Genesys Quality Management 8.0

Quality Manager

User Guide: Agent

About Genesys

Alcatel-Lucent's Genesys solutions feature leading software that manages customer interactions over phone, Web, and mobile devices. The Genesys software suite handles customer conversations across multiple channels and resources—self-service, assisted-service, and proactive outreach—fulfilling customer requests and optimizing customer care goals while efficiently using resources. Genesys software directs more than 100 million customer interactions every day for 4000 companies and government agencies in 80 countries. These companies and agencies leverage their entire organization, from the contact center to the back office, while dynamically engaging their customers. Go to www.genesyslab.com for more information.

Each product has its own documentation for online viewing at the Genesys Technical Support website or on the Documentation Library DVD, which is available from Genesys upon request. For more information, contact your sales representative.

Notice

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Table of Contents

Chapter

1 Introduction

This chapter provides an overview of this document, identifies the primary audience, introduces document conventions, and lists related reference information:

- Document Purpose
- Audience
- Document Version
- Assumed Knowledge
- Conventions Used

Document Purpose

This document describes the Genesys Quality Manager 8.0.480 user interface and contains guides for every task in it.

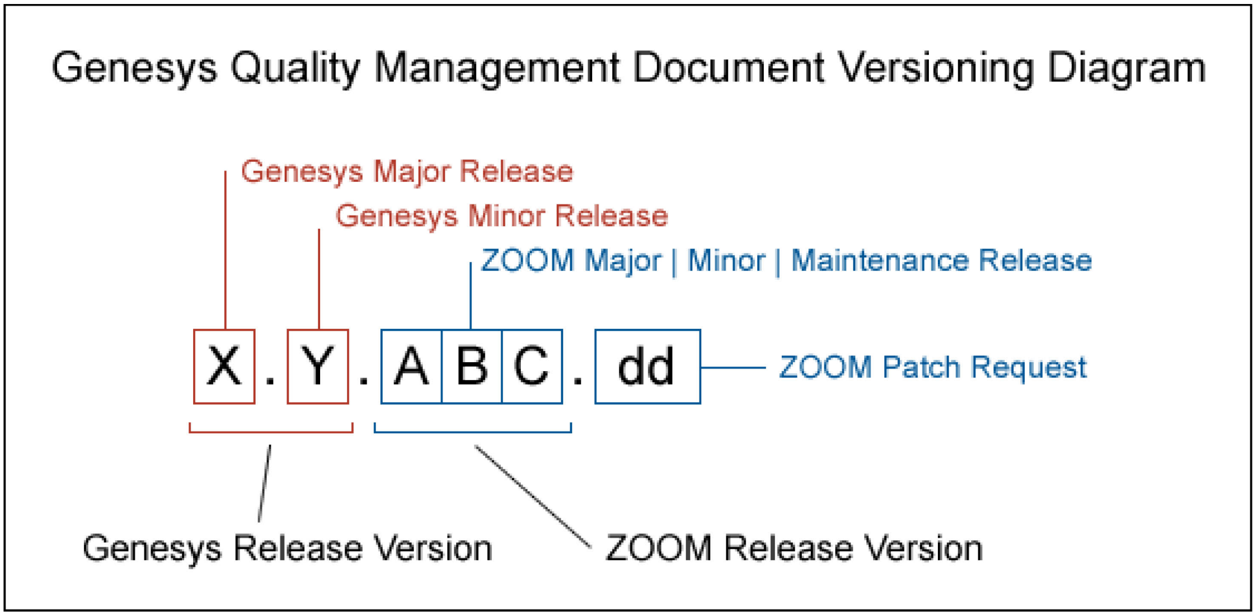
Audience

This document is targeted at Call Center Agents.

Document Version

The Genesys Quality Management products are provided by a partnership between Genesys and ZOOM International. The Genesys Quality Management products use a versioning format that represents a combination/joining of the versions used by these two separate entities. Although the Genesys Quality Management products and documentation use this combined versioning format, in much of the software and logs you will see the ZOOM versioning alone. You need to be aware of this, for example, when communicating with Technical Support.

The version for this document is based on the structure shown in the following diagram:



Assumed Knowledge

- Basic internet browser knowledge.
- Basic IPT terminology knowledge is recommended.

