



**CUSTOMEREXPERIENCEMANAGEMENT**

## **REPORTS GUIDE**

### **Release 4.5**

**PURPOSE:** This guide is intended to provide an overview of each Report style available in the CXM® call recording system. This document will address logging into the system, accessing Reports and changing the Report logo.



## **CONTACT Co-nexus:**

Co-nexus, Inc. 866.400.4CXM  
5600 Northwest Central Dr Ste. 102  
Houston, TX 77092

For more information about CXM®, see your CXM® representative or call 1-866-400-4296.

The purpose of this guide is to provide an overview of each Report style available in the CXM® call recording system. This document is furnished for informational use only, is subject to change without notice, and should not be construed as a commitment by Co-nexus. Co-nexus assumes no responsibility or liability for any errors or inaccuracies that may appear in this book.

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## CUSTOMEREXPERIENCEMANAGEMENT

# TABLE OF CONTENTS

<b>SYSTEM LOGIN</b> .....	<b>6</b>
To Login to the CXM® System: .....	7
To Change Your Password:.....	7
To View Your Profile: .....	7
<b>Downloading Active X</b> .....	<b>8</b>
<b>REPORTS</b> .....	<b>10</b>
<b>FORM REPORTS</b> .....	<b>11</b>
Blank Grading Form: .....	11
Blank Grading Form with Criteria:.....	11
Form Status and Usage: .....	11
Grading Form with Results: .....	12
Grading Form with Results and Comments: .....	12
Grading Form with Results Comments and Criteria:.....	13
Grading Form with Results Comments - Group:.....	14
<b>SCORING REPORTS</b> .....	<b>16</b>
Agent Grade Per Form: .....	16
Agent Grades By Score By Date Graded: .....	16
Average per Question Group: .....	17
Average per Question Group - Graph:.....	17
Average per Question Individual: .....	18
Average per Question Individual - Graph:.....	18

Average Score by Agent for Evaluator:.....	19
Average Score by Agent for Evaluator - Graph: .....	19
Average Score by Date for Evaluator: .....	20
Average Score by Date for Group: .....	21
Average Score by Day of Week for Agent:.....	21
Average Score by Day of Week for Agent - Graph: .....	22
Average Score by Day of Week for Evaluator: .....	23
Average Score by Day of Week for Evaluator – Graph: .....	23
Average Score by Day of Week for Group: .....	24
Average Score by Day of Week for Group - Graph:.....	24
Average Score by Form for Evaluator:.....	25
Average Score by Form for Evaluator - Graph: .....	26
Calls Scored per Month by Evaluator:.....	26
Calls Scored per Month by Evaluator - Graph:.....	27
Calls Scored per Week by Evaluator:.....	27
Calls Scored per Week by Evaluator - Graph:.....	28
Calls Scored per Week by Evaluator by Date Graded:.....	28
Calls Scored per Week by Evaluator by Date Graded - Graph: .....	29
Comment Count per Evaluator:.....	29
Comment Count per Evaluator - Graph: .....	30
Graded Call Count:.....	30
Grades and Survey Results For Date Range: .....	31
Individual Average and Count Summary For Group: .....	31
Individual Averages for Group:.....	31
Monthly Average by Form for Group: .....	32
Monthly Average by Form for Group - Graph: .....	33
Monthly Average by Form for Individual: .....	33
Monthly Average by Form for Individual - Graph: .....	34
Per Question Trending Over Time by Agent - Graph:.....	35
Per Question Trending Over Time by Group - Graph: .....	35
Top Agents per Form: .....	36
Top Agents per Form - Graph: .....	37
Top Evaluators by Calls Scored:.....	37
Weekly Average by Form for Group: .....	38
Weekly Average by Form for Group - Graph: .....	38
Weekly Average by Form for Individual: .....	39
Weekly Average by Form for Individual - Graph: .....	40
<b>SYSTEM REPORTS .....</b>	<b>41</b>
Agent List: .....	41
Calls Recorded per Day: .....	41
Calls Recorded per Month: .....	41
DNIS List:.....	42
Port Usage:.....	42
Skill List: .....	43
Station List: .....	43
Trunk List:.....	43
User List:.....	43
VDN List: .....	44
<b>CALIBRATION REPORTS.....</b>	<b>45</b>
Calibration Summary for Call:.....	45
<b>Portal Reports.....</b>	<b>46</b>

Average Score By Agent: .....	46
Average Score By Agent Graph:.....	46
Average Score By Test: .....	47
Average Score By Test Graph: .....	47
Calls Scored per Month by Agent: .....	47
Calls Scored per Month by Agent - Graph: .....	48
Calls Scored per Week by Agent: .....	48
Calls Scored per Week by Agent - Graph: .....	49
Test Results: .....	49
Test Results By Agent: .....	50
Tests Completed By Test .....	50
Viewed Bulletins .....	50
Viewed Videos .....	51
<b>SYSTEM LOGOUT .....</b>	<b>53</b>

# SYSTEM LOGIN

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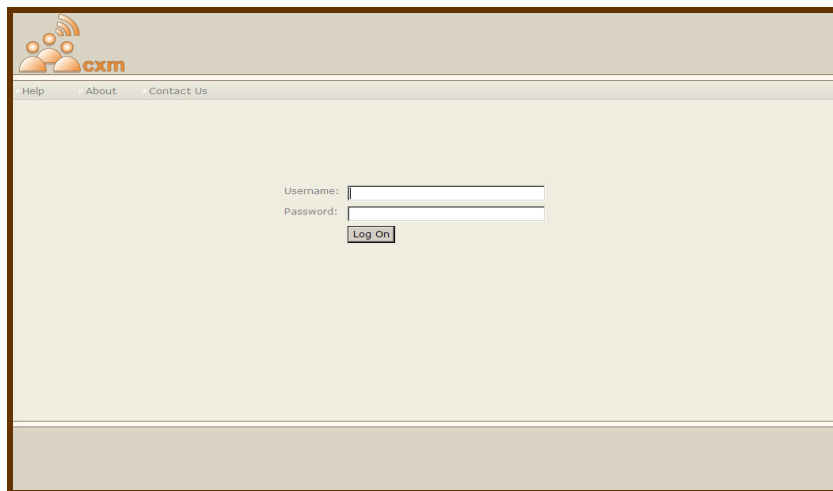
After launching the browser program, type in the URL for CXM®. All Users and Administrators that access the CXM® system will use this same URL. For future reference please record your CXM® URL on the line below:

http://\_\_\_\_\_

If there are any problems accessing the URL, please contact CXM® Support for further help.

A menu item in Favorites can be set in Internet Explorer for easier access to the URL. Also a desktop shortcut icon can be placed on the desktop.

In the middle part of the screen is the system login area. The system requires a User name and password. The system Administrator will provide these, and they should be different from the User's network user name and password.



### To Login to the CXM® System:

1. Enter User Name and Password into the appropriate *Login* fields.
2. Click *Login* or press *Enter*. All Users are taken to the *Quick Search* screen.

### To Change Your Password:

1. To change your password, first select *My Login* and then *Change Password* from the options on the left side of the screen. You can also access the *My Login* → *Change Password* screen by clicking on *My Login* and *Change Password* from the CXM® menu.
2. Enter your new password into the *New Password* field.
3. Enter your new password one more time into the *Confirm Password* field.
4. Click the *OK* button to finalize your new password. A confirmation message will appear at the bottom of the screen.

### To View Your Profile:

1. To view your profile, first select *My Login* and then *Profile* from the options on the left side of the screen. You can also access the *My Login* → *Profile* screen by clicking on *My Login* and *Profile* from the CXM® menu.
2. Your profile will appear on this screen, listing your user information and rights.

## Downloading Active X

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CXM 4.5 uses Crystal Reports 12 for the reporting engine, and this engine uses Active X for printing and exporting reports. Thus, CXM users who want to print and export reports must have the rights to download and run Active X controls. Please consult your network administrator to verify that you do have these rights.

