

NexLog
Advanced Recording Solutions



Quality Factor
Manual
Version 2025.4[7087]

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1. INTRODUCTION

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 DX 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 DX 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 DX 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

Fig. 1.1 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

The screenshot shows the 'FORM CONFIGURATION' tab of the Evaluation Form Editor. It displays a list of questions with their respective skills, points, flag under percentages, autofail under percentages, comment modes, and allow N/A checkboxes. The questions are as follows:

Question	Skill	Points	Flag Under	Autofail Under	Comment Mode	Allow N/A
Did the agent properly greet the caller?	Initial Contact	5	0 %	0 %	NONE	☐
Did the agent determine the caller's name and location?	Information Gathering	5	50 %	0 %	NONE	☐
Did the agent quickly determine the severity of the caller's situation?	Information Gathering	10	25 %	0 %	REQUIRE IF FLAGGED	☐
Did the agent control the call from the start?	Call Control	5	0 %	0 %	NONE	☐
Was the agent able to maintain the caller's attention?	Call Control	10	25 %	0 %	REQUIRE IF FLAGGED	☐
Did the agent show empathy for the caller's situation?	Empathy	5	0 %	0 %	ALLOW	☐

Below the questions list, there are two panels: 'Skills' and 'Questions'. The 'Skills' panel lists various skills such as Dispatch Information Flow, Empathy, Information Gathering, Initial Contact, Interview Questions, Mutual Aid, Radio Protocol, Speaking Skills, Summarization, Supervisor Overview, Telephone Protocol, and Testino. The 'Questions' panel lists various questions such as A testing Question, Accurate info added to CAD?, Advises caller that they will be transferred to another Agency?, All pertinent information from CAD disseminated?, Answered call within 3 seconds, Answered radio traffic in a timely fashion?, Appropriate notifications made in a timely fashion?, Articulates?, Asked about alcohol and drug use?, and Asked about number of occupants in the building?.

Fig. 1.2 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:

- The Evaluation Forms are built from Questions, which in turn use Answer Sets. Each Question is assigned to a Skill Group.
- Evaluation Forms have options, which allow you to configure the available workflow for any evaluation done with this form.
- 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.

Question	Yes	No	N/A
1 Processes incident promptly? (Assignment of Incident)	☐	☐	☐
2 Correct number of units/apparatus assigned? (Assignment of Incident)	☐	☐	☐
3 Nature given when initiating dispatch? (Assignment of Incident)	☐	☐	☐
4 Follow Agency's dispatch protocol? (Assignment of Incident)	☐	☐	☐
5 Immediately notify out of quarters apparatus/units? (Assignment of Incident)	☐	☐	☐
6 Double phrased location? (Assignment of Incident)	☐	☐	☐
7 Dispatched info accurately? (Assignment of Incident)	☐	☐	☐
8 Dispatched info concisely? (Assignment of Incident)	☐	☐	☐
9 Notified responders of scene safety issues? (Summarization)	☐	☐	☐
10 All pertinent information from CAD disseminated? (Summarization)	☐	☐	☐
11 Answered radio traffic in a timely fashion? (Dispatch Information Flow)	☐	☐	☐
12 Correctly identified units requesting info? (Dispatch Information Flow)	☐	☐	☐
13 Correctly identified info requested? (Dispatch Information Flow)	☐	☐	☐

Fig. 1.3 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 DX. Completed Evaluations can be viewed from MediaWorks DX 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 DX 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:

The screenshot displays the NexLog Configuration Manager interface. On the left is a vertical navigation menu with the following items: Home, System, Basic Reports, Enhanced Reports, Networking, Recording, Archiving, Alerts and Logs, Users and Security, Utilities, Quality Factor Software (highlighted), Skill Groups, Answer Sets, Questions, Forms, Completed Evaluations, Agents, Groups and Schedules, Agent Mapping, and Change Password. The main content area has four tabs: CONFIGURATION (selected), IDENTIFICATION, INTERFACES, and HISTORY. Under the CONFIGURATION tab, the following information is displayed:

- Recorder Serial Number: 100000049
- Current Firmware Version: 2.7.0[123]
- IP Address: 192.168.22.131
- MAC Address: 00:01:29:1A:FF:E0
- Total memory KB: 4020232
- Current Time: 2016-08-08 16:34:39
- Timezone: America/New_York (EDT)

Below this information is a section titled "Storage Devices" containing a table:

DEVICE TYPE	PARTITIONS	PERCENT FREE
STORAGE-DEVICE-TYPE-HWRAID	grub,root,log,config,storage	8.16%

At the bottom of the Storage Devices section are two buttons: "Export Config" and "Import Config".

Fig. 2.1 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?”

ANSWER SETS	PUBLISHED
1 10	True
1 5	True
Outstanding / Good / Acceptable / Fair / Poor	True
Yes / No	True
Add Answer Set Edit Answer Set Delete Answer Set	

Fig. 2.2 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.

QUESTION	PUBLISHED
Did the agent control the call from the start?	True
Did the agent determine the caller's name and location?	True
Did the agent properly determine the "type of call"?	True
Did the agent properly greet the caller?	True
Did the agent quickly determine the severity of the caller's situation?	True
Did the agent show empathy for the caller's situation?	True
Did the agent speak clearly?	True
Did the agent verify the caller's telephone number?	True
Was the agent able to maintain the caller's attention?	True
Add Question Edit Question Delete Question	

Fig. 2.3 Questions

Each Question has three options:

- A text field for the question itself
- An Answer Set that the question is to be scored with
- A Skill Group that the Question belongs to

The screenshot displays a web interface for creating or editing a question. It is divided into two main sections: 'QUESTION' and 'PREVIEW'.

QUESTION Section:

- Question Text:** A text input field containing "Did the agent properly determine the 'type of call'".
- Answers:** A dropdown menu showing "Yes / No".
- Skill:** A dropdown menu showing "Information Gathering".
- Published:** A checkbox that is checked, indicating the question is published.

PREVIEW Section:

- Displays the question text: "Did the agent properly determine the 'type of call'".
- Shows two radio button options: "Yes" and "No".

At the bottom of the form, there are two buttons: "Submit" and "Cancel".

Fig. 2.4 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.

Show published forms only ☐

FORM NAME	REVISION	PUBLISHED
Call Taking for EMS Incidents	1	Published
Call Taking for Fire Incidents	1	Published
Call Taking for Police Incidents	1	Published
Dispatch for EMS Incidents	1	Published
Dispatch for Fire Incidents	1	Published
Dispatch for Police Incidents	1	Published
Sample Form	1	Published

[Add Form](#) [Edit Form](#) [Copy Form](#) [Delete Form](#) [Format for Printing](#)

[Export Form and Associated Questions](#) [Import Form](#)

Fig. 2.5 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 (top section) shows all evaluation questions that have been added to the form.
- Skills (bottom-left) lists the configured skill groups with which to filter the questions library.
- Questions Library (bottom-right) shows the 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.