Conventions Used

Names of functions and buttons are in **bold**. Example: **Upload**

File names, file paths, command parameters and scripts launched from the command line are in `non-proportional font`.

```
Code is placed on gray background and bordered
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Chapter

2 Your User Profile and Messages

A short introductory tutorial showing how to access Genesys Quality Manager 8.0.480, update your user profile and view system messages sent automatically to or from your profile.

The information in this chapter is divided into the following topics:

Log In To Genesys Quality Manager

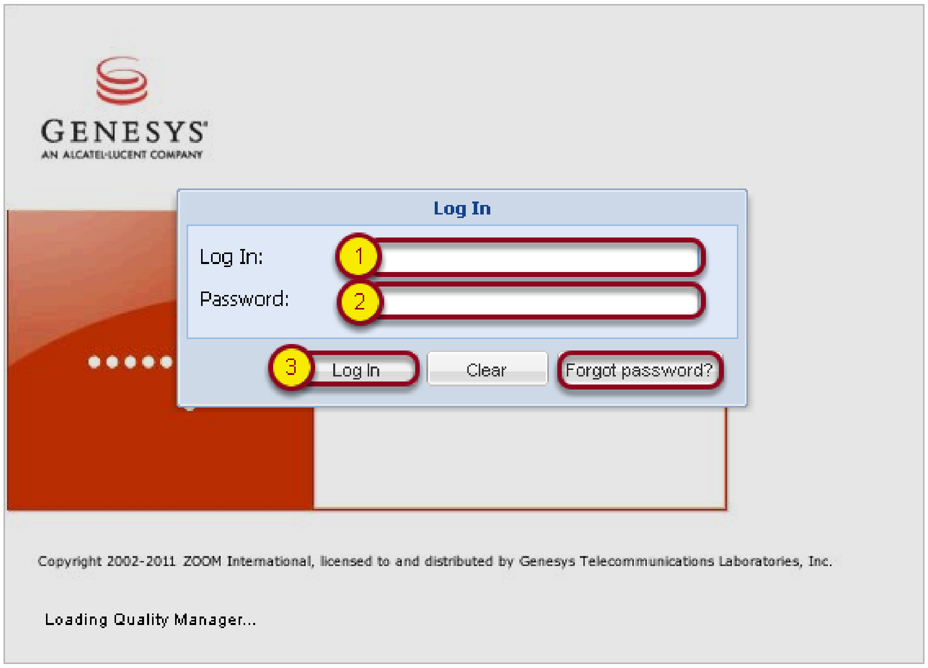

Figure 1: Log In To Genesys Quality Manager

After browsing to the Quality Manager application URL in your browser, enter your **Log In** (1) and **Password** (2) parameters, given to you by your Call Center supervisor or administrator, and press the **Log In** button (3).

If your password is not accepted, press the **Clear** button to enter the parameters again. If you can't remember your password, or the password is still not being accepted, press the **Forgot Password?** button (see next step).

If you are continually getting a red error message when attempting to log in, please contact your Call Center administrator.

Retrieving a Forgotten Password

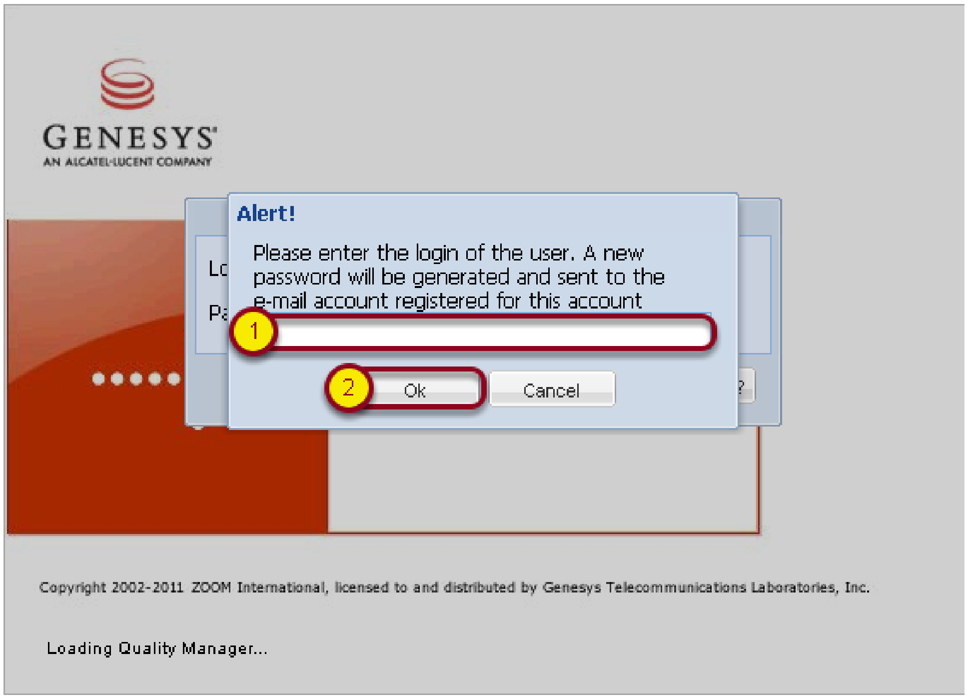

Figure 2: Retrieving a Forgotten Password

Should you ever forget your password, clicking on the **Forget Password?** button displays this screen.

Enter your Quality Manager username (1) into the text box provided (this is the same username as you entered in the first box on the previous step) and press **OK** (2). You will receive a new password, sent to your registered (e.g. company) email account.

Note: After requesting a new password, you will need to refresh your browser window before attempting to log in again.

Genesys Quality Manager User Interface

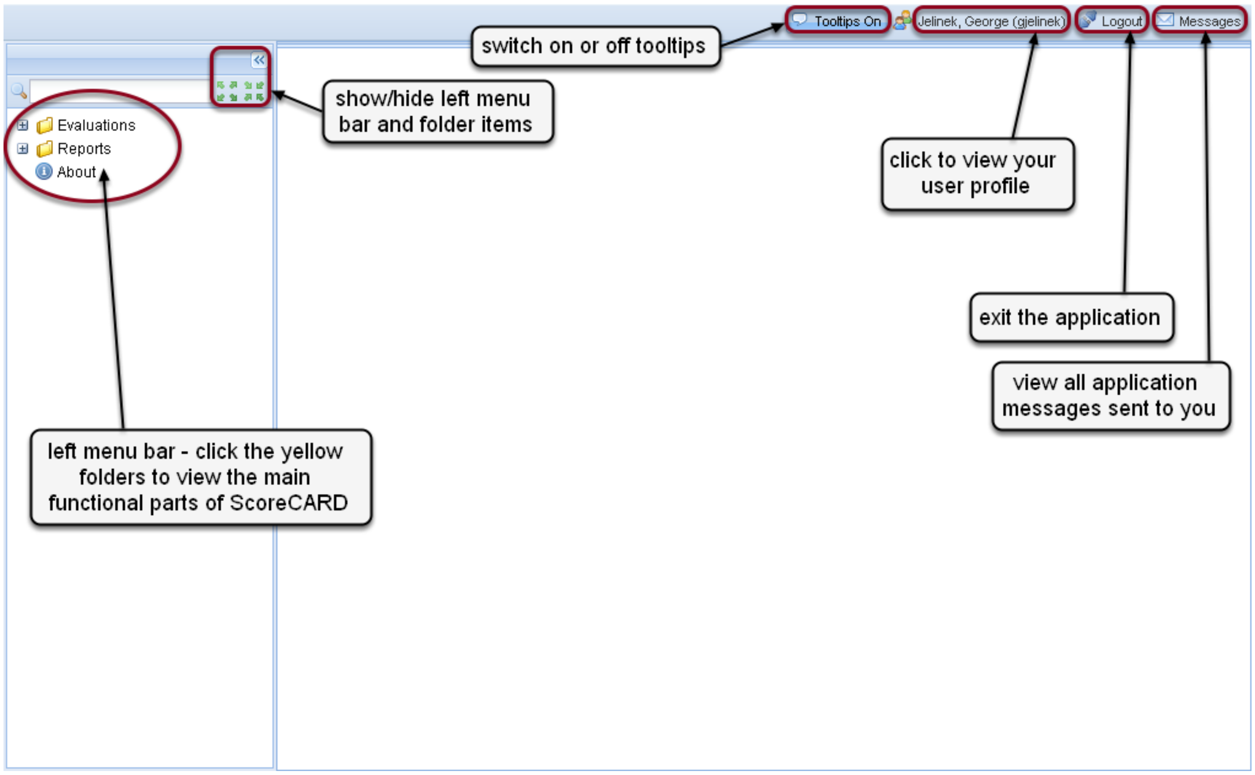

Figure 3: Genesys Quality Manager User Interface

The main user interface screen is shown in the screenshot above. Clicking on folders (e.g. **Evaluations**) in the left menu bar displays items, which when clicked on display a tabbed window in the main part of the screen for a particular area of functionality (e.g. **Evaluation List**).