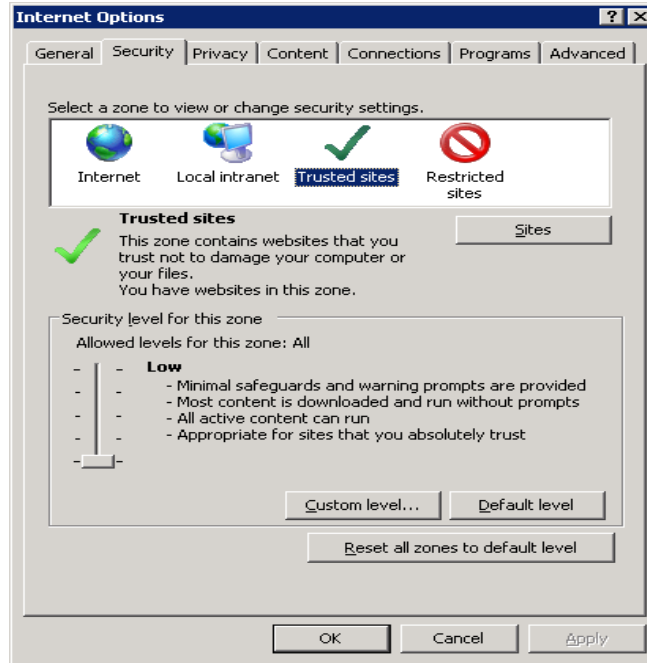
In addition to the proper rights, users will also need to configure their Internet Explorer to allow Active X controls to be downloaded. They will also need to set the url for CXM as a trusted site.

Under *Tools* -> *Internet Options* -> *Trusted Sites* (on Security tab), under ActiveX controls and plug-ins, set the following to enable:

- Allow previously unused ActiveX controls to run without prompt
- Allow Scriptlets
- Automatic prompting for ActiveX controls
- Binary and script behaviors
- Download signed ActiveX controls (this should be set to enable or prompt)
- Run ActiveX controls and plug-ins
- Script ActiveX controls marked safe for scripting

Another way to configure IE is by setting the security level to *Low* for trusted sites, as in the screen shot below:



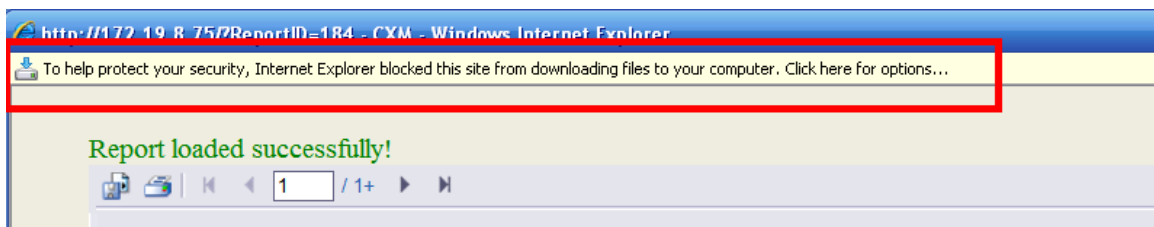


Once IE has been configured, you must close IE then open it back up in order for the settings to apply.

To add CXM as a trusted site, do the following:

1. In IE, go to Tools -> Internet Options.
2. Click on the Security tab.
3. Click Trusted Sites.
4. Click the *Sites* button.
5. For the *Add this website to the zone* box, type in the url for CXM.
6. Click the *Add* button.
7. Click *Close*.

Once these are set, the first time you try to export a report, you may encounter the following:



To continue, click *Click here for options...* then click *Download File*. If all of the above was configured properly, then your report will export successfully.

## REPORTS

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The purpose of the Reports section is to enable the User to access various styles of Reports available in the CXM® system. To access the Reports section from the CXM® user interface, click on *Reports* in the left column or in the CXM® menu located at the top of the window. This section is only accessible to Users with Reports rights.

The User can access Reports from the following sections:

- [Form Reports](#)
- [Scoring Reports](#)
- [System Reports](#)
- [Calibration Reports](#)
- [Report Logo](#)

# FORM REPORTS

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## Blank Grading Form:

The Blank Grading Form Report will show:

- questions and answer choices for the selected grading form

To access a blank grading form from the Reports → Form Reports page, first click to highlight Blank Grading Form in the Report column. Next, select the desired grading form from the Grading Form drop-down box and click the View Report button.

## Blank Grading Form with Criteria:

The Blank Grading Form with Criteria Report will show:

- questions and answer choices for the selected grading form
- any criteria to assist in scoring the call (appears below the corresponding question)

To access a blank grading form with criteria from the Reports → Form Reports page, first click to highlight *Blank Grading Form with Criteria* in the Report column. Next, select the desired grading form from the *Grading Form* drop-down box and click the *View Report* button.

## Form Status and Usage:

The Form Status and Usage Report will show:

- For each form in the system, it will show the form's state, how its weighted, its created date, its completed grades, its uncompleted grades.
- The report is filtered on *Date Graded or Call Date*.

To access a blank grading form with criteria from the Reports → Form Reports page, first click to highlight *Blank Grading Form with Criteria* in the Report column. Next, select the desired grading form from the *Grading Form* drop-down box and click the *View Report* button.

## Grading Form with Results:

The Grading Form with Results Report will show:

- the questions for the selected grading form
- the answers recorded for the agent on the given call
- the scores received by the agent per grading form section
- the total score received by the agent (top right corner)

This report shows grading forms that have been assigned to call buckets and scored.

1. To access a grading form with results from the Reports → Form Reports page, first click to highlight *Grading Form with Results* in the *Report* column.
2. Enter the range of dates from which to search for the completed grading form by selecting the appropriate dates from the *Calls From* and *Calls To* drop-down boxes.
3. By default, CXM® will search all call buckets for completed grading forms. To search a single bucket, click the bucket icon (in the top right corner) and select the desired bucket from the *Buckets* list that appears. A message will appear at the bottom of the window to confirm the selected bucket. Click *Close* to return to the search screen. **Note: To return to searching all call buckets, click the *Reset* button. The search dates will also be reset.**
4. By default, CXM® will search for completed grading forms for all agents. To search for grading forms for a single agent, select the desired agent from the *Agents* drop-down box.
5. Click the *Search* button. A list of completed grading forms will appear at the bottom of the screen.
6. Navigate through the list of completed grading forms using the navigation tools at the bottom of the screen.
7. Click to select the desired grading form.
8. Select a logo.
9. Click the *View Report* button.

## Grading Form with Results and Comments:

The Grading Form with Results and Comments Report will show:

- the questions for the selected grading form
- the answers recorded for the agent on the given call
- the scores received by the agent per grading form section
- the total score received by the agent (top right corner)
- comments given by the evaluator regarding individual questions on the grading form
- section comments given by the evaluator
- overall comments given by the evaluator

This report shows grading forms that have been assigned to call buckets and scored.

1. To access a grading form with results and comments from the Reports → Form Reports page, first click to highlight *Grading Form with Results and Comments* in the *Report* column.
2. Enter the range of dates from which to search for the completed grading form by selecting the appropriate dates from the *Calls From* and *Calls To* drop-down boxes.
3. By default, CXM® will search all call buckets for completed grading forms. To search a single bucket, click the bucket icon (in the top right corner) and select the desired bucket from the *Buckets* list that appears. A message will appear at the bottom of the window to confirm the selected bucket. Click *Close* to return to the search screen. **Note: To return to searching all call buckets, click the *Reset* button. The search dates will also be reset.**
4. By default, CXM® will search for completed grading forms for all agents. To search for grading forms for a single agent, select the desired agent from the *Agents* drop-down box.
5. Click the *Search* button. A list of completed grading forms will appear at the bottom of the screen.
6. Navigate through the list of completed grading forms using the navigation tools at the bottom of the screen.
7. Click to select the desired grading form.
8. Select a logo.
9. Click the *View Report* button.