The screenshot displays the 'Form Creator' interface with two tabs: 'FORM CONFIGURATION' and 'FORM OPTIONS'. The 'FORM CONFIGURATION' tab is active, showing a large empty text area for the form content. Above this area, there are fields for 'Form Name:', 'Passing Score: %', 'Flags to Fail: %', and a 'Published' checkbox. Below the main text area, there are two panels: 'Skills' and 'Questions'. The 'Skills' panel contains a list of skills including 'ALL', 'Assignment of Incident', 'CAD Skills', 'Call Control', 'Dispatch Information Flow', 'Empathy', 'Information Gathering', 'Initial Contact', 'Interview Questions', 'Mutual Aid', 'Radio Protocol', and 'Speaking Skills'. The 'Questions' panel contains a list of questions including 'A testing Question', 'Accurate info added to CAD?', 'Advise caller that they will be transferred to another Agency?', 'All pertinent information from CAD disseminated?', 'Answered call within 3 seconds', 'Answered radio traffic in a timely fashion?', 'Appropriate notifications made in a timely fashion?', 'Articulates?', 'Asked about alcohol and drug use?', and 'Asked about number of occupants in the building?'. At the bottom of the interface are 'Save', 'Cancel', and 'Preview' buttons.

Fig. 2.6 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.

FORM CONFIGURATION FORM OPTIONS

Form Name: **Sample Form** Passing Score: **70** % Flags to Fail: **3** ☒ Published

Question: Did the agent properly greet the caller? **Skill:** Initial Contact

Answer: ☐ Yes ☐ No

Points: **5** Flag Under: **0** % Autofail Under: **0** % Comment Mode: **NONE** ☐ Allow N/A

Question: Did the agent determine the caller's name and location? **Skill:** Information Gathering

Answer: ☐ Yes ☐ No

Points: **5** Flag Under: **50** % Autofail Under: **0** % Comment Mode: **NONE** ☐ Allow N/A

Question: Did the agent quickly determine the severity of the caller's situation? **Skill:** Information Gathering

Answer: 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

Points: **10** Flag Under: **25** % Autofail Under: **0** % Comment Mode: **REQUIRE IF FLAGGED** ☐ Allow N/A

Question: Did the agent control the call from the start? **Skill:** Call Control

Answer: ☐ Yes ☐ No

Points: **5** Flag Under: **0** % Autofail Under: **0** % Comment Mode: **NONE** ☐ Allow N/A

Question: Was the agent able to maintain the caller's attention? **Skill:** Call Control

Answer: 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

Points: **10** Flag Under: **25** % Autofail Under: **0** % Comment Mode: **REQUIRE IF FLAGGED** ☐ Allow N/A

Question: Did the agent show empathy for the caller's situation? **Skill:** Empathy

Answer: 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

Points: **5** Flag Under: **0** % Autofail Under: **0** % Comment Mode: **ALLOW** ☐ Allow N/A

Skills

- Dispatch Information Flow
- Empathy
- Information Gathering
- Initial Contact
- Interview Questions
- Mutual Aid
- Radio Protocol
- Speaking Skills
- Summarization
- Supervisor Overview
- Telephone Protocol
- Testing

Questions

- A testing Question
- Accurate info added to CAD?
- Advises caller that they will be transferred to another Agency?
- All pertinent information from CAD disseminated?
- Answered call within 3 seconds
- Answered radio traffic in a timely fashion?
- Appropriate notifications made in a timely fashion?
- Articulates?
- Asked about alcohol and drug use?
- Asked about number of occupants in the building?

Save as new revision Cancel Preview

Fig. 2.7 Form in Progress

Note

The evaluation form is updated in real-time; if you check the Allow N/A checkbox, 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 selecting an answer in the range boxes yourself. The scoring settings are not saved as default criteria, but simply exist on a per form basis.

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

FORM PREVIEW

1	Did the agent properly greet the caller? (Initial Contact)	☐ Yes ☐ No
2	Did the agent determine the caller's name and location? (Information Gathering)	☐ Yes ☐ No
3	Did the agent quickly determine the severity of the caller's situation? (Information Gathering)	1 2 3 4 5
	Must comment if question is flagged...	
4	Did the agent control the call from the start? (Call Control)	☐ Yes ☐ No
5	Was the agent able to maintain the caller's attention? (Call Control)	1 2 3 4 5
	Must comment if question is flagged...	
6	Did the agent show empathy for the caller's situation? (Empathy)	1 2 3 4 5
	Optionally comment here...	

Fig. 2.8 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 DX; 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.

Show published forms only ☐

FORM NAME	REVISION	PUBLISHED
Sample Form	2	True
Sample Form	1	False

[Add Form](#)
[Edit Form](#)
[Delete Form](#)

Fig. 2.9 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.

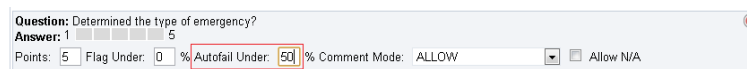
Scoring for the default Answer Sets works like this:

- 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.



Question: Determined the type of emergency?
 Answer: 1 2 3 4 5
 Points: 5 Flag Under: 0 % Autofail Under: 50 % Comment Mode: ALLOW ☐ Allow N/A

Fig. 2.10 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.

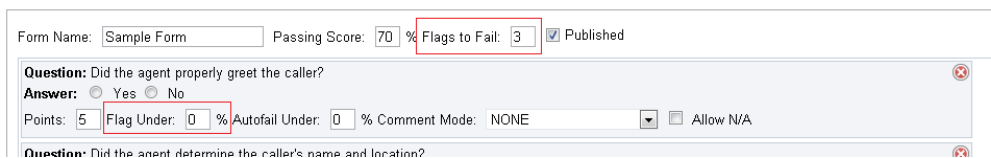
Final Score: 93% Fail (passing score is 70%) [Failed due to Autofailed question]	
Score Breakdown by Skill	
Skill	Score
Overall	93%
Information Gathering	83%
Call Control	100%
Empathy	100%
Initial Contact	100%

Fig. 2.11 Autofail 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.



The screenshot shows the 'Sample Form' configuration interface. At the top, there are fields for 'Form Name: Sample Form', 'Passing Score: 70 %', 'Flags to Fail: 3' (highlighted with a red box), and a 'Published' checkbox. Below this, a question is displayed: 'Question: Did the agent properly greet the caller?'. The 'Answer' section has radio buttons for 'Yes' and 'No'. The 'Points' field is set to 5. The 'Flag Under' field is set to 0% (highlighted with a red box). The 'Autofail Under' field is set to 0%. The 'Comment Mode' is set to 'NONE' with a dropdown arrow. There is also an 'Allow N/A' checkbox. A second question is partially visible at the bottom: 'Question: Did the agent determine the caller's name and location?'.