The buttons at the top right of the screen are common to all users.

Tool tips (information boxes that appear when your mouse cursor hovers over a Genesys Quality Manager feature) are switched on by default, but may be switched off by clicking the button at the top right of the screen.

Your user profile can be viewed and modified by clicking your user name (see next step), you can exit (log out) of the application here and you can view all Genesys Quality Manager system messages sent to you by clicking the **Messages** button (see last step).

Editing Your User Profile

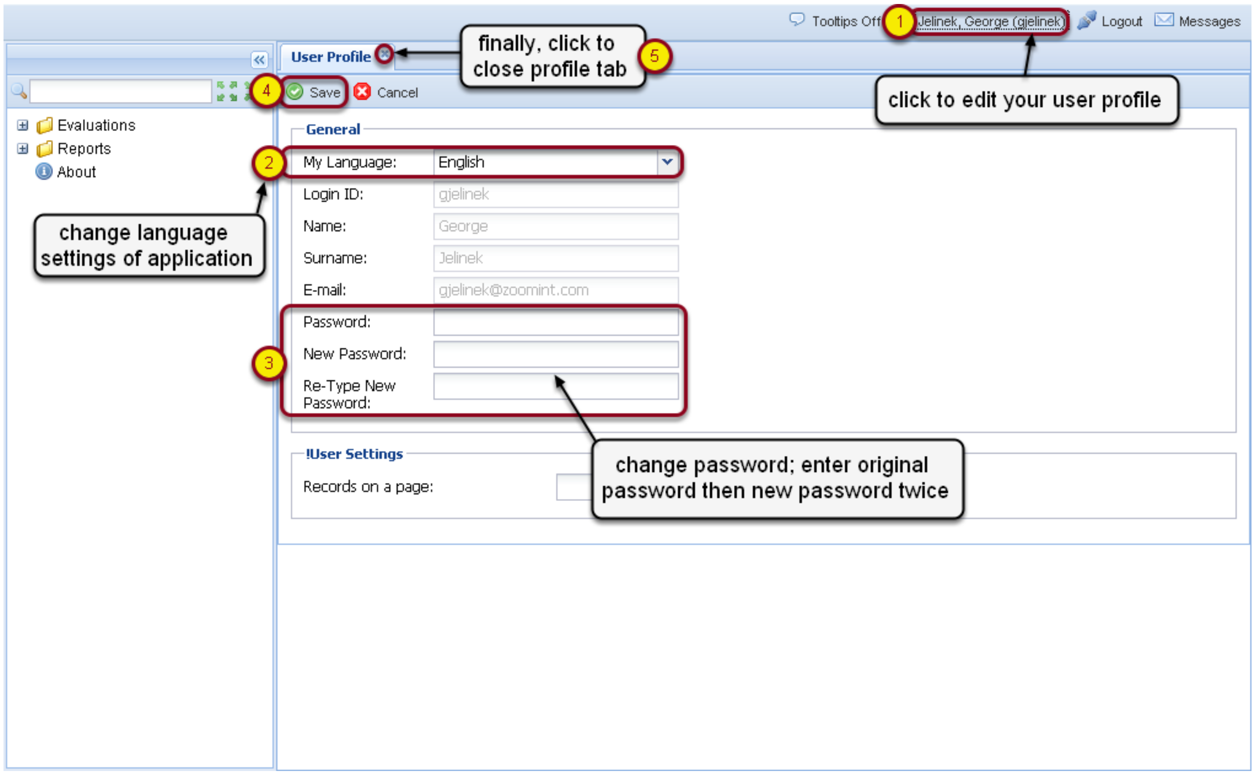

Figure 4: Editing Your User Profile

To view and edit your user profile, click the button with your user name on it. A tab opens, enabling you to update your user details.

Generally you can only edit your language settings (the language of the application when you are logged in) and change your password here.

Note: Changing the language of the application here is only applied the next time you log in.
Additionally, if your browser is not set to use the same language in menus and system messages, you may get occasional mixed-language alert messages when, for example, you refresh the browser page.

To change your password, enter your original **Password**, then a **New Password** in the following two text fields. New passwords must have at least 8 characters, with a least one character a number, at least one a lower and one an upper case letter.

The *User Settings* section contains the following parameters:

- *Records on a page* – enter the number of rows to display on list screens, for example the Evaluation List and User Manager screens. Entering a larger number here (greater than 20) is useful for larger PC displays and will result in fewer pages, but may take longer to scroll or display.

Click **Save** to update your user profile, or **Close** to close the tab without also saving.

