time	Avg Score	Custom Score	Test1	Test2	Test3	Test4	Test5	Test6	Test7	Test8	Test9
13	January 2005	49.2%	49.2%	-	59.1%	-	-	-	-	-	-	-
8	February 2005	65.2%	53.1%	-	57.7%	-	-	-	-	-	-	-
18	March 2005	59.4%	52.5%	-	66.7%	-	-	-	-	-	-	-
16	April 2005	39.3%	59.9%	-	50.5%	-	-	-	-	-	-	-
9	May 2005	56.5%	47.5%	-	43.0%	-	-	-	-	-	-	-
9	June 2005	64.9%	61.6%	-	37.0%	-	-	-	-	-	-	-
Trend: Visitor Orders		-	-	-	-	-	-	-	-	-	-	-

### Average Score by Question by Call Score Form

The Trend Statistics section of the report shows the cumulative average scores of the selected User ID for all Call Score Forms spanning a date range which is the data is distributed over an equal dynamically determined by the data set (days, weeks, months, quarters or years).

Statistics are arranged into columns with the following data fields from left to right:

**Rec Count** The Rec Count column shows the number of recordings analyzed within the corresponding time period in the Time Column.

**Time** The Time column is a dynamic date range spanning from the earliest created recording to the most recent in the Recordings List which is divided into an optimal time period determined by the span.

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**Cumulative Average Score** The Cumulative Average Score Columns show the cumulative average score for Call Score Form within the corresponding time period in the Time column.

## Call Score Caller ID Reports

- Call Score by Caller ID Reports are specifically designed for Call Recording environments where Administrators control recordings and utilize the Caller ID field to enter the User ID, person who created the recording or any other information.
- Call Score Caller ID Reports are identical to Comparative Call Score Reports and Selected User ID Call Score Reports in terms of analysis.
- The Caller ID field is utilized in place of the User ID field as the reference to the scores.
- As Caller ID fields could potentially generate thousands of unique variables which would exceed the drawing capabilities and result in non-viewable information, charts are omitted
- Call Score Caller ID Reports are also accessible from the Analysis Reports Menu and available in Comparative/All User ID as well as Selected User ID reports

## Printing, Saving, Emailing

Reports can be printed by either direct print which outputs directly to your default printer or by standard print option which will launch a printer selection dialog.

Reports can be saved in various file formats for use in or integration with other applications. You can choose from Microsoft Excel, Adobe PDF, HTML for web pages, Comma Separated Values, Rich Text, MHT and various image formats like JPEG, GIF or BMP.

Simply select the file format, name the file, save it and then open in any application which supports that file format.

Email attachments of reports can be created directly from the Reports Viewer Window. Simply select the required attachment format for the report email attachment format selector.