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V-Spark Quickstart Guide

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Abstract

This document provides a brief overview of how to use key V-Spark features, and how to view, customize, and interpret file, agent, and application data.

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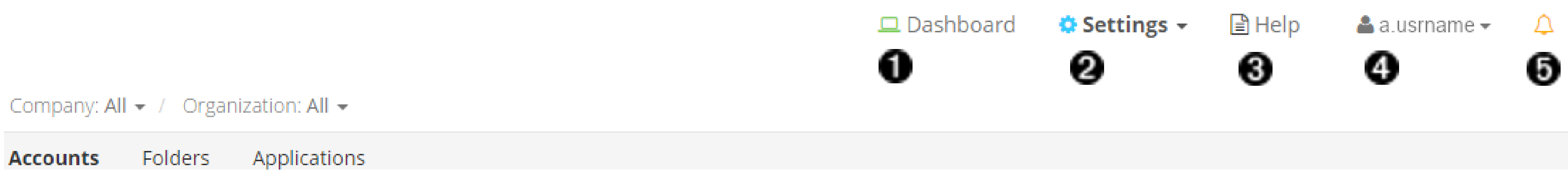
Logging In

You must have a user account to use V-Spark. Click **Sign up** from the home page and fill out the form to request an account. You will receive a confirmation email with a link to V-Spark after your account has been approved by an administrator.

The standard authentication method uses a V-Spark-specific username and password. Some installations use the same networked authentication method for many different systems within the company such as LDAP. If using LDAP credentials, click **Sign in with LDAP**. Ensure that the login page says "Sign in with LDAP" before continuing.

Using the Main Navigation

The following image shows the menu options at the top of your **V-Spark** screen. These menu options provide quick access to the screens that you can use to examine, analyze, and upload data.



❶ Examine your data
❷ Upload audio and customize analysis
❸ Find detailed user documentation
❹ Edit your user details and email options
❺ Display announcements and notifications

The data that is processed and analyzed by V-Spark is organized as follows. Access any of these options from the top left of the screen:

- At the top level, data is associated with a **Company**.
- Each company is subdivided into one or more **Organizations** that allow you to partition your data in ways that mirror the company's structure.
- Data from each organization is further subdivided into one or more **Folders**, which provide a low-level classification mechanism for audio from specific sources, audio from specific dates, and so on.

Using the Audio Evaluator

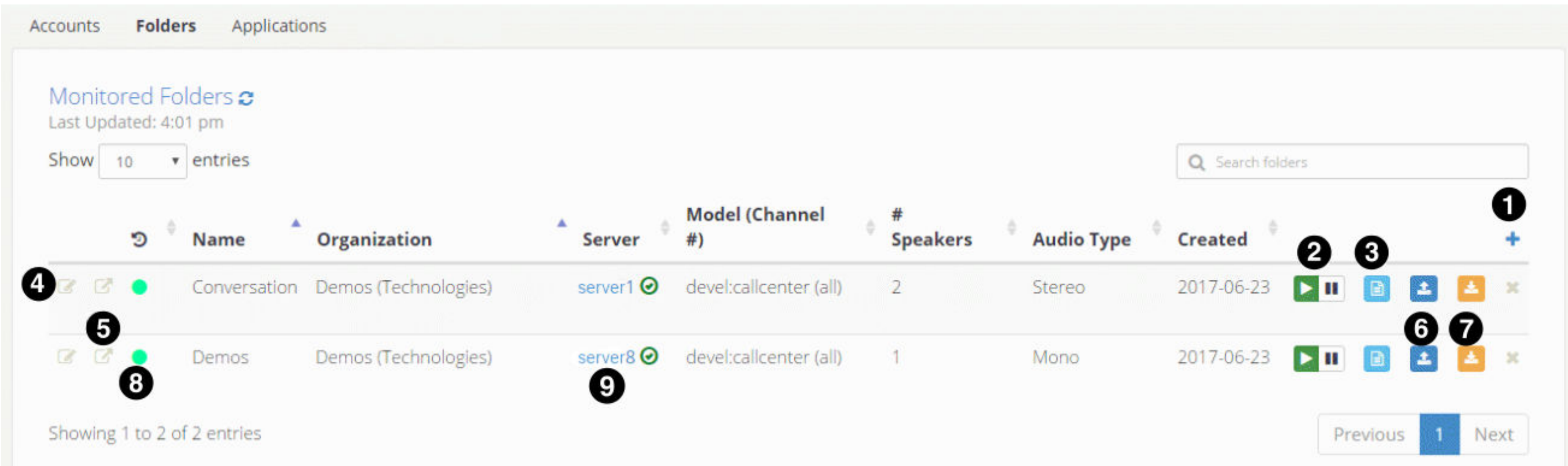
We recommend that you run the Audio Evaluator before submitting new types of audio files to V-Spark for transcription and analysis. This will ensure that V-Spark recognizes the format in which your audio is encoded.

From the Main Menu, click **Help**. From the Help page, click **Will my audio work?** to access the audio evaluator. From there, you can:

1. Click **Choose File** to browse to the location of the audio file that you want to check.
2. Click **Evaluate** to upload the file and verify its compatibility.

