Eventide®

Communications Division

Eventide *Quality Factor* Software

User Manual 2.8.0

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Revision History

This section summarizes significant changes, corrections, and additions to the document. The history appears in chronological order with the most recent document listed first. Documents are identified by part number and applicable software (SW) version.

This section tracks documentation changes. For a description of new software features and improvements introduced in a particular release, see the product release notes on the Eventide company website.

Part Number	Date	SW	Description
141216–08	Nov 20, 2017	2.8.0	• Advanced Evaluation Schedules
141216–07	Sep 1, 2016	2.7.0	• New Overview Section • New Multiple Comments with Actions Mode • Scheduled Evaluation Tab • Updated Screenshots
141216–06	Sep 3, 2015	2.5.6	• Updates to WinUserTracker Appendix
141216–05	Mar 6, 2015	2.5.1	• CompletedEvaluation Deletion Feature • Added WinUserTracker Appendix
141216–04	Feb 6, 2015	2.5.0	• Form Export/Import • Completed Evaluation Deletion • Agent Permission Group
141216–03	May 27, 2014	2.4.0	• Groups and Schedules • Media Start Date • Updates to Completed Evaluations • Updated screenshots to be representative of 2.4
141216–02	Mar 15, 2013	2.2.0	• Minor Updates
141216–01	Apr 30, 2012	2.1.0	• Initial Release

Purpose and Applicability

This publication provides information for users of the Eventide Quality Factor software option for NexLog™ Recorders with MediaWorks Plus software.

This information applies to NexLog Recorder Software 2.7.0 for the NexLog 740 and NexLog 840 recorders. It may also apply to later versions except when superseded by a more recent publication.

Customer Support Information

Eventide is committed to your satisfaction. If, after using this manual, you still have questions about the operation of your Eventide Quality Factor software, contact your Eventide dealer or Eventide Technical Support at service@eventide.com or call (201) 641-1200.

The Eventide web site may have additional information that may be helpful. Go to www.eventide.com.

Release Numbers

You may need to identify the software version and serial number for the following products/components:

- **NexLog Recorder Software:** On the touch screen front panel or with a monitor and mouse attached (while the recorder is running), do the following to display the version information:
    - Select the menu icon on the lower left indicated by an "**e**" icon.
    - Select **Setup**.
    - Select **System**.
    - Select the sub menu **System Info**.
    - The Recorder Serial Number and Current Firmware Version should be displayed.

Alternatively, you can get the version and serial number remotely via the web-based NexLog Configuration Manager software:

- Navigate to the recorder's IP address (example: http://192.168.2.100), and Login. Note that the default logon

credentials for the recorder (before they are changed by the administrator) are User Name: Eventide / Password: 12345.

- In the NexLog Configuration Manager's navigation menu on the left, select the **System** menu.
- In the sub navigation menu select **System Info**.
- The Recorder Serial Number and Current Firmware Version should be displayed.

1. Introduction & Overview

1.1. Welcome

Welcome and congratulations on your purchase of the Eventide® Quality Factor software option for use with an Eventide NexLog™ Recorder and Eventide MediaWorks Plus software.

This manual will help you maximize the use of your product. It includes:

- Explanation of what Quality Factor is and how the product implements call evaluation.
- Step-by-step instructions on how to set up and operate Eventide Quality Factor.
- How to run reports and get the most out of the data generated by Eventide Quality Factor.

1.2. Quality Factor Software Overview

Quality Factor is an add-on NexLog feature that provides a configurable workflow for evaluation of call handling and dispatch calls recorded on your NexLog Recorder. It is accessed via MediaWorks Plus and configured in Configuration Manager. Quality Factor does not require that you use all of its available features if a streamlined workflow is appealing, but it can also support a robust workflow with many features and multiple tiers of responsibility for quality control.

Evaluation of call handling and dispatch is easy with the Eventide Quality Factor software. Once the forms and agents have been configured, it's a simple matter of selecting a call or incident in the MediaWorks Plus web client, right-clicking, and then selecting an Evaluation form. A new browser tab will open with the selected Evaluation form.

Quality Factor is complex product to configure, and so before we discuss configuration, here is an overview of the concepts involved: Roles, Forms, Evaluations, and Actions.

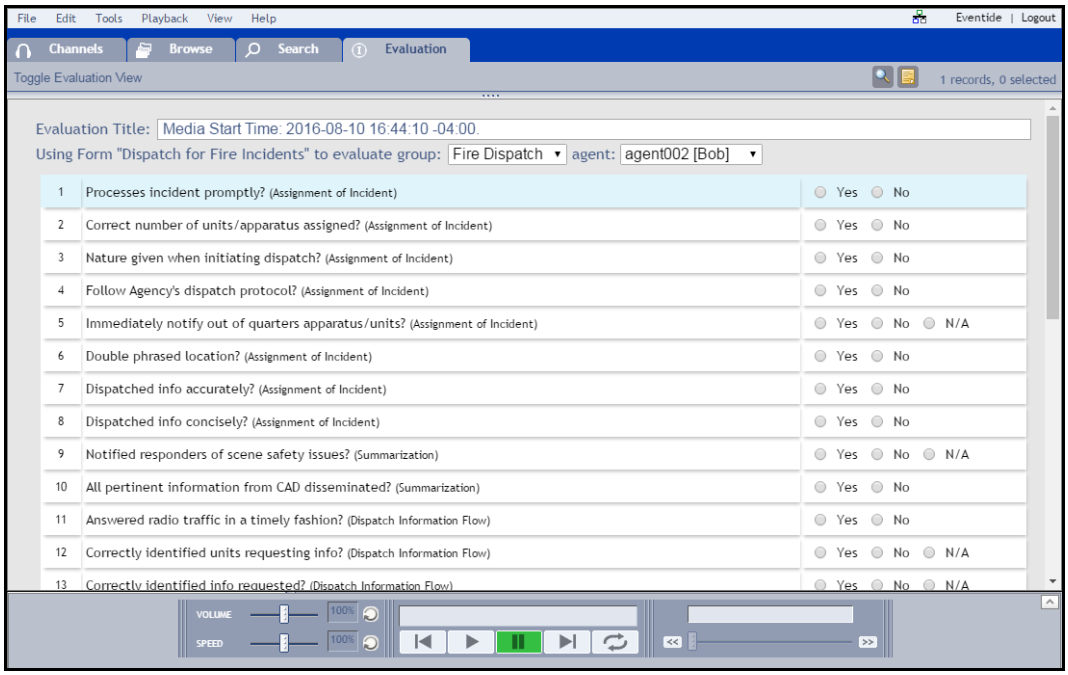
1.2.1. Roles for Quality Factor

Eventide Quality Factor relies on setting up users with these roles & permissions:

- **Agents**: take calls, which are evaluated with forms. Optionally, they can comment or digitally sign only evaluations of calls they took.
- **Group Evaluators**: Evaluate calls for a subset of Agents called an Agent Group, who's access to Evaluations are only those of their team.
- **Super Evaluators** (and **Administrators**): Can evaluate calls for any Agent and administrate the Quality Factor program. They can see all evaluations across all teams, and optionally can comment, edit, delete, lock or protect any evaluation.

1.2.2. Elements of an Evaluation Form

Figure 1—Evaluation Form



Eventide Quality Factor software ships with a set of sample questions and forms that you may find useful. You are free to adapt these to your needs and to add new questions as needed, as described in this manual.

Since most evaluation questions can be answered via a few basic types of answers, the product's Answer Sets are configured separately so that they don't have to be created each time you create a new question.

Eventide Quality Factor software ships with a default collection of Answer Sets. These are:

- Multiple choice set with the two answers:
  Yes / No
- Standard 5-step sliding scale
- Standard 10-step sliding scale
- Multiple choice set with five answers:
  Outstanding / Good / Fair / Poor / Unacceptable.

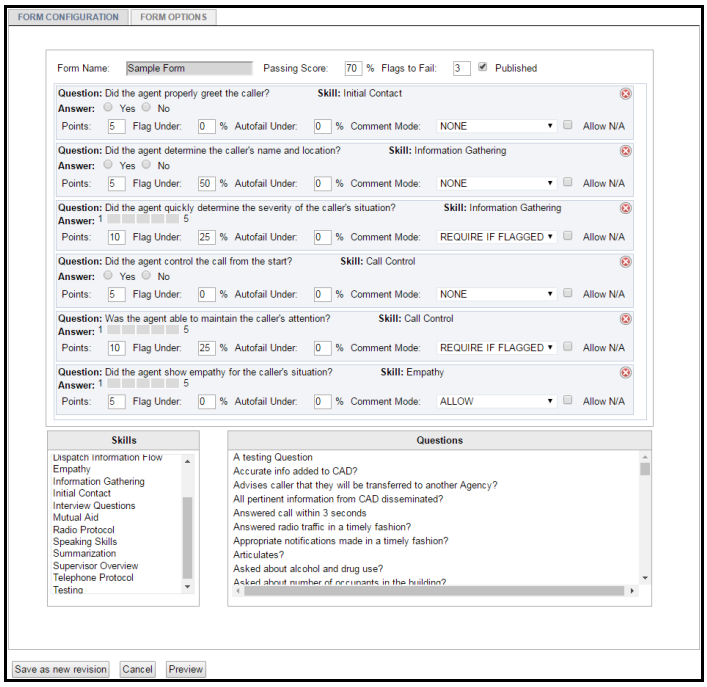
You are free to edit these Answer Sets to bring them in line with your organization's preferred terminology, and to add more Answer Sets if these don't meet your needs.

Eventide Quality Factor software requires each question to be associated with a Skill Group. Skill Groups exist to aid in the creation of forms by grouping questions together by topic or skill, and to allow evaluators and team leaders to run statistical reports by skill to identify areas for improvement and training.

Scoring in Eventide Quality Factor software operates as follows: Each evaluation form is assigned a minimum passing score out of 100. Individual questions may be given a weighted value towards that 100. Additionally, individual questions can be flagged if the answer given results in a score below a minimum percentage. An entire Evaluation can be set to automatically fail based on the number of flags. There is also the option for a single question's failing score to cause an "Autofail" for the entire evaluation.

1.2.3. Evaluation Form Options

Figure 2—Evaluation Form Editor



The form editor also includes an option tab which allows you to configure the comment mode (no comments, single comment, or multiple comments with actions) for each form. This allows you to tune how you want Quality Factor to function for this form. The Form Options include:

- Enable Evaluation Live Scoring
- Evaluation Comment Mode: No Comments, Simple Comments, Multiple Comments with Actions
- Email on Evaluation Submit
- Email on Comments/Actions
- Enable Comment Acknowledgement
- Allow Comment Modification
- Enable Agent Digital Signature

By default, as of NexLog 2.7, forms are set to **Multiple Comments with Actions**. This allows for anyone with appropriate permissions to comment on completed evaluations, for Agents to acknowledge those comments, for evaluations to be locked, protected, or re-opened.

Simple Comments is the mode that forms made with 2.6 and earlier use. It allows an Agent, and only the Agent, to make a single comment on the evaluation after it is complete.

No Comments is a new option that allows a site to keep things simple, with no after-evaluation actions or comments.

Forms can be exported from one NexLog and imported on another; this will include all relevant questions, answer sets and skill groups and create them as needed on the recorder.

1.2.4. Evaluation Form Summary:

To summarize:

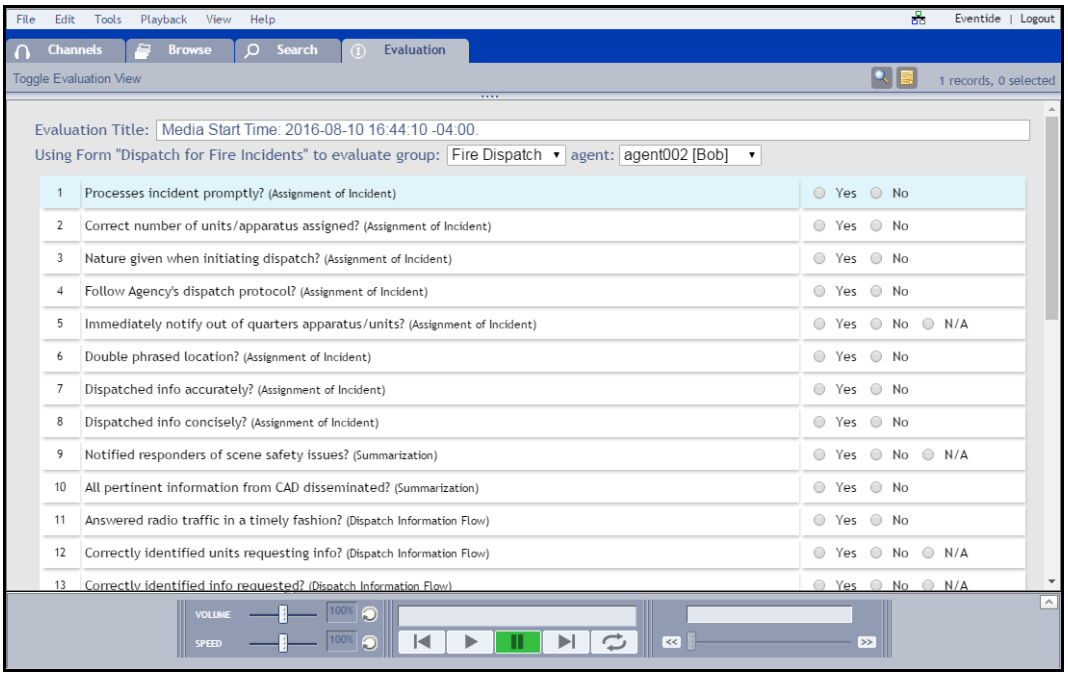
1. The Evaluation Forms are built from Questions, which in turn use Answer Sets. Each Question is assigned to a Skill Group.
2. Evaluation Forms have options, which allow you to configure the available workflow for any evaluation done with this form.
3. And once you are happy with a form, you can Export the form and Import it to other NexLog systems so that you don't have to re-create it from scratch on every system you administrate.

1.2.5. Evaluating a Call

To evaluate a call (or a group of related calls), you choose the call(s) and then select which evaluation form to use. The form will open in a new tab, as seen in the image below. The call(s) being evaluated are playable from the playback controls at the bottom. It will playback the call(s) in mixed mode by default, but if you want to see the calls in the standard timeline/callgrid view, you can click "Toggle Evaluation View" to see the view familiar from the Search or Browse tabs.

Each Evaluation is tagged with an Agent (each of which is pre-assigned to an Agent Group). If you are using a call tagging solution such as Eventide WinUser Tracker (see Appendix A), the call(s) will be tagged with an Agent ID and the Group and Agent will be automatically populated. If not, these can be manually selected at the top of the form.

Figure 3—Evaluation Form



While evaluating there are a variety of actions that can be taken, depending on the configuration of the form itself and the needs of your organization. These actions are:

- **Submit**: The evaluation is complete and ready for others to view it. This will refuse to complete if a question is unanswered.
- **Escalate and Submit**: In the rare case where an evaluation requires immediate attention from higher up in the organization, escalation will submit the evaluation in a protected state, so that the Agent being evaluated cannot see this evaluation until a Super Evaluator or Admin decides to unprotect it. This feature is restricted to forms set to use Multiple Comments with Actions.
- **Save In Progress**: This will save the settings of this evaluation for now so that it can be returned to later. In Progress evaluations can be found on the Evaluations tab in MediaWorks Plus. Completed Evaluations can be viewed from MediaWorks Plus or from the NexLog Configuration Manager software.
- **Discard**: This closes the evaluation without saving. If it was previously saved as in progress, this deletes it from the recorder.

2. Quality Factor: Configuration

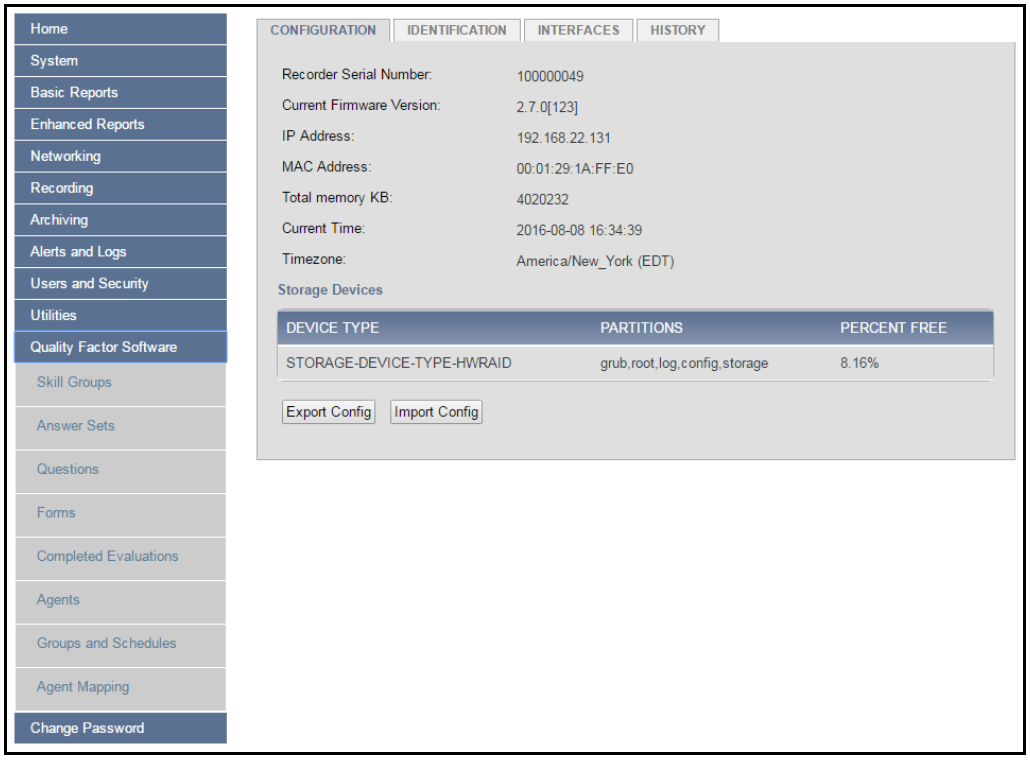
The Eventide Quality Factor software option provides a structured way for organizations to analyze and report on call and dispatch handling performance.

In order for Eventide Quality Factor software to work, you will need a NexLog recorder running at least NexLog software version 2.1 and an Evaluation Agents license sufficient to cover all Agents who will be evaluated. On the NexLog recorder, you will need to add a custom field for Agent_ID, of type Text. Also required is a web browser that the MediaWorks Plus web client supports:

- Internet Explorer 11 & Edge
- Chrome
- Firefox

Quality Factor software is configured using the NexLog Configuration Manager in the Quality Factor Software section, as seen here:

Figure 4—Quality Factor



2.1. Skill Groups, Answer Sets, Questions, and Evaluation Forms

This chapter describes how to establish Skill Groups for Questions, how to create Answer Sets, how to create Questions, and finally how to create and revise the Evaluation Forms.

2.1.1. Skill Groups

Skill Groups are a way of organizing questions, both to ease in the creation of Evaluation forms, and to increase the usefulness of the evaluation results.

Before you can create new questions, you should take a look at the sample Skill Groups that ship with the Eventide Quality Factor option.

These are:

- Assignment of Incident
- CAD Skills
- Call Control
- Dispatch Information Flow
- Empathy
- Information Gathering
- Initial Contact
- Interview Questions
- Mutual Aid
- Radio Protocol
- Speaking Skills
- Summarization
- Supervisor Overview
- Telephone Protocol

If these groups cover your needs, you can proceed to Answer Sets and then to Questions.

Otherwise, you can add and edit the list of available skill groups by navigating to the Quality Factor Software -> Skill Groups page in the NexLog Configuration Manager web-based software.

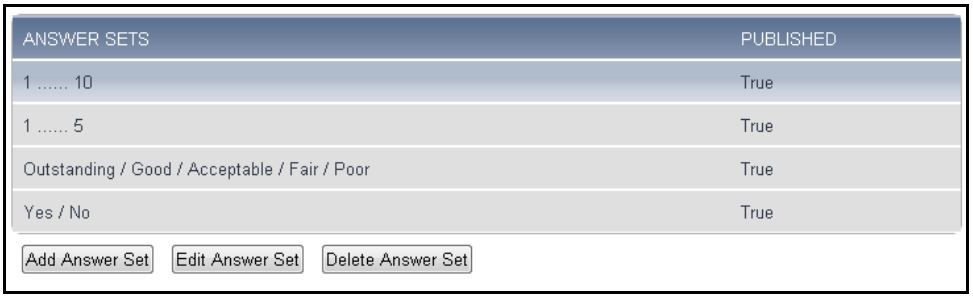
NOTE: Questions are assigned to skill groups when created or edited via the Questions page.

2.1.2. Answer Sets

Questions can be scored using 4 types of Answer Sets:

- Multiple Choice: A list of 2 or more answers, where the first choice is worth 100% and the last choice is worth 0%, in even increments. Examples:
    - For the default Answer Set “Yes/No”, Yes is worth 100% and No is worth 0%. (If you want No to be worth 100%, then create a new Answer Set with “No/Yes”).
    - If you create a 3-choice Answer Set such as Yes/Partial/No, then Yes is worth 100%, Partial is worth 50%, and No is worth 0%. (If you want No to be worth 100%, then create a new Answer Set with “No/ Partial /Yes”).
    - Range 1 through 10: This type of answer set allows a Question to be scored using a sliding scale with 10 steps, where step 1 is worth 0% and step 10 is worth 100%, with equal increments for each step. You can name step 1 (such as “Poor”) and you can name step 10 (such as “Excellent”).
    - Range 1 through 5: The same as Range 1 through 10, except this Answer Set allows a Question to be scored using a sliding scale with 5 steps, where step 1 is worth 0% and step 5 is worth 100%, with equal increments for each choice. You can name step 1 (such as “Poor”) and you can name step 5 (such as “Excellent”).
    - Freeform: This answer set is unique in that it has no effect on how the form is scored. It is useful for questions that do not have a qualitative answer, such as “Summarize the contents of the call” or “Was there anything unusual in this call worth noting?”