Fig. 2.12 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: (default)
- Optional: comments provide a text-entry area for the evaluator to make a note if something unusual catches their ear
- Require: a comment will always be required and an evaluation cannot be saved as complete until the comment has been filled out
- Require if Flagged: 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'.

Fig. 2.13 Comment Mode Menu in Form Builder

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.

Fig. 2.14 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.

FORM CONFIGURATION - FORM OPTIONS

Email Options

Email on Evaluation Submit:
 Agent
 Evaluator
 Agent's Group Leaders
 Super Evaluators
 Admins

Email on Comments/Actions:
 Agent
 Evaluator
 Agent's Group Leaders
 Super Evaluators
 Admins

Email on Score Lower than: ☐ %
 Agent
 Evaluator
 Agent's Group Leaders
 Super Evaluators
 Admins

Comment Options

Evaluation Comment Mode: **Multiple Comments With Actions**

☐ Enable Comment Acknowledgement

☐ Allow Comment Modification

☐ Enable Agent Digital Signature

☐ Lock Evaluation After Being Signed

Other Options

☐ Enable Evaluation Live Scoring

☐ Enable Option To View All Possible Conditional Questions In Evaluation

Fig. 2.15 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:

Comments and Actions

Evaluation Completed by Evaluator Eventide on 2016-08-02 15:24:57

Comment Only by Evaluator Eventide on 2016-08-09 18:20:15
 Example of a Comment.

Comment Only
 Comment Only
 Acknowledge Above Comments
Lock
 Protect
 Reopen

Submit

100% 100%

⏮ ⏪ ⏸ ⏩ ⏭ ⏮ ⏪ ⏸ ⏩ ⏭

Fig. 2.16 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

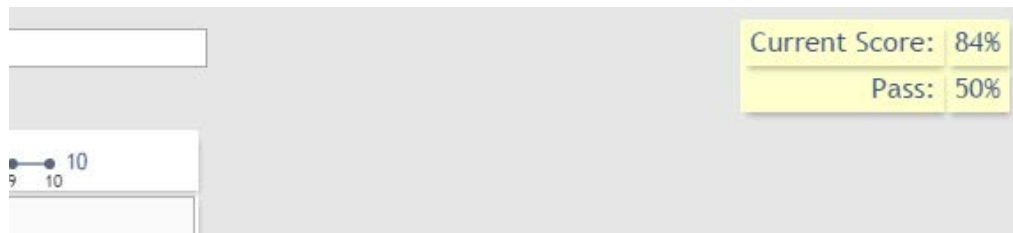


Fig. 2.17 Live Scoring

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

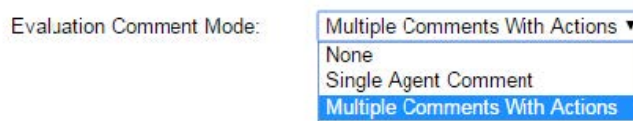


Fig. 2.18 Evaluation Comment Mode

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 DX-Series.

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

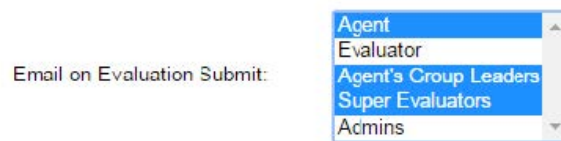


Fig. 2.19 Email on Evaluation submit

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

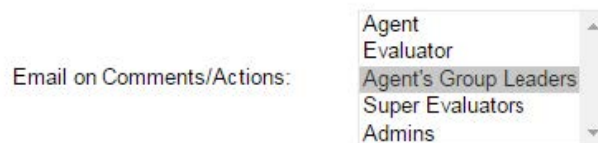


Fig. 2.20 Email on Comment or action

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 an “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

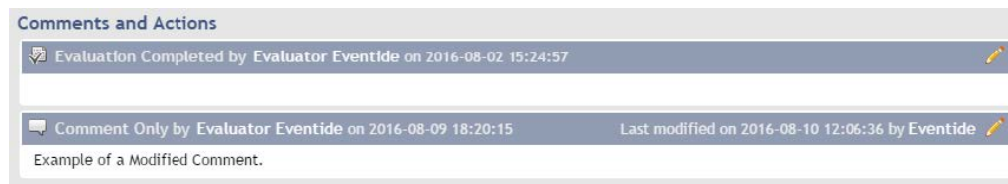


Fig. 2.21 Comment Modification Pencil

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

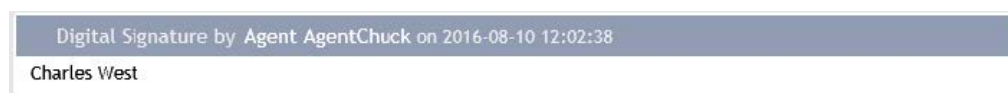


Fig. 2.22 Digital Signature

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 DX-Series 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

FORM NAME	REVISION	PUBLISHED
Sample Form	1	Published

Add Form Edit Form Delete Form Format for Printing

Export Form and Associated Questions Import Form

Fig. 2.23 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

FORM NAME	REVISION
Sample Form	1

Add Form Edit Form Delete Form Format for Printing

Export Form and Associated Questions Import Form

Browse... No file selected.

OK

Fig. 2.24 Import Forms

To import a form, click the “Import Form button”, click “Browse...”, and then select the formName.eva file you want to load on to the recorder and 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 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 DX 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

AGENT ID	NAME
agent001	Richie Davis
agent002	Nancy Kimmel
agent003	Charles Hawkins
agent004	George LaPrete
agent005	Elizabeth Winter
agent006	Jane Darbon

Fig. 3.1 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

NEW AGENT

AgentID:

Agent Name:

Associated User Account:
[None]
Eventide
JVasquez

Fig. 3.2 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.

Note

If you add agents without an active Quality Factor License, it will limit the number of agents you can use when the license is activated.

3.1.3. Edit Agent



EDIT AGENT

AgentID: agent007

Agent Name: Julian Vasquez

Associated User Account: JVasquez

Submit Cancel

Fig. 3.3 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

GROUPNAME	MEMBERS	SCHEDULED
Police Dispatch	agent006, agent007	No
EMT Dispatch	agent004, agent005	No
Fire Dispatch	agent001, agent002, agent003	Yes

Add Group Edit Group Delete Group

Fig. 3.4 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.

Fig. 3.5 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 DX-Series 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.

Fig. 3.6 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 DX against the Flagged for Evaluator field for their user name, and see the calls that have been assigned.

AGENT GROUP | SCHEDULE EVALUATIONS

☒ Enable Scheduled Evaluations

Schedule evaluations start date: 2017-11-18

Schedule one evaluation per X calls for each agent: 100

Minimum call duration to be evaluated (secs): 60

Advanced

Note: Evaluations are scheduled when these settings are saved, then once every hour thereafter.

Save Cancel

Fig. 3.7 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.