Using and Creating Folders

The **Settings** screen shows how to interact with folders on your system:



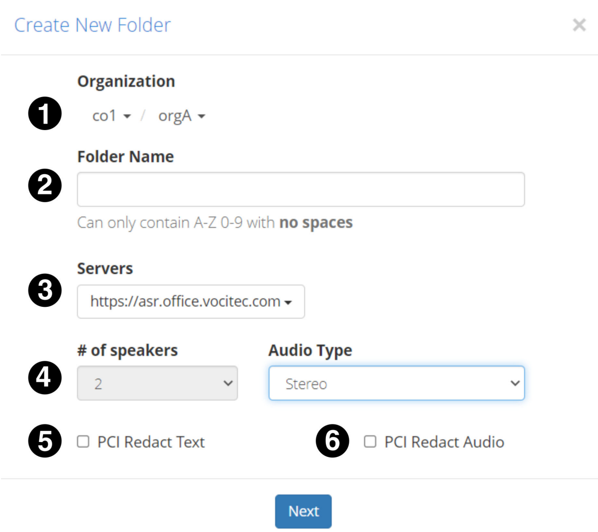
❶ Create a new folder
❷ Pause file processing for a folder
❸ View folder processing status
❹ Edit a folder
❺ View folder on dashboard
❻ Upload audio to a folder
❼ Download a zip archive of files from the folder. Displays a dialog that allows you to specify the type (JSON, text transcript, MP3) and date range of files to be downloaded. The maximum size of the zip file is 2 GB. To work around this limit, use a smaller date range or download specific types of files together.
❽ Indicates how recently files were last processed. Hovering over the indicator displays the time of last completion
❾ Shows the server name and a symbol indicating authorization token validity (green check for valid, red x for invalid)

Creating a New Folder for your Audio

If you want to create a new area for storing audio from a specific source or from a specific time period, create a **folder** in which to store that information.

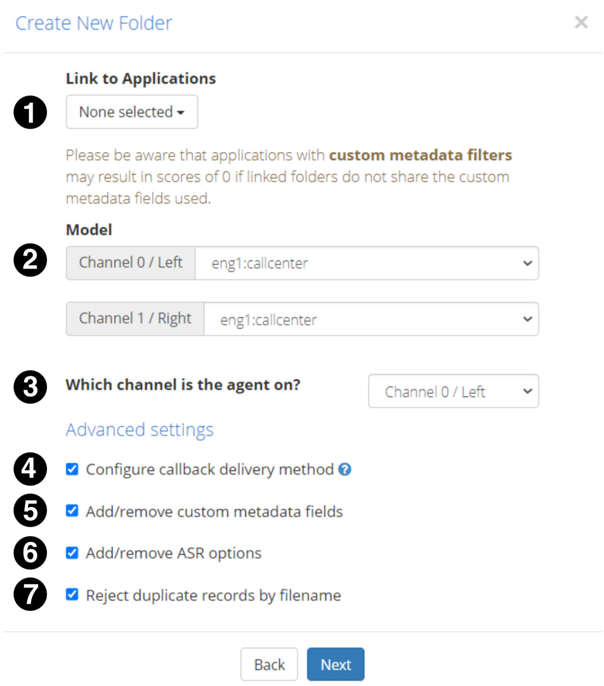
> **NOTE**
> To create folders, you must be a system administrator or user with create/edit permission for a company or organization.

To create a new folder, navigate to the Folders page and click **+**. The **Create New Folder** screen displays with the following options:



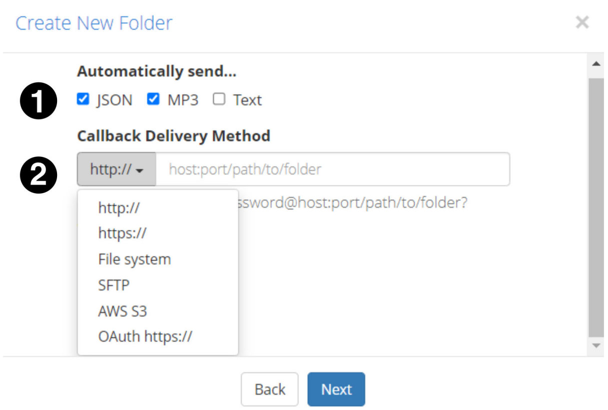
1. Select the company and organization
2. Enter the folder name
3. Select the appropriate transcription server or servers from the dropdown
4. Select number of speakers and type of audio (Mono 1-channel; Stereo 2-channel)
5. Select this box to automatically redact text
6. Select this box to automatically redact audio

After providing the information requested, click **Next**. The **Advanced Settings** screen displays:



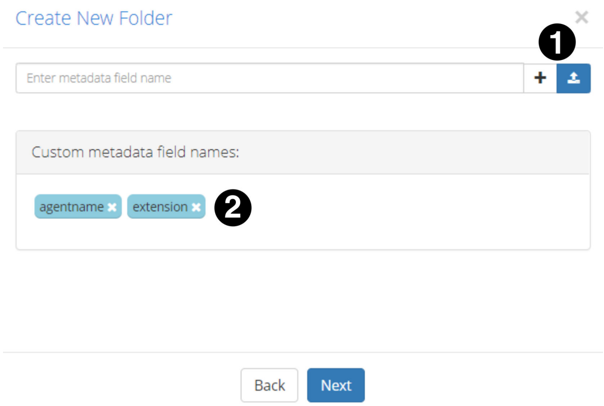
1. Select applications to use for analysis
2. Select call model for each channel.
3. If the audio was recorded with a separate stereo channel for each speaker, select the agent's audio channel.
4. Check to send JSON, audio, or text to a location as audio is processed
5. Check to edit custom metadata fields
6. Check to edit ASR options
7. Check to reject duplicate files based on name for this folder only

After completing the advanced settings, click **Next**. If you checked "Configure callback delivery method", the **Callback Delivery Method** screen displays. These options enable you to configure the callback delivery method and specify which kinds of files will be sent.