## Grading Form with Results Comments and Criteria:

The Grading Form with Results Comments and Criteria Report will show:

- the questions for the selected grading form
- the answers recorded for the agent on the given call
- the scores received by the agent per grading form section
- the total score received by the agent (top right corner)
- comments given by the evaluator regarding individual questions on the grading form
- section comments given by the evaluator
- overall comments given by the evaluator
- criteria given to aid the evaluator in scoring questions on the grading form

This report shows grading forms that have been assigned to call buckets and scored.

1. To access a grading form with results, comments and criteria from the Reports → Form Reports page, first click to highlight *Grading Form with Results Comments and Criteria* in the *Report* column.
2. Enter the range of dates from which to search for the completed grading form by selecting the appropriate dates from the *Calls From* and *Calls To* drop-down boxes.
3. By default, CXM® will search all call buckets for completed grading forms. To search a single bucket, click the bucket icon (in the top right corner) and select the desired bucket from the *Buckets* list that appears. A message will appear at the bottom of the window to confirm the selected bucket. Click *Close* to return to the search screen. **Note: To return to searching all call buckets, click the *Reset* button. The search dates will also be reset.**
4. By default, CXM® will search for completed grading forms for all agents. To search for grading forms for a single agent, select the desired agent from the *Agents* drop-down box.
5. Click the *Search* button. A list of completed grading forms will appear at the bottom of the screen.
6. Navigate through the list of completed grading forms using the navigation tools at the bottom of the screen.
7. Click to select the desired grading form.
8. Select a logo.
9. Click the *View Report* button.

## Grading Form with Results Comments - Group:

The Grading Form with Results Comments – Group report displays each grade for a group and optionally a bucket.

Do the following to view the report:

1. Select a date for *Date Start*.
2. Select a date for *Date End*.
3. Optionally, select a bucket.
4. Select a *Group*.

CXM®

5. Select a logo.
6. Click *View Report*.

# SCORING REPORTS

## Agent Grade Per Form:

### This report will show:

- The agent name (agent id), grading form, graded on, grader, and score for each grade
- Total scored and total average is displayed

1. To access this report, go to *Reports* → *Scoring Reports*, click *Agent Grade Per Form* in the *Report* column.
2. Enter the range of dates from which to compile the report by selecting the appropriate dates from the *Date Start* and *Date End* drop-down boxes.
3. For *Search By*, select either *Date Graded* or *Call Date*.
4. Select the desired Group from the drop-down box.
5. Select the desired bucket from the bucket selector.
6. Optionally, select a grade type filter.
7. Select a logo.
8. Click *View Report*.

## Agent Grades By Score By Date Graded:

### This report will show:

- The agent name, agent id, grading form, and score for each grade
- Total scored and total average is displayed
- Pulls grades with same score as entered in *Score equals*

1. To access this report, go to *Reports* → *Scoring Reports*, click *Agent Grades By Score By Date Graded* in the *Report* column.
2. Select a date range, **which will filter by date graded**.
3. Select the desired Group from the drop-down box.
4. For *Score equals*, enter a score.
5. Optionally, select a grade type filter.
6. Select a logo.



7. Click *View Report*.

## Average per Question Group:

**This report will show:**

- each question from the selected grading form
- the average score received on each question by the designated group during the given time range

1. To access this report, go to Reports → Scoring Reports, click *Average per Question Group* in the *Report* column.
2. Enter a date range by setting *Date Start* and *Date End*.
3. For *Search By*, select either *Date Graded* or *Call Date*.
4. Select a group.
5. Select a grading form.
6. To allow self-graded scores to be included in the averages, select the option entitled *Include Self Graded*.
7. Select a logo.
8. Click *View Report*.

## Average per Question Group - Graph:

**This report will show:**

- a bar graph showing the group's average score for each question of the selected grading form
- a list of questions from the selected grading form (page 2 of report)

1. To access this report, go to Reports → Scoring Reports, click *Average per Question Group - Graph* in the *Report* column.
2. Enter a date range by setting *Date Start* and *Date End*.
3. For *Search By*, select either *Date Graded* or *Call Date*.
4. Select a group.
5. Select a grading form.
6. To allow self-graded scores to be included in the averages, select the option entitled *Include Self Graded*.

7. Select a logo.
8. Click *View Report*.

## Average per Question Individual:

**This report will show:**

- questions from the selected grading form
- the average score received per question by the selected agent during the given time range

1. To access an Average per Question Individual Report from the Reports → Scoring Reports page, first click to highlight *Average per Question Individual* in the *Report* column.
2. Enter the range of dates from which to compile the report by selecting the appropriate dates from the *Date Start* and *Date End* drop-down boxes.
3. For *Search By*, select either *Date Graded* or *Call Date*.
4. Select the desired Agent from the drop-down box.
5. To include inactive agents' scores in the averages, select the option entitled *Include inactive agents*.
6. Select the desired Grading Form from the drop-down box.
7. To allow self-graded scores to be included in the averages, select the option entitled *Include Self Graded*.
8. Select a logo.
9. Click *View Report*.

## Average per Question Individual - Graph:

**This report will show:**

- a bar graph showing the agent's average score for each question of the selected grading form
- a list of questions from the selected grading form (page 2 of report)

1. To access an Average per Question Individual - Graph Report from the Reports → Scoring Reports page, first click to highlight *Average per Question Individual - Graph* in the *Report* column.

2. Enter the range of dates from which to compile the report by selecting the appropriate dates from the *Date Start* and *Date End* drop-down boxes.
3. For *Search By*, select either *Date Graded* or *Call Date*.
4. Select the desired Agent from the drop-down box.
5. To include inactive agents' scores in the averages, select the option entitled *Include inactive agents*.
6. Select the desired Grading Form from the drop-down box.
7. To allow self-graded scores to be included in the averages, select the option entitled *Include Self Graded*.
8. Select a logo.
9. Click *View Report*.

## Average Score by Agent for Evaluator:

### This report will show:

- each agent name
- name of each evaluator who has graded calls for each agent during the given time range
- the average score given to the agent by each evaluator
- the overall average score for each agent

1. To access an Average Score by Agent for Evaluator Report from the Reports → Scoring Reports page, first click to highlight *Average Score by Agent for Evaluator* in the *Report* column.
2. Enter the range of dates from which to compile the report by selecting the appropriate dates from the *Date Start* and *Date End* drop-down boxes.
3. For *Search By*, select either *Date Graded* or *Call Date*.
4. To allow self-graded scores to be included in the averages, select the option entitled *Include Self Graded*.
5. Optionally, select a grade type.
6. Select a logo.
7. Click *View Report*.

## Average Score by Agent for Evaluator - Graph:

### This report will show:

- a bar graph showing each agent's average score from each evaluator during the given time range

1. To access an Average Score by Agent for Evaluator - Graph Report from the Reports → Scoring Reports page, first click to highlight *Average Score by Agent for Evaluator - Graph* in the *Report* column.
2. Enter the range of dates from which to compile the report by selecting the appropriate dates from the *Date Start* and *Date End* drop-down boxes.
3. For *Search By*, select either *Date Graded* or *Call Date*.
4. To allow self-graded scores to be included in the averages, select the option entitled *Include Self Graded*.
5. Optionally, select a grade type.
6. Select a logo.
7. Click *View Report*.

## Average Score by Date for Evaluator:

### This report will show:

- the name of each evaluator who has scored calls during the given time range
- the dates on which the evaluator scored calls
- the average score given by the evaluator on each given day

1. To access an Average Score by Date for Evaluator Report from the Reports → Scoring Reports page, first click to highlight *Average Score by Date for Evaluator* in the *Report* column.
2. Enter the range of dates from which to compile the report by selecting the appropriate dates from the *Date Start* and *Date End* drop-down boxes.
3. For *Search By*, select either *Date Graded* or *Call Date*.
4. To allow self-graded scores to be included in the averages, select the option entitled *Include Self Graded*.
5. Select a grade type.
6. Select a logo.
7. Click *View Report*.