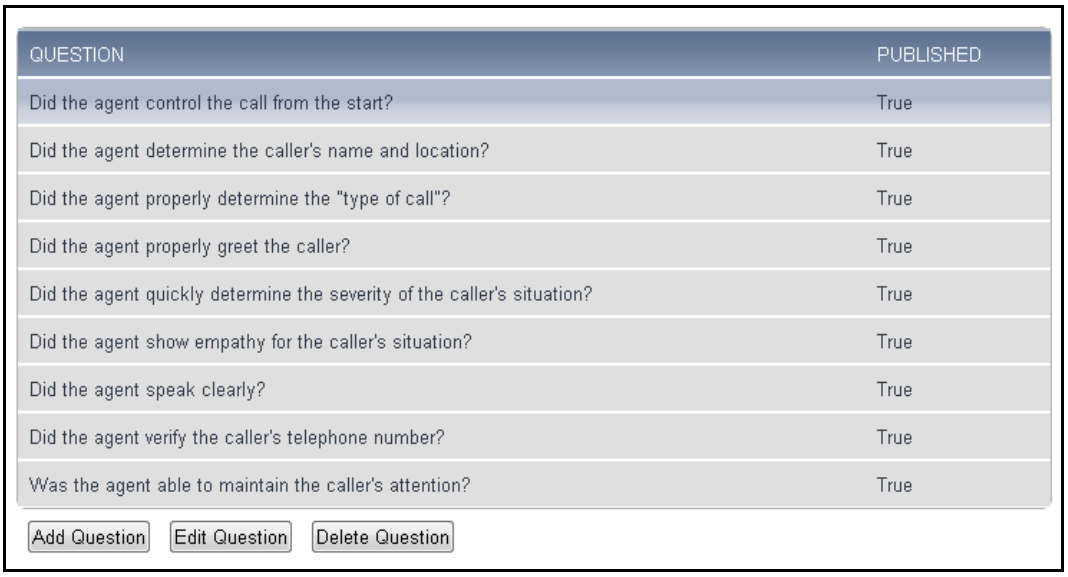
Figure 5—Answer Sets



2.1.3. Questions

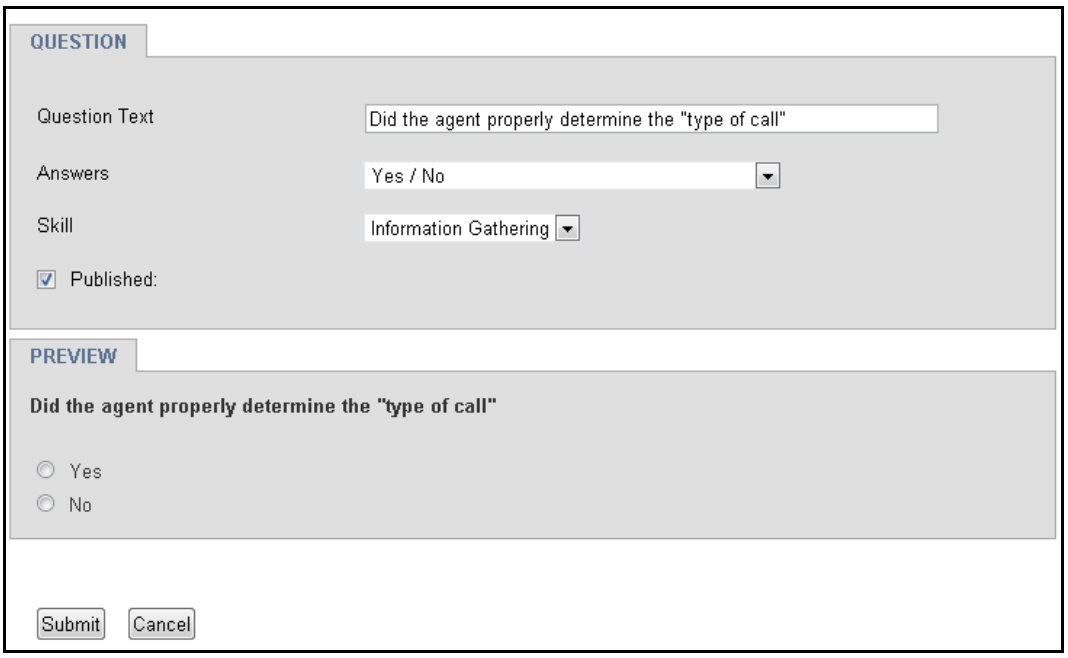
Questions are at the core of evaluation forms. Questions should be developed based on your agency’s Evaluation criteria. Eventide Quality Factor software includes a set of sample Questions that will aid in understanding how questions are created, scored, and categorized into skills. You are free to customize the sample questions and add additional questions as you see fit.

Figure 6—Questions



Each Question has three options: a text field for the question itself, an Answer Set that the question is to be scored with, and the Skill Group that the Question belongs to.

Figure 7—Question Creation and Edit page



Questions can be “published,” (meaning that they are ready for use), or “unpublished,” (meaning that they are either in a rough draft form or have been retired and replaced by a newer question). Once unpublished, questions in use remain in the forms that use them, but they cannot be added to new forms.

Note that editing a question that is already in use will affect every instance of that question, including on existing forms, so editing questions should be done

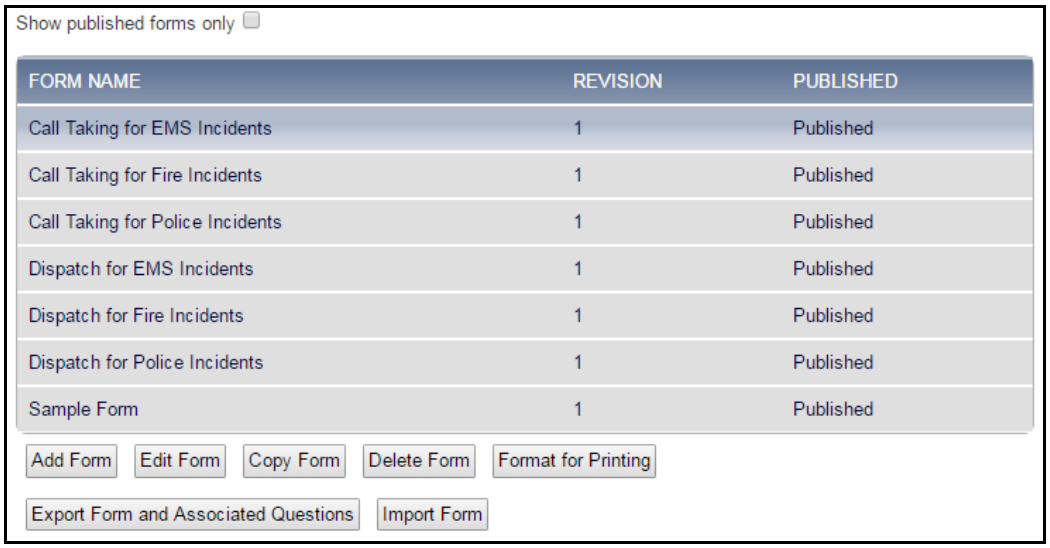
only to correct typos or to make minor changes in wording; no change should be made that would change the meaning of an answer that was already submitted.

If you need to make a substantial change, unpublish the original question (Edit Question -> Published checkbox) and then create a new question.

2.1.4. Forms

The forms page shows you a list of the Evaluation forms on the system. There is one sample form, three standard Call Taking forms and three Dispatch forms included.

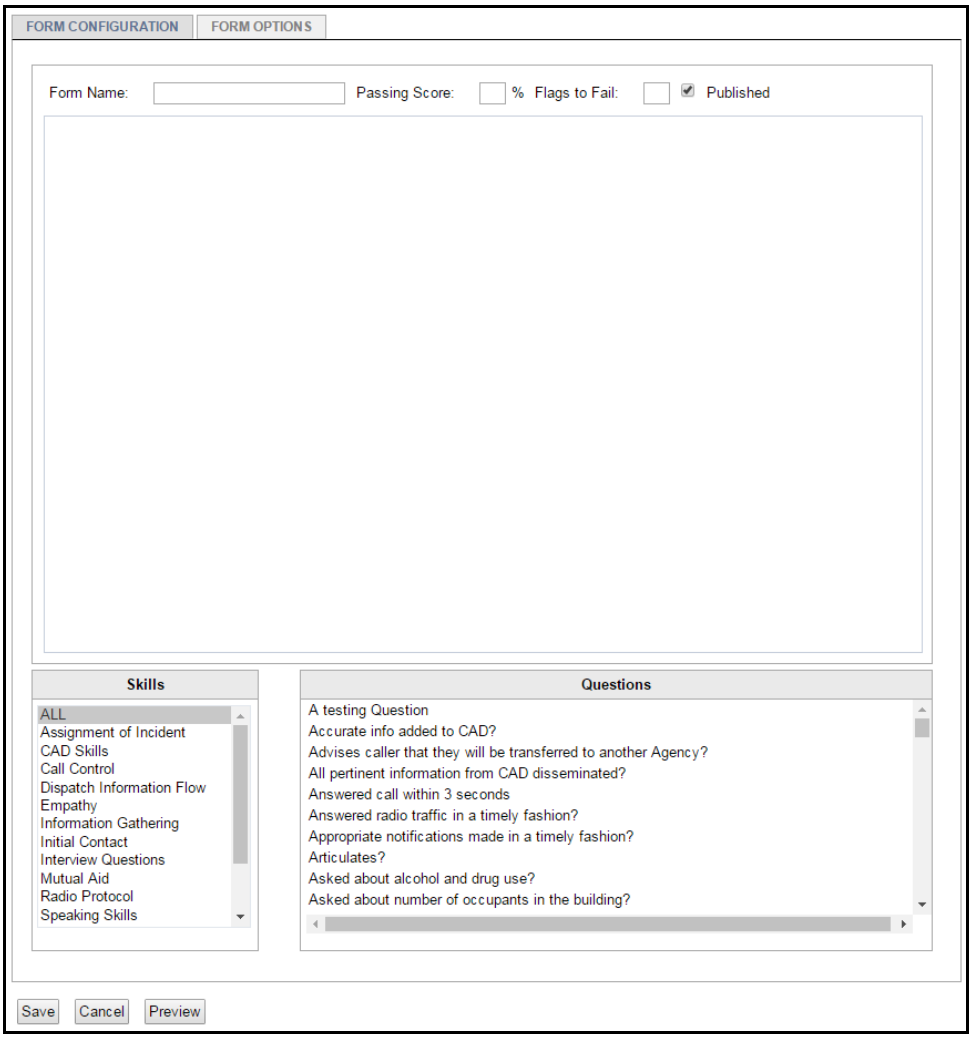
Figure 8—Quality Factor: Forms page



The forms are configured by the System Administrator from the Quality Factor Software: Forms page of the NexLog Configuration Manager. The Form creation page, shown below, is organized into three separate fields:

- Evaluation Form, at top, with all evaluation questions that have been added to the form.
- Skills, at bottom-left, listing the configured skill groups with which to filter the questions library.
- Questions Library, at bottom-right, with a bank of questions that have been developed for use in one or more Evaluation Forms; the list is filtered based on the selected Skill Group in the Skills field.

Figure 9—Form Creator

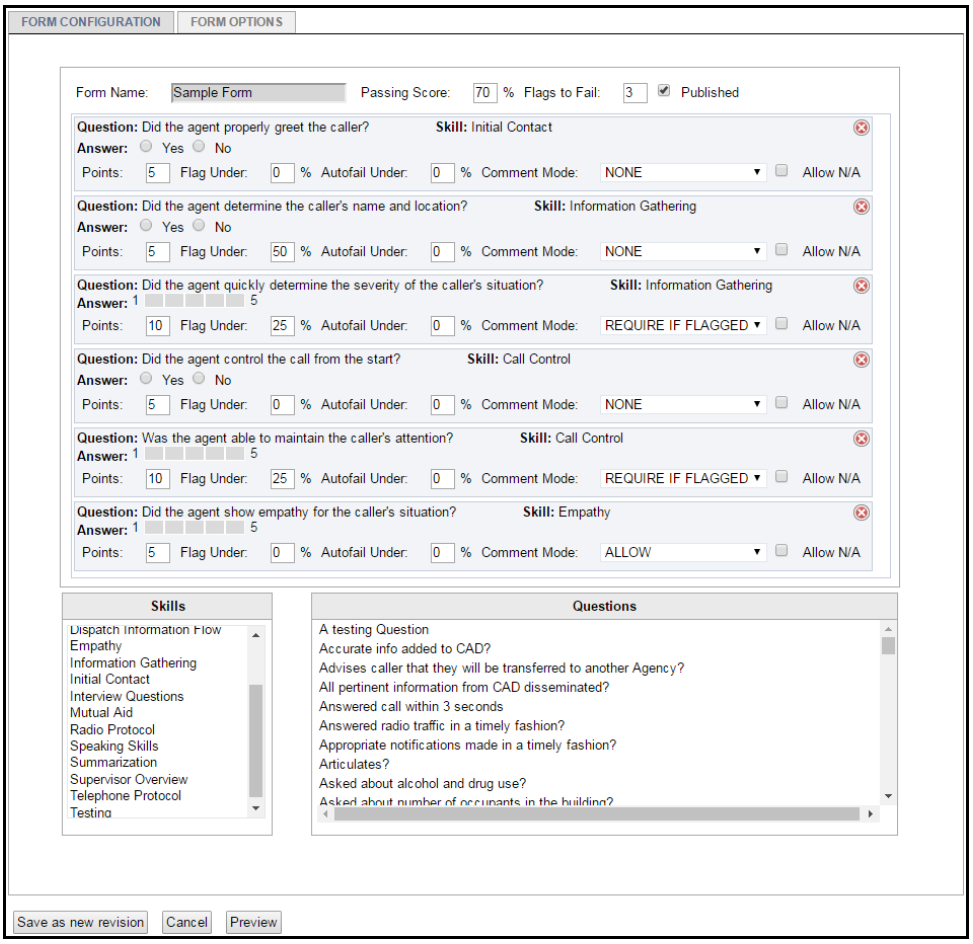


There is no limit to the number of different evaluation forms that may be created. For instance, different call handling teams or call types may have specific technical needs that should be evaluated differently, and thus may require a separate form.

Forms are created by dragging and dropping questions from the Questions field into the Form field. You can then re-order questions by dragging (up or down) and dropping, and you can delete previously added questions by clicking the red X in the upper-right corner of the question you want to delete.

The minimum score to pass and the number of flags to fail are configured at the top; more information about both topics is provided in the Evaluation Scoring section later in this chapter.

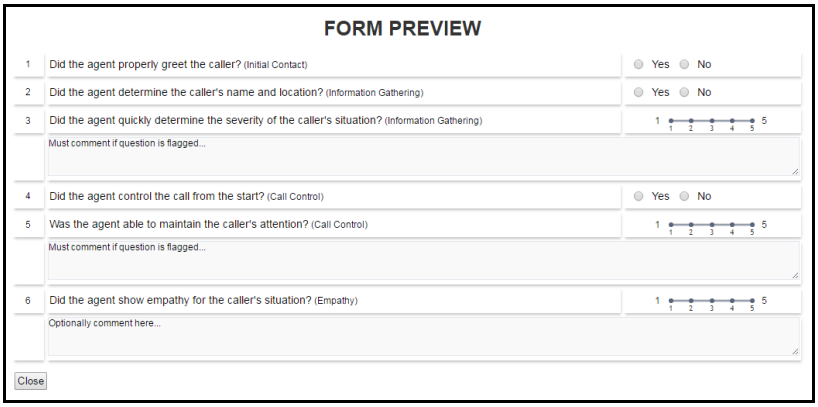
Figure 10— Form In Progress



Note that the evaluation form is updated in real-time; if you check the Allow N/A checkbox, as in question two in the example above, you will see the addition of a radio button for N/A. If a question has a 1-5 or 1-10 range, you can see how it will work by clicking in the range boxes yourself. These scoring settings are not saved as default answers; they are just for getting a feel for the form.

From here, you can save the form, cancel, or preview the form, which shows you how the form will look when run in MediaWorks Plus:

Figure 11— Form Preview



2.1.5. Publishing Forms and Questions

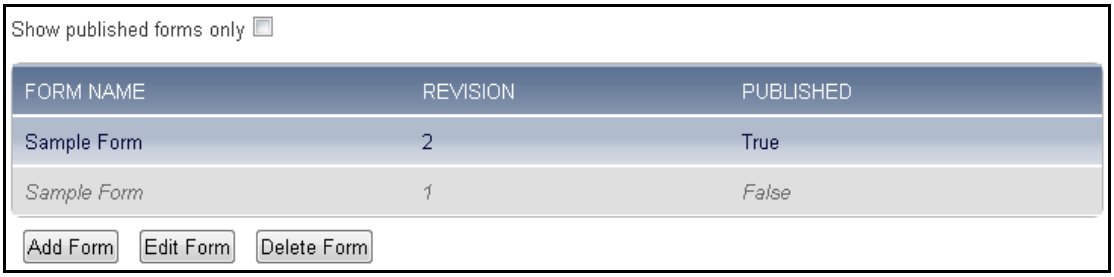
You'll notice that the creation and editing pages for Forms and Questions have a checkbox for Published. When a Form or Question is "Published," it is available for use in MediaWorks Plus; an unpublished form or question is either not yet ready for use, or has been retired and replaced. Unpublishing is different than deleting, because you aren't allowed to delete a form or question that has been used in a completed or an in-progress evaluation, but by unpublishing, you can prevent its use in the future.

Questions can be edited after they have been used in a completed evaluation, but this will affect every evaluation that used the question; in other words, editing a question should only be done to correct a typo or clarify its meaning in a way that would leave the correct answer the same. For major changes, unpublish the old version of the question and create a new question with the changed text or answer set. This will allow you to make use of your new version of the question on forms you create in the future (or on future revisions of your current forms), without effecting existing forms or completed evaluations.

When a form that has been used is edited, it will be saved as a new Revision, and the previous version will be automatically unpublished. The unpublished, previous versions will show up on the Form page in grey italics. The Form page has a check box to "Show published forms only," which is useful for clarity when many forms have been through several revisions.

Previous revisions remain on the logger because they are in use by previously completed evaluations, but are not available to be used for new evaluations.

Figure 12— Form Unpublished Because of New Revision



2.2. Evaluations Scoring

The way Evaluations are scored is straight forward but flexible enough to handle many evaluation requirements. The simplest case is a form that has a number of questions and a percentage value that needs to be met in order to pass. A form designed to meet more complex needs can have certain questions worth more points than others, can have questions that trigger an instant fail of the entire evaluation if the Agent doesn't meet expectations, and can require an Evaluator to comment on a failed question. We'll go over the basics of scoring first, and then tackle the Autofail, Flags to Fail and Commenting options.

2.2.1. Basic Scoring

Each question in a form is assigned a maximum value; this defaults to 5 points. The value of each question is relative to the other questions, so if you want a question to be worth twice as much as the others, you can set it to 10 points and leave the rest alone. Because the completed evaluation page will show the score as a percentage out of 100, there is no need to manually manage the total number of per-question points.

Scoring for the default Answer Sets works like this:

- **1 to 5:** A five is worth 100%, a four is worth 75%, a three is worth 50%, a two is worth 25% and a one is worth 0%.
- **1 to 10:** Rounding to the nearest ones place, a ten is worth 100%, a nine is worth 89%, an eight is worth 77%, a seven is worth 67%, a six is worth 56%, a five is worth 44%, a four is worth 33%, a three is worth 22%, a two is worth 11%, and a one is worth 0%
- **Yes / No:** Yes is worth 100% and No is worth 0%. Note that this isn't a special kind of question; it's just a two answer Multiple Choice question. If you want to use questions that need No to be the correct answer, you can create a multiple choice Answer Set called No / Yes.
- **Outstanding / Good / Fair / Poor / Unacceptable:** This is a five answer Multiple Choice question, and it scores the same as the 1 to 5 range Answer Set, with Outstanding being worth 100%, Unacceptable being worth 0% and Fair being worth 50%.
- **Freeform Answer:** Freeform answers do not affect score, as they are for non-quantitative questions that don't easily translate into numbers.

2.2.2. Autofail

Sometimes the answer to a question is important enough to be pass/fail for the entire evaluation. For example, you likely have a hardline stance against call takers using profanity when talking to callers. This is where the Autofail feature might be of use. Any question in an Evaluation form can be set to Autofail if it is scored below a certain percentage.

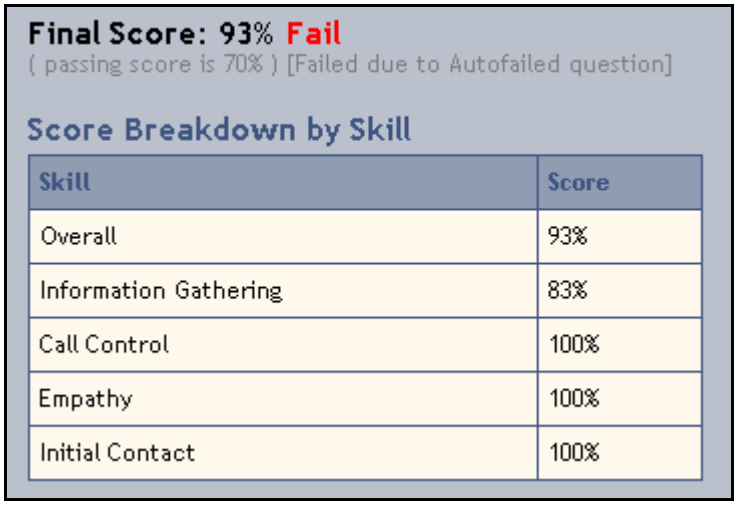
Figure 13—Question from Form Edit with Autofail Under % Highlighted

If you want a multiple choice or range-based question to Autofail only if the agent gets less than an acceptable score, you can set this value to 50% or 25% to have it fail under those values.

Note that Autofail will not preclude the rest of the questions on a form from being evaluated, so when the evaluation has been completed, you may see a

percentage score alongside the failure that is greater than the minimum score needed to pass.

Figure 14—Autofailed Form with High Score



2.2.3. Flags

Another way to make scoring more sophisticated is through the use of Flags. A flagged question is one that requires attention because it was scored too low to be considered acceptable. If a form uses flags (and if Flags to Fail has been set to a number greater than 0), then an Agent receiving at least that number of flags on the form will fail the evaluation, regardless of the total score achieved.