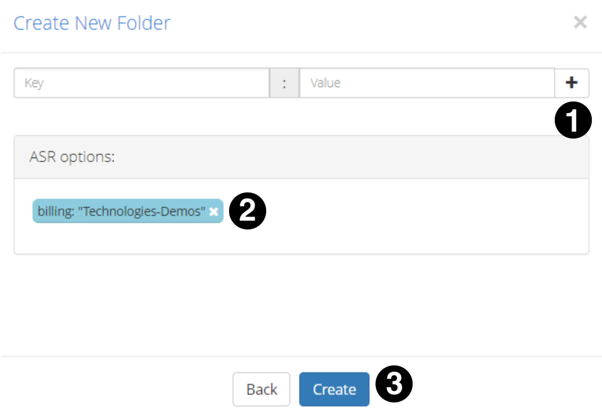
1. Select file type to send automatically via callback. Choose from JSON, MP3, and Text.
2. Select a callback delivery method from the dropdown

If you checked "Add/remove custom metadata fields" the **Custom Metadata** screen displays. This option enables you to upload a text file that identifies the names of metadata fields to extract from the transcript of the audio that you will then upload.



1. Upload the text file containing your custom metadata field names or enter them manually
2. Verify that all of your field names have appeared

If you checked "Add/remove ASR options" the **ASR Options** screen displays. These options enables you to view and edit ASR tags.



1. Add ASR tags
2. View existing ASR options
3. Create folder and prepare to upload your audio

Refer to the **V-Spark Management Guide** for more detailed information on creating folders and the various options contained within.

Uploading Audio Files

Click the blue and white upload icon ( ) to upload audio to a folder for processing. The **Upload Audio Files** screen displays.

1. Click **Choose File** to select the compatible file (or zip file of compatible files) that you want to upload.
2. Click **Upload** to upload audio to the folder

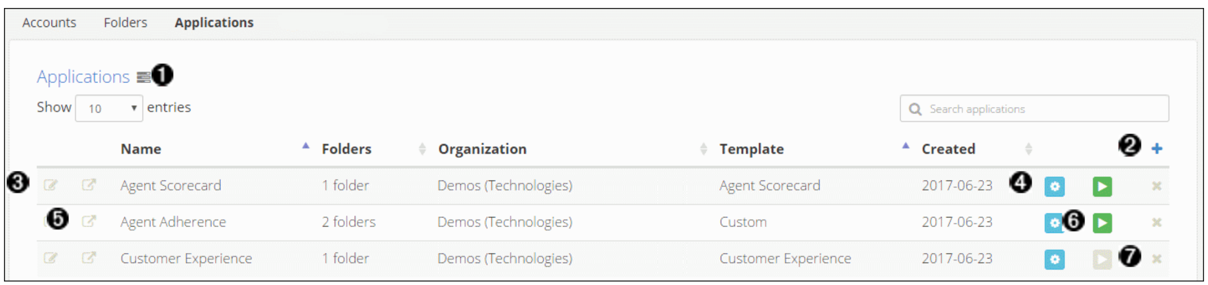
NOTE
See the **V-Spark Management Guide** for more information about uploading metadata with your audio, and uploading audio via web-based interface or web services.

Customizing Analysis

V-Spark provides multiple ways of analyzing submitted audio files. One way is to create an **application** that scans your incoming audio for patterns, specific terms, and so on. To view, create, reprocess, edit, or delete an application, use the **Settings** drop-down menu to access the **Applications Overview** screen:

> **NOTE**
> For detailed information about creating applications, see the **V-Spark Application Development Guide**.

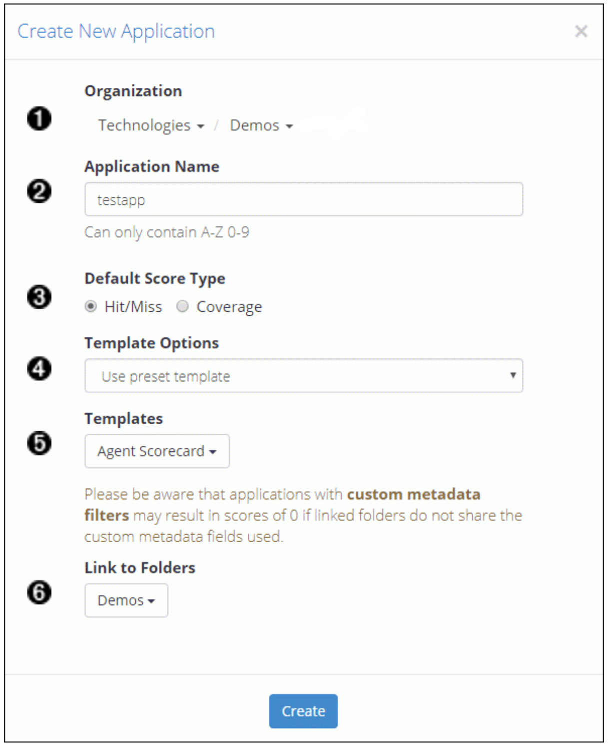
> **TIP**
> Applications can be associated with one or more folders within an organization. Files are scored when they are uploaded to any folder that is linked to an application.
>
> Applications can rescore all of the audio files in a folder by reprocessing them. If an application is modified, reprocess all of the folders associated with that application.