## Average Score by Date for Group:

**This report will show:**

- dates on which agents from the selected group were scored
- the average score received by the group on each given date

1. To access an Average Score by Date for Group Report from the Reports → Scoring Reports page, first click to highlight *Average Score by Date for Group* in the *Report* column.
2. Enter the range of dates from which to compile the report by selecting the appropriate dates from the *Date Start* and *Date End* drop-down boxes.
3. For *Search By*, select either *Date Graded* or *Call Date*.
4. Select the desired Group from the drop-down box.
5. To allow self-graded scores to be included in the averages, select the option entitled *Include Self Graded*.
6. Optionally, select a grade type.
7. Select a logo.
8. Click *View Report*.

## Average Score by Day of Week for Agent:

**This report will show:**

- the name of each grading form used for scoring the selected agent's calls during the given time range
- the day(s) of the week on which the agent's calls were scored
- the average score received by the selected agent on each day of the week

1. To access an Average Score by Day of Week for Agent Report from the Reports → Scoring Reports page, first click to highlight *Average Score by Day of Week for Agent* in the *Report* column.
2. Enter the range of dates from which to compile the report by selecting the appropriate dates from the *Date Start* and *Date End* drop-down boxes.
3. For *Search By*, select either *Date Graded* or *Call Date*.
4. Select the desired Agent from the drop-down box.

5. To include inactive agents' scores in the averages, select the option entitled *Include inactive agents*.
6. Select the desired Grading Form from the drop-down box.
7. To allow self-graded scores to be included in the averages, select the option entitled *Include Self Graded*.
8. Optionally, select a grade type.
9. Select a logo.
10. Click *View Report*.

## Average Score by Day of Week for Agent - Graph:

### This report will show:

- a line graph showing the selected agent's average scores on each day of the week for each grading form used during the given time range

1. To access an Average Score by Day of Week for Agent - Graph Report from the Reports → Scoring Reports page, first click to highlight *Average Score by Day of Week for Agent - Graph* in the *Report* column.
2. Enter the range of dates from which to compile the report by selecting the appropriate dates from the *Date Start* and *Date End* drop-down boxes.
3. For *Search By*, select either *Date Graded* or *Call Date*.
4. Select the desired Agent from the drop-down box.
5. To include inactive agents' scores in the averages, select the option entitled *Include inactive agents*.
6. Select the desired Grading Form from the drop-down box.
7. To allow self-graded scores to be included in the averages, select the option entitled *Include Self Graded*.
8. Optionally, select a grade type.
9. Select a logo.
10. Click *View Report*.

## Average Score by Day of Week for Evaluator:

### This report will show:

- the name of each evaluator who scored calls during the given time range
- each day of the week on which the evaluator scored calls
- the average score given by the evaluator on each day of the week

1. To access an Average Score by Day of Week for Evaluator Report from the Reports → Scoring Reports page, first click to highlight *Average Score by Day of Week for Evaluator* in the *Report* column.
2. Enter the range of dates from which to compile the report by selecting the appropriate dates from the *Date Start* and *Date End* drop-down boxes.
3. For *Search By*, select either *Date Graded* or *Call Date*.
4. To allow self-graded scores to be included in the averages, select the option entitled *Include Self Graded*.
5. Optionally, select a grade type.
6. Select a logo.
7. Click *View Report*.

## Average Score by Day of Week for Evaluator – Graph:

### This report will show:

- a bar graph showing the average score given by each evaluator on each day of the week during the given time range

1. To access an Average Score by Day of Week for Evaluator - Graph Report from the Reports → Scoring Reports page, first click to highlight *Average Score by Day of Week for Evaluator - Graph* in the *Report* column.
2. Enter the range of dates from which to compile the report by selecting the appropriate dates from the *Date Start* and *Date End* drop-down boxes.
3. For *Search By*, select either *Date Graded* or *Call Date*.
4. To allow self-graded scores to be included in the averages, select the option entitled *Include Self Graded*.
5. Optionally, select a grade type.

6. Select a logo.
7. Click *View Report*.

## Average Score by Day of Week for Group:

**This report will show:**

- the name of each grading form used to score calls for the selected group during the given time range
- the days of the week on which calls were scored for agents in the selected group
- the average score received by the group on each day of the week

1. To access an Average Score by Day of Week for Group Report from the Reports → Scoring Reports page, first click to highlight *Average Score by Day of Week for Group* in the *Report* column.
2. Enter the range of dates from which to compile the report by selecting the appropriate dates from the *Date Start* and *Date End* drop-down boxes.
3. For *Search By*, select either *Date Graded* or *Call Date*.
4. Select the desired Group from the drop-down box.
5. Select the desired Grading Form from the drop-down box.
6. To allow self-graded scores to be included in the averages, select the option entitled *Include Self Graded*.
7. Optionally, select a grade type.
8. Select a logo.
9. Click *View Report*.

## Average Score by Day of Week for Group - Graph:

**This report will show:**

- a line graph showing the selected group's average scores on each day of the week for each grading form used during the given time range

1. To access an Average Score by Day of Week for Group - Graph Report from the Reports → Scoring Reports page, first click to



- highlight *Average Score by Day of Week for Group - Graph* in the *Report* column.
2. Enter the range of dates from which to compile the report by selecting the appropriate dates from the *Date Start* and *Date End* drop-down boxes.
  3. For *Search By*, select either *Date Graded* or *Call Date*.
  4. Select the desired Group from the drop-down box.
  5. Select the desired Grading Form from the drop-down box.
  6. To allow self-graded scores to be included in the averages, select the option entitled *Include Self Graded*.
  7. Optionally, select a grade type.
  8. Select a logo.
  9. Click *View Report*.

## Average Score by Form for Evaluator:

### This report will show:

- the name of each grading form used to score calls during the given time range
- the name of each evaluator who used each grading form
- the average score given by each evaluator on each grading form
- the overall average score given for each grading form

1. To access an Average Score by Form for Evaluator Report from the Reports → Scoring Reports page, first click to highlight *Average Score by Form for Evaluator* in the *Report* column.
2. Enter the range of dates from which to compile the report by selecting the appropriate dates from the *Date Start* and *Date End* drop-down boxes.
3. For *Search By*, select either *Date Graded* or *Call Date*.
4. To allow self-graded scores to be included in the averages, select the option entitled *Include Self Graded*.
5. Optionally, select a grade type.
6. Select a logo.
7. Click *View Report*.

## Average Score by Form for Evaluator - Graph:

### This report will show:

- a bar graph showing the average score given by each evaluator using each grading form during the given time range

1. To access an Average Score by Form for Evaluator - Graph Report from the Reports → Scoring Reports page, first click to highlight *Average Score by Form for Evaluator - Graph* in the *Report* column.
2. Enter the range of dates from which to compile the report by selecting the appropriate dates from the *Date Start* and *Date End* drop-down boxes.
3. For *Search By*, select either *Date Graded* or *Call Date*.
4. To allow self-graded scores to be included in the averages, select the option entitled *Include Self Graded*.
5. Optionally, select a grade type.
6. Select a logo.
7. Click *View Report*.

## Calls Scored per Month by Evaluator:

### This report will show:

- the months during the given time range in which calls were scored
- the name of each evaluator who scored calls during each month
- the number of calls scored by each evaluator
- the total number of calls scored during each month

1. To access a Calls Scored per Month by Evaluator Report from the Reports → Scoring Reports page, first click to highlight *Calls Scored per Month by Evaluator* in the *Report* column.
2. Enter the range of dates from which to compile the report by selecting the appropriate dates from the *Date Start* and *Date End* drop-down boxes.
3. For *Search By*, select either *Date Graded* or *Call Date*.
4. Optionally, select a grade type.
5. Select a logo.
6. Click *View Report*.