If Flags to Fail is set to 0, then no amount of flags will fail the form, but individual questions can still be set to be flagged if you want.

Figure 15—Flags To Fail and Flag Under % Highlighted

A flag (resulting from a low score on a question) can also be configured to require the evaluator to write a comment.

2.2.4. Comments

With the exception of Free Form questions, each question on a form can have a field for comments.

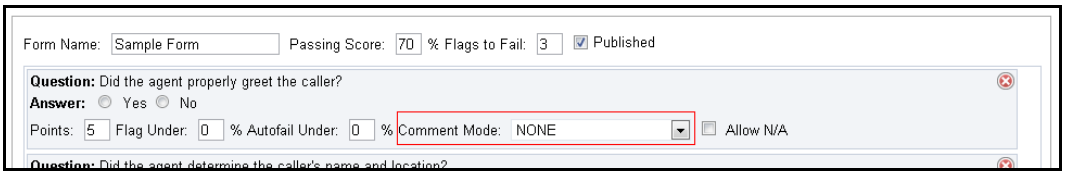
There is a pull down menu on the Evaluation Form builder with four options:

- None

- Optional
- Require
- Require if flagged.

The default setting is None.

Figure 16—Comment Mode Menu in Form Builder



"Optional" comments provide a text-entry area for the evaluator to make a note, if something unusual catches their ear.

"Require" means that a comment will always be required and an evaluation cannot be saved as complete until the comment has been filled out.

"Require if flagged" means that a comment is required if an evaluator gives a low enough score to this question to trigger the flag. This comment would typically explain why the question was scored so low. If you are setting up a question with the Autofail feature and want to require a comment in that case, set the Flag Under % to the same as the Autofail Under % and set the comment field to Require if Flagged.

2.2.5. Allow N/A

Each question can be configured to have a Not Applicable (N/A) answer that removes the question from scoring. A question answered N/A will not affect the total score nor the breakdown by skill group. N/A is configured per-question in the form editor and when checked, will result in an "N/A" radio button being added next to the Answer Set.

Figure 17—Flags To Fail and Flag Under % Highlighted

2.2.6. Scoring Summary

In summary, an evaluation passes if all three of the following conditions are met:

1. No questions with Autofail capability have been failed.
2. The number of flagged questions is less than the form's Flags to Fail quantity.
3. The percentage score is equal to or greater than the form's Passing Score.

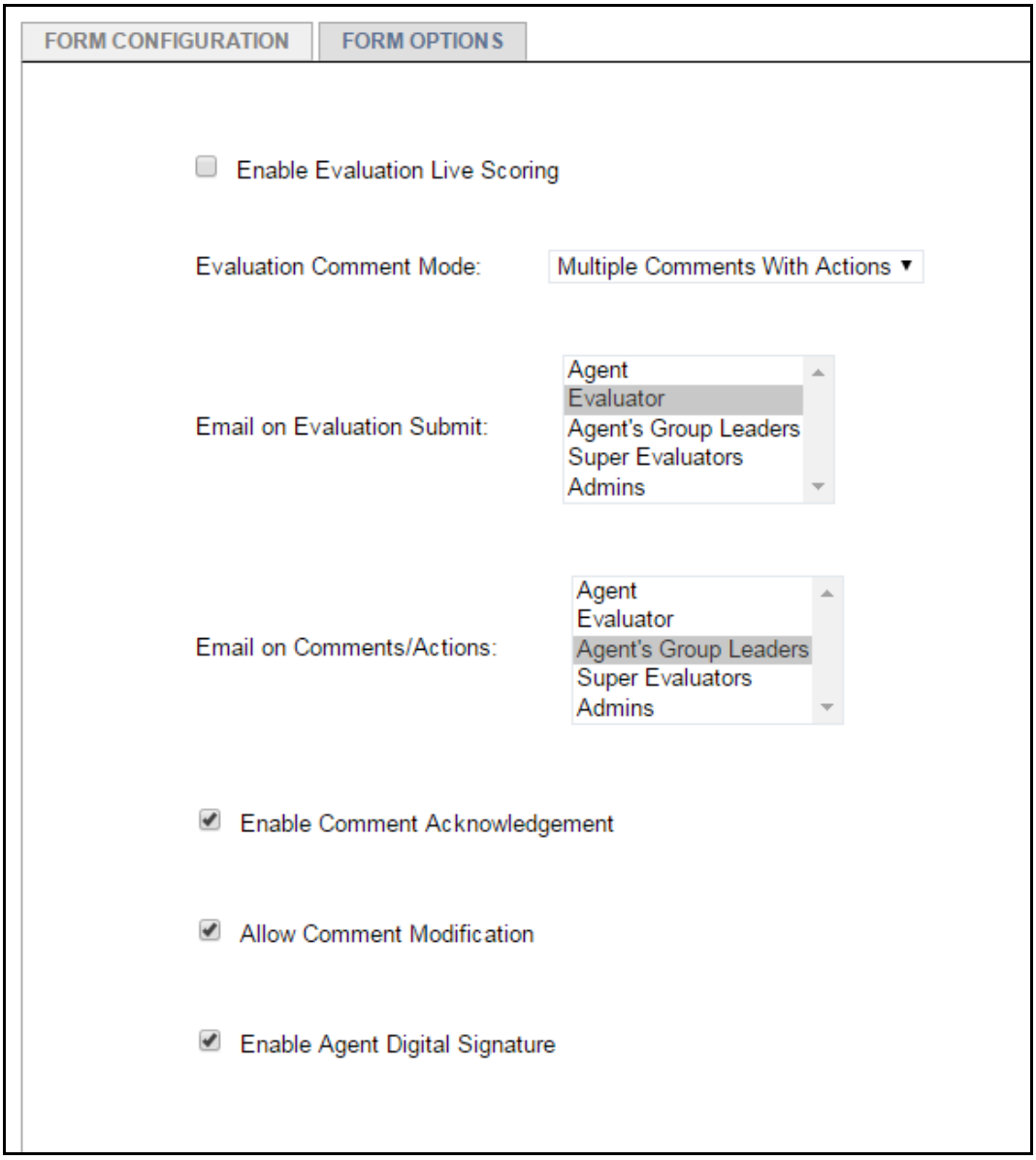
An evaluation will not be able to be saved as completed if:

1. Any questions have not been answered.
2. Any questions requiring a comment are lacking a comment.
3. Any flagged questions for which a comment is 'required if flagged' lacks a comment.

2.3. Evaluation Form Options and Actions

Forms have a variety of options that can be accessed in the Form Options tab in the Form Editor.

Figure 18—Form Options

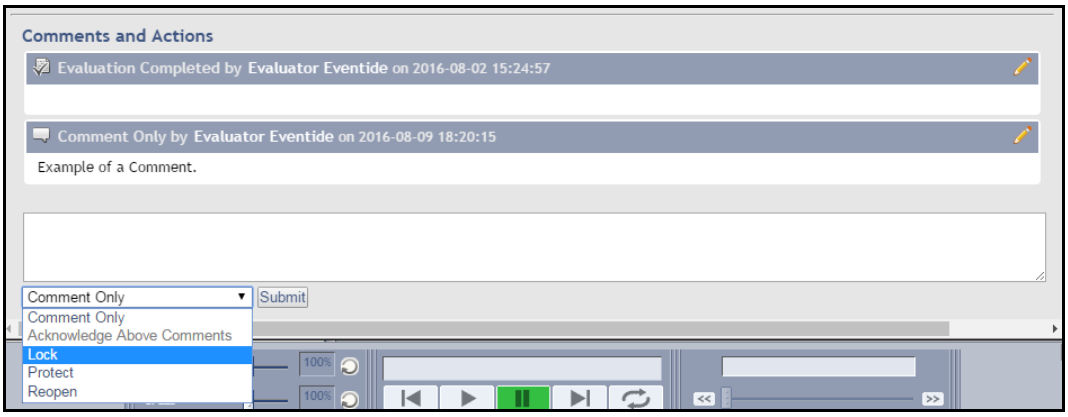


The Form Options include:

- Enable Evaluation Live Scoring
- Evaluation Comment Mode: No Comments, Simple Comments, Multiple Comments with Actions
- Email on Evaluation Submit
- Email on Comments/Actions
- Enable Comment Acknowledgement
- Allow Comment Modification
- Enable Agent Digital Signature

These actions are taken when viewing a completed evaluation, at the bottom of the evaluation form:

Figure 19—Evaluation Actions



Here you can see the action history of this evaluation. In this case it is simple: the evaluation was completed, and then the evaluator commented on the evaluation with the text “Example of a Comment.” The grey rows show you an audit history, in the format of Action Taken, by (Agent/Evaluator/Group Leader/SuperEvaluator) (User Name) on Date. The available actions depend on both the options for the form and the user looking at the form; for example, Acknowledge Above Comments is greyed out because the logged in user is not the Agent that the evaluation is about, and if we were logged in as the Agent, only Comment or Acknowledge Above Comments would be accessible because the other actions are restricted to the other Evaluation roles.

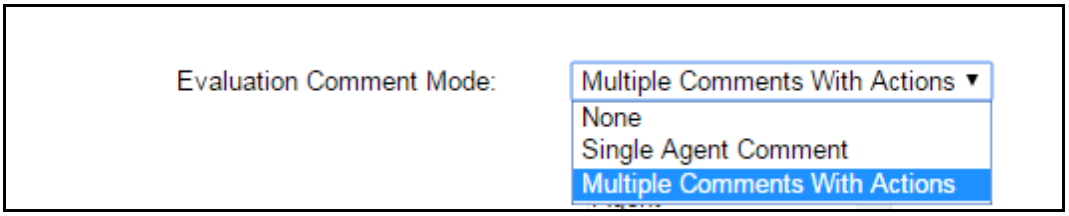
2.3.1. Live Scoring

Figure 20—Live Scoring

Live Scoring for a form will allow evaluators to see the current score of the form as it is filled out. You may want to use this just while designing a form, to see if the weight of each question is appropriate, or leave it on so that evaluators can see whether the calculated score is in line with what they are expecting.

2.3.2. Evaluation Comment Mode

Figure 21—Evaluation Comment Mode

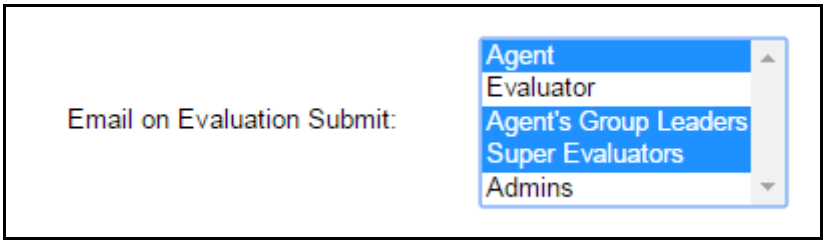


This option controls the commenting workflow for Evaluations. You can choose None, which is the simplest situation: calls are evaluated, and that's it. You can choose Single Agent Comment, which allows for one Agent comment. Single Agent Comment was the only style previous to NexLog 2.7.

Multiple Comments with Actions is the new default as of NexLog 2.7. This option is required for some of the options below: Enable Comment Acknowledgement, Allow Comment Modification, Enable Agent Digital Signature. It also provides for additional actions that an Agent, Evaluator, or SuperEvaluator can take on a completed evaluation. These actions: *reopen, acknowledge comment, lock, protect, digital signature* are covered later in this manual.

2.3.3. Email On Evaluation Submit

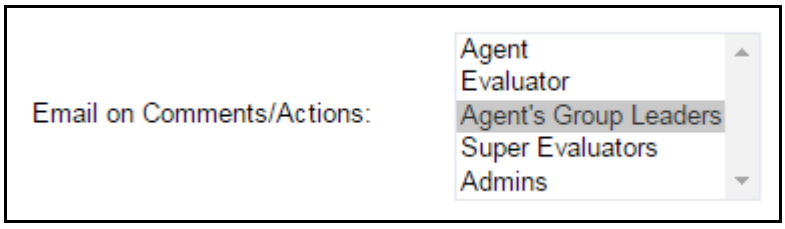
Figure 22—Email on Evaluation Submit



This setting controls who will be emailed when an evaluation is completed. In the example above, the Agent, their Group Leaders and all Super Evaluators will be emailed. To configure more than one recipient at a time, use the ctrl key and click. Note: this feature relies on an email server being properly configured in Configuration Manager and each recorder user being configured with an email address. See the NexLog Manual for more details.

2.3.4. Email On Comment or Action

Figure 23—Email on Comment or Action



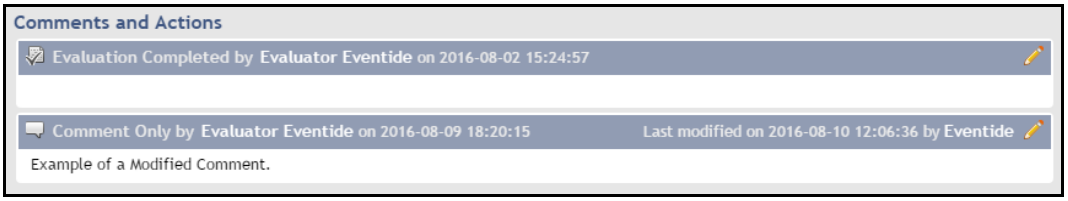
Emails can also be configured for whenever an evaluation is commented on or other actions (locked, digitally signed, etc) are taken. This setting allows emails to be sent to a different set of users here. In this case, it is configured to send to the Group Leader for the Agent involved in the Evaluation. As above, email must be properly configured for emails to be sent.

2.3.5. Enable Comment Acknowledgement

Click this checkbox to allow users to respond to a new comment on an evaluation with a “Acknowledge Above Comments” action. This allows for users to acknowledge that they have seen the above comments at a certain time, without requiring a response or comment at the same time. They can also include a comment as part this acknowledgement, but it is not required.

2.3.6. Enable Comment Modification

Figure 24—Comment Modification Pencil



With comment modification enabled, the pencil icon on the right will appear and can be used by any user with appropriate permissions to modify the text of any comment. A modified comment will show who and when for the most recent modification in the right side, as shown in the image above.

2.3.7. Enable Agent Digital Signature

Figure 25—Digital Signature

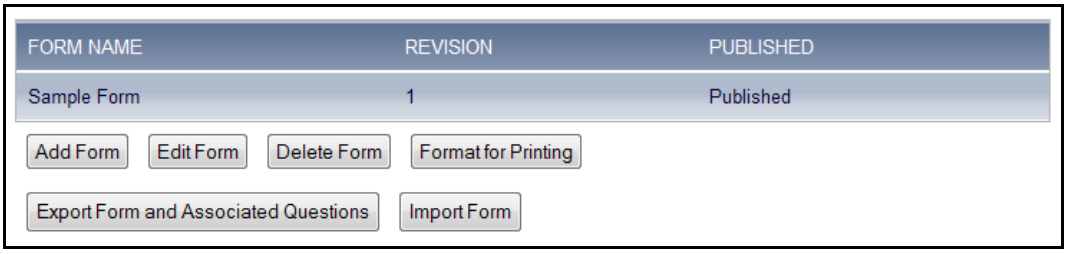
For sites that require a digital signature feature, this option allows an agent to sign that they saw the evaluation at a specific time. They can only sign once unless the evaluation is modified again. Only the Agent can sign, and text is required to be entered into the field.

2.4. Evaluation Form Import and Export

Once you are happy with a form, you can export the form and import it to other NexLog systems, so that you don't have to re-create it from scratch on every system you administrate. Only users in the Admin or SuperEvaluator permission groups can use the export and import features.

2.4.1. Export Form and Associated Questions

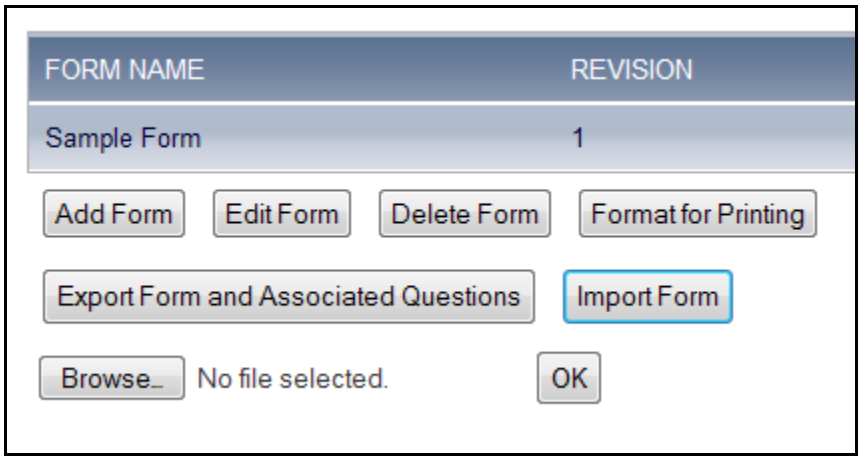
Figure 26—Export Form and Associated Questions



Select a form by clicking on it in the list, then click Export Form and Associated Questions. The form and its constituent parts (questions, skill groups and answer sets) will be processed and turned into a **formName.eva** file; the button will change into text that reads "Export Complete! Click to download form" which you can click to download the file.

2.4.2. Import Form

Figure 27—Import Form



To import a form, click the Import Form button and then click Browse… and select the **formName.eva** file you want to load on to the recorder, then press OK. The form will be imported, unless the same exact form already exists on the recorder, in which case you will be warned that it cannot be imported.

If a form with the same name already exists, the imported form will be saved as a new revision and be set as unpublished; you can then choose to publish it when it is ready to supersede the existing form.

Any answer sets, questions or skill groups involved in the form that don't already exist on the recorder will be added and available for new form construction; Any answer sets, questions or skill groups that already exist will remain as they are.

3. Agents, Agent Groups, and Workstations

3.1. Agents

Agents are call takers (workers who answer/place calls) at the call center. Creating an agent entry for someone (in the logger's database) is necessary if you want to be able to evaluate their phone performance.

To avoid cluttering your logger's User list with Agents, agents do not require a proper User account unless you also wish for them to be able to use an account to log in to the recorder. They can be entered only in the Agents Page. Group Leaders, who are able to log in to the recorder to evaluate agents, do need a proper user account. Group Leaders do not need to have their own agent entry unless in addition to their group leader role they will be taking/placing calls and will themselves need to be evaluated.

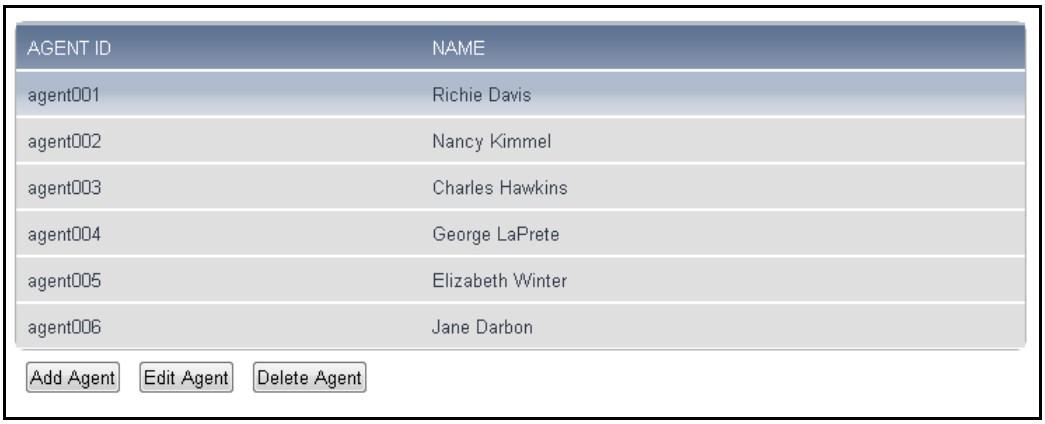
Each Agent has an Agent ID and a Name. Agents can also be associated with a User account, which can be used to allow an agent to see (and add a comment to) their own evaluations. If an Agent is expected to use MediaWorks Plus or have other recorder access, they will also need a properly configured User account.

Each evaluation can be marked with an Agent and their Agent Group. To simplify this, the Workstations feature allows Agents to be automatically associated with calls based on channel number or channel name.

The maximum number of agents able to be configured on a recorder is determined by the add-on license key for Agents, which is called "Quality Factor Base Software 20x" on the System: License Keys page of the NexLog Configuration Manager. Agents are licensed in groups of 20, so a "Quality Factor Base Software 20x = 3" would mean you are licensed for 60 agents.

3.1.1. Agent Page

Figure 28—Agents

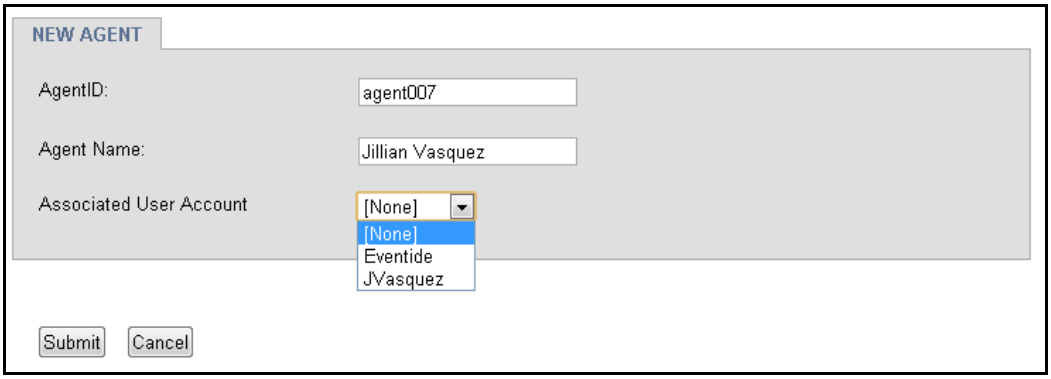


Agents are managed at the Quality Factor Software: Agents page of the Configuration Manager. Here you can add new Agents, and edit or delete existing Agents.

Special note about deleting agents: Completed evaluations for deleted agents remain on the system and you can view those evaluations by other criteria. In addition, data about deleted agents continues to be used in generating reports, for example a report on a group will include the deleted agents' scores, since they are part of the group's historical performance data. However, you will no longer be able to run a report explicitly on the deleted agent as a criterion.