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 -04:00				

Fig. 3.8 Example of a Call Record Flagged for Evaluator

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

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		☐

Fig. 3.9 Example of a Call Record Flagged for Evaluator After Being Evaluated

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

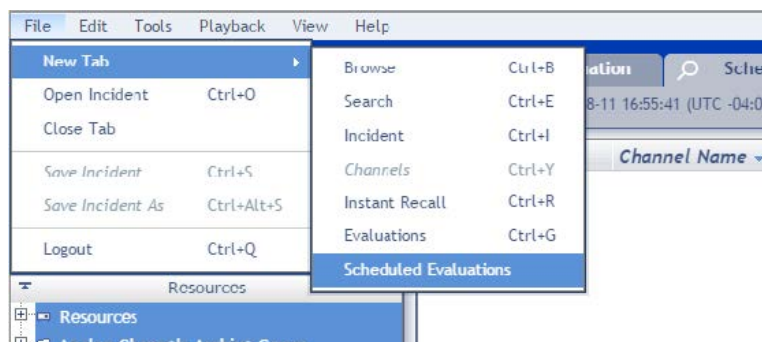


Fig. 3.10 Scheduled Evaluation tab

The Schedule Evaluations tab opens 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

WORKSTATION NAME	LOCATION	MAC ADDRESS
Evaluations Head	Main Office	BC:30:5B:AF:AC:17
Agent 001	Call Station 1	
Agent 002	Call Station 2	
Agent 003	Call Station 3	

Fig. 3.11 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.

3.3.1. Adding a Workstation with Static Mapping

The screenshot shows a web form titled 'NEW WORKSTATION'. It is divided into three main sections. The first section, 'NEW WORKSTATION', contains three text input fields: 'Workstation Name:', 'Workstation Location:', and 'MAC Address:'. The second section, 'AGENT MAPPING', features two radio buttons: 'Static' (which is selected) and 'Dynamic'. Below these is a dropdown menu labeled 'AgentID:'. The third section, 'ASSOCIATED CHANNELS', contains two text input fields: 'Channel Names:' and 'Channel Numbers:'. At the bottom of the form are two buttons: 'Add' and 'Cancel'.

Fig. 3.12 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

NEW WORKSTATION

Workstation Name:

Workstation Location:

MAC/KEY: ☐ Tag position by web browser ID.

IP Address: ☐ Monitor IP

AGENT MAPPING

☐ Static ☒ Dynamic

ASSOCIATED CHANNELS

Channel Names:

Channel Numbers:

Fig. 3.13 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.

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:

```

Command Prompt
Host Name . . . . . : D4H2Y871
Primary Dns Suffix . . . . . :
Node Type . . . . . : Hybrid
IP Routing Enabled. . . . . : No
WINS Proxy Enabled. . . . . : No

Ethernet adapter Local Area Connection:

   Connection-specific DNS Suffix  . : 
   Description . . . . . : Intel(R) PRO/100 VE Network Connection
   Physical Address. . . . . : 00-13-20-09-FB-94
   Dhcp Enabled. . . . . : Yes
   Autoconfiguration Enabled . . . : Yes
   IP Address. . . . . : 192.168.2.237
   Subnet Mask . . . . . : 255.255.255.0
   Default Gateway . . . . . : 192.168.2.1
   DHCP Server . . . . . : 192.168.2.1
   DNS Servers . . . . . : 64.253.32.3
   Lease Obtained. . . . . : Friday, November 17, 2006 1:45:33 PM
   Lease Expires . . . . . : Friday, November 17, 2006 11:45:33 PM

C:\>IPCONFIG

```

Fig. 3.14 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 DX

NEW WORKSTATION

Workstation Name:

Workstation Location:

MAC/KEY: ☐ Tag position by web browser ID.

IP Address: ☐ Monitor IP

AGENT MAPPING

☐ Static ☒ Dynamic

ASSOCIATED CHANNELS

Channel Names:

Channel Numbers:

Add Cancel

Fig. 3.15 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://\(recorder IP address\)/agent/login.py](http://(recorder IP 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.

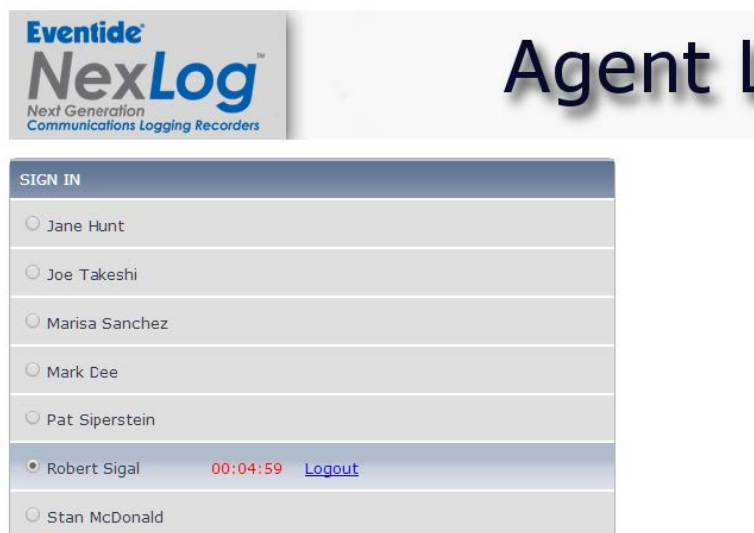


Fig. 3.16 Agent Login Page

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 DX.

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 DX 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 DX with a NexLog DX-Series 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, as an example, 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, they 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 they are taken as agent001.

The screenshot shows the 'AGENT GROUP' and 'AGENT ENROLLMENT' sections of a web interface. The 'AGENT GROUP' section has a 'Group name' field with the value 'EMT Dispatch'. The 'AGENT ENROLLMENT' section has two main areas: 'Agents in this group' and 'Leaders of this Group'. The 'Agents in this group' area has a dropdown menu 'Choose an agent' and a list of agents: 'agent001' and 'agent003', each with a 'remove' button. The 'Leaders of this Group' area has a dropdown menu 'Choose a User' and a list of users: 'JDarboon', each with a 'remove' button. Below the 'Agents in this group' section, there is a text input field labeled 'Select the agents for this group'. Below the 'Leaders of this Group' section, there is a text input field labeled 'Select the leaders for this group'. At the bottom of the form, there are 'Save' and 'Cancel' buttons.

Fig. 4.1 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 DX 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 DX web client

MediaWorks DX web client can be navigated to as follows:

[http://\(Recorder IP Address\)/client/mediaworks](http://(Recorder IP Address)/client/mediaworks)

Log-on to MediaWorks DX 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.