❶ View application jobs queue
❷ Create a new application
❸ Edit application settings
❹ Edit application categories and phrases
❺ View application on dashboard
❻ Reprocess an application
❼ Delete an application

Creating Applications

To create an application, click **+**. The **Create New Application** screen displays:

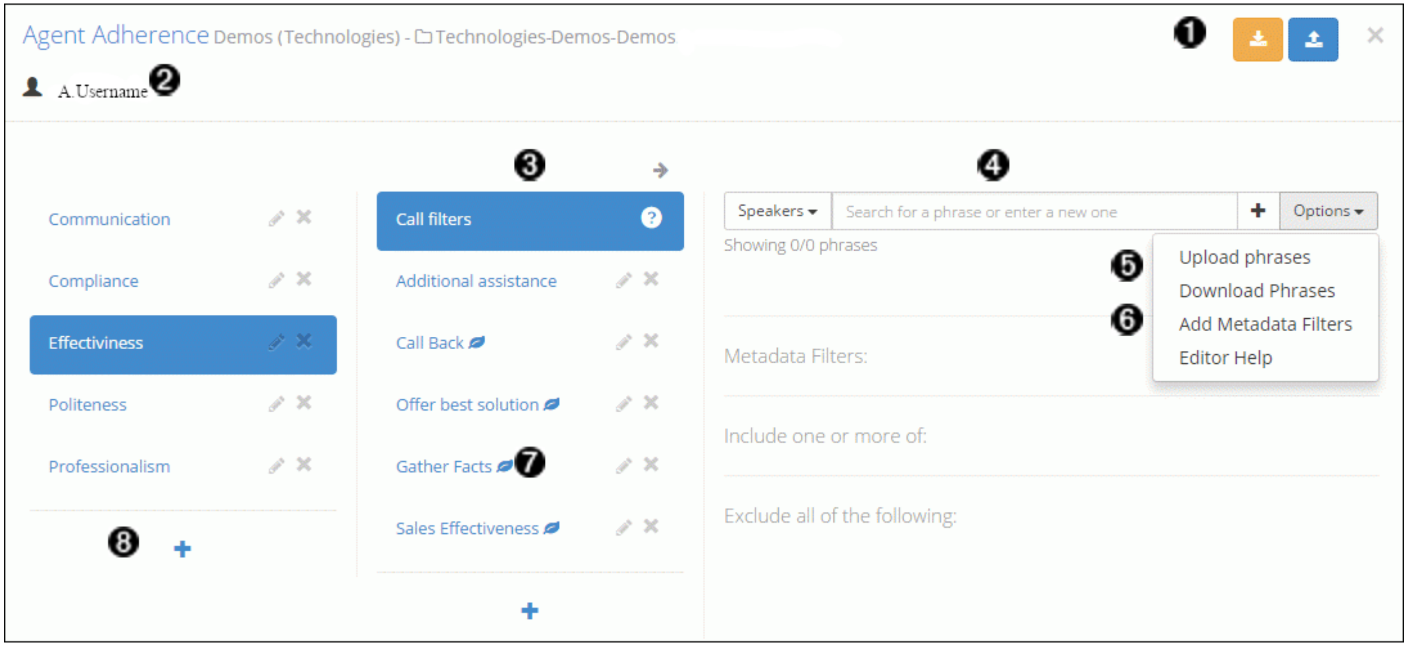


❶ Select company and organization
❷ Enter application name
❸ Select default score type
❹ Select template option (Build from scratch, Use preset template, or Copy from existing organization)
❺ Select an application template
❻ Select folder(s) for your application to analyze

Customizing Applications

Regardless of how you created an application, you will often want to customize it. V-Spark includes a graphical application editor to simplify this task.

To access the application editor, select **Applications** from the **Settings** dropdown. Type the name of the application that you want to customize in the search bar. To open the application editor, click the blue and white gear icon ( ) next to the application that you want to edit. This displays an application-specific version of the **Edit Application** screen:



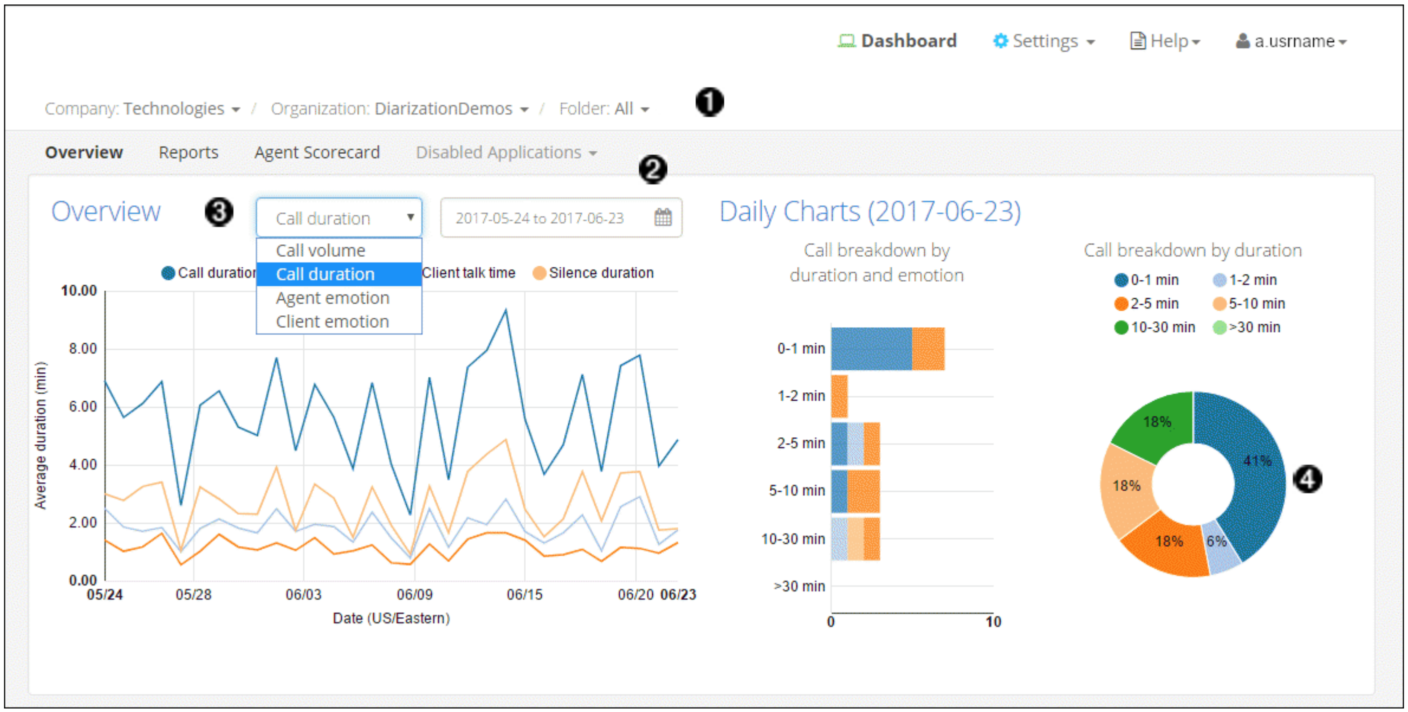
❶ Upload or download a JSON version of your application
❷ Displays all users currently viewing the application
❸ Select a category of this application to edit
❹ Add speaker phrases (include phrases or exclude phrases) to your application
❺ Upload or download lists of phrases for your application
❻ Add filters to your application
❼ Denotes leaf-level categories
❽ Create a new category

Examining Call Data

V-Spark provides many ways of summarizing and exploring data about the audio files (commonly referred to as *calls* because the audio files are typically recordings of telephone conversations). The next few sections explain how to access various types of summary and analytical data.

Dashboard Overview

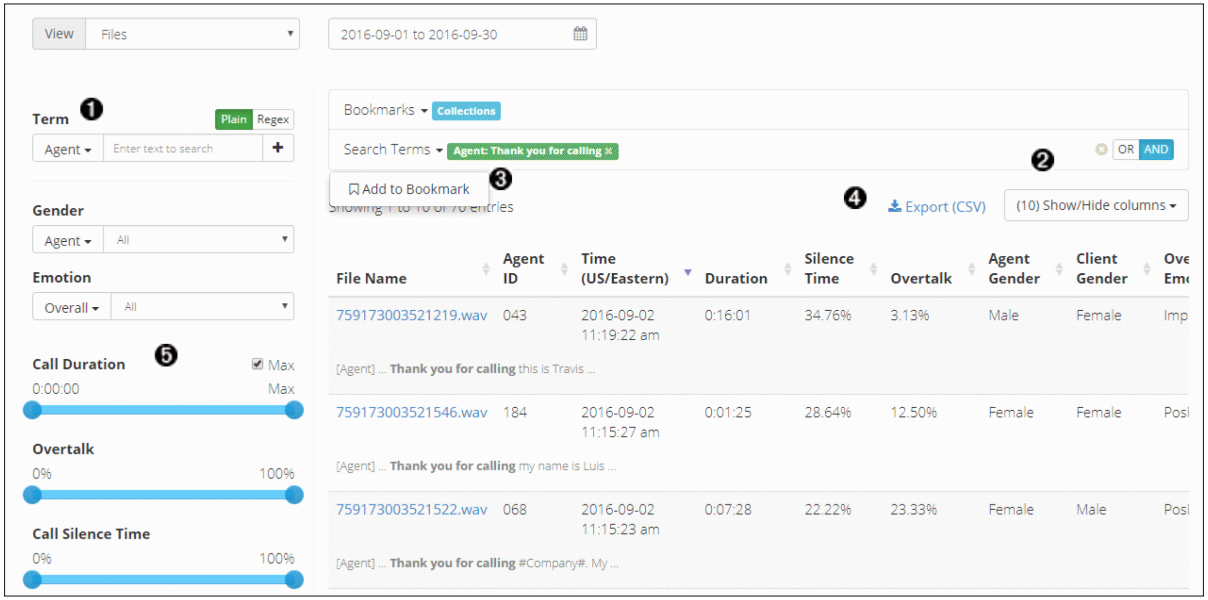
The **Dashboard Overview** screen for each folder provides multiple ways of viewing data about an organization's audio files.



❶ Choose a folder to examine its data
❷ Select the date range you want to analyze
❸ Select different graph types to view your data from every angle
❹ Roll over parts of the graphs to get specific information about call types

Searching Audio Files for Insights

The following screenshot shows the **File** view of the calls in a folder. To access this screen for a specified folder, click **Dashboard**, then select the appropriate **Company**, **Organization**, and **Folders** options to navigate to the folder that contains the audio files you want to search.