Note: As mentioned above, if Contact Center (e.g. CUCM) integration is used with Genesys Quality Manager, only language settings and your password can be updated here. If Genesys Quality Manager is being used in standalone (non-integrated) mode, it may be possible to modify your login ID, name and email address too - please check with your Administrator.

View System Messages

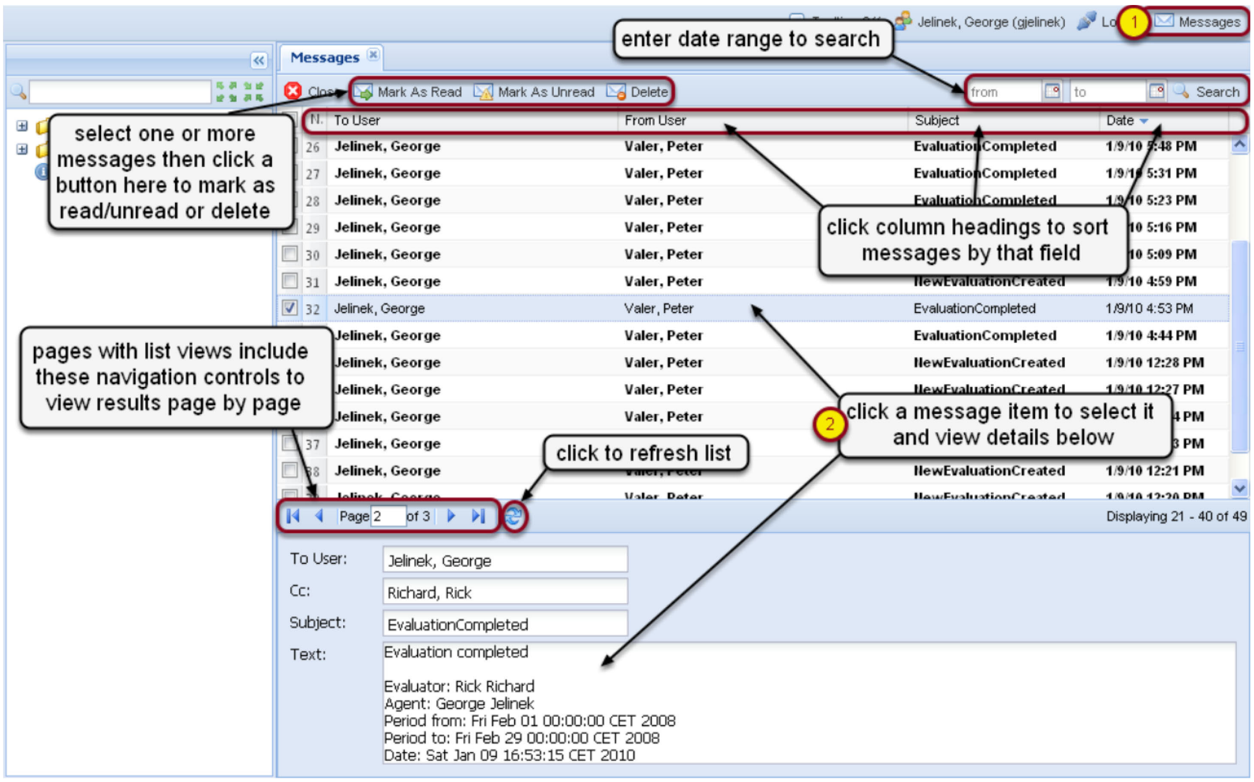

Figure 5: View System Messages

Clicking the **Messages** button at the top right of the application window opens the messages tab.

System messages are automatically generated when certain events take place, such as scheduling or completing an evaluation. You can view all the messages that are to / from your user profile here.

Click an item to view the message details in the text fields at the bottom of the tab.

You can also filter and sort the message list by clicking on column headings or enter a date range to search in, and click the **Search** button at the top right.

Chapter

3 Evaluations

The information in this chapter is divided into the following topics:

Scheduling An Evaluation

A short tutorial to show how to schedule a new self-evaluation in Genesys Quality Manager 8.0.480.

Open The Evaluation Planner

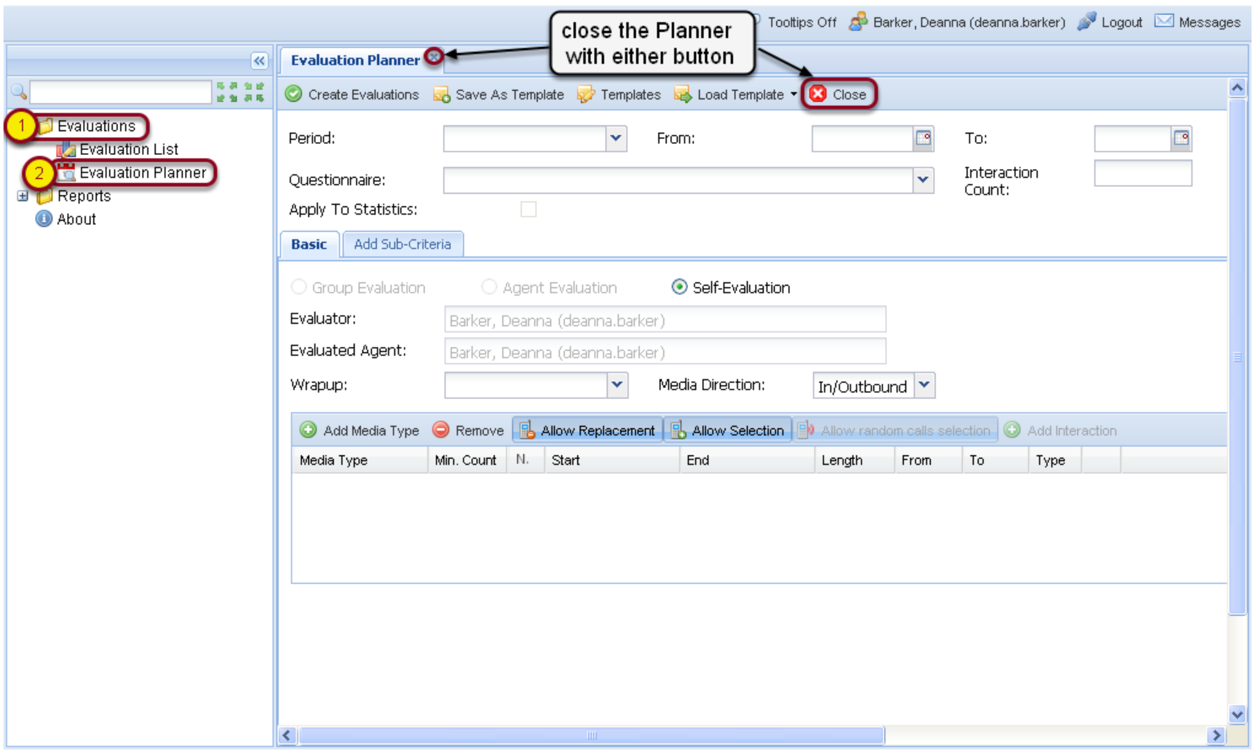

Figure 6: Open The Evaluation Planner

To schedule a new evaluation, open the **Evaluation Planner** in the **Evaluations** section of the left hand menu.

If you wish to close the new evaluation without planning evaluation(s), press the **Close** button or click the tab close icon to exit the Planner.

Specify An Evaluation Period And Questionnaire

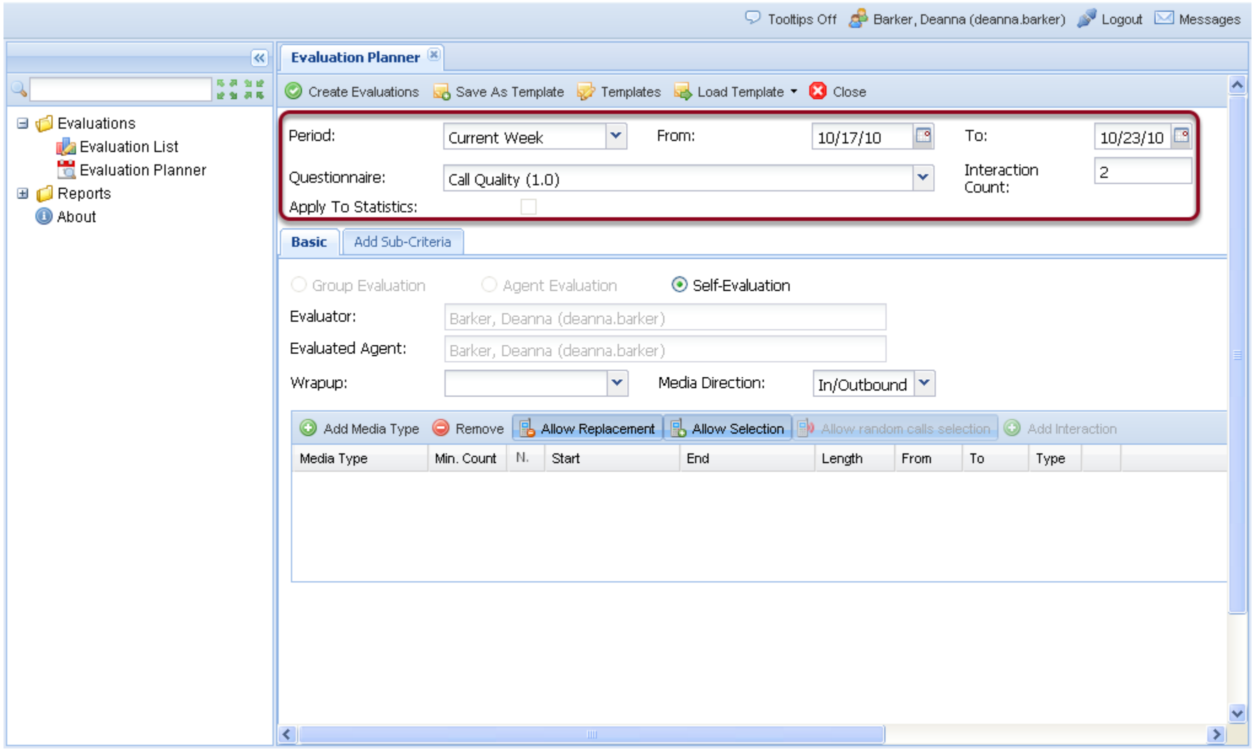

Figure 7:Specify An Evaluation Period And Questionnaire

Using the drop down boxes for **Period**, **From** and **To**, specify the evaluation period (time range of interactions to evaluate).

The **Questionnaire** drop down box enables you to pick an available questionnaire to use for the evaluation.

Finally, the **Interaction Count** specifies the minimum number of interactions (calls, messages or other media) to be used for this evaluation. This number should equal the sum of all the media type counts specified in the **Basic** and **Sub-Criteria** tabs (see later). You can leave this empty for now, and fill in a value after completing the **Media Type** section later.