## Calls Scored per Month by Evaluator - Graph:

This report will show:

- a bar graph showing the number of calls graded by each evaluator during each month of the given time range

1. To access a Calls Scored per Month by Evaluator - Graph Report from the Reports → Scoring Reports page, first click to highlight *Calls Scored per Month by Evaluator - Graph* in the Report column.
2. Enter the range of dates from which to compile the report by selecting the appropriate dates from the *Date Start* and *Date End* drop-down boxes.
3. For *Search By*, select either *Date Graded* or *Call Date*.
4. Optionally, select a grade type.
5. Select a logo.
6. Click *View Report*.

## Calls Scored per Week by Evaluator:

This report will show:

- the weeks during the given time range in which calls were scored
- the name of each evaluator who scored calls during each week
- the number of calls scored by each evaluator
- the total number of calls scored during each week

1. To access a Calls Scored per Week by Evaluator Report from the Reports → Scoring Reports page, first click to highlight *Calls Scored per Week by Evaluator* in the Report column.
2. Enter the range of dates from which to compile the report by selecting the appropriate dates from the *Date Start* and *Date End* drop-down boxes.
3. For *Search By*, select either *Date Graded* or *Call Date*.
4. Optionally, select a grade type.
5. Select a logo.
6. Click *View Report*.

## Calls Scored per Week by Evaluator - Graph:

**This report will show:**

- a bar graph showing the number of calls graded by each evaluator during each week of the given time range

1. To access a Calls Scored per Week by Evaluator - Graph Report from the Reports → Scoring Reports page, first click to highlight *Calls Scored per Week by Evaluator - Graph* in the *Report* column.
2. Enter the range of dates from which to compile the report by selecting the appropriate dates from the *Date Start* and *Date End* drop-down boxes.
3. For *Search By*, select either *Date Graded* or *Call Date*.
4. Optionally, select a grade type.
5. Select a logo.
6. Click *View Report*.

## Calls Scored per Week by Evaluator by Date Graded:

**This report will show:**

- a bar graph showing the number of calls graded by each evaluator during each week of the given time range

1. To access a Calls Scored per Week by Evaluator - Graph Report from the Reports → Scoring Reports page, first click to highlight *Calls Scored per Week by Evaluator by Date Graded* in the *Report* column.
2. Enter the range of dates from which to compile the report by selecting the appropriate dates from the *Date Start* and *Date End* drop-down boxes.
3. Optionally, select a grade type.
4. Select a logo.
5. Click *View Report*.

## Calls Scored per Week by Evaluator by Date Graded - Graph:

### This report will show:

- a bar graph showing the number of calls graded by each evaluator during each week of the given time range

1. To access a Calls Scored per Week by Evaluator - Graph Report from the Reports → Scoring Reports page, first click to highlight *Calls Scored per Week by Evaluator by Date Graded - Graph* in the Report column.
2. Enter the range of dates from which to compile the report by selecting the appropriate dates from the *Date Start* and *Date End* drop-down boxes.
3. Optionally, select a grade type.
4. Select a logo.
5. Click *View Report*.

## Comment Count per Evaluator:

### This report will show:

- the name of each evaluator who made comments on grading forms during the given time range
- the number of comments made by each evaluator

1. To access a Comment Count per Evaluator Report from the Reports → Scoring Reports page, first click to highlight *Comment Count per Evaluator* in the Report column.
2. Enter the range of dates from which to compile the report by selecting the appropriate dates from the *Date Start* and *Date End* drop-down boxes.
3. For *Search By*, select either *Date Graded* or *Call Date*.
4. To allow self-graded scores to be included in the averages, select the option entitled *Include Self Graded*.
5. Optionally, select a grade type.
6. Select a logo.
7. Click *View Report*.

## Comment Count per Evaluator - Graph:

### This report will show:

- a bar graph showing the number of comments made on grading forms by each evaluator during the given time range

1. To access a Comment Count per Evaluator - Graph Report from the Reports → Scoring Reports page, first click to highlight *Comment Count per Evaluator - Graph* in the *Report* column.
2. Enter the range of dates from which to compile the report by selecting the appropriate dates from the *Date Start* and *Date End* drop-down boxes.
3. For *Search By*, select either *Date Graded* or *Call Date*.
4. To allow self-graded scores to be included in the averages, select the option entitled *Include Self Graded*.
5. Optionally, select a grade type.
6. Select a logo.
7. Click *View Report*.

## Graded Call Count:

### This report will show:

- the name of each agent in the selected group with calls graded during the given time range
- the number of calls that have been graded for each agent

1. To access a Graded Call Count Report from the Reports → Scoring Reports page, first click to highlight *Graded Call Count* in the *Report* column.
2. Enter the range of dates from which to compile the report by selecting the appropriate dates from the *Date Start* and *Date End* drop-down boxes.
3. Select the desired Group from the drop-down box.
4. Optionally, select a grading form.
5. Optionally, select a grade type.
6. Select a logo.
7. Click *View Report*.

## Grades and Survey Results For Date Range:

### This report will show:

- The grades and surveys for the selected date range

1. To access this report, click Reports → Scoring Reports, click *Grades and Survey Results For Date Range* in the Report column.
2. Enter the range of dates from which to compile the report by selecting the appropriate dates from the *Date Start* and *Date End* drop-down boxes.
3. Select a logo.
4. Click *View Report*.

## Individual Average and Count Summary For Group:

### This report will show:

- The average and count of grades in a group

1. To access this report from the Reports → Scoring Reports page, click *Individual Average and Count Summary For Group* in the Report column.
2. Enter the range of dates from which to compile the report by selecting the appropriate dates from the *Date Start* and *Date End* drop-down boxes.
3. Select the desired Group from the drop-down box.
4. Optionally, select the grade type.
5. For *Search By*, select either *Date Graded* or *Call Date*.
6. Click *View Report*.

## Individual Averages for Group:

### This report will show:

- the name of each grading form used to score calls for agents in the selected group during the given time range
- the name of each agent with calls scored using each grading form
- the average score received by each agent on each grading form
- the average score for each grading form
- the overall average score of all the grading forms

1. To access an Individual Averages for Group Report from the Reports → Scoring Reports page, first click to highlight *Individual Averages for Group* in the *Report* column.
2. Enter the range of dates from which to compile the report by selecting the appropriate dates from the *Date Start* and *Date End* drop-down boxes.
3. Select the desired Group from the drop-down box.
4. Select the desired Grading Form from the drop-down box.
5. To allow self-graded scores to be included in the averages, select the option entitled *Include Self Graded*.
6. Click *View Report*.

### Monthly Average by Form for Group:

**This report will show:**

- the name of each grading form used to score calls for the selected group during the given time range
- the months in which each grading form was used to score calls
- the average score received by agents in the selected group during each listed month
- the average score for each grading form
- the overall average score of all the grading forms

1. To access a Monthly Average by Form for Group Report from the Reports → Scoring Reports page, first click to highlight *Monthly Average by Form for Group* in the *Report* column.
2. Enter the range of dates from which to compile the report by selecting the appropriate dates from the *Date Start* and *Date End* drop-down boxes.
3. For *Search By*, select either *Date Graded* or *Call Date*.
4. Select the desired Group from the drop-down box.
5. Select the desired Grading Form from the drop-down box.
6. To allow self-graded scores to be included in the averages, select the option entitled *Include Self Graded*.
7. Optionally, select a grade type.
8. Select a logo.