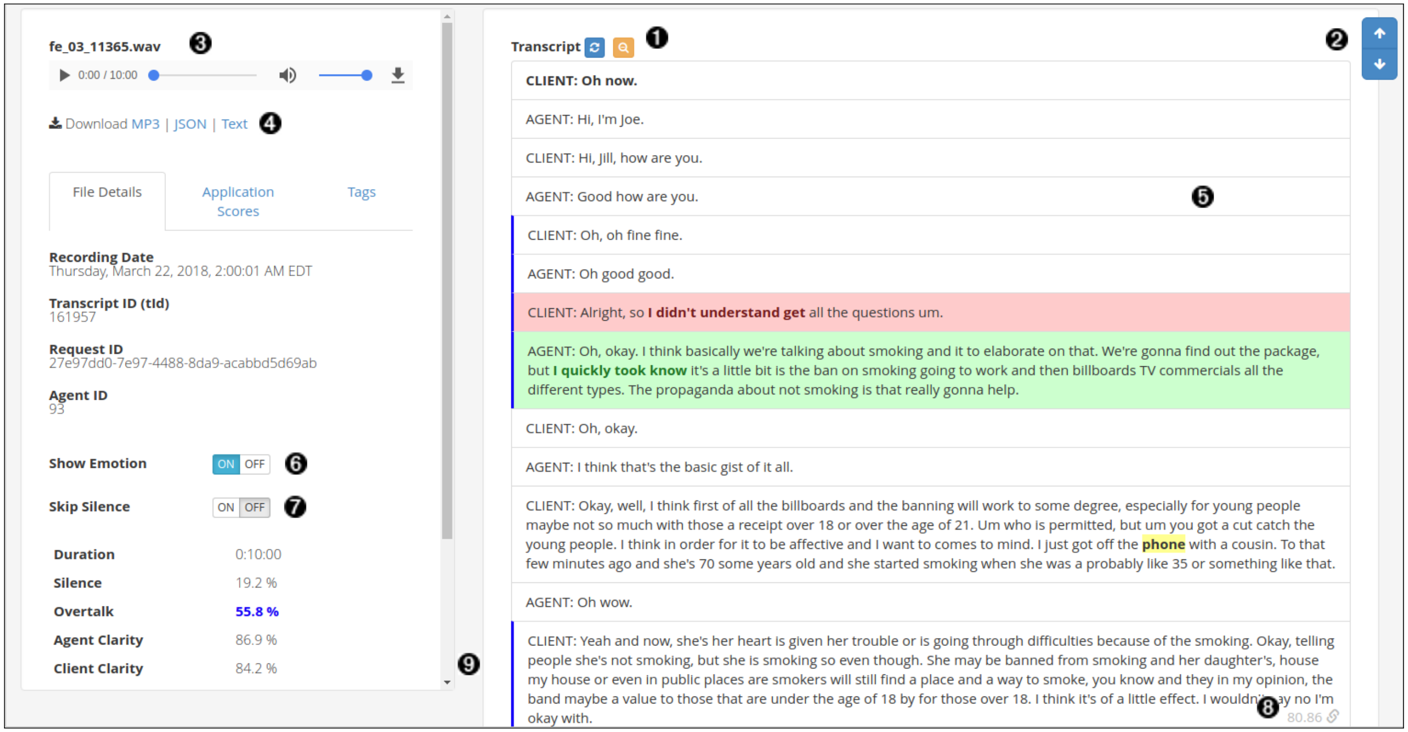
❶ Search your files for key words and phrases
❷ Show and hide columns to customize display
❸ Bookmark frequent searches
❹ Export results to CSV
❺ Use filters to narrow down your search

To search the transcriptions of the files that are located in this folder, enter a term into the search field under the **Term** label. The files in the selected date range for the current folder are searched for the specified term, and that term is added to the list of search terms at right.

> **NOTE**
> See the **V-Spark Review and Analysis Guide** for detailed information about using all of the options on the **View Files** screen.

Examining Audio File Details

To see information about an audio file in the current folder, click its name in the file list to open a **File Details** screen:



- ❶ Clear search term highlighting from transcript display
- ❷ Use the up and down arrows to view instances of your search terms
- ❸ Play call audio
- ❹ Select **MP3** to download an MP3 audio file of the call. Select **JSON** to download a JSON file of the call transcript. Select **Text** to download a text file of the call transcript.
- ❺ Select a piece of the transcript to play audio from that point
- ❻ Show emotion for a visual representation of sentiment analysis
- ❼ Skip silent portions of the call for faster review
- ❽ Select to display a URL that links to this point in the transcript. You can copy this URL to the clipboard for use elsewhere.
- ❾ The blue border on the left of the transcript indicates portions of the call with high overtalk