Filter Interactions By Wrapup Or Media Direction (Optional)

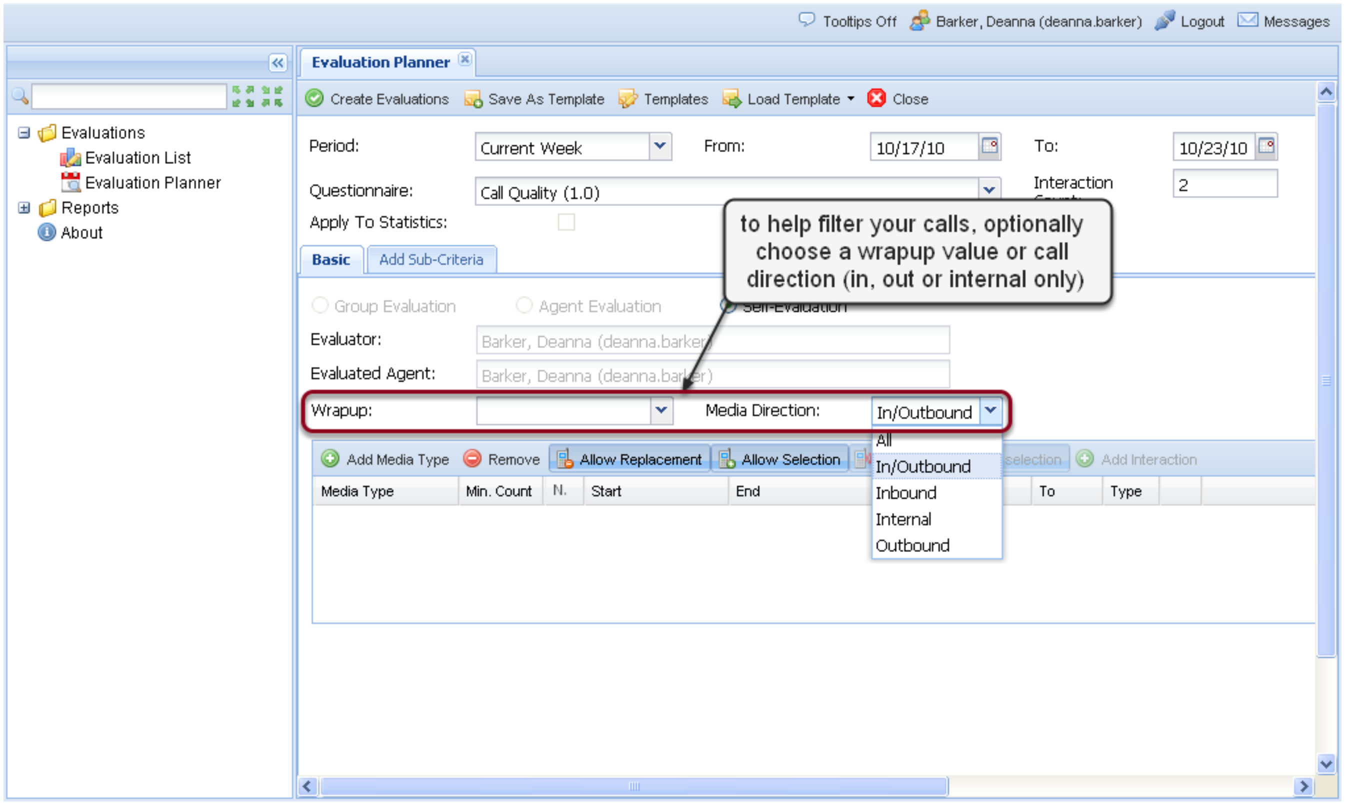

Figure 8: Filter Interactions By Wrapup Or Media Direction

Your interactions (e.g. calls) can be further filtered by selecting a **Wrapup** value (if one is available) and a filter on the **Media Direction** (incoming calls or outgoing calls only, internal only, or all calls).

Add Evaluation Media Types

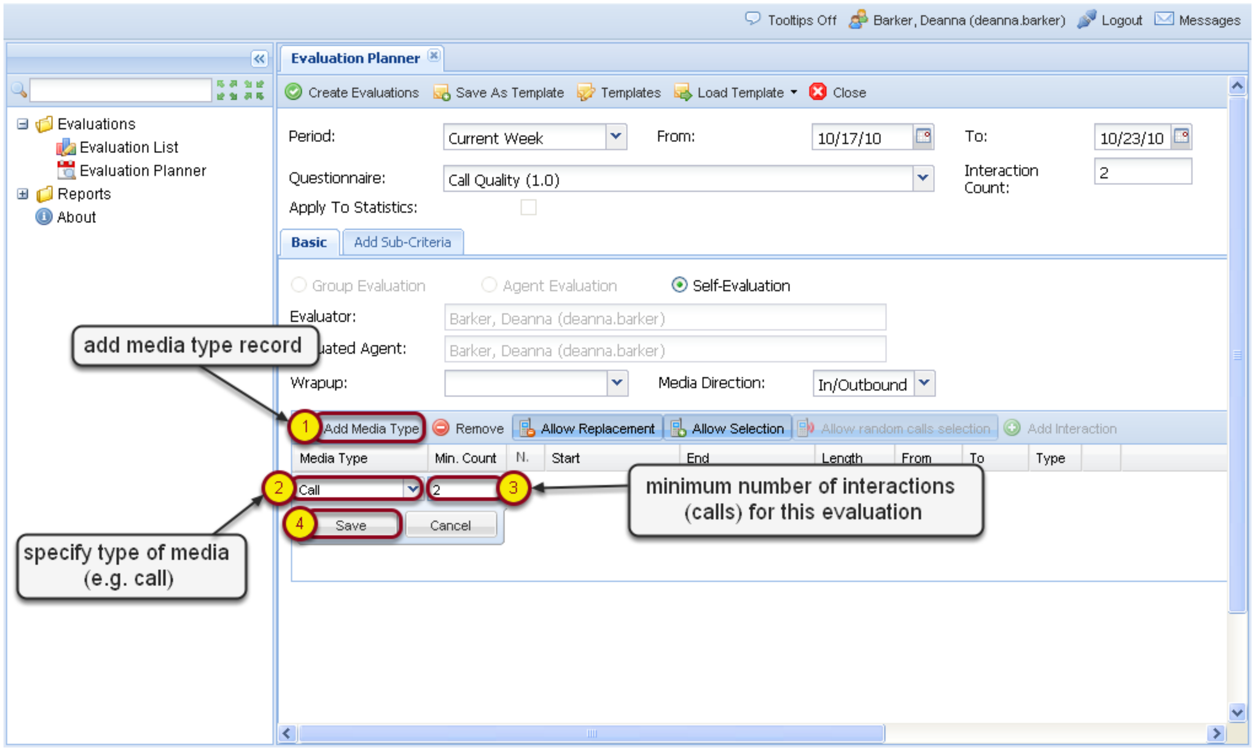

Figure 9: Add Evaluation Media Types

Next on the **Basic** tab, specify the types of interactions (media) to be evaluated (for example: calls, screen videos, etc.).

Click the **Add Media Type** button to add a new **Media Type**. The media types created within QM Suite are as follows:

- **Call** – select only from interactions containing call recordings (this includes screen captures that also include call recordings)
- **Call+Screen** – select only from interactions that contain both a call recording and a screen capture
- **Screen** – select only from interactions containing screen captures (this includes call recordings that also include screen captures)

External media may also be specified (**Chat** logs or **Email**). In the latter case, the media must be accessed outside Quality Manager.

The **Min. Count** field is the minimum number of media records that should be sampled for this type. Unless **Sub-Criteria** are going to be specified, the sum of all **Media Type** record counts on this tab must equal the **Interaction Count** value at the top of the Planner screen.

The **Allow Selection** and **Allow Replacement** buttons have no function when logged in as an agent, so please disregard them.

Add Sub-Criteria (Optional)

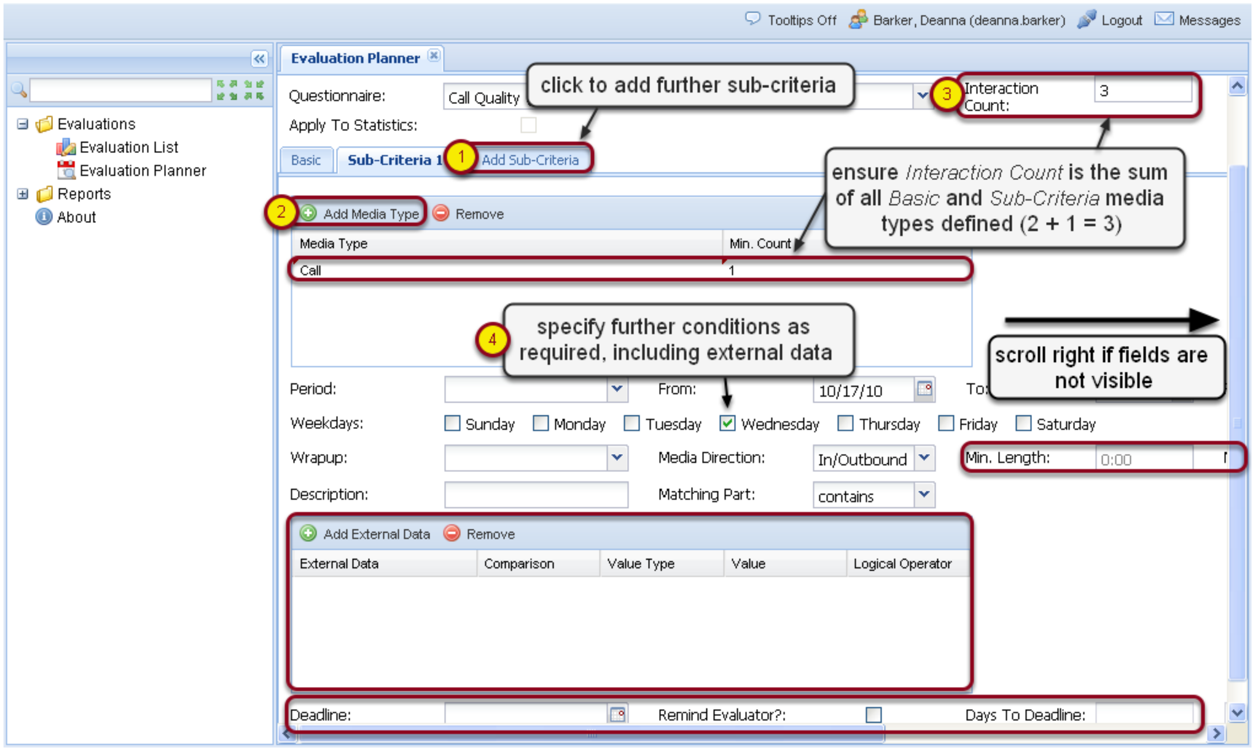

Figure 10: Add Sub-Criteria (Optional)

Optionally, more advanced filtering criteria can be specified by clicking the **Add Sub-Criteria** tab.

In addition to the options available on the *Basic* tab, a subset of sampled calls can be required to match a different specific time period, a minimum call length (**Min. Length**) or have specific **External Data** associated with them.