Fig. 4.2 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:

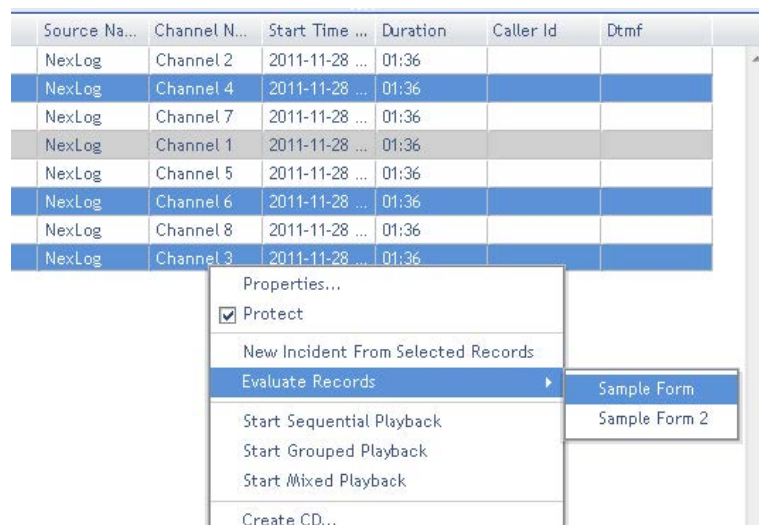


Fig. 4.3 Evaluate Multiple Records as One

4.2.1. Evaluations Form

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

Item	Question	Yes	No	N/A
1	Processes incident promptly? (Assignment of Incident)	☐	☐	
2	Correct number of units/apparatus assigned? (Assignment of Incident)	☐	☐	
3	Nature given when initiating dispatch? (Assignment of Incident)	☐	☐	
4	Follow Agency's dispatch protocol? (Assignment of Incident)	☐	☐	
5	Immediately notify out of quarters apparatus/units? (Assignment of Incident)	☐	☐	☐
6	Double phrased location? (Assignment of Incident)	☐	☐	
7	Dispatched info accurately? (Assignment of Incident)	☐	☐	
8	Dispatched info concisely? (Assignment of Incident)	☐	☐	
9	Notified responders of scene safety issues? (Summarization)	☐	☐	☐
10	All pertinent information from CAD disseminated? (Summarization)	☐	☐	
11	Answered radio traffic in a timely fashion? (Dispatch Information Flow)	☐	☐	
12	Correctly identified units requesting info? (Dispatch Information Flow)	☐	☐	☐
13	Correctly identified info requested? (Dispatch Information Flow)	☐	☐	☐

Fig. 4.4 Evaluation Report form

Using 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.

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.

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.

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).



Fig. 4.5 Timeline Toggle Button (highlighted in red)

Play the Call - 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.

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

Evaluate the call - 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 DX; if your NexLog DX-Series 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 DX and the NexLog Configuration Manager. MediaWorks DX 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 DX 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 DX 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 DX, 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.

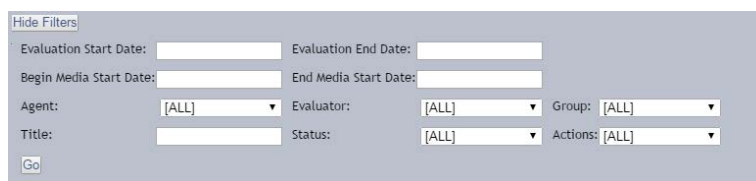


Fig. 4.6 Completed Evaluations Filters

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:

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		Source Name	Channel Name	Channel ID	Start Time	Duration	Incident Name
Date:		2016-08-11		NexLog 131	Channel 17	17	2016-08-01 23:45:12 -04:00	14	None
Evaluator:		Eventide		NexLog 131	Channel 17	17	2016-08-01 23:44:42 -04:00	14	None
Facility:		Eventide		NexLog 131	Channel 17	17	2016-08-01 23:40:53 -04:00	14	None
Agent:		agent002							
Group:		Fire Dispatch							
Form:		Dispatch for Fire Incidents							
Revision:		1							

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

Fig. 4.7 Top of Completed Evaluations Form

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.

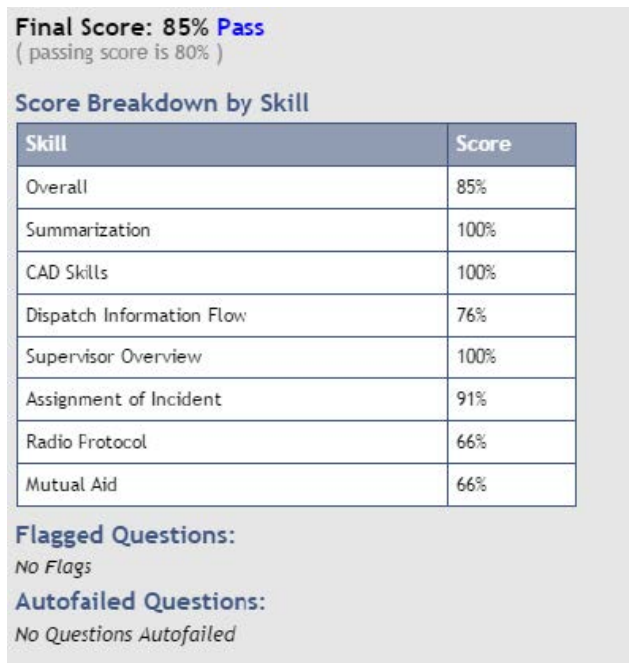


Fig. 4.8 Score Breakdown of Completed Evaluations Form

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.

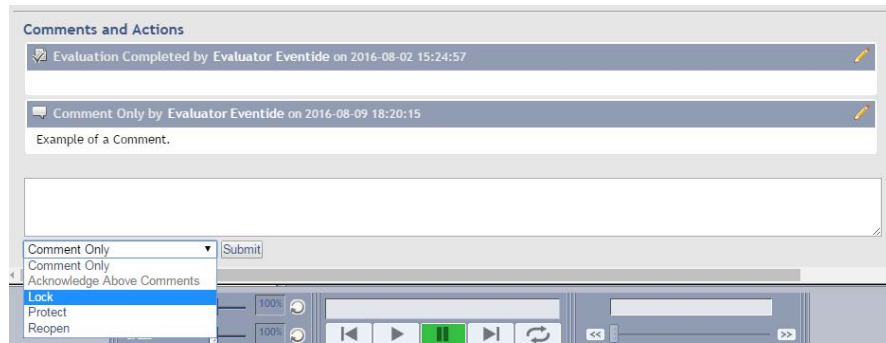


Fig. 4.9 Evaluation Actions

Evaluations can exist in five states:

- **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.
- **Completed:** The Evaluation is complete and can be seen by the Agent involved, their Group Leader and by all Super Evaluators and Admins.
- **Protected:** The Evaluation is protected and can no longer be seen by the Agent.
- **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.
- **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.

Fig. 4.10 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.