3.1.2. Add Agent

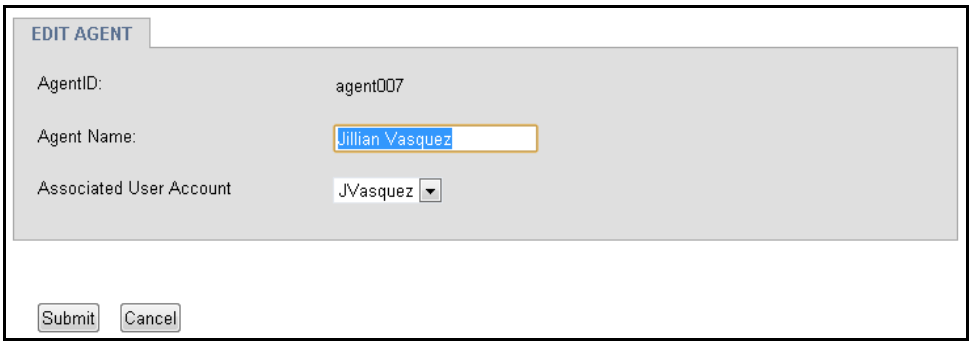
Figure 29—Add Agent



Creating new Agents is simple. You enter an Agent ID, an Agent Name, and optionally, associate the Agent with a User account existing on the Recorder. It is recommended that the associated user be made part of the Agent permission group.

3.1.3. Edit Agent

Figure 30—Edit Agent



Here you are able to change the Agent Name and associated User Account of an Agent.

3.1.4. Delete Agent

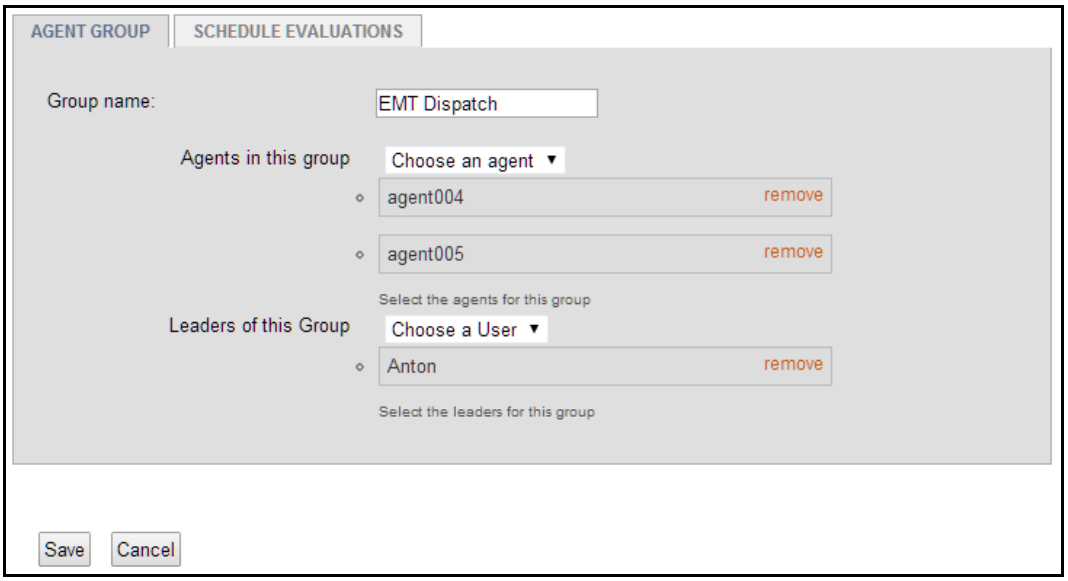
This button allows you to delete an existing Agent. It will prompt you to verify you want to proceed, and then will delete the Agent from the recorder.

3.2. Groups & Scheduling

Figure 31—Agent Groups

For organizations with multiple teams, Agents can be added to Groups. You can run Evaluation reports against groups to compare performance intra- and inter-groups. Groups contain agents and one or more users who is a group leader. Users with Admin, SuperEvaluator or Group Evaluators Security Groups are able to be group leaders.

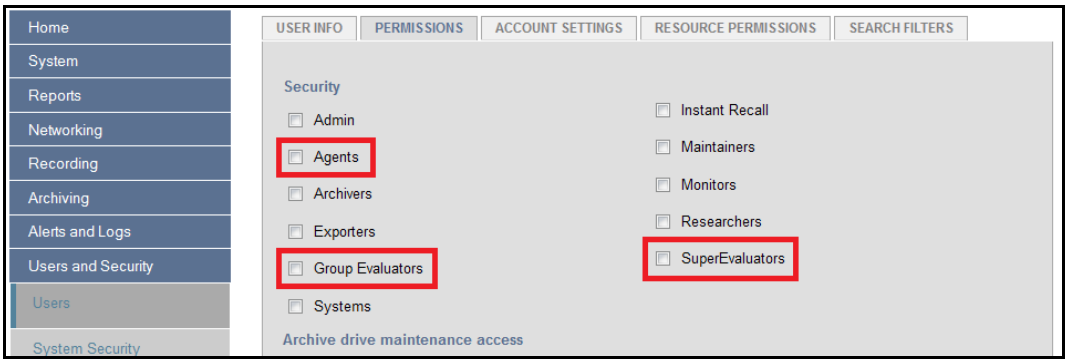
Figure 32—Agent Group Creation and Edit Page



3.2.1. Creating a Group Leader

Group leaders are users and must be created in the Users And Security: Users page of NexLog Configuration Manager. Group leaders must be part of one of three Security Groups: Admin, SuperEvaluator or Group Evaluator. A user in the Group Evaluators security group must also be a Group Leader in order to run evaluations.

Figure 33—User Permissions tab in User Edit and Creation Pages



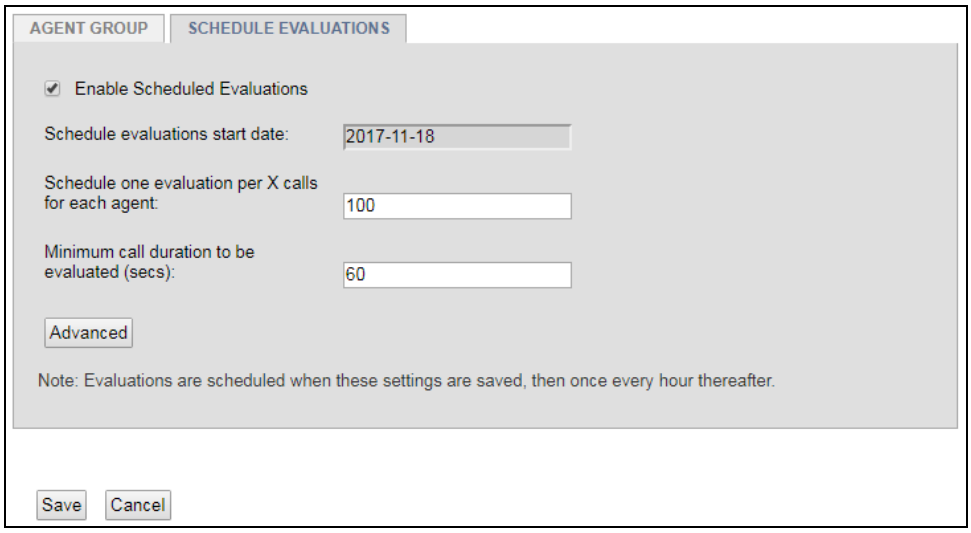
Once a user with Agent Group Leader permissions is created, you can assign that user to be Leader of a Group as shown in the previous section above. If the group leader is also a call taker, you can associate the group leader's user account with an agent in the agent creation or editing page, as seen in the Add Agent section above.

3.2.2. Schedules

Calls can be automatically flagged for evaluation using the Scheduled Evaluations feature. For each Agent Group, there can be schedule rules

configured that will tag every X call longer than Y duration with the user name of the group leader. The group leader can then do a search in MediaWorks Plus against the Flagged for Evaluator field for their user name, and see the calls that have been assigned.

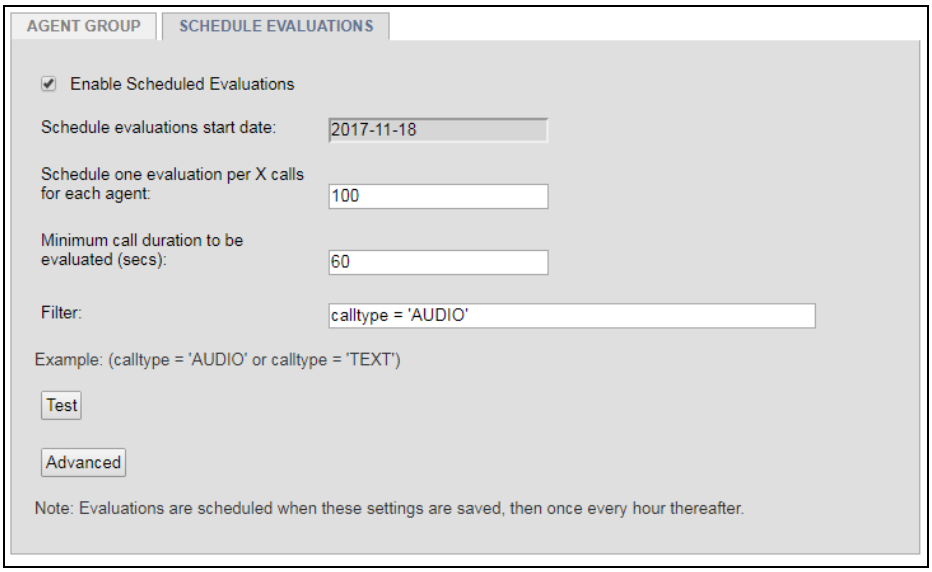
Figure 34—Schedule Evaluations



In the example above, every 100th call longer than a minute will be flagged for evaluation; calls less than a minute long will be ignored for the count. Calls are scheduled starting from the start date, at the time the schedule is saved and then once every hour thereafter.

Advanced Evaluation Scheduling is a feature that requires an add-on license. It you to specify any metadata field as criteria on scheduling evaluations. For example, you can schedule one evaluation per 100 audio calls only with call duration min 60 sec by setting Filter to calltype = 'AUDIO'.

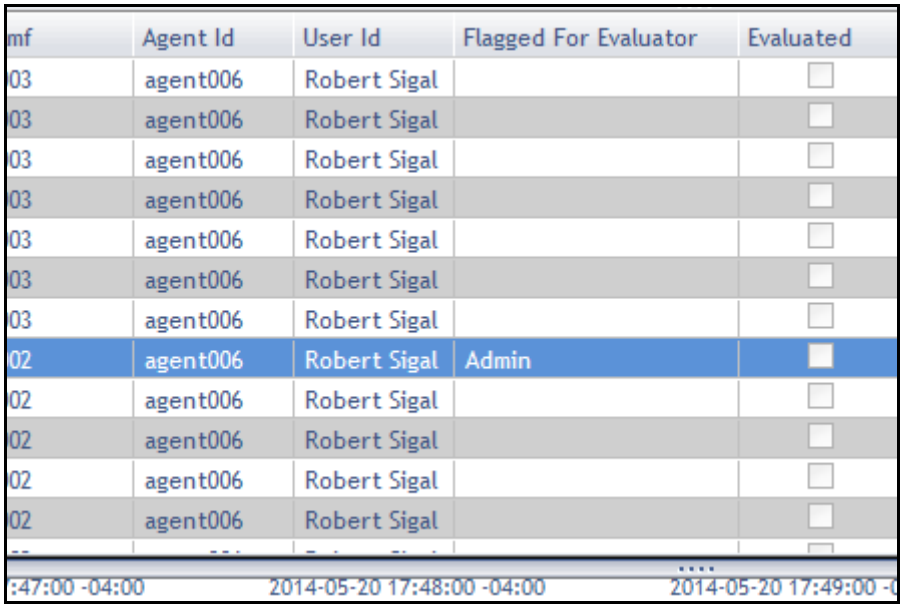
Figure 35—Advanced Schedule Evaluations



With Test button you may preview calls that would be scheduled for evaluation based on the configuration that you entered on that page.

Note: Popups should not be blocked for preview via test button.

Figure 36—Example of a Call Record Flagged for Evaluator

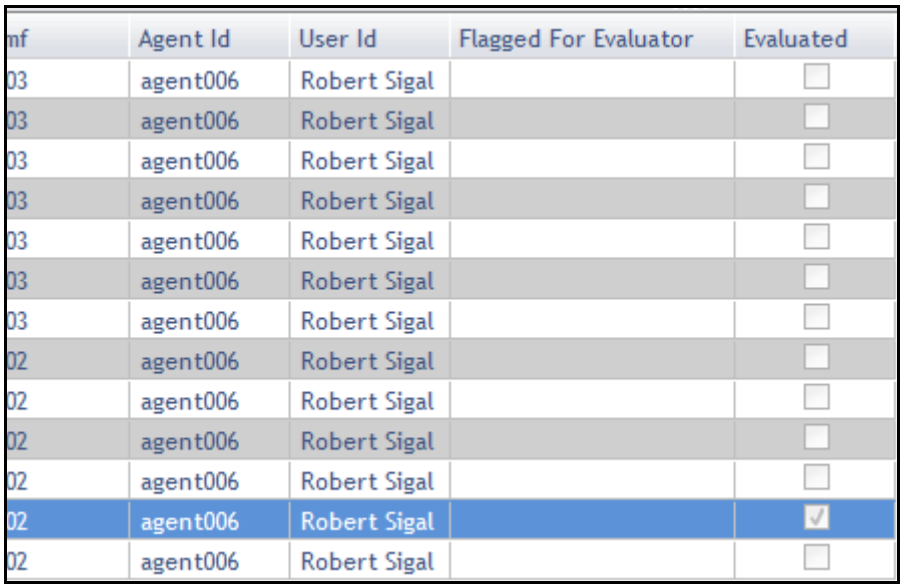


mf	Agent Id	User Id	Flagged For Evaluator	Evaluated
03	agent006	Robert Sigal		☐
03	agent006	Robert Sigal		☐
03	agent006	Robert Sigal		☐
03	agent006	Robert Sigal		☐
03	agent006	Robert Sigal		☐
03	agent006	Robert Sigal		☐
03	agent006	Robert Sigal		☐
02	agent006	Robert Sigal	Admin	☐
02	agent006	Robert Sigal		☐
02	agent006	Robert Sigal		☐
02	agent006	Robert Sigal		☐
02	agent006	Robert Sigal		☐

:47:00 -04:00 2014-05-20 17:48:00 -04:00 2014-05-20 17:49:00 -

After the call has been evaluated, the Flagged For Evaluator field will be cleared and the Evaluated checkbox will be checked, as seen here:

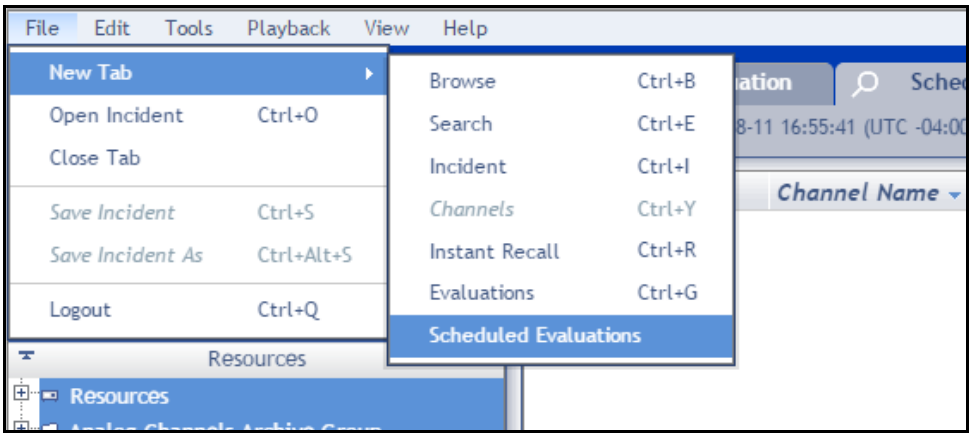
Figure 37—Example of a Call Record Flagged for Evaluator After Being Evaluated



mf	Agent Id	User Id	Flagged For Evaluator	Evaluated
03	agent006	Robert Sigal		☐
03	agent006	Robert Sigal		☐
03	agent006	Robert Sigal		☐
03	agent006	Robert Sigal		☐
03	agent006	Robert Sigal		☐
03	agent006	Robert Sigal		☐
03	agent006	Robert Sigal		☐
02	agent006	Robert Sigal		☐
02	agent006	Robert Sigal		☐
02	agent006	Robert Sigal		☐
02	agent006	Robert Sigal		☐
02	agent006	Robert Sigal		☑
02	agent006	Robert Sigal		☐

If you are logged into MediaWorks Plus with a Group Evaluator, Super Evaluator or Admin user, you will see a tab available for you:

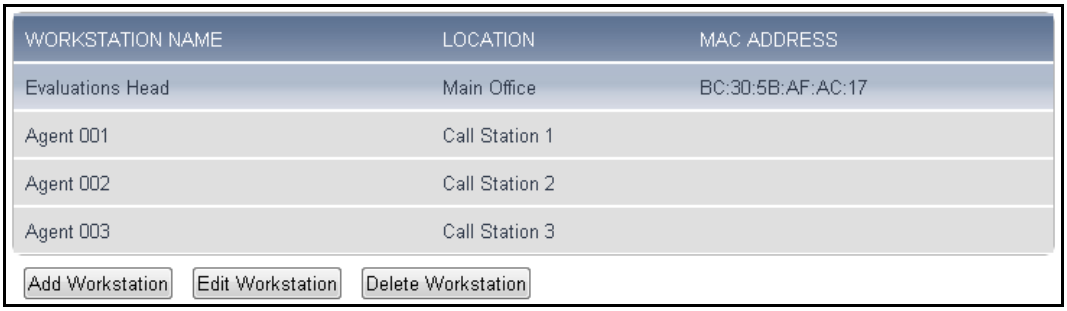
Figure 38—Scheduled Evaluation Tab



The Schedule Evaluations tab open a search tab pre-populated to search for all calls in the last 60 days with Flagged For Evaluator set to your user account. This list makes it easy to keep up to date on your assigned evaluations.

3.3. Agent Mapping

Figure 39—Agent Mapping



Agent Mapping allows you to tag incoming and outgoing calls on a channel number or channel name with information about the Agent or User handling the call.

With Static Mapping, all calls on a specific channel name or channel number are tagged with an Agent_ID. This is ideal for situations where an Agent has his or her own telephone that is not shared by other agents.

To use Static Agent Mapping, you must first go to Recording->Custom Fields and add a Custom Field for Agent_ID, of type Text.

With Dynamic Mapping, calls are tagged with a User_ID based on active MediaWorks (thick client) logins from Workstations identified via MAC address. If the User also has an associated Agent account, the call is also tagged with the Agent_ID. This is ideal for situations where a call taker desk is used by multiple people over the course the day and each call taker has their own user account to log into MediaWorks (thick client) with.

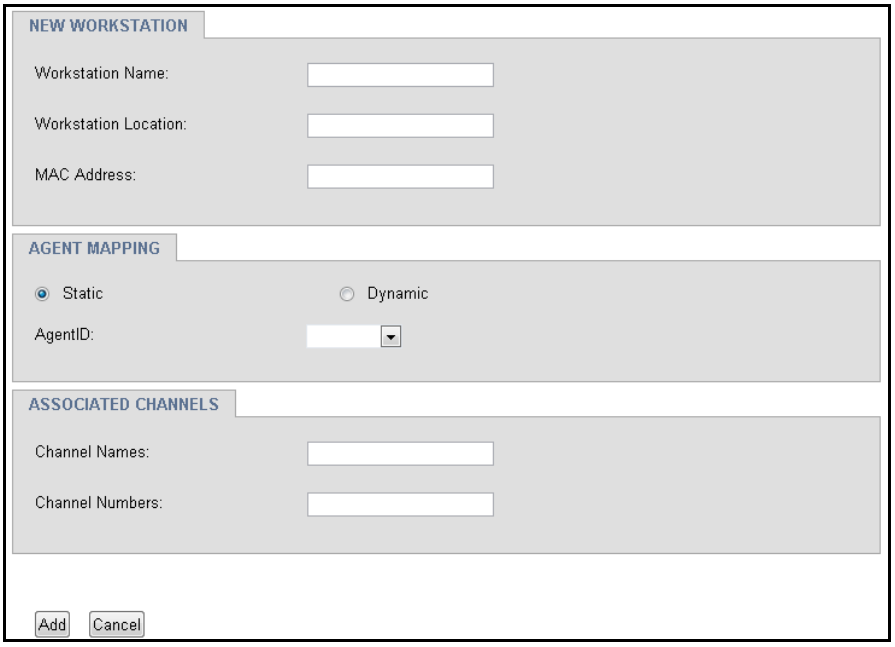
For Dynamic Agent Mapping, you must first go to Recording->Custom Fields and add Custom Fields for User_ID and Agent_ID, both of type Text.

If an Agent is associated with a User account, and calls are tagged with either method, the other field will be automatically filled out as well. The User ID field must match the User account name exactly; if you are using Windows User Tracker to tag calls, the recorder user account and the Windows user account must be named identically for the Agent field to also be populated.

Note: In NexLog 2.0 the Agent Mapping feature was called "Workstations" and accessible in NexLog Configuration Manager via Recording -> Agent Mapping. Static Agents were not supported in NexLog 2.0

3.3.1. Adding a Workstation with Static Mapping

Figure 40—Add Workstation



The Add Workstation screen is used to assign specific channels to a workstation location and an agent (user), so that calls can be tagged with that information. When a user is logged in to MediaWorks (thick client) at a designated workstation, calls received at that location will have the user name saved in the call metadata.

Add a workstation name and location; these are for clarity sake. Entering a MAC address is recommended but not necessary as it is not used internally for a static mapping.

Click the radio button for Static, then choose the AgentID you want to map to a channel name or channel number from the AgentID pull down menu. Then enter the channel number(s) and/or channel name(s) you want mapped to that Agent.

You can create a single static map that maps the same Agent ID to multiple channels by entering channel numbers like this

- 1, 3, 5, 7-9

which would map to channels 1, 3, 5, 7, 8, and 9.