Examining Agent and Client Interaction

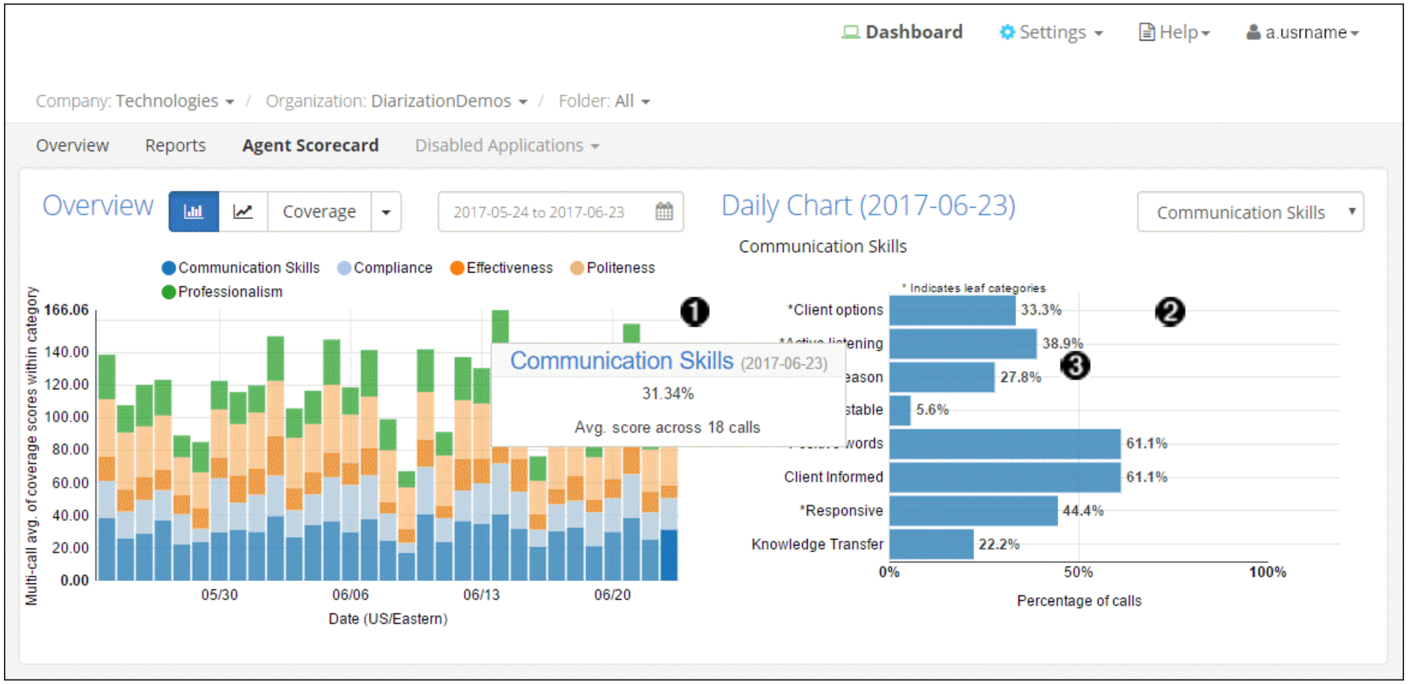
When V-Spark processes audio, it is divided into *Agent* and *Client* speakers. V-Spark helps you explore and audit Agent information for things like politeness and emotion, the presence of specific phrases, compliance with requirements for content in each call, and so on. For mono audio, V-Spark uses a process called side classification to label speech as coming from either Agent or Client. For stereo audio, the channel that contains the Agent speaker can be set from the Folder screen.

The next few sections illustrate the basic mechanisms that V-Spark provides to examine Agent performance and how to work with that information. These sections use an application called "Agent Scorecard" that was designed to increase the efficiency of the agent evaluation process by automatically detecting the presence or absence of phrases that correspond to QA form requirements. The results of this application can be used to get an overall view of agent performance, pinpoint performance categories that require improved training, and compare scores for individual agents.

NOTE
See the **V-Spark Review and Analysis Guide** for detailed information about the different **Views** that are available for you to use when exploring agent data, application templates such as the **Agent Scorecard**, and using all of the options on the **File Details** page.

Examining Agent Performance

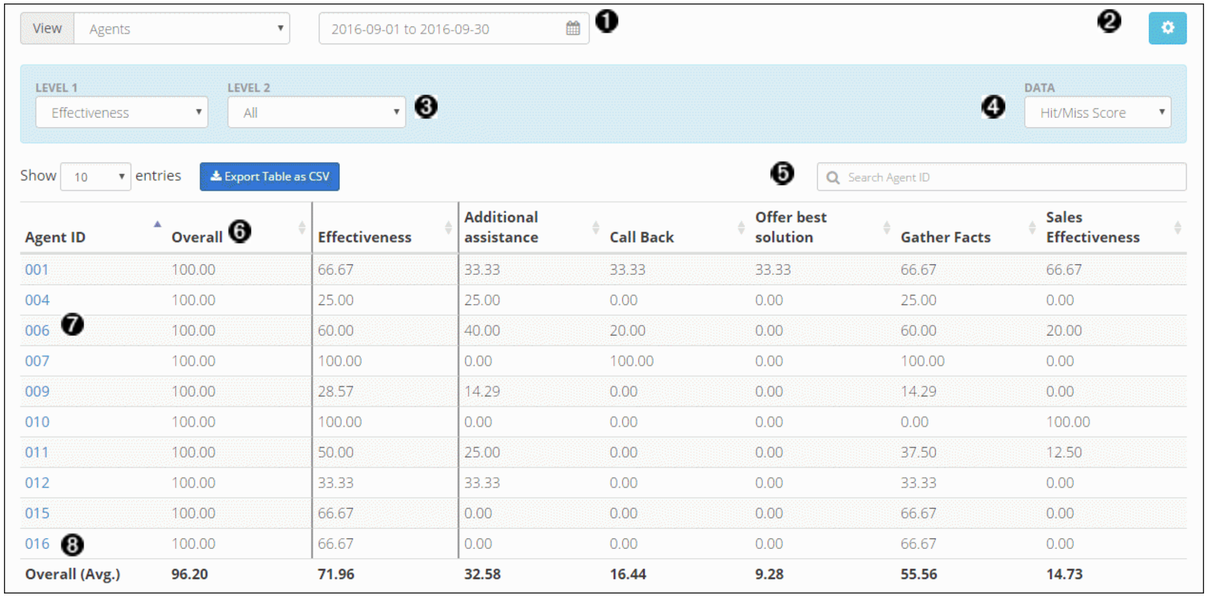
The **Agent Scorecard** screen displays an overview of score information for a given folder. To access this screen for a specified folder, click Dashboard, then click the drop-down to the right of the **Folder** and select the folder that you are interested in. Finally, select the **Agent Scorecard** application from the submenu.