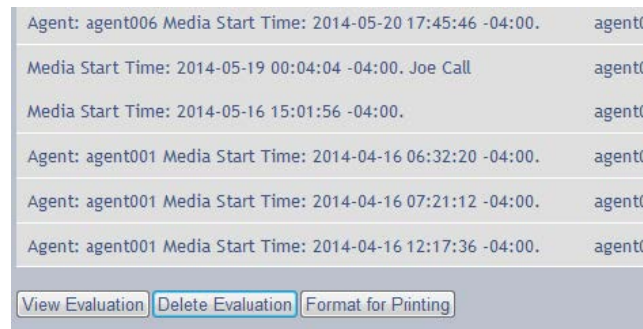


Fig. 4.11 Deletion Button for Admin users

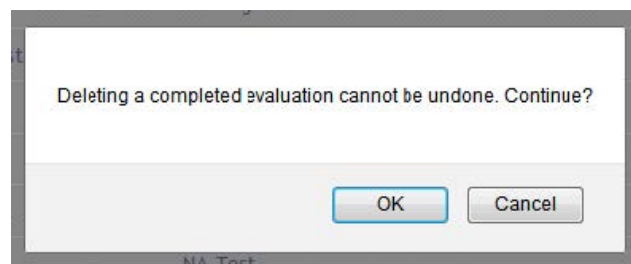


Fig. 4.12 Deletion Confirmation

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.

Home	REPORT NAME	DESCRIPTION
System	Evaluation Score Trends	Graphs Information about Evaluation Scores over time
Reports	Intragroup Score Trends	Graphs Information scores over time for agents in a group
Recording Reports	Interform Score Trends	Graphs Information comparing scores between forms
Quality Factor Reports	Skill Trends	Graphs scores broken out by individual skills
Networking	Evaluation Tabulation	Shows Evaluation data in a tabular format
Recording	Run Report	
Analysis		

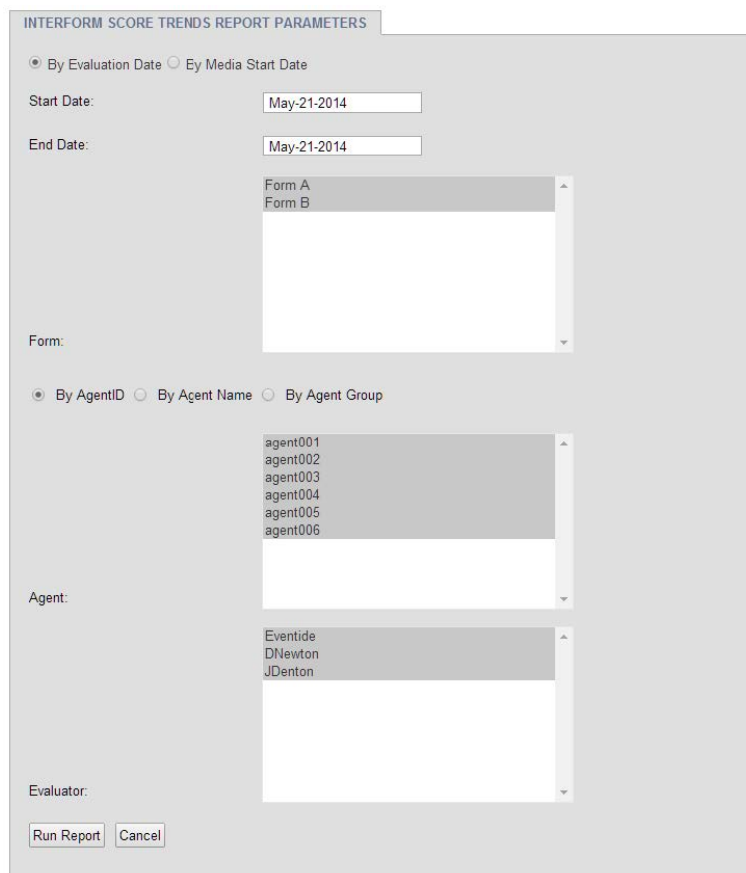
Fig. 5.1 Quality Factor Reports Main Page

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
- Evaluation Tabulation

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



The form is titled "INTERFORM SCORE TRENDS REPORT PARAMETERS". It contains several sections for filtering data:

- Date Selection:** Two radio buttons at the top: "By Evaluation Date" (selected) and "By Media Start Date". Below are "Start Date:" and "End Date:" fields, both containing "May-21-2014".
- Form Selection:** A dropdown menu labeled "Form:" showing "Form A" and "Form B".
- Agent Selection:** Three radio buttons: "By AgentID" (selected), "By Agent Name", and "By Agent Group". Below is an "Agent:" dropdown menu showing a list of agent IDs: agent001, agent002, agent003, agent004, agent005, and agent006.
- Evaluator Selection:** A dropdown menu labeled "Evaluator:" showing "Eventide", "DNewton", and "JDenton".
- Buttons:** "Run Report" and "Cancel" buttons at the bottom.

Fig. 5.2 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:

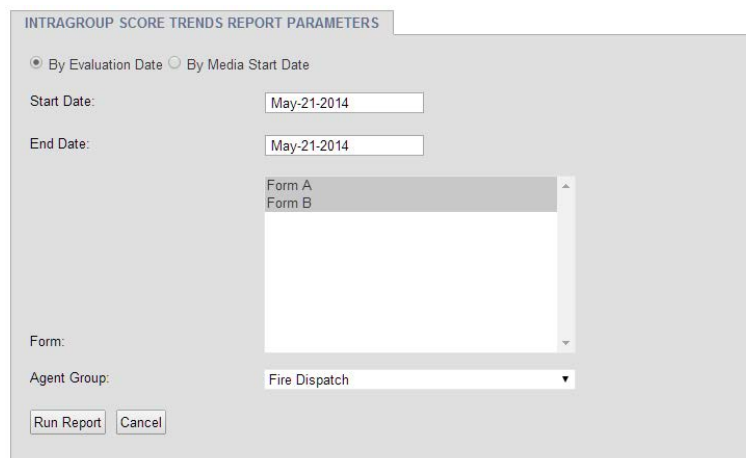


This is a close-up of the "By Agent Group" section of the form:

- Three radio buttons: "By AgentID", "By Agent Name", and "By Agent Group" (selected).
- A dropdown menu labeled "Agent Group:" showing a list of agent groups: "Fire Dispatch", "EMT Dispatch", and "Police Dispatch".

Fig. 5.3 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:



The screenshot shows a web form titled "INTRAGROUP SCORE TRENDS REPORT PARAMETERS". It features two radio buttons at the top: "By Evaluation Date" (selected) and "By Media Start Date". Below these are two date input fields, both containing "May-21-2014". A central area contains a list box with "Form A" and "Form B" visible, and a larger empty white box below it. At the bottom left, there are "Form:" and "Agent Group:" labels. The "Agent Group:" dropdown menu is set to "Fire Dispatch". At the bottom right, there are "Run Report" and "Cancel" buttons.

Fig. 5.4 Intragroup Trends Report Form

As with the other forms, there are two options for date:

- Evaluation Date
- 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
- number of flags per agent

You can filter by date, forms, agent id, agent name, agent group, and evaluator.