Channel names can be mapped in a comma delimited list, or with * as a wildcard, so:

- Fire 1, Fire 2

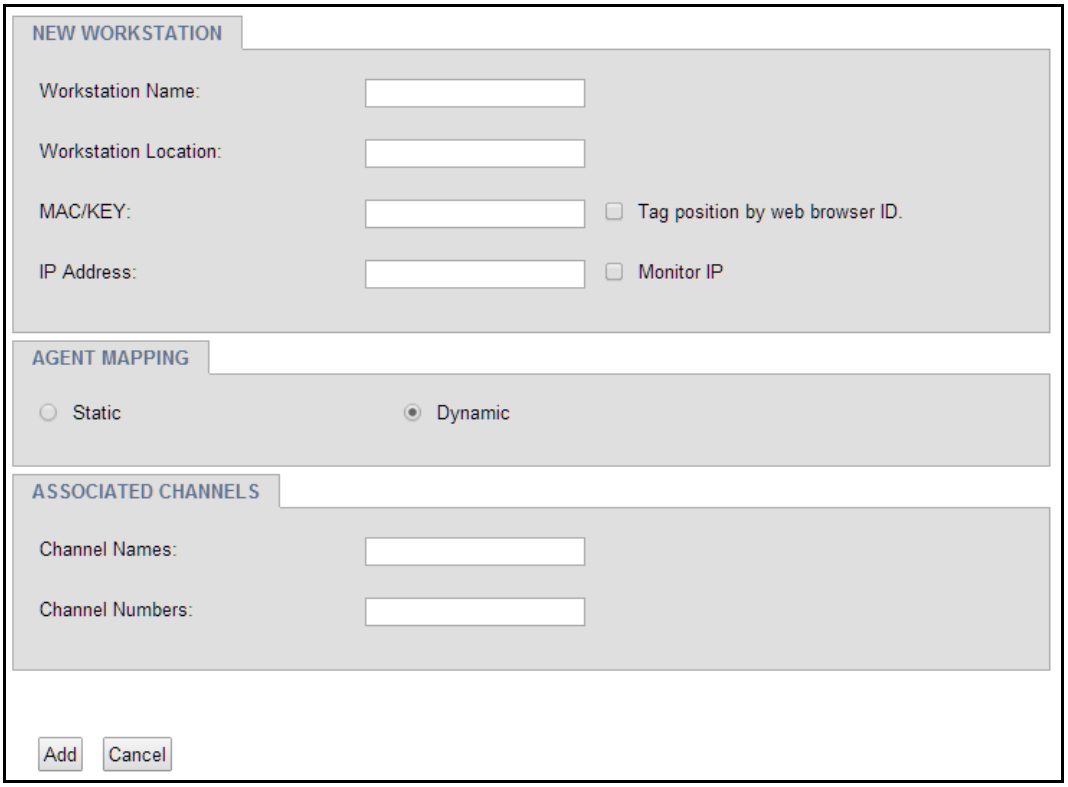
Would map to channels Fire 1 and Fire 2, and

- F*

would map to channels Fire 1, Fire 2, Forestry, and all other channels on the recorder that had channel names starting with F.

3.3.2. Add Workstation with Dynamic Mapping for MediaWorks

Figure 41—Add Workstation



The Add Workstation screen is used to assign specific channels to a workstation location and an agent (user), so that calls can be tagged with that information. When a user is logged in to MediaWorks (thick client) at a designated workstation, calls received at that location will have the user name saved in the call metadata.

Enter the workstation name, location identifier, the channel number(s) associated with this workstation, channel name(s), and the MAC address of the workstation in the fields provided.

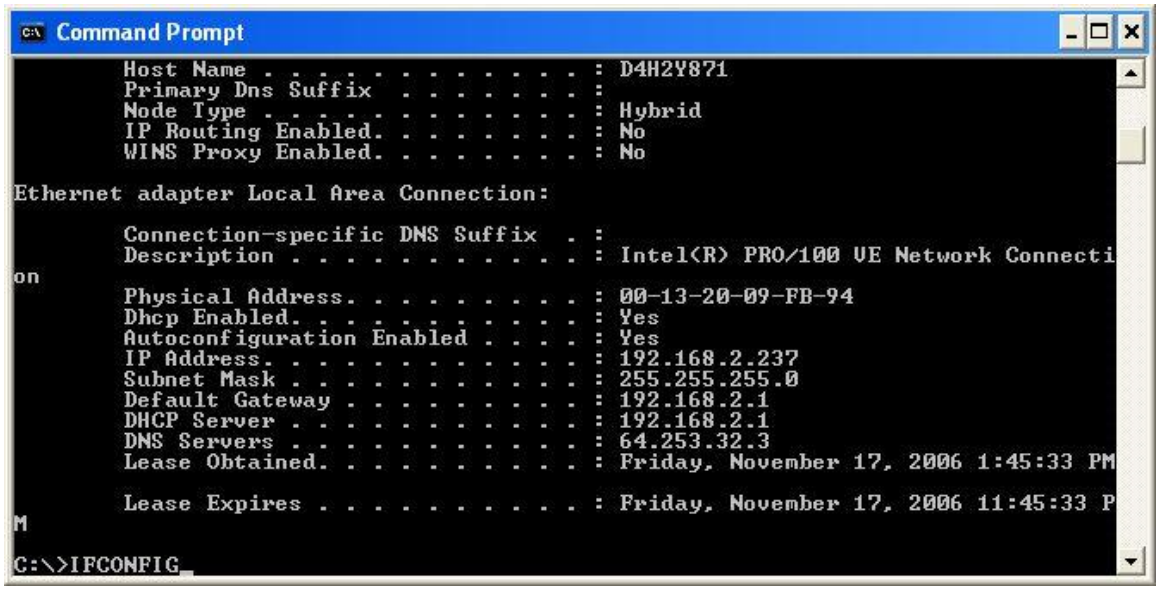
Each workstation must have a unique MAC address, which is a unique hardware identifier for the workstation's Ethernet adapter. The Tag position by web

Do the following on the PC containing Microsoft Windows to find out the MAC address that is assigned to the PC:

1. From Programs, select **Accessories**, then **Command Prompt**.
2. When the Command Prompt screen displays, type **ipconfig /all** and press ***Enter***.

The following information displays:

Figure 42—Finding MAC Address with IPCONFIG /all

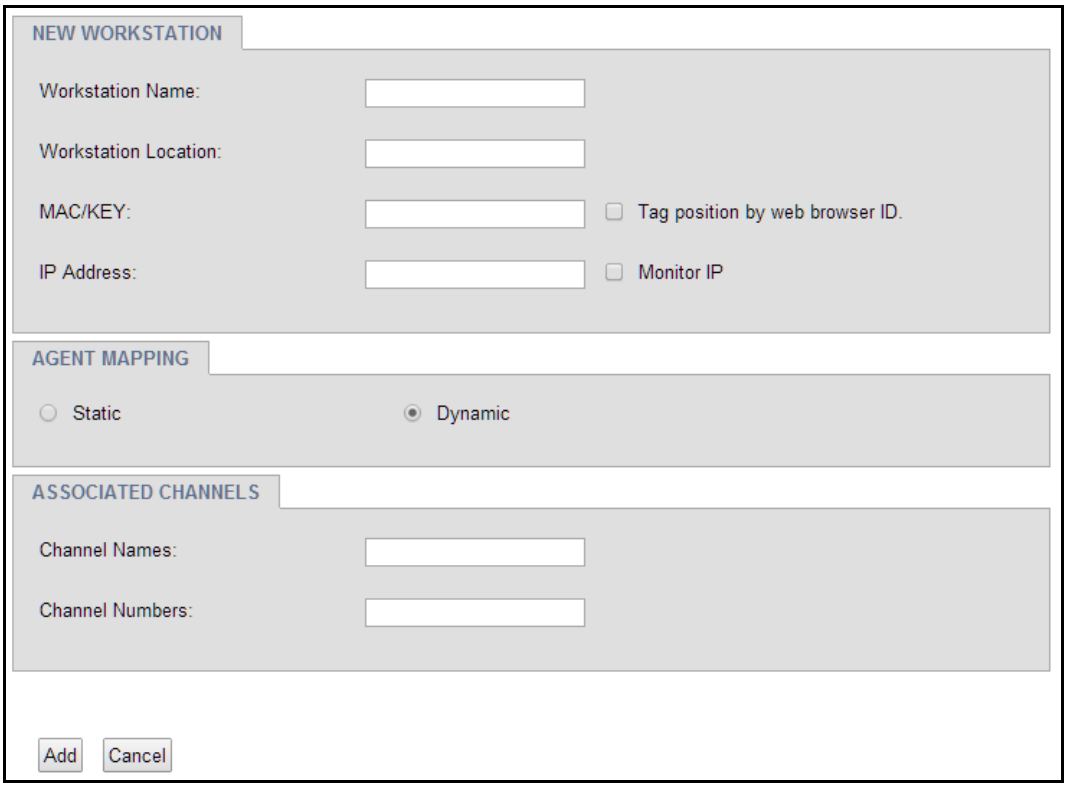


The MAC address is the Physical Address (in this example 00-13-20-FB-94).

Finally, to complete workstation setup, you must create a new metadata field called **user_id**. If a user is logged into MediaWorks (thick client) or MediaAgent on a configured workstation, then any calls recorded on the channel(s) associated with that workstation during the logged-in period are tagged with the user_id logged in.

3.3.3. Add Workstation with Dynamic Mapping for MediaWorks Plus

Figure 43—Add Workstation



The Add Workstation screen is used to assign specific channels to a workstation location and an agent (user), so that calls can be tagged with that information. It is possible to configure this at each workstation such that the agent currently logged in is tagged to the calls that come in during their shift.

This method requires each workstation to be configured individually from the workstation itself. Connect to the NexLog recorder and navigate to Add Workstation, then fill in the workstation name and its location. Check the Tag position by web browser ID checkbox, configure the channels and then click Add.

What this does is allow this web browser act as a workstation login. Once configured, navigate to http://(recorder address)/agent/login.py and you will be greeted by a list of the Agents present on this system. Select an agent and click the Login link that will appear. This Agent will remain logged in until logged out from this page, even if in the meantime the browser is closed and then re-opened.

Figure 44—Agent Login Page

In the figure above, you can see that Agent Robert Sigal logged in 4 minutes, 59 seconds ago, and the Logout link is available.
This method of tagging agents is ideal for sites using MediaWorks Plus.

3.3.4. Workstation Summary

In summary, a call will be tagged with Agent_ID if:

1. Static Agent Mapping is configured for calls on that channel number.
2. Static Agent Mapping is configured for calls on that channel name.
3. A User with an associated Agent account is logged into MediaWorks (thick client) at a Workstation configured for Dynamic Agent Mapping of calls on this channel name or channel number. The call will also be tagged with User_ID.
4. An Agent is logged in at the Agent/Login.py webpage in a configured browser. The User_ID will then be populated with the User name of the Agent.

A call will be tagged with User_ID if:

1. Dynamic Agent Mapping is configured for calls on this channel name or channel number and a User with permission to access those channels is logged into MediaWorks (thick client) at the Workstation at the time of the call.

2. Static Agent Mapping is configured for calls on that channel name or channel number, for an Agent with an associated User account. The call will also be tagged with Agent_ID.

For additional information on Workstations and Call Tagging, see Appendix A: WinUserTracker

4. Evaluations

Evaluations are performed using the MediaWorks Plus web client, as described in this section.

4.1. A Word about Permissions

Evaluations can only be performed by users who are logged into MediaWorks Plus with a NexLog User account that is a member of the Admin, Group Evaluators or SuperEvaluator permission groups. Group Evaluators can only evaluate calls for agents in the agent groups for which they have been designated as a Leader. Group Evaluators who are group leaders can only view completed evaluations for their agent groups, and Group Evaluators who are not a group leader can only see completed evaluations about themselves.

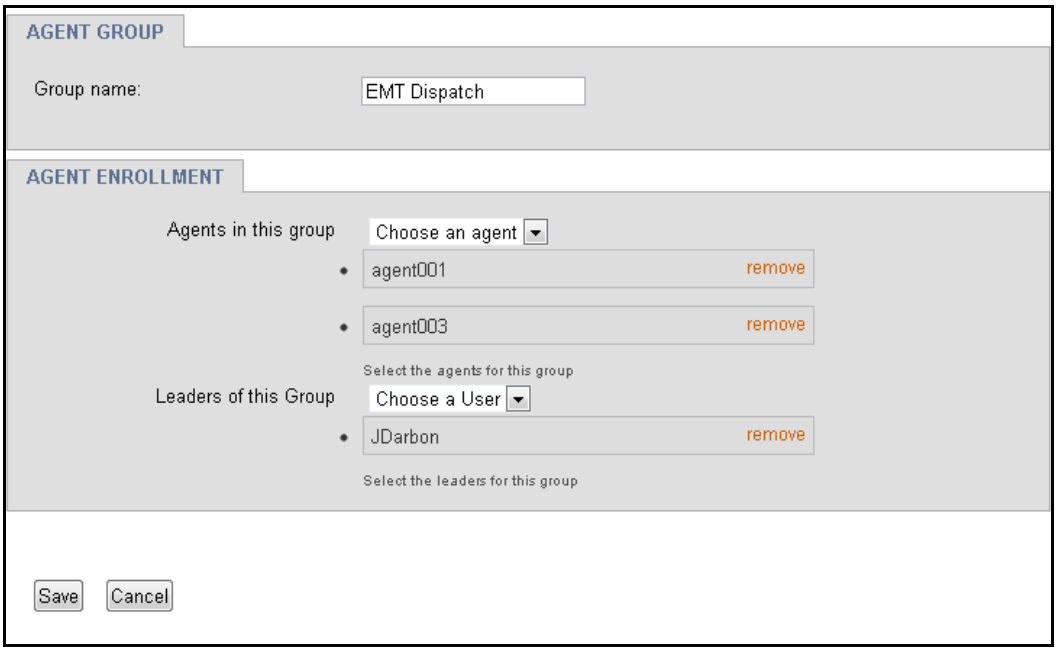
So if User JDarbon is:

- associated with Agent id agent001
- AND is Leader of Group EMT Dispatch
- AND is in the permissions group Group Evaluators,

Then she can:

- Evaluate calls made by any Agent in the EMT Dispatch group.
- See completed evaluations for any Agent in the EMT Dispatch group.
- Add an Agent Comment to evaluations of calls she's taken as agent001.

Figure 45— Agent Group Edit Page



Note: Admins and SuperEvaluators can evaluate anyone, can see all completed evaluations, and can run reports for all agent groups.

Agents don't need an associated User account, but if your forms use Single Comment Mode or Multiple Comments and Actions mode, they will need a User account that is part of the Agent permission group; this will allow them to view the Completed Evaluations tab in MediaWorks Plus software to see only their evaluations and allow them to add a comment, acknowledge other comments and digitally sign their evaluations. Note that in Single Comment Mode, no one but the agent who was evaluated can add a comment to completed evaluations.

4.2. MediaWorks Plus web client

MediaWorks Plus web client can be navigated to as follows:

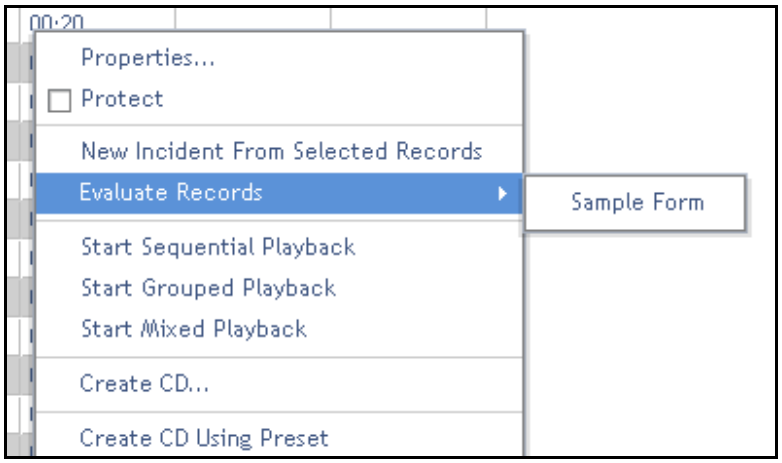
http://ipaddress.of.recorder/client/mediaworks

(where ipaddress.of.recorder is the IP address of the NexLog recorder). Consult with your network administrator if you don't know this address.

Log-on to MediaWorks Plus using your NexLog user account ID and password.

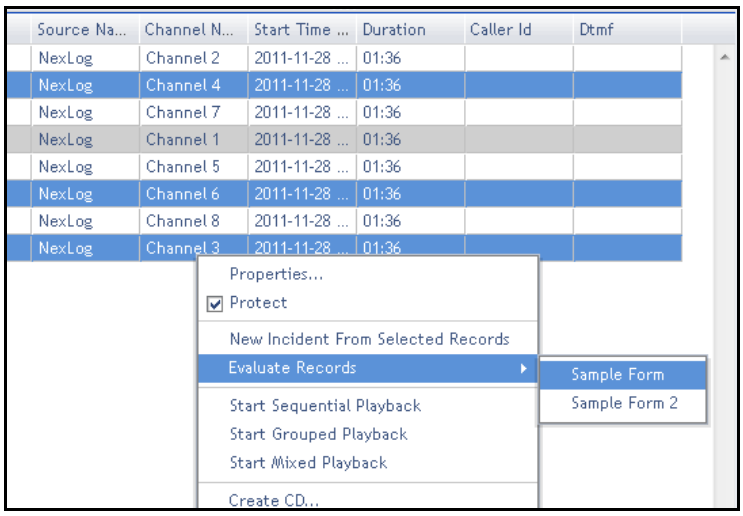
Select a call from the "Search" or "Browser" tab, right click on the call, and then select the Evaluation form that you wish to run (only published forms will be shown in this list). The Evaluation form will open in its own tab.

Figure 46— Evaluate Records Sub-menu



Sometimes a single phone call or interaction can end up as two records on the recorder. For example, an analog line set to record based on Vox Threshold may have a call broken in two because of an extended silence in the middle. In order to properly evaluate the whole call, you can select multiple records from the search or browser tabs, by ctrl+clicking additional pieces of the call, then right-click and select the form, as follows:

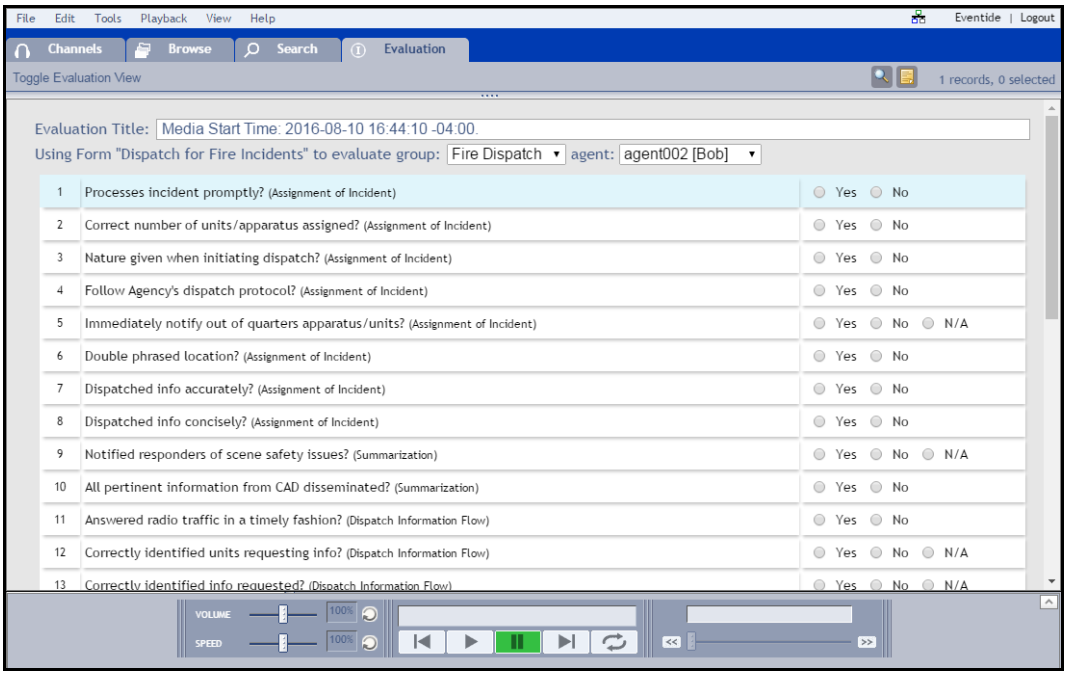
Figure 47— Evaluate Multiple Records as One



4.2.1. Evaluations

Once selected, the Evaluation form will open in its own tab:

Figure 48— Evaluation Report Form



The form is largely self-explanatory.

Use the transport controls at the bottom of the page to listen to the call(s) while you are evaluating.

1. Edit the title:

The default title will include the Agent_ID the call is tagged with and the Media Start Time. You can leave this as is, or change it as much as you like.

2. Select the Agent Group:

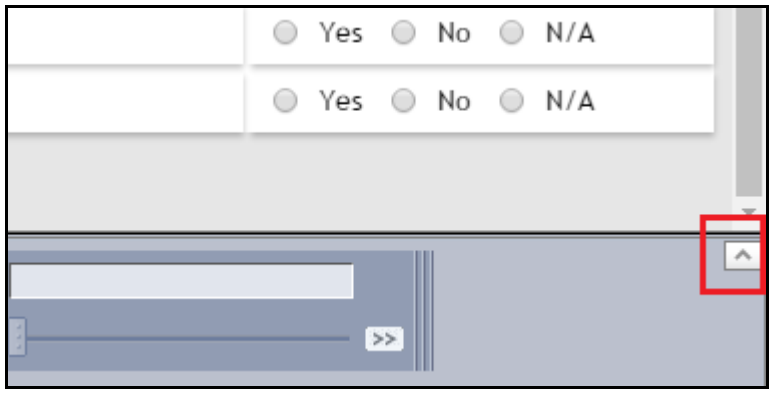
Click the Group menu to select an agent group, and then the Agent menu will only show Agents who are in that group.

3. Select the Agent:

If the call selected was automatically tagged with an Agent via the NexLog workstations feature, then the Agent and Group will be pre-populated with the Agent that was tagged, but you can override this manually.