9. Click *View Report*.

## Monthly Average by Form for Group - Graph:

### This report will show:

- a line graph showing the selected group's average scores for each grading form used during each month of the given time range

1. To access a Monthly Average by Form for Group - Graph Report from the Reports → Scoring Reports page, first click to highlight *Monthly Average by Form for Group - Graph* in the *Report* column.
2. Enter the range of dates from which to compile the report by selecting the appropriate dates from the *Date Start* and *Date End* drop-down boxes.
3. For *Search By*, select either *Date Graded* or *Call Date*.
4. Select the desired Group from the drop-down box.
5. Select the desired Grading Form from the drop-down box.
6. To allow self-graded scores to be included in the averages, select the option entitled *Include Self Graded*.
7. Optionally, select a grade type.
8. Select a logo.
9. Click *View Report*.

## Monthly Average by Form for Individual:

### This report will show:

- the name of each grading form used to score calls for the selected agent during the given time range
- the months in which each grading form was used
- the average score received by the selected agent during each listed month
- the average score for each grading form
- the overall average score for all the grading forms

1. To access a Monthly Average by Form for Individual Report from the Reports → Scoring Reports page, first click to highlight *Average Monthly Average by Form for Individual* in the *Report* column.

2. Enter the range of dates from which to compile the report by selecting the appropriate dates from the *Date Start* and *Date End* drop-down boxes.
3. For *Search By*, select either *Date Graded* or *Call Date*.
4. Select the desired Agent from the drop-down box.
5. To include inactive agents' scores in the averages, select the option entitled *Include inactive agents*.
6. Select the desired Grading Form from the drop-down box.
7. To allow self-graded scores to be included in the averages, select the option entitled *Include Self Graded*.
8. Optionally, select a grade type.
9. Select a logo.
10. Click *View Report*.

## Monthly Average by Form for Individual - Graph:

### This report will show:

- a line graph showing the selected agent's average scores for each grading form used during each month of the given time range

1. To access a Monthly Average by Form for Individual - Graph Report from the Reports → Scoring Reports page, first click to highlight *Monthly Average by Form for Individual - Graph* in the *Report* column.
2. Enter the range of dates from which to compile the report by selecting the appropriate dates from the *Date Start* and *Date End* drop-down boxes.
3. For *Search By*, select either *Date Graded* or *Call Date*.
4. Select the desired Agent from the drop-down box.
5. To include inactive agents' scores in the averages, select the option entitled *Include inactive agents*.
6. Select the desired Grading Form from the drop-down box.
7. To allow self-graded scores to be included in the averages, select the option entitled *Include Self Graded*.
8. Optionally, select the grade type.

9. Select a logo.
10. Click *View Report*.

## Per Question Trending Over Time by Agent - Graph:

**This report will show:**

- a line graph showing change in the selected agent's scores on each question of the selected grading form over the given time range
- a list of questions from the selected grading form (page 2 of report)

1. To access a Per Question Trending Over Time by Agent - Graph Report from the Reports → Scoring Reports page, first click to highlight *Per Question Trending Over Time by Agent - Graph* in the *Report* column.
2. Enter the range of dates from which to compile the report by selecting the appropriate dates from the *Date Start* and *Date End* drop-down boxes.
3. For *Search By*, select either *Date Graded* or *Call Date*.
4. Select the desired Agent from the drop-down box.
5. To include inactive agents' scores in the averages, select the option entitled *Include inactive agents*.
6. Select the desired Grading Form from the drop-down box.
7. To allow self-graded scores to be included in the averages, select the option entitled *Include Self Graded*.
8. Optionally, select a grade type.
9. Select a logo.
10. Click *View Report*.

## Per Question Trending Over Time by Group - Graph:

**This report will show:**

- a line graph showing change in the selected group's average scores on each question of the selected grading form over the given time range
- a list of questions from the selected grading form (page 2 of report)

1. To access a Per Question Trending Over Time by Group - Graph Report from the Reports → Scoring Reports page, first click to highlight *Per Question Trending Over Time by Group - Graph* in the *Report* column.
2. Enter the range of dates from which to compile the report by selecting the appropriate dates from the *Date Start* and *Date End* drop-down boxes.
3. For *Search By*, select either *Date Graded* or *Call Date*.
4. Select the desired Group from the drop-down box.
5. Select the desired Grading Form from the drop-down box.
6. To allow self-graded scores to be included in the averages, select the option entitled *Include Self Graded*.
7. Optionally, select a grade type.
8. Select a logo.
9. Click *View Report*.

## Top Agents per Form:

### This report will show:

- each grading form used during the given time range
- the designated number of agents with top average scores on each grading form
- the average score received by each agent

1. To access a Top Agents per Form Report from the Reports → Scoring Reports page, first click to highlight *Top Agents per Form* in the *Report* column.
2. Enter the range of dates from which to compile the report by selecting the appropriate dates from the *Date Start* and *Date End* drop-down boxes.
3. For *Search By*, select either *Date Graded* or *Call Date*.
4. Designate the number of top Agents to be listed.
5. To allow self-graded scores to be included in the averages, select the option entitled *Include Self Graded*.
6. Optionally, select a grade type.
7. Select a logo.

8. Click *View Report*.

## Top Agents per Form - Graph:

**This report will show:**

- a bar graph showing the designated number of top agents and their average scores on each grading form during the given time range

1. To access a Top Agents per Form - Graph Report from the Reports → Scoring Reports page, first click to highlight *Top Agents per Form - Graph* in the *Report* column.
2. Enter the range of dates from which to compile the report by selecting the appropriate dates from the *Date Start* and *Date End* drop-down boxes.
3. For *Search By*, select either *Date Graded* or *Call Date*.
4. Designate the number of top Agents to be listed.
5. To allow self-graded scores to be included in the averages, select the option entitled *Include Self Graded*.
6. Optionally, select a grade type.
7. Select a logo.
8. Click *View Report*.

## Top Evaluators by Calls Scored:

**This report will show:**

- in ranked order, the designated number of evaluators who have scored the most calls during the given time range
- the number of calls scored by each evaluator

1. To access a Top Evaluators by Calls Scored Report from the Reports → Scoring Reports page, first click to highlight *Top Evaluators by Calls Scored* in the *Report* column.
2. Select a logo.
3. Click *View Report*.

## Weekly Average by Form for Group:

This report will show:

- the name of each grading form used to score calls for the selected group during the given time range
- the weeks in which each grading form was used to score calls
- the average score received by agents in the selected group during each listed week
- the average score for each grading form
- the overall average score of all the grading forms

1. To access a Weekly Average by Form for Group Report from the Reports → Scoring Reports page, first click to highlight *Weekly Average by Form for Group* in the *Report* column.
2. Enter the range of dates from which to compile the report by selecting the appropriate dates from the *Date Start* and *Date End* drop-down boxes.
3. For *Search By*, select either *Date Graded* or *Call Date*.
4. Select the desired Group from the drop-down box.
5. Select the desired Grading Form from the drop-down box.
6. To allow self-graded scores to be included in the averages, select the option entitled *Include Self Graded*.
7. Optionally, select a grade type.
8. Select a logo.
9. Click *View Report*.

## Weekly Average by Form for Group - Graph:

This report will show:

- a line graph showing the selected group's average scores for each grading form used during each week of the given time range

1. To access a Weekly Average by Form for Group - Graph Report from the Reports → Scoring Reports page, first click to highlight *Weekly Average by Form for Group - Graph* in the *Report* column.

2. Enter the range of dates from which to compile the report by selecting the appropriate dates from the *Date Start* and *Date End* drop-down boxes.
3. For *Search By*, select either *Date Graded* or *Call Date*.
4. Select the desired Group from the drop-down box.
5. Select the desired Grading Form from the drop-down box.
6. To allow self-graded scores to be included in the averages, select the option entitled *Include Self Graded*.
7. Optionally, select a grade type.
8. Select a logo.
9. Click *View Report*.