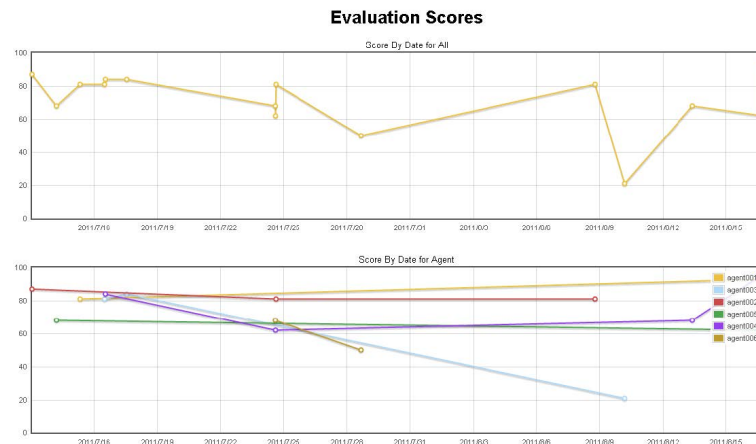


Fig. 5.5 Evaluation Scores Report

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.

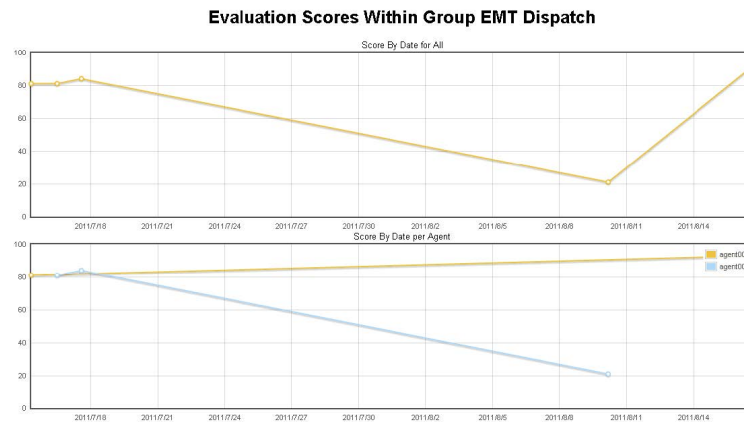


Fig. 5.6 Intragroup Scores

5.2.3. Interform Score Trends Report

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

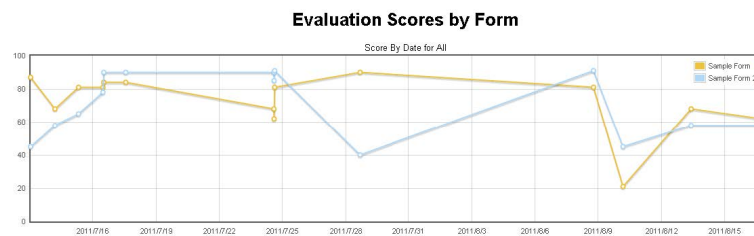


Fig. 5.7 Interform Scores Report

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.

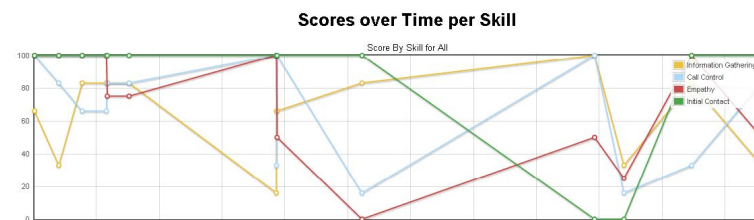


Fig. 5.8 Skill Trends Report

5.2.5. Evaluation Tabulation

Evaluation Tabulation (Evaluation Scores Table) shows Evaluation data in a table, with the following information:

- Date of Evaluation
- AgentID
- Name

- Agent Group
- Evaluator Percentage Score
- Flags
- Pass/Fail

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

Fig. 5.9 Evaluation Scores Table

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 70— 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 Eventide Quality Factor Manual v2.8.3 63 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 # 64 Eventide Quality Factor
Manual v2.8.3 # {{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 title
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}}
```

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. # 66 Eventide Quality Factor Manual v2.8.3 # 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>
 Date Reviewed: _____/
 _____/_____

 Evaluator's Name:

 Agent's Signature:

 </h4> {{end_print_section}}

A. APPENDIX A: WINUSERTRACKER

A.1. 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:

- At install time, the user who installed WinUserTracker is tracked with a Log In time
- Logging out is tracked with a Log Out time
- As is shutting down the PC
- Logging in as a user is tracked with a Log In time
- Any time the computer is locked, the current user is recorded with a Log Out time
- Unlocking the computer records the current user with a Log In time

A.2. Installation and Configuration

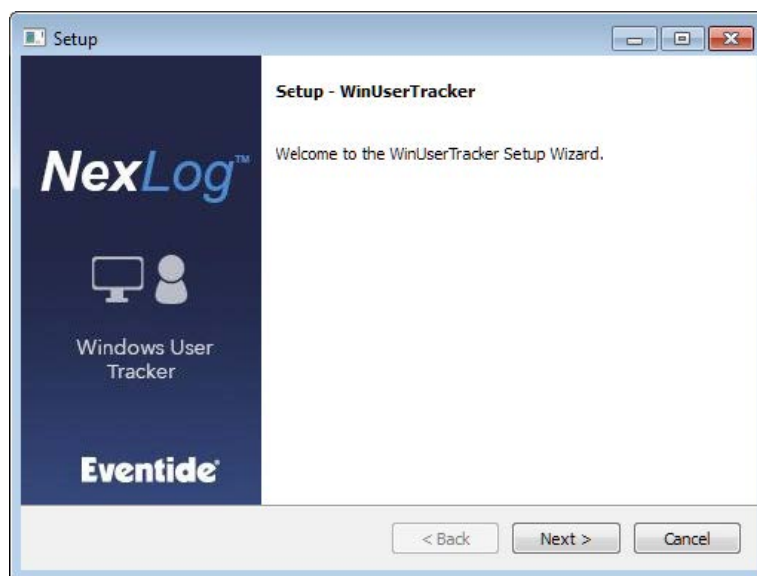


Fig. A.1 WinUserTracker Installer

Launch the WinUserTracker installer. Click Next.



Fig. A.2 License Agreement

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

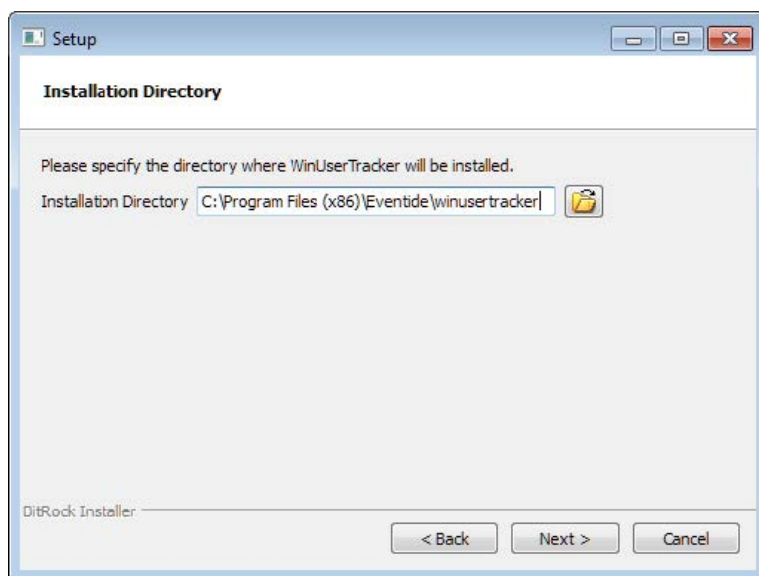


Fig. A.3 Installation Directory

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

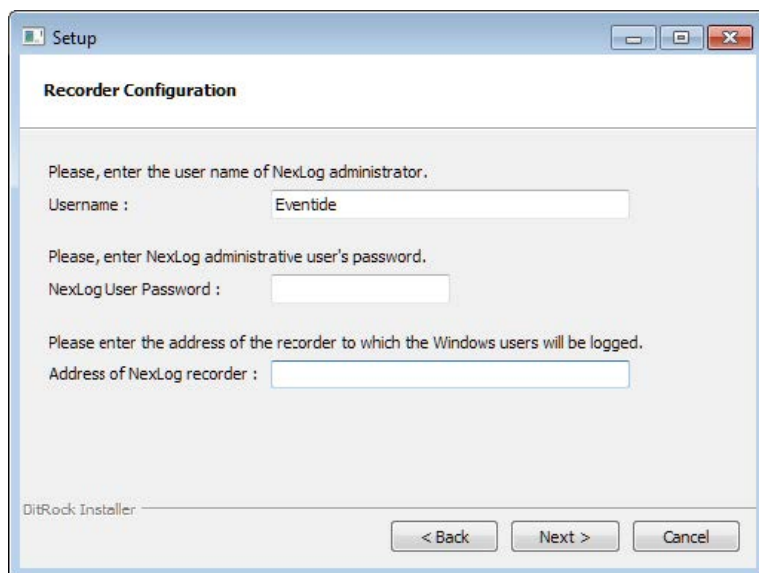


Fig. A.4 Recorder Configuration

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.

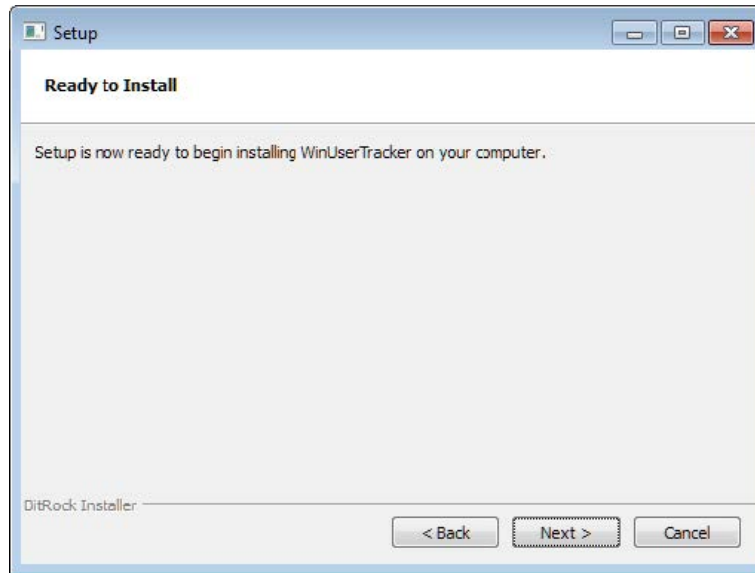


Fig. A.5 Ready to Install

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

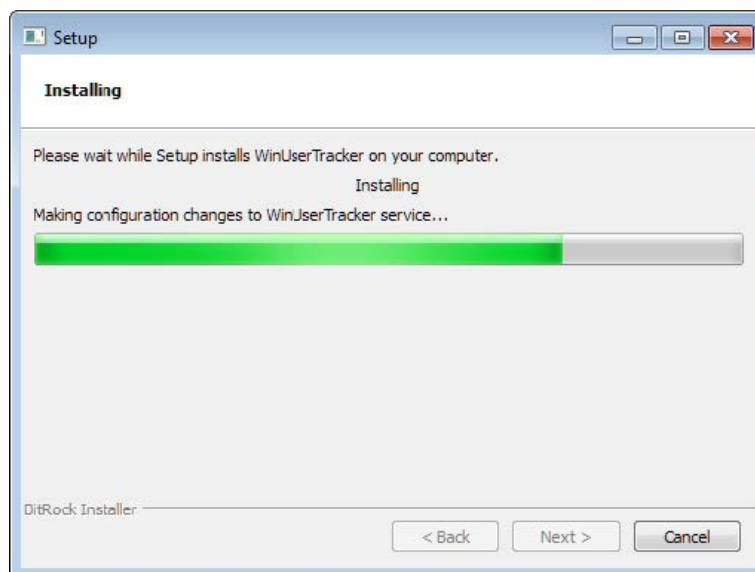


Fig. A.6 Installing...

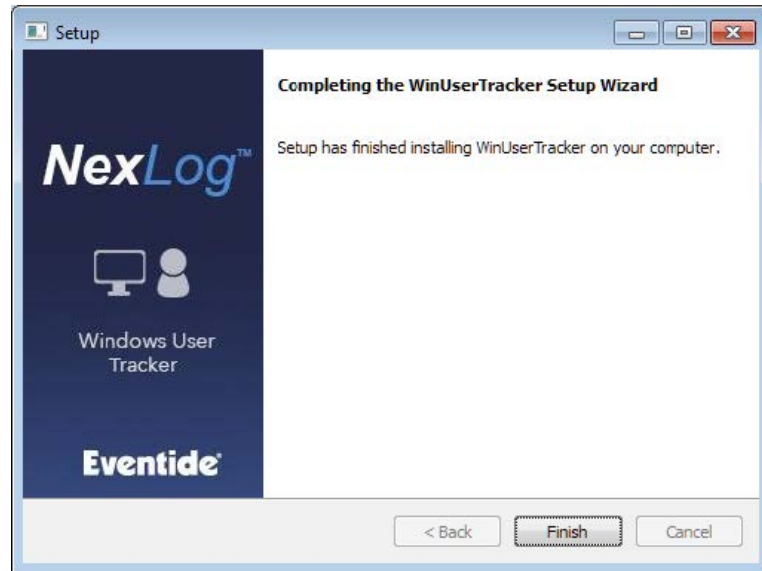


Fig. A.7 Finished!

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.

A.3. 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 DX 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.