Finally, a deadline can be specified, by which the evaluation must be complete. Set a future date in the **Deadline** field, specify whether you want to send a reminder message to yourself (**Remind Evaluator**), and how many days before the deadline the message should be sent (**Days To Deadline**).

Further Sub-Criteria can be added as required, but as mentioned earlier, the sum of the **Min. Count** fields for all media records from all Basic and Sub-Criteria tabs must be the same as the **Interaction Count** value at the top of the Planner.

Using Evaluation Templates (Optional)

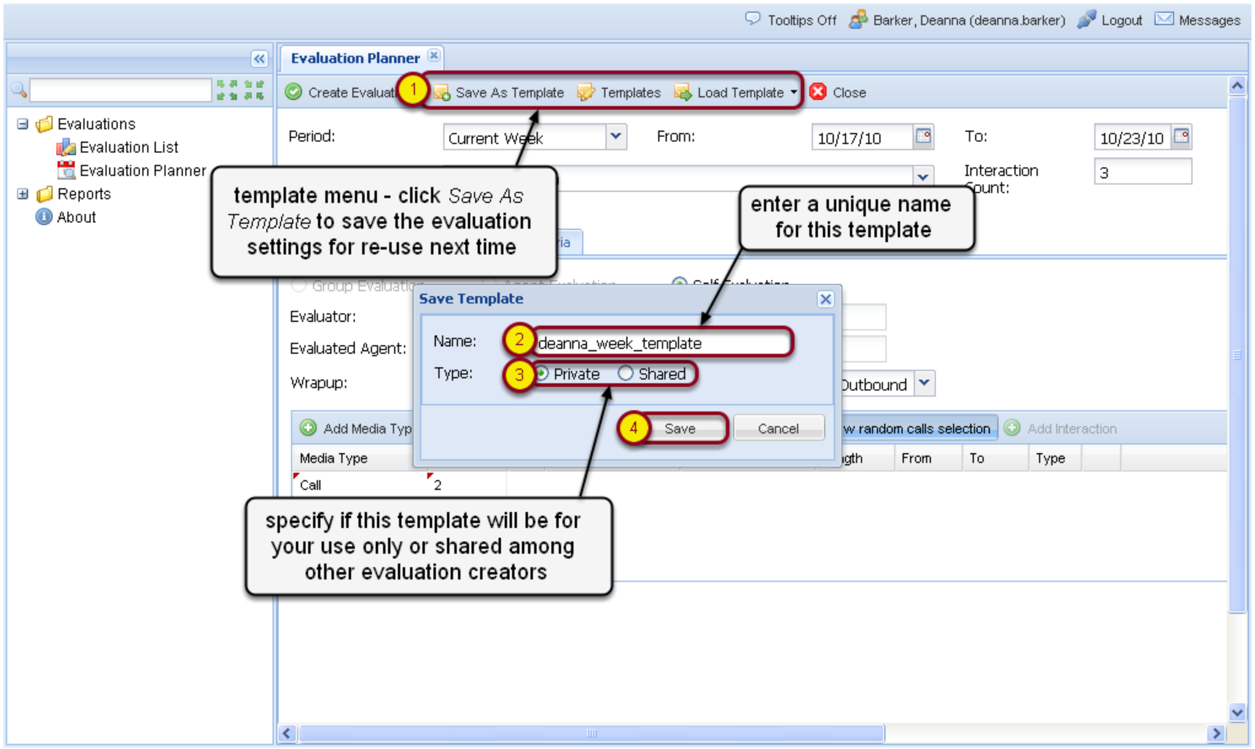

Figure 11: Using Evaluation Templates (Optional)

The evaluation is now ready to be scheduled. However, you may want to first save these settings now as an evaluation template, which will allow you to schedule a similar evaluation much more quickly next time.

Each evaluation template can be saved for private use only, or shared among all users having evaluation creation permissions.

To save this evaluation as a template, click the **Save As Template** button, specify a unique name for the template in the dialog box and specify whether this template is to be shared with other evaluation creators or not, before clicking the *Save* button.

After saving one or more evaluation templates, the template settings can be loaded into the Evaluation Planner (after creating a new evaluation as usual), by clicking the **Load Template** button in the men bar and selecting an existing template name from the drop-down list that appears.

Note: Loading an evaluation template will overwrite any existing settings in the Evaluation Planner.

Evaluation templates that you have permissions to load can also be permanently deleted by clicking the **Templates** button in the menu bar of the Evaluation Planner, then selecting the appropriate template in the Templates dialog box and clicking the **Remove** button.

Removing an evaluation template is permanent and cannot be undone!

Schedule (Create) The Evaluation

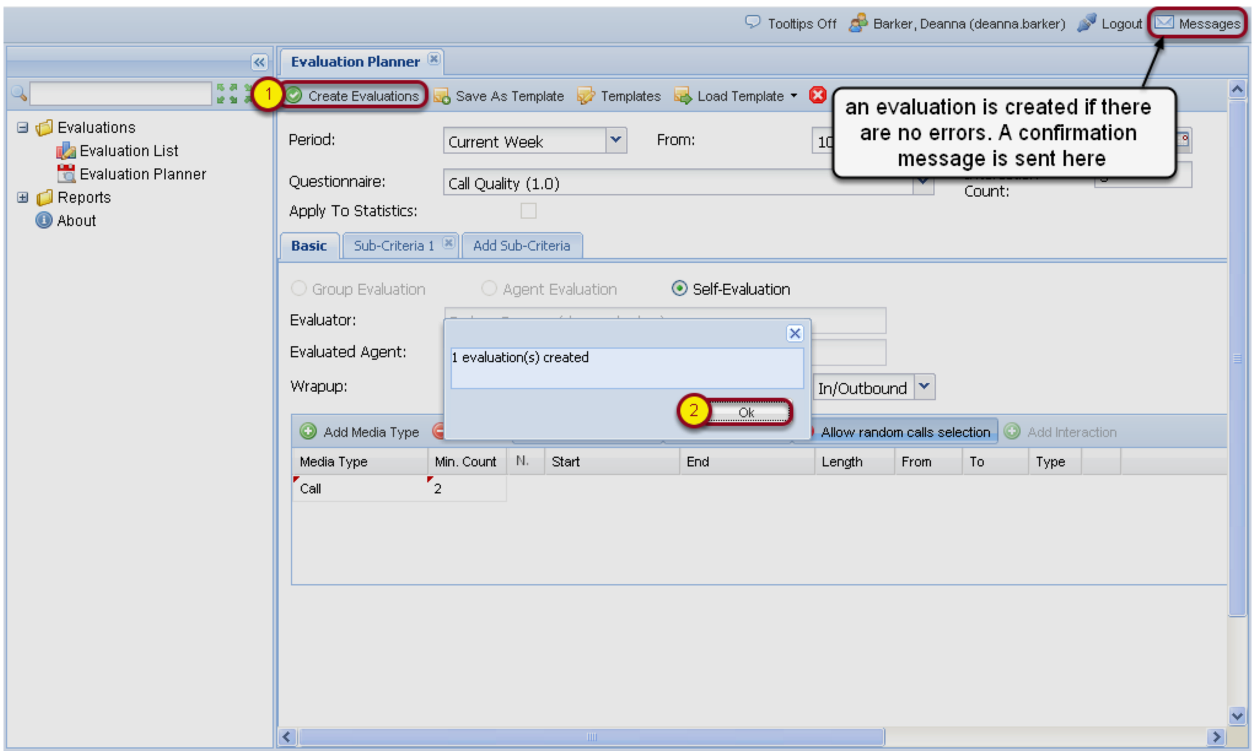

Figure 12: Schedule (Create) The Evaluation