## Weekly Average by Form for Individual:

### This report will show:

- the name of each grading form used to score calls for the selected agent during the given time range
- the weeks in which each grading form was used
- the average score received by the selected agent during each listed week
- the average score for each grading form
- the overall average score for all the grading forms

1. To access a Weekly Average by Form for Individual Report from the Reports → Scoring Reports page, first click to highlight *Weekly Average by Form for Individual* in the *Report* column.
2. Enter the range of dates from which to compile the report by selecting the appropriate dates from the *Date Start* and *Date End* drop-down boxes.
3. For *Search By*, select either *Date Graded* or *Call Date*.
4. Select the desired Agent from the drop-down box.
5. To include inactive agents' scores in the averages, select the option entitled *Include inactive agents*.
6. Select the desired Grading Form from the drop-down box.
7. To allow self-graded scores to be included in the averages, select the option entitled *Include Self Graded*.

8. Optionally, select a grade type.
9. Select a logo.
10. Click *View Report*.

## Weekly Average by Form for Individual - Graph:

**This report will show:**

- a line graph showing the selected agent's average scores for each grading form used during each week of the given time range

1. To access a Weekly Average by Form for Individual - Graph Report from the Reports → Scoring Reports page, first click to highlight *Weekly Average by Form for Individual - Graph* in the Report column.
2. Enter the range of dates from which to compile the report by selecting the appropriate dates from the *Date Start* and *Date End* drop-down boxes.
3. For *Search By*, select either *Date Graded* or *Call Date*.
4. Select the desired Agent from the drop-down box.
5. To include inactive agents' scores in the averages, select the option entitled *Include inactive agents*.
6. Select the desired Grading Form from the drop-down box.
7. To allow self-graded scores to be included in the averages, select the option entitled *Include Self Graded*.
8. Optionally, select a grade type.
9. Select a logo.
10. Click *View Report*.



# SYSTEM REPORTS

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## Agent List:

**This report will show:**

- a list of agents entered into the CXM® system

1. To access an Agent List Report from the Reports → System Reports page, first click to highlight *Agent List* in the *Report* column.
2. Select a logo.
3. Click *View Report*.

## Calls Recorded per Day:

**This report will show:**

- a list of each day within the given time range
- the number of calls recorded each day of the given time range

1. To access a Weekly Average by Form for Individual - Graph Report from the Reports → Scoring Reports page, first click to highlight *Weekly Average by Form for Individual - Graph* in the *Report* column.
2. Enter the range of dates from which to compile the report by selecting the appropriate dates from the *Date Start* and *Date End* drop-down boxes.
3. Select a logo.
4. Click *View Report*.

## Calls Recorded per Month:

**The report will show:**

- a list of each month within the given time range
- the number of calls recorded each month of the given time range

1. To access a Weekly Average by Form for Individual - Graph Report from the Reports → Scoring Reports page, first click to highlight

*Weekly Average by Form for Individual - Graph* in the *Report* column.

2. Enter the range of dates from which to compile the report by selecting the appropriate dates from the *Date Start* and *Date End* drop-down boxes.
3. Select a logo.
4. Click *View Report*.

## DNIS List:

**This report will show:**

- a list of DNISs entered into the CXM® system

1. To access an Agent List Report from the Reports → System Reports page, first click to highlight *Agent List* in the *Report* column.
2. Select a logo.
3. Click *View Report*.

## Port Usage:

**This report will show:**

- a daily and hourly breakdown of port usage

1. To access this report, click Reports → System Reports, click *Port Usage* in the *Report* column.
2. Select a logo.
3. Click *View Report*.

Following is how the *Busy Time* percentages are calculated:

Every 10 seconds, the number of ports in use is stored, and then these are averaged out for the hour. This is done every hour.

For example, say we took a sample now, and 10 ports are being used, then 10 seconds later, 20 ports are in use. If this port use pattern continues (10, 20, 10, 20...), then over the hour, the average port use will be 15. The percentage is then determined by using the maximum number of ports.

Thus, if the maximum number of ports for the system is 20, then the report should say 75% busy for that hour (average of 15 ports in use divided by 20, which is the maximum number of ports available).

NOTE: For this feature to work correctly, the maximum number of ports must be set under System -> System Settings, option id 733.

## Skill List:

This report will show:

- a list of skills entered into the CXM® system

1. To access an Agent List Report from the Reports → System Reports page, first click to highlight *Agent List* in the *Report* column.
2. Select a logo.
3. Click *View Report*.

## Station List:

This report will show:

- a list of stations entered into the CXM® system

1. To access an Agent List Report from the Reports → System Reports page, first click to highlight *Agent List* in the *Report* column.
2. Select a logo.
3. Click *View Report*.

## Trunk List:

This report will show:

- a list of trunks entered into the CXM® system

1. To access an Agent List Report from the Reports → System Reports page, first click to highlight *Agent List* in the *Report* column.
2. Select a logo.
3. Click *View Report*.

## User List:

This report will show:

- a list of users entered into the CXM® system

1. To access an Agent List Report from the Reports → System Reports page, first click to highlight *Agent List* in the *Report* column.
2. Select a logo.
3. Click *View Report*.

## VDN List:

**This report will show:**

- a list of VDNs entered into the CXM® system

1. To access an Agent List Report from the Reports → System Reports page, first click to highlight *Agent List* in the *Report* column.
2. Select a logo.
3. Click *View Report*.

# CALIBRATION REPORTS

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## Calibration Summary for Call:

The Calibration Report will show:

- the name of each evaluator who scored the call for the selected agent using the selected grading form
- the questions from the selected grading form
- the answer each evaluator gave for each question
- the average score received for each question
- if there are differences between the evaluators' answers, the question will be marked with an X (For example, if two evaluators answered "yes" to question number 1, while one evaluator answered "no" to question number 1, the question will be marked with an X to show that the evaluators did not score the question the same way.)

1. To access a Calibration Summary Report from the Reports → Calibration Reports page, first click to highlight Calibration Summary for Call in the Report column. A list of call buckets will appear.
2. Click to select the call bucket that contains the desired graded call. A list of the calls in the selected bucket will appear on the right side of the screen. The number of times each call has been graded will appear in the *Graded* column.
3. Click the "+" on the left side of the row containing the desired call. The rows will expand to reveal further details about the graded call (name of the agent, grading form used).
4. Click to select the grading form to be used for compiling the Calibration Report. The row will be highlighted (orange) and the *View Report* button, located in the lower right corner, will be active.
5. Select a logo.
6. Click *View Report*.

# Portal Reports

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## Average Score By Agent:

**This report will show:**

- For each test result, the agent, number of tests taken, and the score
- Average score for results shown

1. To access this report from the Reports → Portal Reports, click *Average Score By Agent* in the *Report* column.
2. Enter the range of dates from which to compile the report by selecting the appropriate dates from the *Date Start* and *Date End* drop-down boxes.
3. Select an agent.
4. Optionally, check inactive agents.
5. Select a group.
6. Select a logo.
7. Click *View Report*.

## Average Score By Agent Graph:

**This report will show:**

- Bar graph for test results

1. To access this report from the Reports → Portal Reports, click *Average Score By Agent Graph* in the *Report* column.
2. Enter the range of dates from which to compile the report by selecting the appropriate dates from the *Date Start* and *Date End* drop-down boxes.
3. Select an agent.
4. Optionally, check inactive agents.
5. Select a group.
6. Select a logo.
7. Click *View Report*.

## Average Score By Test:

**This report will show:**

- For each test, the test name, tests completed, high, low, and average are shown
- Average score

1. To access this report from the Reports → Portal Reports, click *Average Score By Test* in the *Report* column.
2. Enter the range of dates from which to compile the report by selecting the appropriate dates from the *Date Start* and *Date End* drop-down boxes.
3. Select a test.
4. Select a group.
5. Select a logo.
6. Click *View Report*.

## Average Score By Test Graph:

**This report will show:**

- For each test, the test name, tests completed, high, low, and average are shown on a bar graph

1. To access this report from the Reports → Portal Reports, click *Average Score By Test Graph* in the *Report* column.
2. Enter the range of dates from which to compile the report by selecting the appropriate dates from the *Date Start* and *Date End* drop-down boxes.
3. Select a test.
4. Select a group.
5. Select a logo.
6. Click *View Report*.