❶ Roll over parts of the graph to see agent scores for each category
❷ Category breakdowns show you exactly where your agents can improve
❸ Click on a section of the graph to view lower-level categories for even more detailed insights

Examining Individual Agent Data

The **View** section at the bottom of the **Agent Scorecard** screen (discussed in Examining Agent Performance) shows detailed information about all of the agents within a selected or default time period. Because it provides tabular information about each agent within that time period, the **Individual Agent Data** screen (as shown in the following screenshot) makes it easy to view analysis and statistics for multiple agents at a glance.

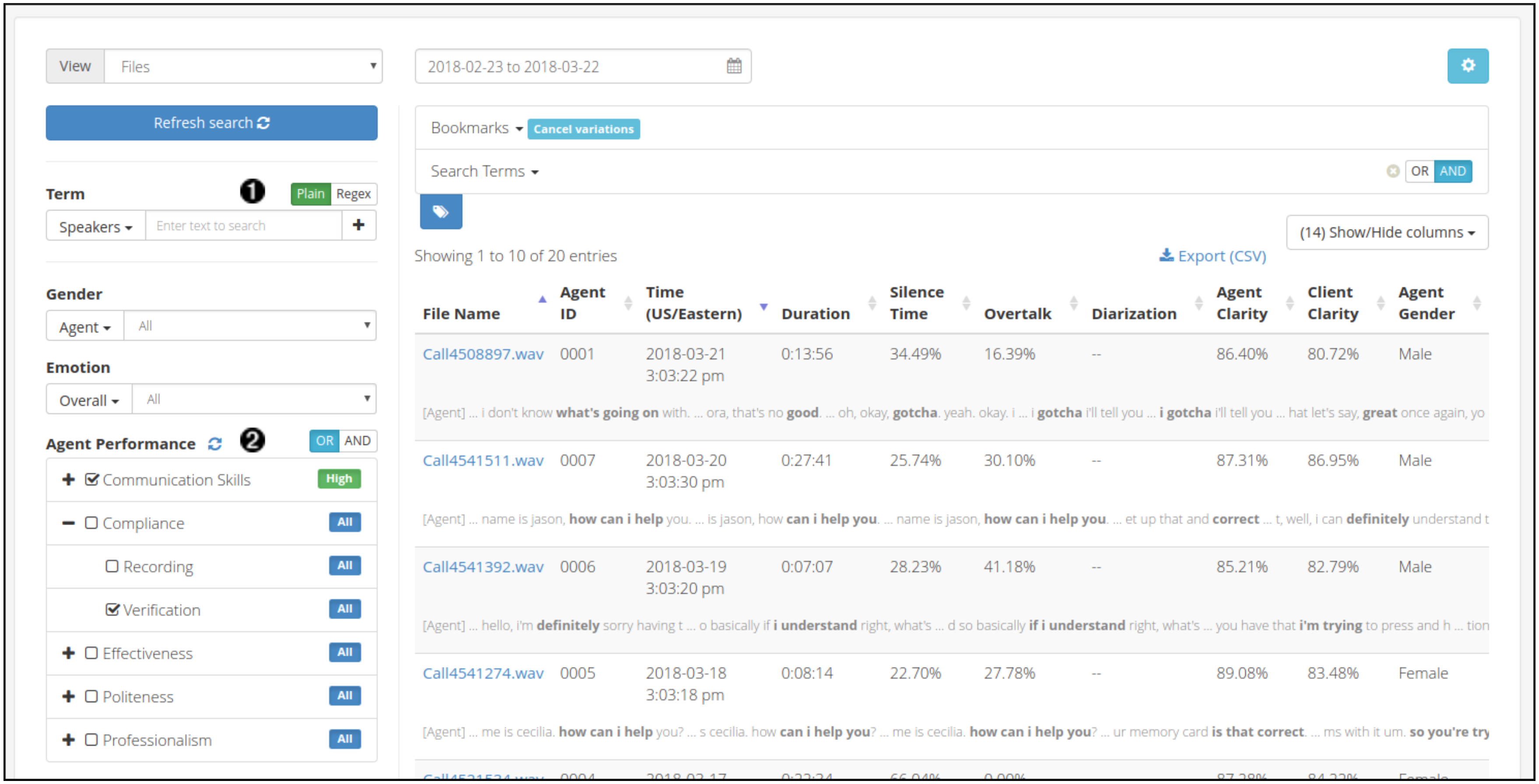


- ❶ Select date range
- ❷ View the application categories and phrases
- ❸ Select application level and categories to view
- ❹ Select data to view (Hit/Miss Score, Coverage Score, Average Call Duration, or Average Call Silence)
- ❺ Search for a specific agent ID
- ❻ An agent's overall score for all calls
- ❼ Click on an agent ID to see all calls handled by that agent
- ❽ Average overall totals for all agents

Filtering Agent Data

The **View** section at the bottom of the Agent Scorecard screen (discussed in Examining Agent Performance) enables you to filter the information about all of the Agents within a selected or default time period. These filters enable you to drill down into multiple levels within characteristics such as Communication Skills, Compliance, Effectiveness, and so on.

To display the Filtering **Agent Data Files** screen like the following, select **Files** from the **View** drop-down menu.



❶ Search your calls using text, filters, and bookmarked searches just like in the Dashboard Files View

❷ Filter calls using individual or combined application categories