After specifying the criteria for determining agent calls for evaluation, schedule (i.e. create) the evaluation by clicking the **Create Evaluation** button with green check mark symbol at the top of the Evaluation Planner page.

If any parameters or options are not correct during creation, a validation error will help you identify the cause of the issue; otherwise a small message will confirm that the evaluation has been scheduled.

After clicking **OK** the Planner screen will close. At this point, a confirmation message is sent to you, visible in **Messages** list.

View Created Evaluations

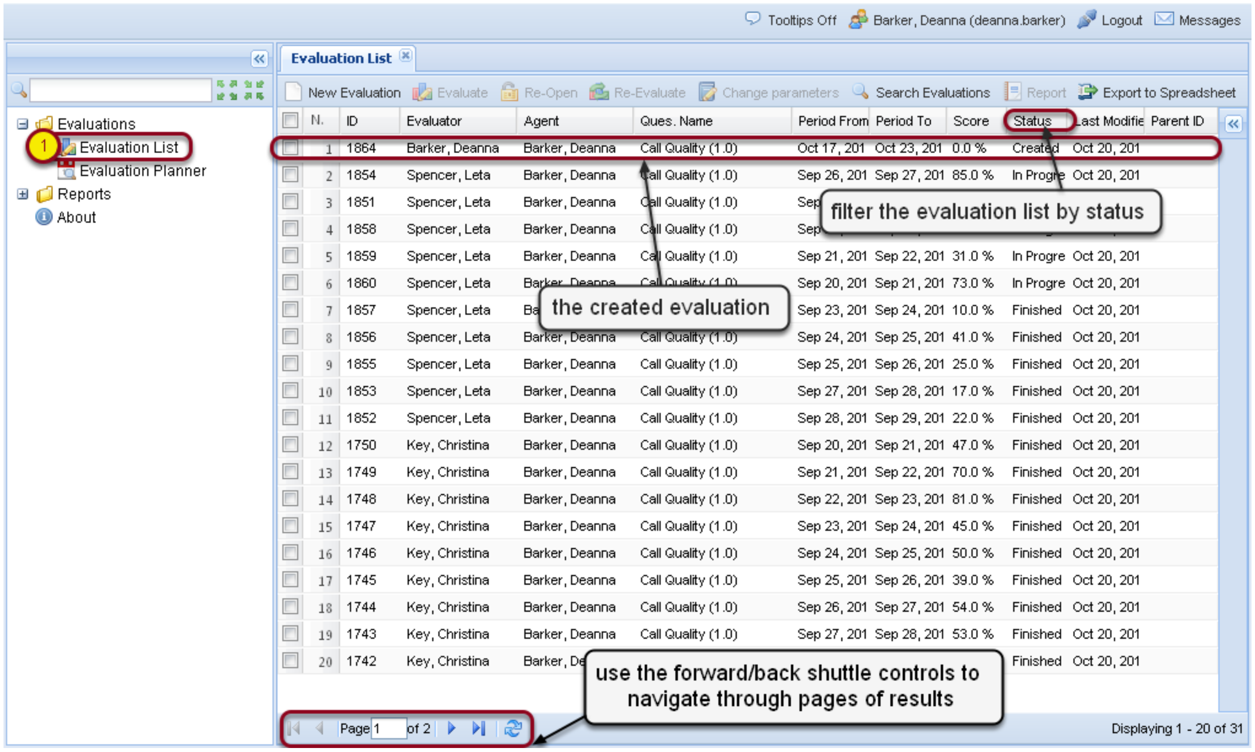

Figure 13: View Created Evaluations

Existing evaluations are displayed in the **Evaluation List**. Your newly created evaluation should be visible at the end of the list by default.

This list screen enables you to also permanently remove (**Delete**) evaluations and create **New Evaluations**. Pressing the latter button opens the Evaluation Planner as before.

The status of a newly scheduled evaluation is **CREATED**, but this will change to **IN PROGRESS** or **FINISHED** during the life cycle of the evaluation - see Perform A Self-Evaluation for more information.

You can sort the columns by clicking on a column heading, or show evaluations having a specific status via the **SHOW** drop down.

Searching For Evaluations

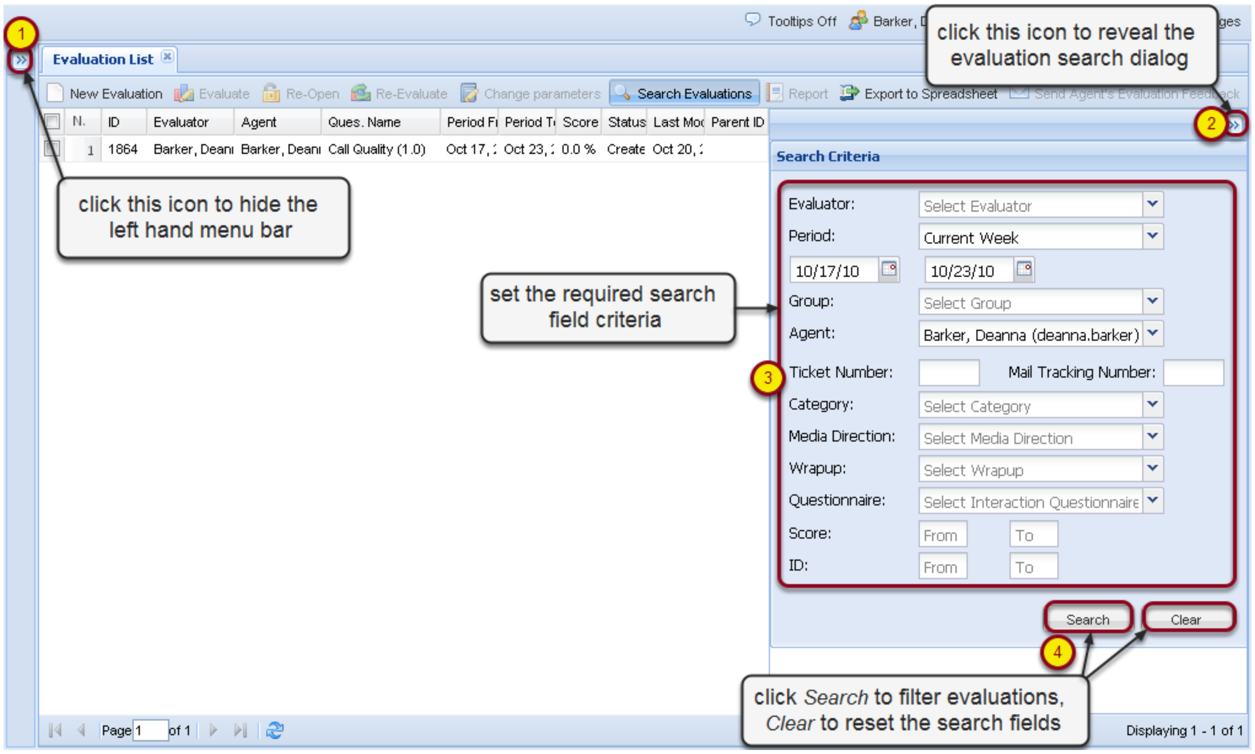

Figure 14: Searching For Evaluations

Evaluations can be also be filtered using the search dialog.

Click the icon at the top right of the Evaluation List tab (see screenshot) to reveal the search dialog, set as few or many search fields as necessary, and click **Search** to apply the filter, or **Clear** to reset the search fields.

In order to get the maximum possible display width for the list, you can hide the left hand menu bar (see screenshot).

Performing A Self- Evaluation

Evaluations contain one or more media (interaction) records, each of which must be graded by answering all questions shown in the evaluation's questionnaire. This tutorial describes how to open and grade a self-evaluation that you have previously scheduled.

Open The Scheduled Evaluation

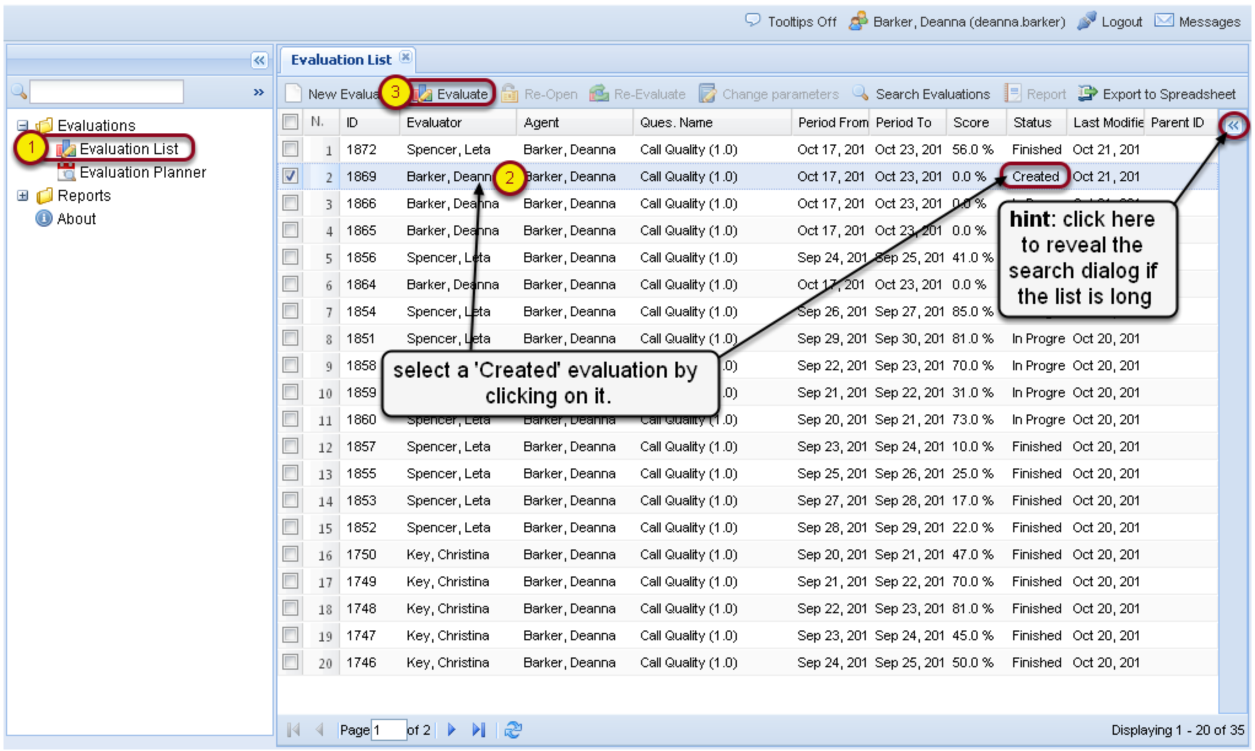

Figure 15: Open The Scheduled Evaluation