## Calls Scored per Month by Agent:

**This report will show:**

- each month during the given time range in which an agent scored calls
- the name of each agent who scored calls during each listed month
- the number of calls scored by each agent during each month

1. To access a Calls Scored per Month by Agent Report from the Reports → Portal Reports page, first click to highlight *Calls Scored per Month by Agent* in the *Report* column.
2. Enter the range of dates from which to compile the report by selecting the appropriate dates from the *Date Start* and *Date End* drop-down boxes.
3. For *Search By*, select either *Date Graded* or *Call Date*.
4. Optionally, select grade type.
5. Select a logo.
6. Click *View Report*.

### Calls Scored per Month by Agent - Graph:

**This report will show:**

- a bar graph showing the number of calls graded by each agent during each month of the given time range

1. To access a Calls Scored per Month by Agent – Graph Report from the Reports → Portal Reports page, first click to highlight *Calls Scored per Month by Agent - Graph* in the *Report* column.
2. Enter the range of dates from which to compile the report by selecting the appropriate dates from the *Date Start* and *Date End* drop-down boxes.
3. For *Search By*, select either *Date Graded* or *Call Date*.
4. Optionally, select grade type.
5. Select a logo.
6. Click *View Report*.

### Calls Scored per Week by Agent:

**This report will show:**

- each week during the given time range in which an agent scored calls
- the name of each agent who scored calls during each listed week
- the number of calls scored by each agent during each week



1. To access a Calls Scored per Week by Agent Report from the Reports → Portal Reports page, first click to highlight *Calls Scored per Week by Agent* in the *Report* column.
2. Enter the range of dates from which to compile the report by selecting the appropriate dates from the *Date Start* and *Date End* drop-down boxes.
3. For *Search By*, select either *Date Graded* or *Call Date*.
4. Optionally, select grade type.
5. Select a logo.
6. Click *View Report*.

## Calls Scored per Week by Agent - Graph:

### This report will show:

- a bar graph showing the number of calls graded by each agent during each week of the given time range

1. To access a Calls Scored per Week by Agent - Graph Report from the Reports → Portal Reports page, first click to highlight *Calls Scored per Week by Agent - Graph* in the *Report* column.
2. Enter the range of dates from which to compile the report by selecting the appropriate dates from the *Date Start* and *Date End* drop-down boxes.
3. For *Search By*, select either *Date Graded* or *Call Date*.
4. Optionally, select grade type.
5. Select a logo.
6. Click *View Report*.

## Test Results:

### This report will show the agent, score, date due, and date completed for each test result for the selected test.

1. To access this report from the Reports → Portal Reports page, click *Test Results* in the *Report* column.
2. Select a test.
3. Select a logo.

4. Click *View Report*.

## Test Results By Agent:

This report will show:

- the agent, question, answer, whether the answer is correct or not. If the answer is not correct, then it shows the correct answer.
- Score per test, average, and average for all tests

1. To access this report from the Reports → Portal Reports page, click *Test Results By Agent* in the *Report* column.
2. Select a test.
3. Select a logo.
4. Click *View Report*.

## Tests Completed By Test

This report will show:

- For the select test and group, agent and date completed is shown.
- Number who have completed test
- Number who have not completed test

1. To access this report from the Reports → Portal Reports page, click *Tests Completed By Test* in the *Report* column.
2. Select an agent.
3. Optionally, check *Include inactive agents?* to show inactive agents in the agent selector.
4. Select a group.
5. Select a test.
6. Select a logo.
7. Click *View Report*.

## Viewed Bulletins

This report will show:

- Each agent the bulletin is assigned
- Whether or not the agent has viewed the bulletin
- Number of agents assigned
- Number of views

1. To access this report from the Reports → Portal Reports page, click *Viewed Bulletins* in the *Report* column.
2. Optionally, select a bulletin.
3. Select a logo.
4. Click *View Report*.

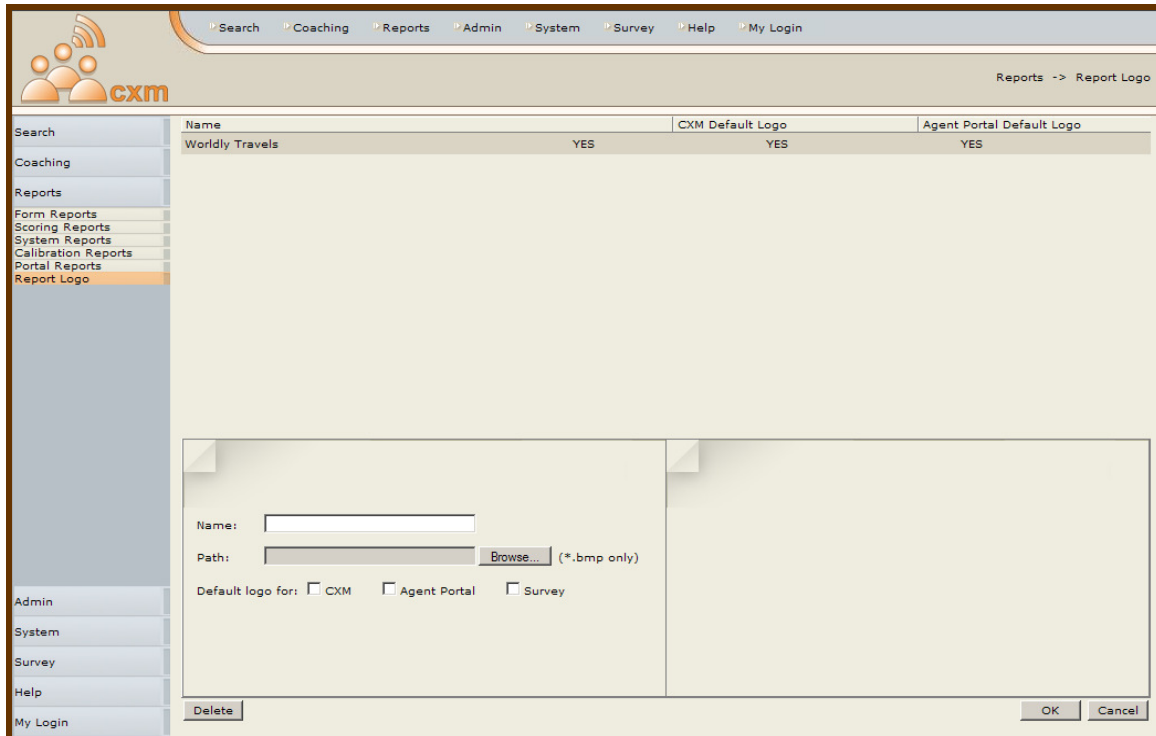
## Viewed Videos

**This report will show:**

- **Each agent the video is assigned**
- **Whether or not the agent has viewed the video**
- **Number of agents assigned**
- **Number of views**

1. To access this report from the Reports → Portal Reports page, click *Viewed Videos* in the *Report* column.
2. Optionally, select a video.
3. Select a logo.
4. Click *View Report*.

# REPORTS LOGO



The Reports Logo section allows the administrator to change the logo that appears on reports.

To upload a new image, do the following:

1. Enter a name for the image.
2. Select an image – *bmp(bit map)* only!
3. If you want this logo to be the default image for either CXM, Agent Portal, or Survey, then check the appropriate *Default logo for* box. This setting is optional.
4. Click OK.

There is no limit on the number of images that can be uploaded.

# SYSTEM LOGOUT

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1. To log out of the CXM® System, click *My Login* in the bottom left corner, or from the CXM® menu. The *Logout* page will appear.
2. Click *Logout* to end your CXM® session. This will take you to the CXM® *Login* screen.