Otherwise the agent will be preset as '[Not Set]' and the evaluator will need to select the agent using the dropdown menu. Do this by listening to the call and determining the agent based on the agent's voice (or use external information such as work schedules to determine which agent was at the recorded position).

Figure 49— Timeline Toggle Button (highlighted in red)



4. Play the Call(s):

The call(s) being evaluated are playable from the playback controls at the bottom. It will playback the call(s) in mixed mode by default, but if you want to see the calls in the standard timeline/callgrid view, you can click "Toggle Evaluation View" to see the view familiar from the Search or Browse tabs.

5. Annotate the call(s): (Optional)

You can use the text and audio annotation features of MediaWorks Plus to make Evaluation specific annotations that will only appear in the Evaluation and not in other contexts in MediaWorks Plus. This may be used to show exactly where an Agent didn't follow protocol correctly, or to highlight a particularly positive interaction worth noting.

6. Evaluate the call(s):

Use the mouse to select the answer for each question.

Enter as much text as you like into the comment boxes to explain the score or to comment about the call. If a comment is required, you will not be able to submit the evaluation until it is entered, but you can save the evaluation as "in progress".

If a question is not applicable to the specific call, and if the form makes an N/A available for the question, then you can click the N/A radio button to have the question ignored for this call. (N/A buttons are optional and are configured by the form creator on a per-question basis).

4.2.2. Evaluations and Saving

Once you have completed an evaluation, you can save it as complete by clicking Submit Evaluation. If the evaluation is incomplete, an error message will pop up explaining why the evaluation cannot be saved. For example, if you overlooked a question, it will prompt you to answer that question.

Evaluations can also be saved "in progress", with the Save As In Progress button. Clicking this will bring you to a page that says "Form saved but incomplete." You can resume all in-progress evaluations by loading the

Evaluations tab in MediaWorks Plus; if your NexLog user account has any in-progress evaluations, you will see them listed on this tab with a status of In-Progress.

Once an evaluation form is submitted, you will be shown the completed evaluation page for that completed evaluation.

4.3. Completed Evaluations

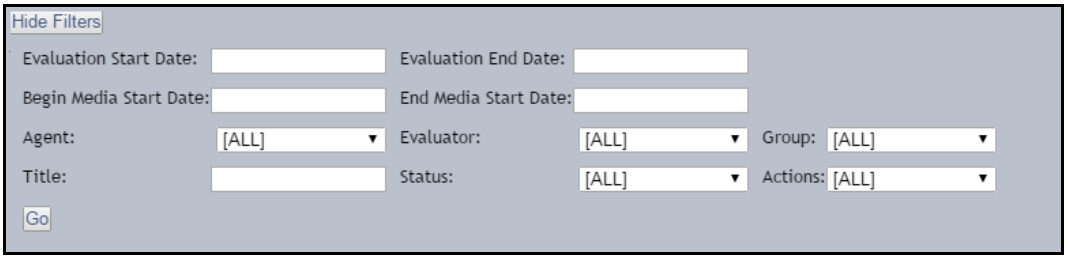
Completed evaluations can be reviewed in both MediaWorks Plus and the NexLog Configuration Manager. MediaWorks Plus has a new kind of tab, Completed Evaluations, which can be opened from the File->New Tab menu. In the NexLog Configuration Manager, Completed Evaluations are found in the Quality Factor Software section.

The Completed Evaluations page differs in MediaWorks Plus than in Configuration Manager in one important way: it has a transport control at the bottom of the page that allows you to listen to the evaluated call(s).

Completed Evaluations can only be seen by users logged into NexLog Configuration Manager or MediaWorks Plus with an account that is a member of the Agents, Admin, Group Evaluators or SuperEvaluators permission groups. Admins and SuperEvaluators can see completed evaluations for all agents, but Group Evaluators can see only those involving agents and agent groups for which they are a designated Group Leader, or which are of the agent they are associated with. Agents can only see Completed Evaluations tagged with their account.

The Completed Evaluations page lists all of the completed evaluations on the logger, with a heading for Agent, Form, Evaluator, Date and Score. To view an evaluation, simply click on it to select it and then click View Evaluation and the evaluation will be displayed. In MediaWorks Plus, it will open in a new tab. If you want to print an evaluation, select it from the list and click print evaluation; the selected evaluation will open in a new tab in a printer friendly format, which you can then print with your browser as you can any web page.

Figure 50—Completed Evaluations Filters

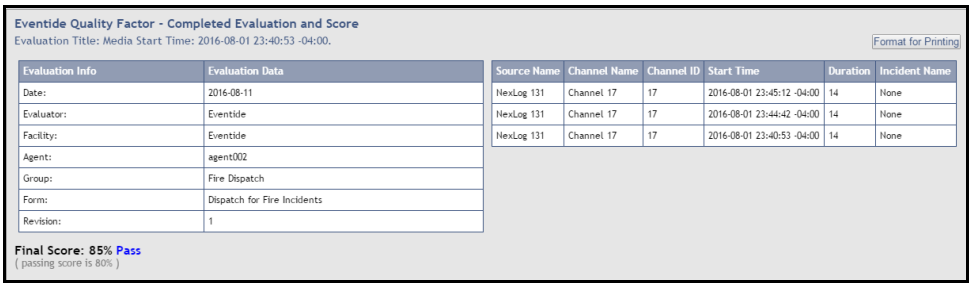


You can filter the list by evaluation date, media start date, agent, group, evaluator, and any by combination of these. For example, you may want to see all evaluations completed between September 1, 2011 and October 31, 2011, of agent agent003, by evaluator JDarbon. Or you might want to see the

evaluations that were made at a different time of calls that were recorded September 1, 2011 and October 31, 2011. In the first case you set the Evaluation Start Date and End Date, in the second, you would set the Begin Media Start Date and the End Media Start Date.

The top of a completed evaluation form will look like this:

Figure 51— Top of Completed Evaluations Form



Eventide Quality Factor - Completed Evaluation and Score

Evaluation Title: Media Start Time: 2016-08-01 23:40:53 -04:00.

Format for Printing

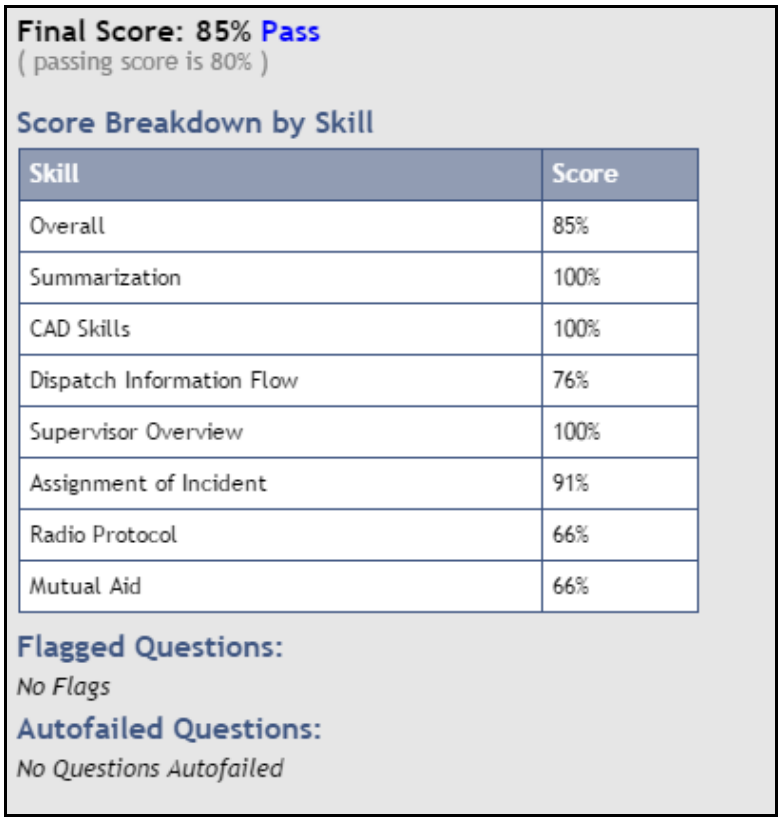
Evaluation Info	Evaluation Data
Date:	2016-08-11
Evaluator:	Eventide
Facility:	Eventide
Agent:	agent002
Group:	Fire Dispatch
Form:	Dispatch for Fire Incidents
Revision:	1

Source Name	Channel Name	Channel ID	Start Time	Duration	Incident Name
NexLog 131	Channel 17	17	2016-08-01 23:45:12 -04:00	14	None
NexLog 131	Channel 17	17	2016-08-01 23:44:42 -04:00	14	None
NexLog 131	Channel 17	17	2016-08-01 23:40:53 -04:00	14	None

Final Score: 85% Pass
(passing score is 80%)

It contains a summary of the evaluation, including the call records evaluated, as well as the final score and pass/fail information. Below that, it will show a breakdown of the score based on skill group. It also lists any flagged questions and any autofailed questions, and below that it shows the full completed results.

Figure 52— Score Breakdown of Completed Evaluations Form



Final Score: 85% Pass
(passing score is 80%)

Score Breakdown by Skill

Skill	Score
Overall	85%
Summarization	100%
CAD Skills	100%
Dispatch Information Flow	76%
Supervisor Overview	100%
Assignment of Incident	91%
Radio Protocol	66%
Mutual Aid	66%

Flagged Questions:

No Flags

Autofailed Questions:

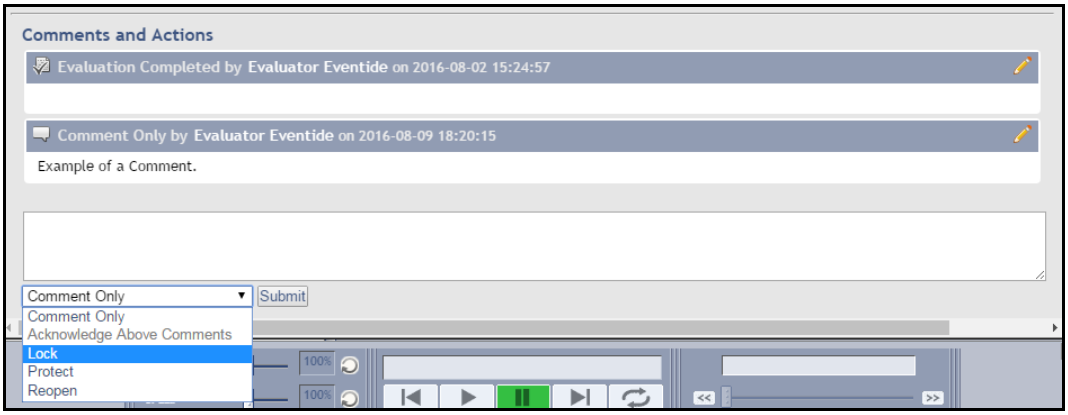
No Questions Autofailed

4.3.1. Multiple Comments With Actions Mode

The Completed Evaluations page also has a field for Comment, which in Single Comment Mode can only be filled out by the Agent that the Evaluation is about. The Agent in question needs to be configured such that it has an associated User account that has Agent, Group Evaluators, SuperEvaluator or Admin permissions.

At the bottom, below the questions, is a section for comments and actions. This is where an Agent can comment on their evaluations, and other actions can be performed by users with the correct permissions, such as Lock, Protect, Reopen.

Figure 53—Evaluation Actions



Evaluations can exist in five states:

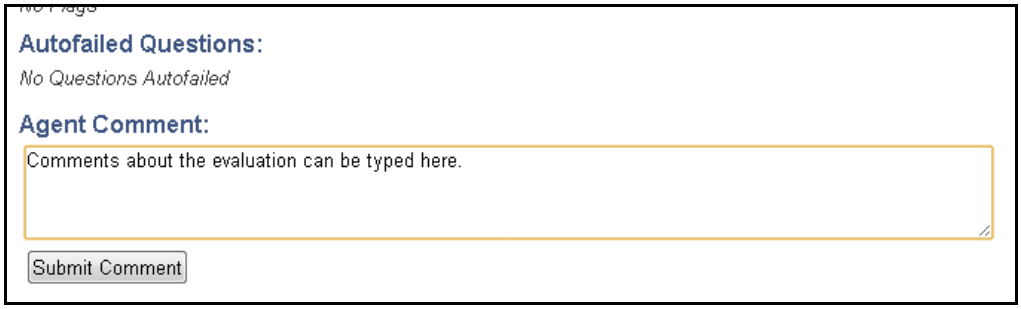
1. **In Progress:** The Evaluation has begun but was saved in progress. It can be completed by the Evaluator who started it and it does not count towards any reporting.
2. **Completed:** The Evaluation is complete and can be seen by the Agent involved, their Group Leader and by all Super Evaluators and Admins.
3. **Protected:** The Evaluation is protected and can no longer be seen by the Agent.
4. **Escalated:** The Evaluation was protected at completion time to flag it for the attention of a Super Evaluator or Admin. Like Protected, it can no longer be seen by the Agent. A Super Evaluator or Admin can decide to change the status to locked, protected or unprotected.
5. **Locked:** The Evaluation is locked from further changes being made. It can be unlocked by a Super Evaluator or an Admin.

4.3.2. Single Comment Mode: Agent Comment

The Completed Evaluations page also has a field for Comment, which in Single Comment Mode can only be filled out by the Agent that the Evaluation is about. The Agent in question needs to be configured such that it has an associated

User account that has Agent, Group Evaluators, SuperEvaluator or Admin permissions.

Figure 54—Completed Evaluations Form with Agent Comment



4.3.3. Deleting Completed Evaluations

Only Users with Admin permissions can delete completed evaluations. On the completed evaluations page Admin users will have an additional button Delete Evaluation. If an evaluation is selected from the list, clicking this button will prompt to make sure you want to delete the evaluation. Clicking ok will then delete the evaluation.

Figure 55—Deletion Button for Admin Users

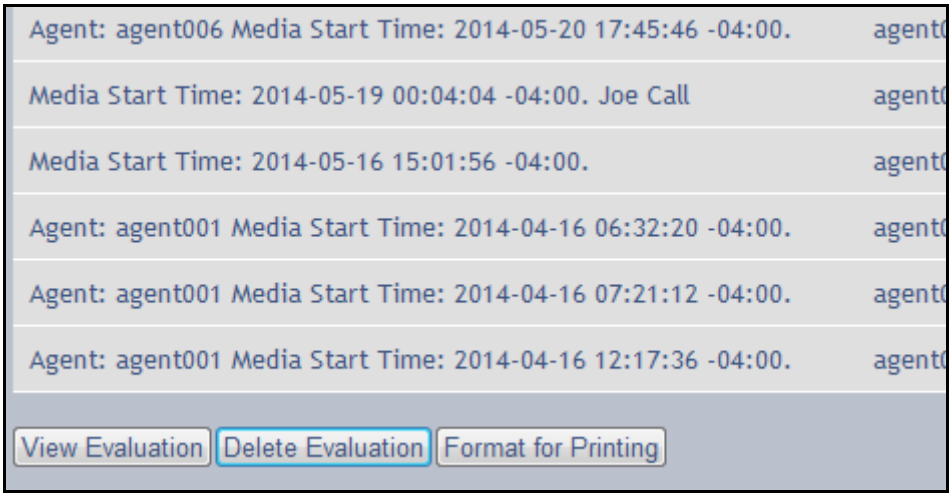
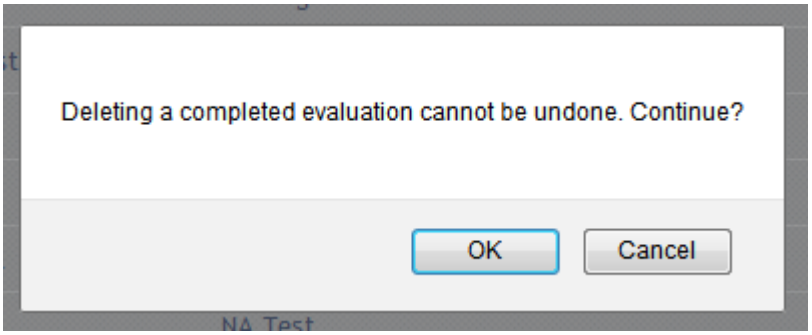


Figure 56—Deletion Confirmation



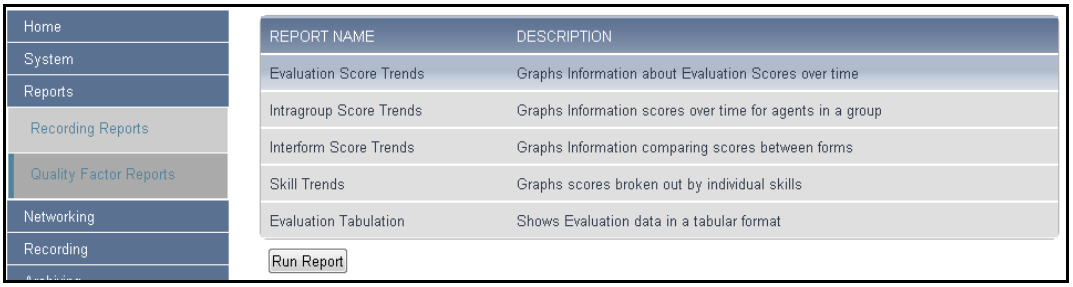
5. Quality Factor Reports

Quality Factor Basic Reports allows you to analyze the performance of your agents and see trends in evaluation results over time. There is also an Enhanced Reporting add-on package that allows for much deeper, customizable reporting. For information about Enhanced Reports, see the NexLog Enhanced Reporting manual, (Eventide part number: 141268.) The remainder of this section is about Basic Reports.

5.1. Reports and Permissions

Reports can only be run by users logged into Configuration Manager with an account that is a member of the Admin, Group Evaluators or SuperEvaluator permission groups. Admins and SuperEvaluators can run reports for all groups; Evaluators can run reports only involving agents and agent groups for which they are a designated Group Leader.

Figure 57— Quality Factor Reports Main Page

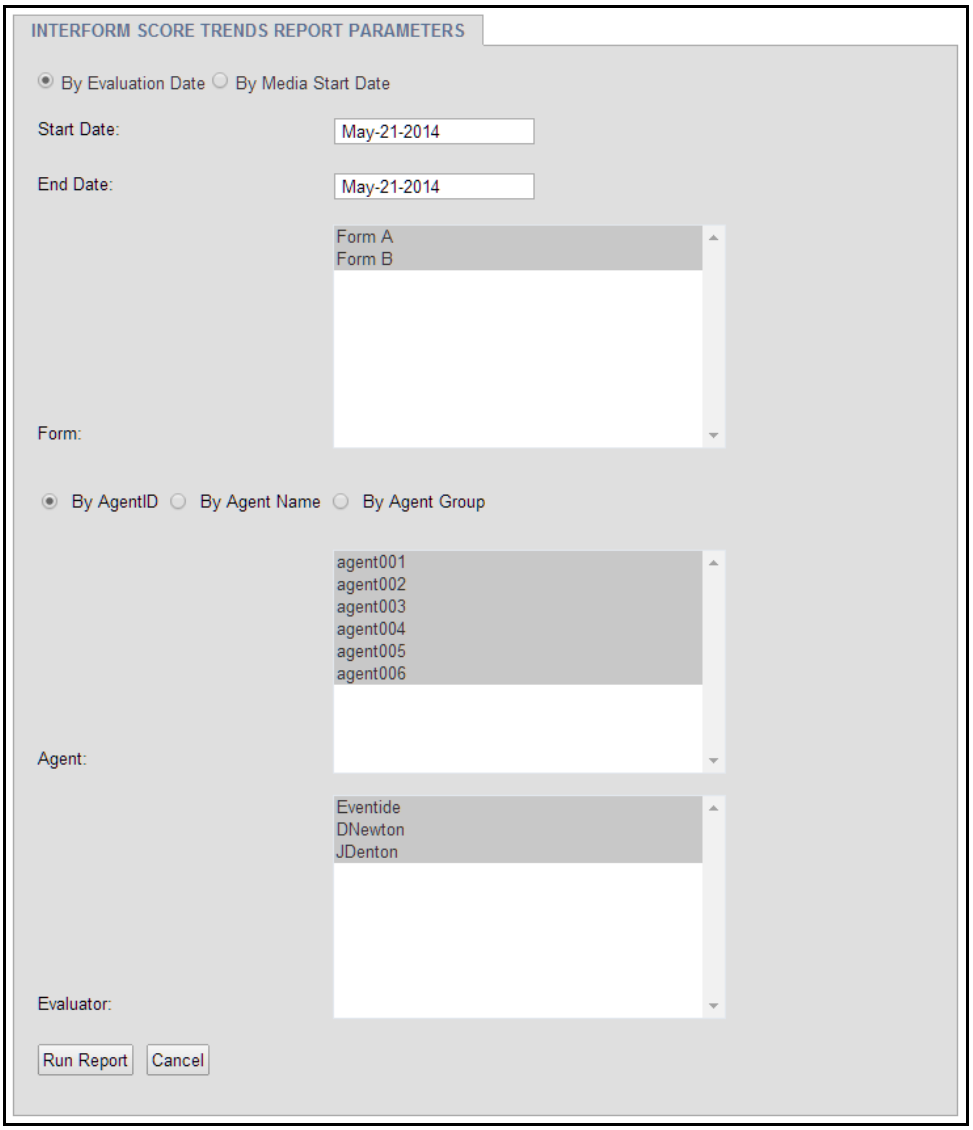


5.2. Basic Evaluation Reports

The Eventide Quality Factor option ships with five Basic Evaluation Reports: Evaluation Score Trends, Intragroup Score Trends, Interform Score Trends, Skill Trends, and Evaluation Tabulation.

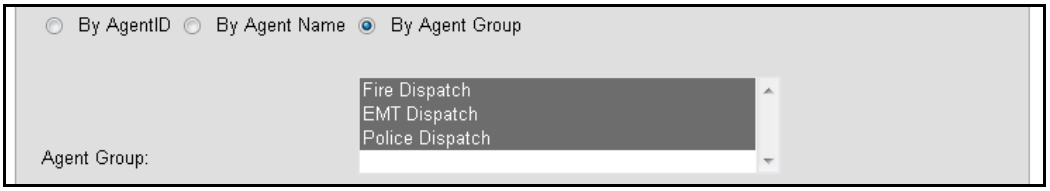
All of these reports except for Intragroup Trends are run via the following form:

Figure 58— Evaluation Report Form



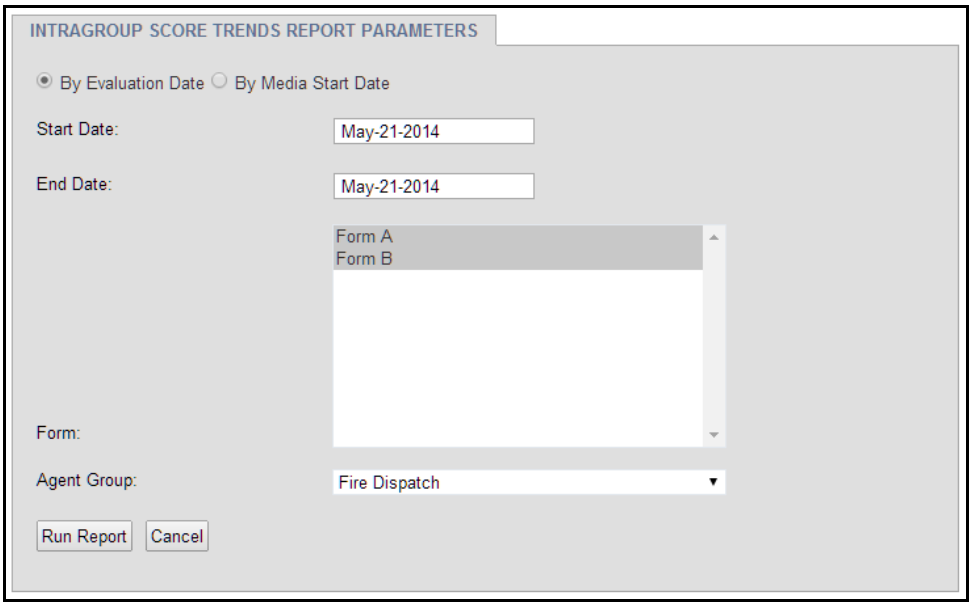
The form allows you to narrow the scope of the report based on Evaluation date, Form, Agent, and Evaluator, as well as by the date. There are two option for date: Evaluation Date and Media Start Date. The former is based on when the evaluations were completed, the latter is by when the recordings were made. For Agents, you can choose based on Agent ID, Agent Name, or Agent Group, and the form will dynamically change to show the correct options, as shown below:

Figure 59— Evaluation Report By Agent Group



The Intragroup Trends report only requires that you to select a date range, Form and Agent Group, as shown below:

Figure 60— Intragroup Trends Report Form

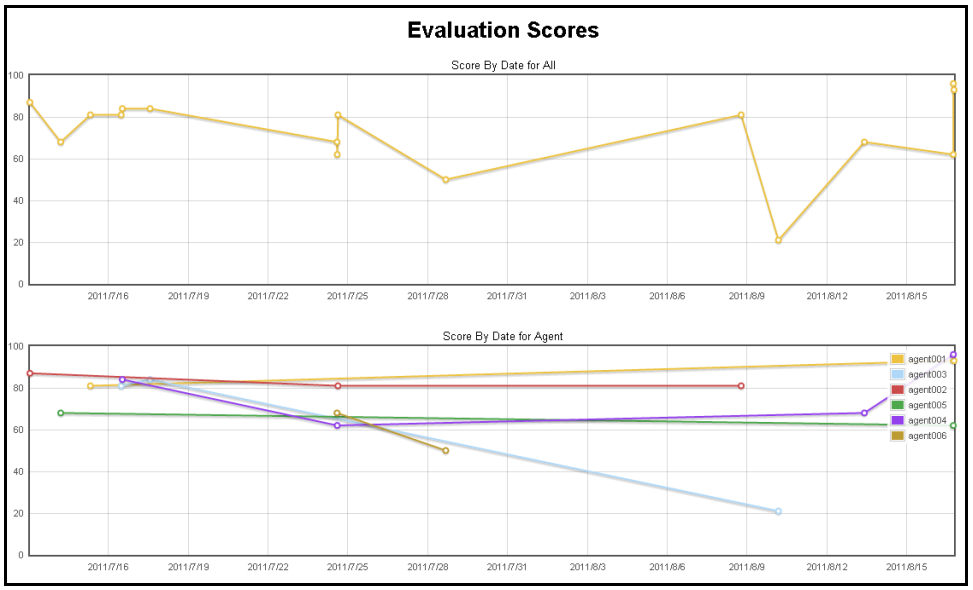


As with the other forms, there are two option for date: Evaluation Date and Media Start Date.

5.2.1. Evaluation Score Trends Report

Evaluation Score Trends graphs Evaluation Scores over time, showing four charts: the average score by date for all, score by date per agent, score by date per evaluator, and number of flags per agent. You can filter by date, forms, agent id, agent name, agent group, and evaluator.

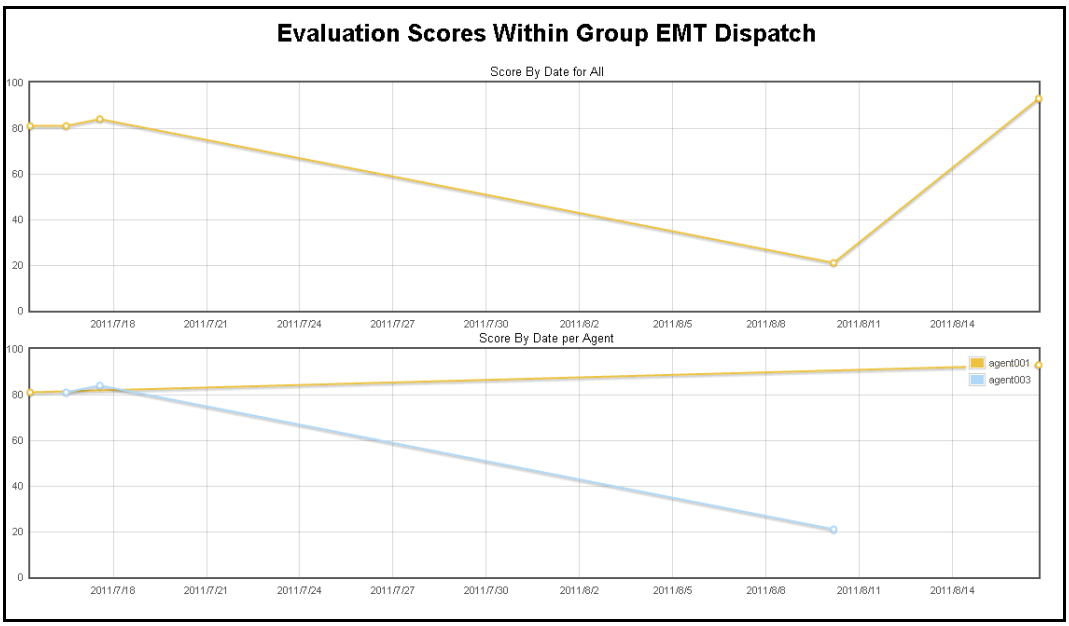
Figure 61— Evaluation Scores Report



5.2.2. Intragroup Score Trends Report

The Intragroup Score Trends report graphs scores over time for agents in a single group, showing two charts: Score By Date for All, and Score By Date per Agent. With this report, you can see how a group has been performing as a unit, and see if any individual agents are excelling or underperforming compared to the rest.

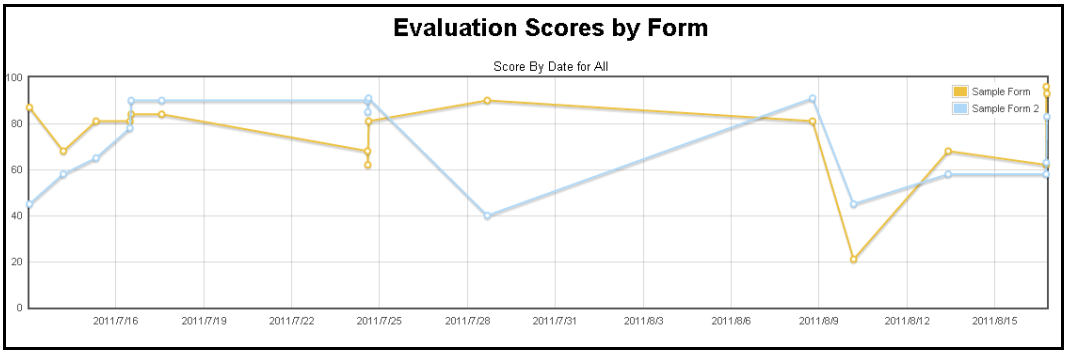
Figure 62— Intragroup Scores



5.2.3. Interform Score Trends Report

The Interform Score Trends report compares scores between forms, graphing the performance over time.

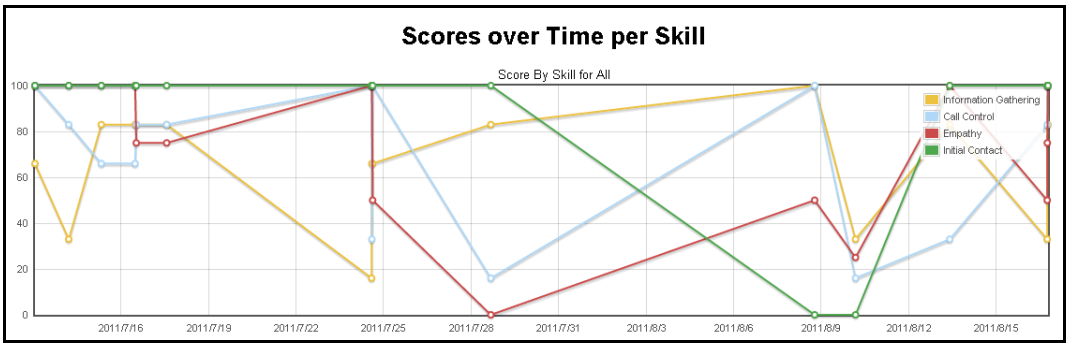
Figure 63— Interform Scores Report



5.2.4. Skill Trends Report

The Skill Trends report graphs scores broken out by individual skills, to highlight areas that are in need of improvement.

Figure 64— Skill Trends Report



5.2.5. Evaluation Tabulation

Evaluation Tabulation (Evaluation Scores Table) shows Evaluation data in a table, with Date of Evaluation, AgentID, Name, Agent Group, Evaluator, Percentage Score, Flags, and Pass/Fail.

Figure 65— Evaluation Scores Table

Score By Date

Date	AgentID	Agent Name	Agent Group	Evaluator	Percentage	Flags	Pass/Fail
2011-07-13	agent002	David Gately	Fire Dispatch	Eventide	87	0	PASS
2011-07-14	agent005	Elizabeth Winter	Fire Dispatch	Eventide	68	0	PASS
2011-07-15	agent001	Jane Darbon	EMT Dispatch	Eventide	81	0	PASS
2011-07-16	agent003	Robert Arctor	EMT Dispatch	Eventide	81	0	PASS
2011-07-16	agent004	Jillian Vasquez	Police Dispatch	Eventide	84	0	PASS
2011-07-17	agent003	Robert Arctor	EMT Dispatch	Eventide	84	0	PASS
2011-07-24	agent006	George LaPrete	Police Dispatch	Eventide	68	0	PASS
2011-07-24	agent004	Jillian Vasquez	Police Dispatch	Eventide	62	0	PASS
2011-07-24	agent002	David Gately	Fire Dispatch	Eventide	81	0	PASS
2011-07-28	agent006	George LaPrete	Police Dispatch	Eventide	90	0	PASS

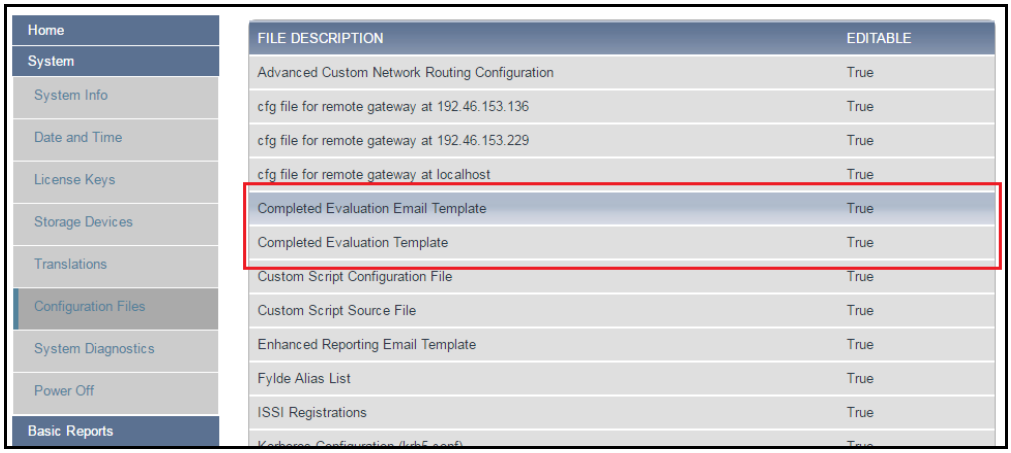
6. Quality Factor Layout Templates

Quality Factor forms and emails are configurable to include the information you want and exclude information you find unnecessary.

6.1. Configuration Files

If you want to modify the layout of Completed Evaluations or the content of Completed Evaluation Emails, use the Configuration Files page under System in Configuration Manager as seen below:

Figure 66— Quality Factor Reports Main Page



The Quality Factor templates are highlighted in red in the above image:

- Completed Evaluation Email Template
- Completed Evaluation Template

6.2. Completed Evaluation Email Template

This file allows you to customize the layout and information included in emails sent when actions are taken on an evaluation form both for the web and for its print formatting.

Lines beginning with # are comments. The first non-comment line defines the email's subject. Remaining lines make up the email's body. You can incorporate basic html to stylize text and include dynamically generated info blocks by

including the variables below surrounded with double curly brackets (such as `{{ip_eth0}}` being used to place Recorder's configured IP on eth0 into the email.)

Links to the recorder can be created by including a line like these:

- `http://{{ip_eth0}}{{path}}`
- `http://example.domainname.info{{path}}`

Several variables for substitution are available:

{{ip_eth0}} - The Recorder's configured IP on eth0.

{{ip_eth1}} - The Recorder's configured IP on eth1.

{{loggerserial}} - The Serial # of the recorder.

{{loggername}} - The Configured Name of the recorder.

{{loggerfacility}} - The Configured Facility name of the recorder.

{{action}} - The action performed on a completed evaluation.

{{performed_by}} - The username of the user (agentID if the agent) carrying out the action.

{{title}} - The Title of the completed evaluation.

{{path}} - The Path on the recorder where the evaluation is located such that http://{{ip_eth0}}{{path}} will be a valid link if the IP on eth0 is reachable.

6.3. Completed Evaluation Email Template Default

If you need to restore to the original layout, you can copy and paste the lines below to return to the default Completed Evaluation Template.

```
# Completed Evaluation Email Template
# This file defines the contents of emails sent upon actions on
completed evaluations.
# Lines beginning with # are comments.  The first non comment
line
# defines the email's subject. Remaining lines make up the
email's body.
#
# Several variables for substitution are available:
#  {{ip_eth0}} The Recorder's configured IP on eth0
#
#  {{ip_eth1}} The Recorder's configured IP on eth1
#
#  {{loggerserial}} The Serial # of the recorder
#
#  {{loggername}} The Configured Name of the recorder
#
#  {{loggerfacility}} The Configured Facility name of the
recorder
#
```

```
#  {{action}} The action performed on a completed evaluation
#
#  {{performed_by}} The username of the user (agentID if the
agent) carrying out the action
#
#  {{title}} The Title of the completed evaluation
#
#  {{path}} The Path on the recorder where the evaluation is
located,
#           such that http://{{ip_eth0}}{{path}} will be a valid
link if the IP on eth0 is reachable
#
#
# The Following line is the email ttle
Eventide NexLog [{{loggername}}]: Evaluation: {{action}}
#
# The following lines are the email body
Eventide Quality Factor Software
Evaluation Title: {{title}}
Recorder: SN{{loggerserial}}- {{loggername}}
Facility: {{loggerfacility}}

{{performed_by}} has performed the following action on an
evaluation: {{action}}

You may view the evaluation at the following link after verifying
your recorder login credentials: Error! Hyperlink reference not
valid.
```

6.4. Completed Evaluation Template

This file allows you to customize the layout and information included in a completed evaluation form both for the web and for its print formatting. You can incorporate basic html to stylize text and include dynamically generated info blocks by including the variables below surrounded with double curly brackets (such as `{{call_info_table}}` being used to place a table containing information about the calls being evaluated.)

Several variables for substitution are available:

{{agent}} - The agent ID of the agent being evaluated.

{{agent_comment}} - Section allowing an agent to comment once on the evaluation (only used if form is Single Comment Mode.)

{{annotations_table}} - The table containing annotations pertaining to the evaluation.

{{autofailed_questions}} - Information about autofailed questions.

{{call_info_table}} - The table containing call information.

{{end_print_section}} - A placeholder that denotes the end of content that should only be display when printing.

{{evaluation_actions}} - Section listing actions performed on the evaluation (only used if form is set to Multiple Comments with Actions.)

{{evaluation_date}} - The date the evaluation was completed.

{{evaluation_info_table}} - The table containing information about the completed evaluation.

{{evaluation_title}} - The Completed Evaluation's title.

{{evaluation_title_editable}} - The Completed Evaluation's title with option to edit the title.

{{evaluator}} - The evaluator username.

{{facility}} - The facility name.

{{final_score}} - Information about the final score.

{{flagged_questions}} - Information about flagged questions.

{{form}} - The name of the form used for the evaluation

{{full_results}} - Section containing the results of the completed evaluation

{{group}} - The group name to which the agent belongs

{{line}} - A horizontal line to be drawn to separate different sections

{{media_start_time}} The start time of the first call in the evaluation

{{newline}} - A formatting placeholder that will allow data to be displayed on the next line

{{print_format_button}} - A button that allows the evaluation to be viewed for printing

{{score}} - The overall score of the evaluation

{{skill_score_table}} - The table containing score breakdown by skill

{{start_print_section}} - A placeholder that denotes the start of content that should only be displayed when printing

{{tab}} - A formatting placeholder that will allow data to be displayed side-by-side

6.5. Completed Evaluation Template Default

If you need to restore to the original layout, you can copy and paste the lines below to return to the default Completed Evaluation Template.

```
# Completed Evaluation Template
# This file defines the sections and layout of a completed
evaluation
# Lines beginning with # are comments.
#
```

```
# Several variables for substitution are available:
#  {{agent}} The agent ID of the agent being evaluated
#
#  {{agent_comment}} Section allowing an agent to comment once on
the evaluation (if applicable)
#
#  {{annotations_table}} The table containing annotations
pertaining to the evaluation
#
#  {{autofailed_questions}} Information about autofailed
questions
#
#  {{call_info_table}} The table containing call information
#
#  {{end_print_section}} A placeholder that denotes the end of
content that should only be display when printing
#
#  {{evaluation_actions}} Section listing actions performed on
the evaluation (if applicable)
#
#  {{evaluation_date}} The date the evaluation was completed
#
#  {{evaluation_info_table}} The table containing information
about the completed evaluation
#
#  {{evaluation_title}} The Completed Evaluation's title
#
#  {{evaluation_title_editable}} The Completed Evaluation's
title, that is editable
#
#  {{evaluator}} The evaluator username
#
#  {{facility}} The facility name
#
#  {{final_score}} Information about the final score
#
#  {{flagged_questions}} Information about flagged questions
#
#  {{form}} The name of the form used for the evaluation
#
#  {{full_results}} Section containing the results of the
completed evaluation
#
#  {{group}} The group name to which the agent belongs
#
#  {{line}} A horizontal line to be drawn to separate different
sections
#
#  {{media_start_time}} The start time of the first call in the
evaluation
#
#  {{newline}} A formatting placeholder that will allow data to
be displayed on the next line
#
#  {{print_format_button}} A button that allows the evaluation to
be viewed for printing
#
```

```
#  {{score}} The overall score of the evaluation
#
#  {{skill_score_table}} The table containing score breakdown by
skill
#
#  {{start_print_section}} A placeholder that denotes the start
of content that should only be displayed when printing
#
#  {{tab}} A formatting placeholder that will allow data to be
displayed side-by-side
#
#
#
#  Example:
#
#
#  <h1>Evaluation for Agent {{agent}} completed on
{{evaluation_date}}, performed by {{evaluator}}.</h1>
{{print_format_button}}
#
#  {{agent}} scored {{score}} on form {{form}}
#
#  {{evaluation_info_table}}{{tab}}{{call_info_table}}
#  {{skill_score_table}}
#  {{flagged_questions}}
#  {{line}}
#  {{full_results}}
#  {{line}}
#  {{evaluation_actions}}
#


<h1>Eventide Quality Factor - Completed Evaluation and Score</h1>
{{print_format_button}}

{{evaluation_title}}

{{evaluation_info_table}}{{tab}}{{call_info_table}}

{{annotations_table}}

{{final_score}}

{{skill_score_table}}

{{flagged_questions}}

{{autofailed_questions}}

{{agent_comment}}

{{line}}

{{full_results}}

{{line}}
```

```
{{evaluation_actions}}

{{start_print_section}}

{{line}}

{{newline}}

<h1>Review:</h1>
<h4>
<br>
Date Reviewed: _________/_________/_____________
<br><br><br>
Evaluator's Name:
_____________________________________________________________________
<br><br><br>
Agent's Signature:
_____________________________________________________________________
<br>
</h4>

{{end_print_section}}
```

Appendix A: WinUserTracker

An Introduction

WinUserTracker is a Windows service that sends the currently logged in User of the Windows system to a configured NexLog Recorder.

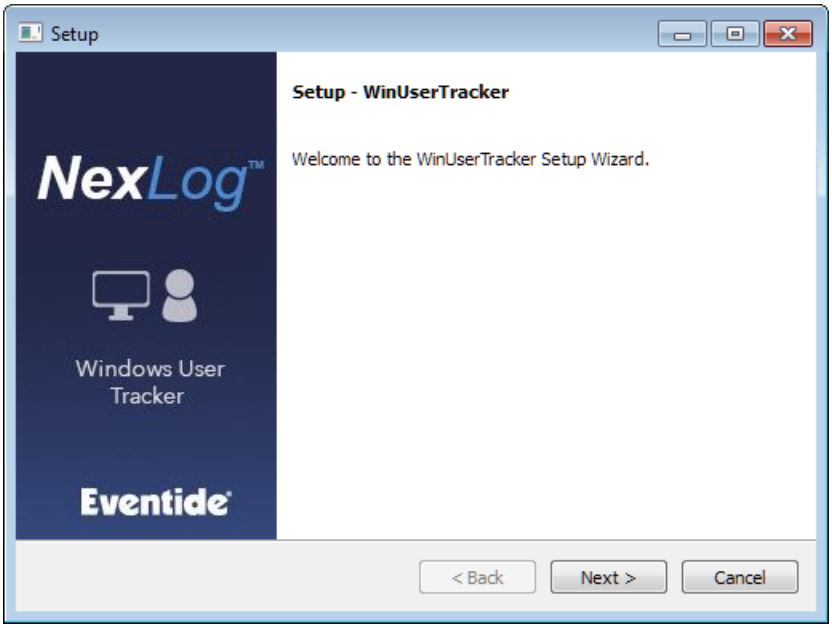
The log in and log out times and user name are tracked in the Client Activity and Audit History tables, visible in Configuration Manager under the Alerts and Logs section. When configured alongside an Agent Mapping Workstation assigned to the same MAC address, this can be used to tag calls on a recorder resource with the user name logged in at a call taking station. This appendix will explain when WinUserTracker tracks a client log in or log out, how to install and configure it, and then how this works alongside the Agent Mapping and Evaluations features described earlier in this manual.

Once configured, WinUserTracker sends the current user and or “Log In” time. Then when user log in or log out events happen, additional times are tracked.

The event times tracked are:

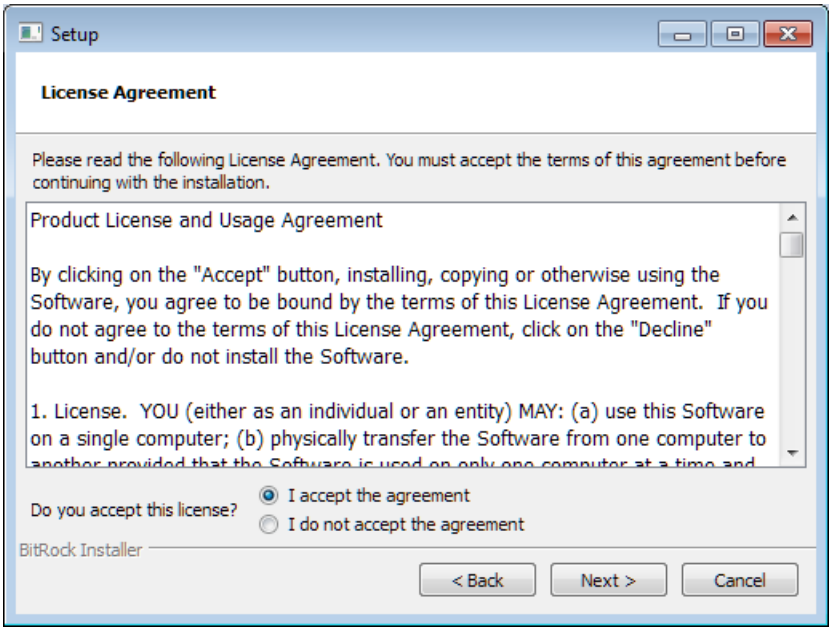
1. At install time, the user who installed WinUserTracker is tracked with a Log In time.
2. Logging out is tracked with a Log Out time.
3. As is shutting down the PC.
4. Logging in as a user is tracked with a Log In time.
5. Any time the computer is locked, the current user is recorded with a Log Out time.
6. Unlocking the computer records the current user with a Log In time.

Figure 67— WinUserTracker Installer



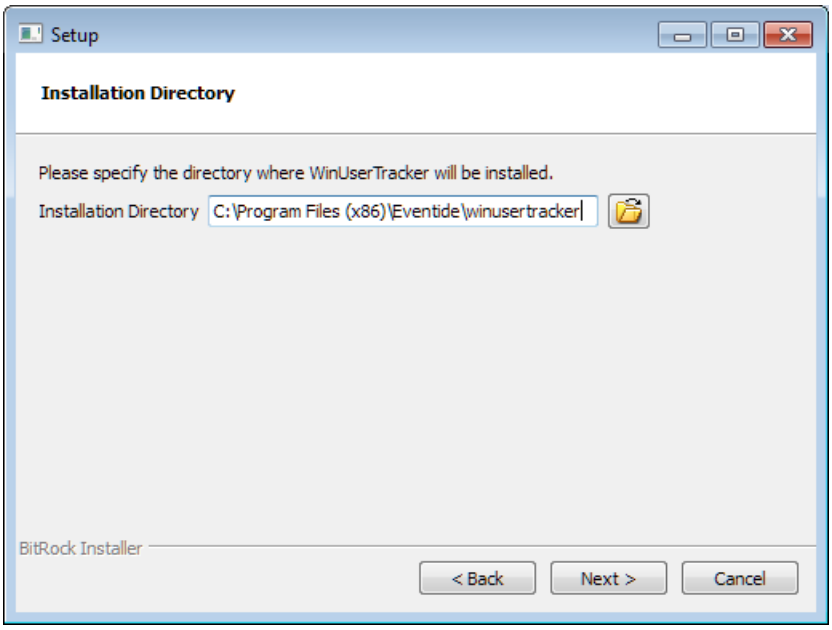
Launch the WinUserTracker installer. Click Next.

Figure 68— License Agreement



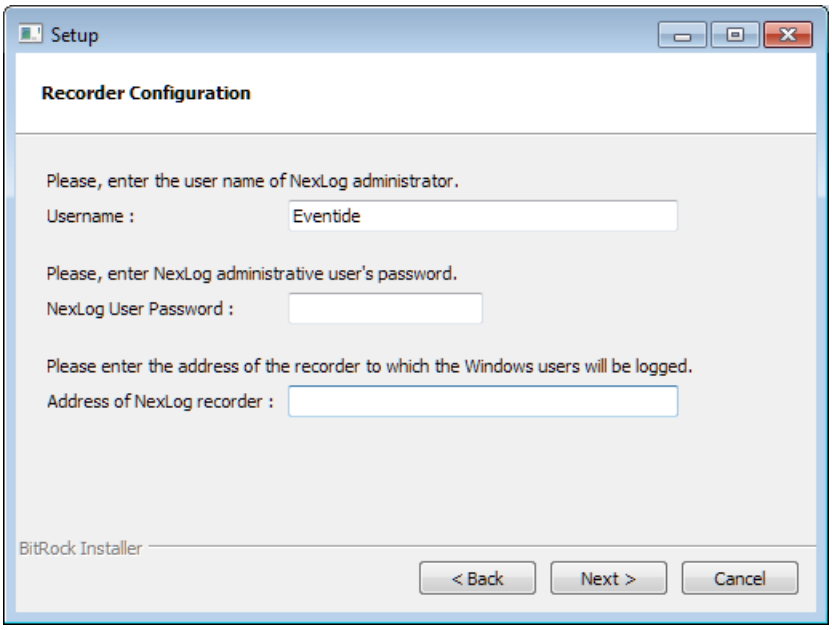
Select “I accept the agreement” and click next to continue.

Figure 69— Installation Directory



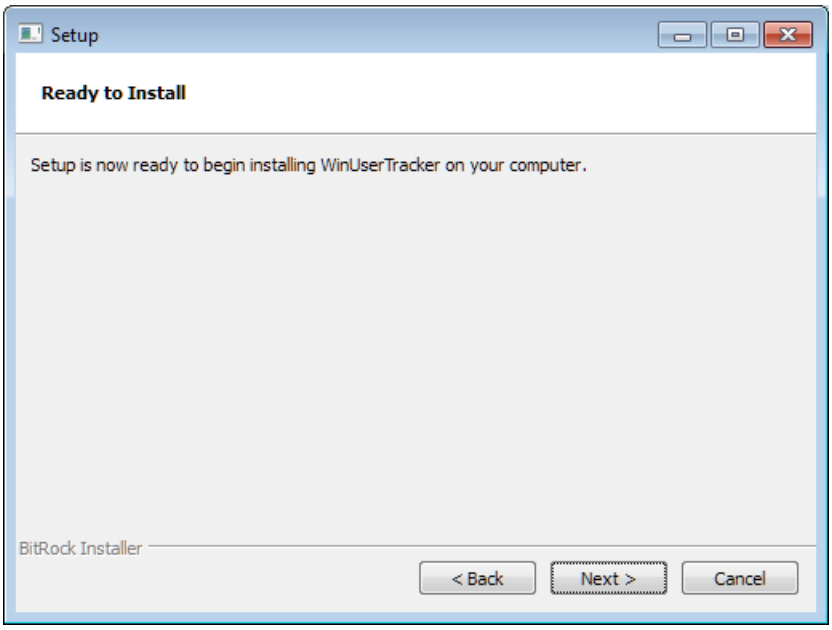
By default, WinUserTracker will be installed to *C:\Program Files (x86)\Eventide\winusertracker*. We recommend leaving it at this location.

Figure 70— Recorder Configuration



At the third step, enter an Administrator user name, password and IP address for the Recorder that will be tracking Windows User logins. The user name and password is required to make entries in the Client Activity table on the Recorder; the credentials are stored on the PC in an encrypted format.

Figure 71— Ready to Install



At this point, the installer is ready. Click next to proceed with the install.

Figure 72— Installing…

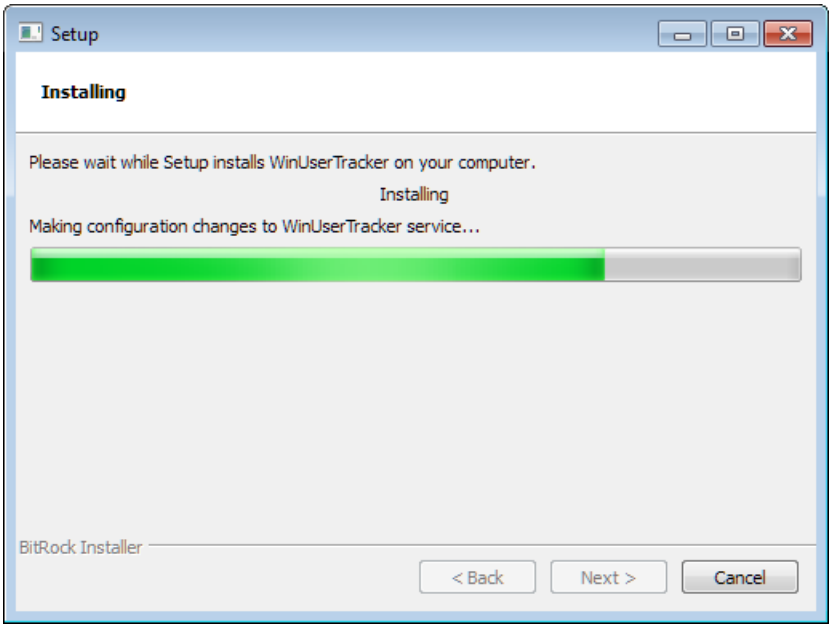
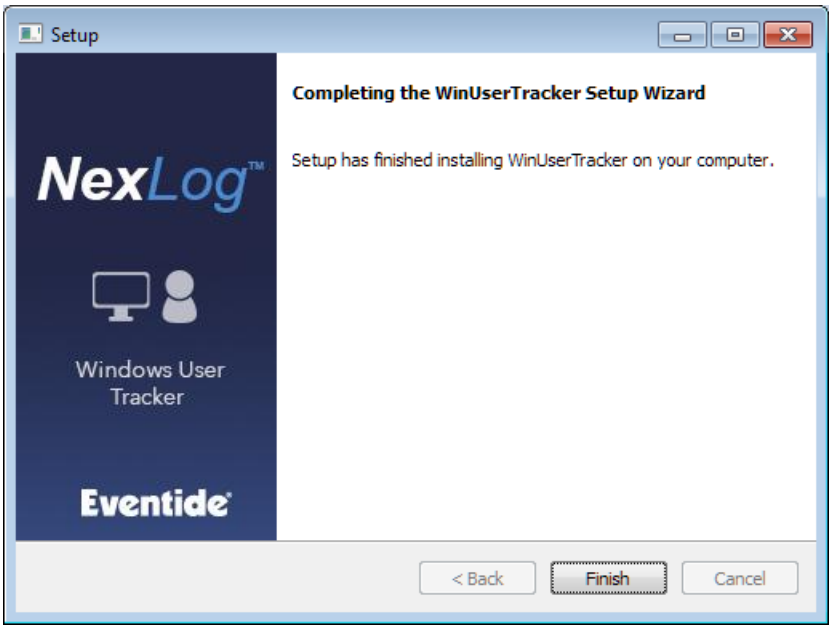


Figure 73— Finished!



If you want to re-configure WinUserTracker to point at a different NexLog Recorder, or to use different administrator credentials, run the installer a second time and follow these same steps.

Using WinUserTracker for Agent Mapping and Evaluations

Once WinUserTracker is configured and users are being tracked on the Client Activity page, you are ready to configure Agent Mapping for each workstation. Navigate to the Alerts and Logs: Client Activity page of Configuration Manager and make a note of the MAC address for each entry that lists a Client Type of "Client-Tag."

For each unique MAC address, you need to make a Workstation on the Quality Factor Software: Agent Mapping page. Click Add Workstation and enter a Name, Location (optional) and IP Address (optional) to provide context for the workstation, then select Dynamic and enter the MAC/KEY for this Workstation. This workstation is tied to the physical PC that is reporting the logged in user via WinUserTracker, so enter the Channel Names or Channel Numbers associated with any phones, radios, and/or screen capture agents that are answered at this workstation.

This will tag these calls with the Windows user name in the USER_ID metadata field. The Evaluations feature relies on the AGENT_ID field and for this to be automatically populated, the AGENT_ID field with the associated Agent for this user must be configured in the Associated User Account field of the Edit Agent page found at Quality Factor Software: Agents.

This Associated User Account name, which is chosen from the existing User accounts on the recorder, must match the Windows user name exactly. For

example, if the Windows user names follow the pattern FirstInitial.LastName, then the recorder user name for Robert Davidson must also be R.Davidson as it will be for the Windows user name. Otherwise, the Associated User Account name will not match and the Agent ID field will not be populated.

Once this is all configured, check the results by making a test call from the workstation. Search for the call with MediaWorks Plus and if not already visible, make the columns for User ID and Agent ID visible; see that the new call is tagged with both.

Assuming you have already configured Agent Groups and Leaders (as discussed in chapter 3.2 of this manual), you can now set up a schedule to tag calls for Evaluation.

Limited Warranty

The Eventide® NexLog™ Recorders are built to exacting quality standards and should give years of trouble-free service. If you are experiencing problems, your recourse is this warranty.

Eventide Inc. warrants the products unit to be free from defects in workmanship and material under normal operation and service for a period of one year from the date of purchase, as detailed in this warranty. At our discretion within the warranty period, we may elect to repair or replace the defective unit. This means that if the unit fails under normal operation because of such defect, we will repair the defective unit at no charge for parts or labor. We also assume a limited responsibility for shipping charges, as described later in this warranty.

The warranty does not extend beyond repair or replacement as stated herein and in no event will we be responsible for consequential or incidental damages caused by any defect, and such damages are specifically excluded from this warranty. Our sole obligation is to repair or replace the defective unit as described herein.

The warranty **DOES NOT COVER** any damage to the unit regardless of the cause of that damage. The unit is a complex piece of equipment that does not react well to being dropped, bounced, crushed, soaked or exposed to excessively high temperatures, voltages, electrostatic or electromagnetic fields. If the unit is damaged for these or similar causes, and the unit is deemed to be economically repairable, we will repair it and charge our normal rates.

The warranty **DOES NOT COVER** shipping damage, either to or from Eventide. If you receive a new unit from us in damaged condition, notify us and the carrier; we will arrange to file an insurance claim and either repair or exchange the unit. If you receive a new unit from a dealer in damaged condition, notify the dealer and the carrier.

If we receive the unit from you with apparent shipping damage, we will notify you and the carrier. In this case, you must arrange to collect on any insurance held by you or your carrier. We will await your instructions as to how to proceed with the unit, but we will charge you for all repairs on damaged units.

Who is covered under the warranty

The warranty applies to the original purchaser of a new unit from Eventide or an Authorized Eventide Dealer. Demo units are also covered by this warranty under slightly different circumstances (see the following information on “When the warranty becomes effective.” Units that are used, or have been used as part of a rental program, are not covered under any circumstances.

It is your responsibility to prove or to be able to prove that you have purchased the unit under circumstances which affect the warranty. A copy of your purchase invoice is normally necessary and sufficient for this.

If you have any questions about who is an Authorized Eventide Dealer, call Eventide at 201-641-1200.

Units with the serial number plate defaced or removed will not be serviced or covered by this warranty.

When the warranty becomes effective

The one-year warranty period begins on the day the unit is purchased from an Authorized Eventide Dealer or, if the unit is drop-shipped from Eventide, on the day shipped, plus a reasonable allowance for shipping delays. This applies whether or not you return your warranty registration form.

When we receive a unit, this is how we determine whether it is under warranty:

If the unit was shipped from our factory within the past calendar year, we assume that it is under warranty unless there is evidence to the contrary, such as its having been sold as used or rented, etc.

If the unit was shipped from our factory more than a calendar year ago, we assume it is not under warranty unless there is a warranty registration form on file showing that it has been purchased within the past year under appropriate conditions or if you send a copy of your purchase invoice indicating warranty status along with the unit.

If the unit was used as a demo, the warranty runs from the date that it was received by the dealer. The original purchaser gets the unexpired portion of that warranty.

When you send a unit for repair, you should indicate whether or not you believe it to be under warranty. If you do not say the unit is under warranty, we will charge you for the repair and we will not refund unless the charge was caused by an error on our part. If you believe the unit to be under warranty and you do say it is but this disagree, you will not incur any charges until the dispute is resolved.

Reading the above, you can see that it is to your advantage to send in the warranty registration form when you purchase the unit. If we know who you are,

we can send you updates and notifications, and advise you of our new products. It will also enable you to receive pre-shipment of certain parts.

Who performs warranty work

The only company authorized to perform work under this warranty is Eventide Inc., Little Ferry, New Jersey. While you are free to give personal authorization to anyone else (or to work on it yourself), we will not honor claims for payment for parts or labor from you or from third parties.

However, we and our dealers do try to be helpful in various ways. Our dealers will assist, usually without charge during the warranty period, in determining whether there is a problem requiring return to the factory, and alleviating user error or interconnection problems that may be preventing the unit from operating to its full capability.

We are available for consultation if the dealer is unable to assist.

If a part is found to be defective during the warranty period and you wish to replace it yourself, we will normally ship the part immediately at no charge, provided your warranty registration form is on file. We reserve the right to request that the defective part be returned to us.

Shipping within the 50 United States

You are responsible for getting the unit to our door at no cost to us. We cannot accept collect or COD shipments.

We will return the in-warranty unit to you prepaid, at our expense, using a standard shipping method, normally United Parcel Service. If you are in a hurry and want us to use a premium shipping method (such as air express, next day air, etc.), be sure you tell us and agree to pay shipping charges collect. If you specify a method that does not permit collect or COD charges, remit sufficient funds to prepay shipping.

Shipping outside the 50 United States

If you purchased the unit from a dealer in your country, consult with the dealer before returning the unit.

If you wish to return the unit to us, please note the following policies:

The unit must be prepaid to our door. This means that you are responsible for all shipping charges, including customs brokerage and duties. When a unit is shipped to us it must be cleared through United States Customs by an authorized broker. You must make arrangements for this to be done. Normally, your freight forwarder has a branch in the United States that can handle this transaction. If you want our assistance in clearing incoming packages, you must notify us before shipping the unit for repair, giving full

details of the shipment, and including a minimum of $250.00 in US funds to cover the administrative and brokerage expenses. Any balance will be applied to the repair charges or refunded. If a balance is due to us, we will request a further prepayment.

All shipments will be returned to you collect. If this is impossible because of shipping regulations or money is due us, we will request prepayment from you for the appropriate amount.

All funds must be in $US. Payment may be made by check drawn on any bank in the US, or by telegraphic funds transfer to our bank. If you send US currency, be sure that it is sent by a method you can trace, such as registered mail. If you wish to pay by Letter of Credit, be sure that it affords sufficient time for work to be performed and the L/C negotiated, and that it is free from restrictive conditions and documentation requirements.

We reserve the right to substitute freight carriers. Although we will attempt to honor your request for a specific carrier, it is frequently necessary to select a substitute because of difficulties in communication or scheduling.

This warranty gives you specific legal rights and you may also have other rights which vary from location to location.

Software License

The Eventide® NexLog™ Recorder contains proprietary Eventide Firmware and Software. In addition Eventide MediaWorks, Eventide MediaWorks Plus, Eventide Quality Factor, and Eventide MediaAgent are proprietary Eventide Software. The Software License for this software follows:

Product License and Usage Agreement

By installing, copying or otherwise using the Software, you agree to be bound by the terms of this License Agreement. If you do not agree to the terms of this License Agreement, do not use or install the Software.

1. License. YOU (either as an individual or an entity) MAY: (a) use this Software on a single computer; (b) physically transfer the Software from one computer to another provided that the Software is used on only one computer at a time and that you remove any copies of the Software from the computer from which the Software is being transferred; and (c) install a second copy of the Software in the event that the first Software installation is unusable. In addition, the Eventide NexLog firmware may only be installed on a purchased and Licensed Eventide NexLog Recorder.

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2. Ownership. This License is not a sale of the Software or any Firmware contained in the Product. Eventide and its licensors retain all rights, interest, title in and ownership of the Software, Firmware and Documentation, including all intellectual property rights. No title to the intellectual property in the Software and Firmware is transferred to you. You will not acquire rights to the Software and Firmware except as expressly set forth above.

3. No Reverse Engineering and Other Restrictions. You agree that you will not (and if you are a corporation, you will use your best efforts to prevent your

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