To perform an evaluation, navigate to the **Evaluation List**, select (click) the appropriate evaluation and click the **Evaluate** button.

Only evaluations that have been created but not yet completed are possible to evaluate.

To re-use a completed evaluation, see the 'Re-Use an Evaluation' steps at the end of this tutorial.

The Evaluator Screen

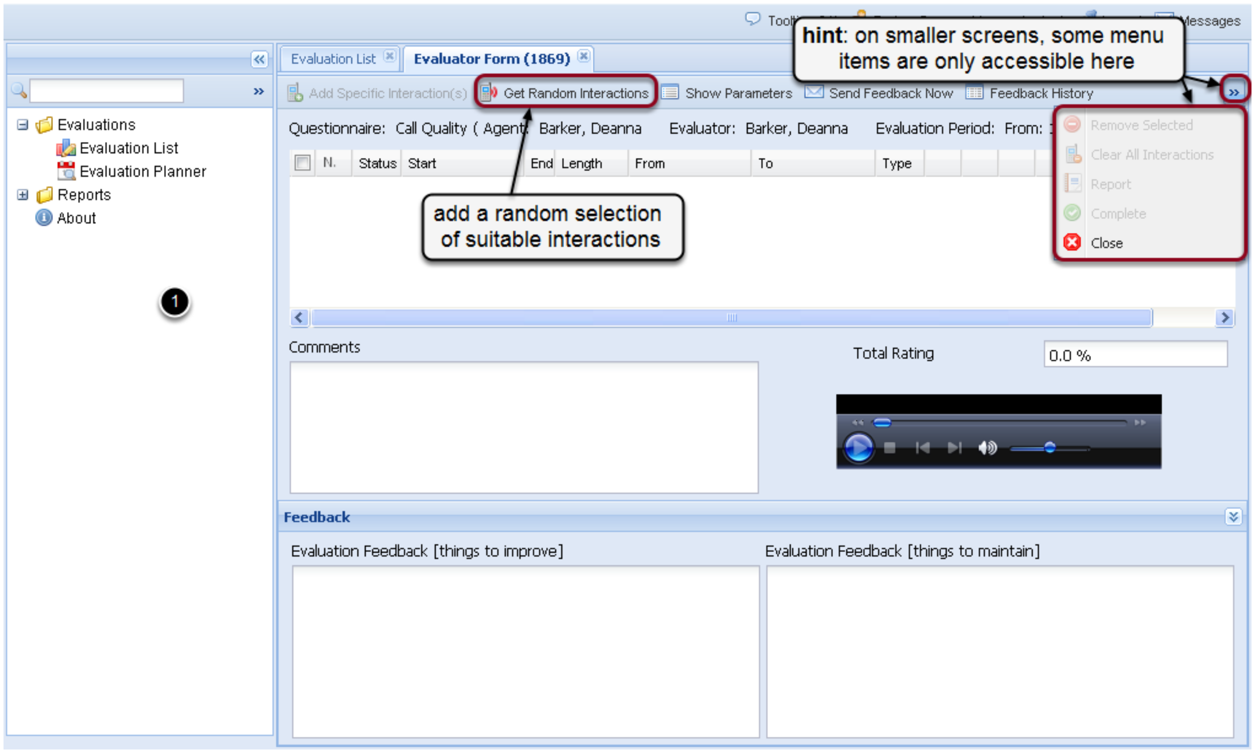

Figure 16: The Evaluator Screen

After starting an evaluation, the evaluator form is displayed. This can be closed again without saving changes by clicking the **Close** button on the toolbar or tab. Note that some buttons mentioned in this tutorial may not be visible on smaller monitor screens and can only be accessed via the expansion symbol on the right-hand side (see screenshot).

Add Random Media For Evaluation

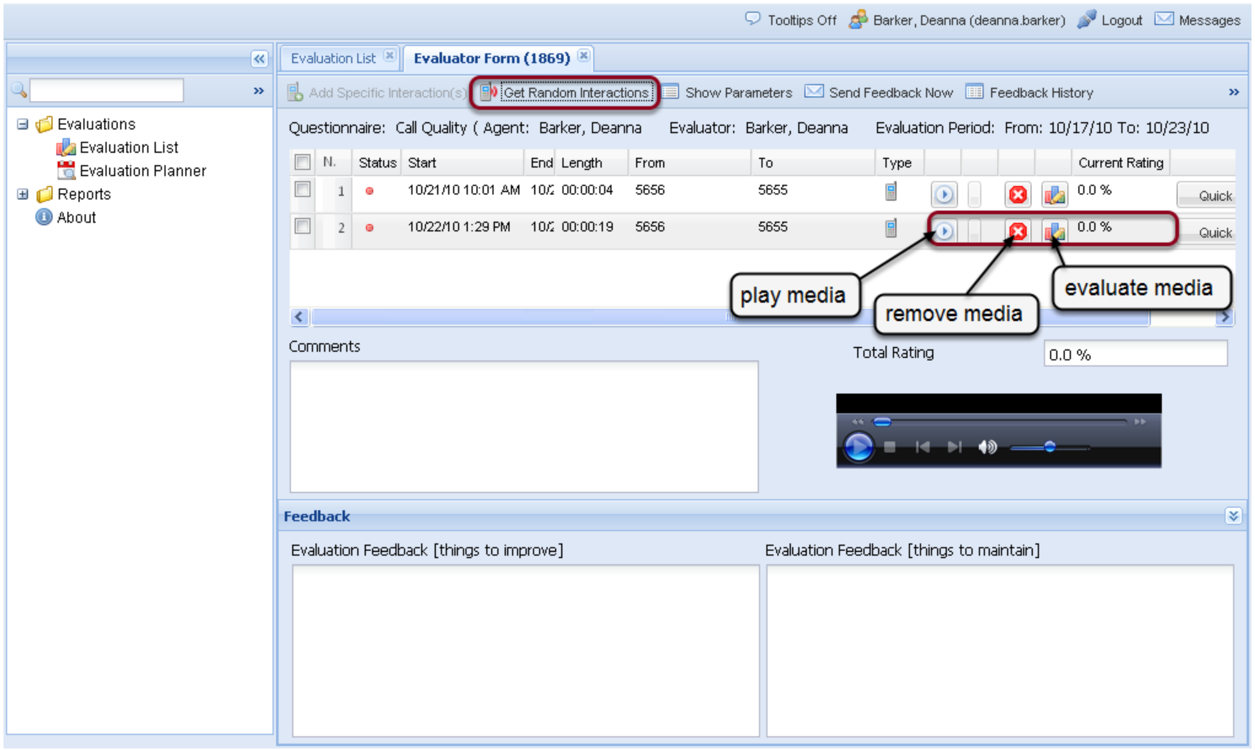

Figure 17: Add Random Media For Evaluation

If the evaluation uses agent calls, click the **Get Random Interactions** button.

This will retrieve the minimum number of appropriate agent calls 'interactions' or 'media records'), as specified when scheduling the evaluation

Each media record (if permitted) has buttons to play the media on the integrated media player, replace the media record, remove the media and grade the media record. You might wish to replace a media record if the recording is bad or irrelevant.

The **Current Rating** column displays the sum of questionnaire answers for each media record, while the **Total Rating** field displays the average of all **Current Rating** values. Finally, a **Quick Note** button optionally enables the evaluator to draw attention to some short text written for each media record without having to open the grading form. This could be used for quickly marking exceptional records for later study, for example.

The **Comments** and **Evaluation Feedback** text fields visible on this screen display the text added in these fields for all media evaluations.

Important! When using the **Get Random Interactions** function when performing an evaluation, Genesys Quality Manager only selects interactions that have not yet been used for evaluation.

Grading A Media Record

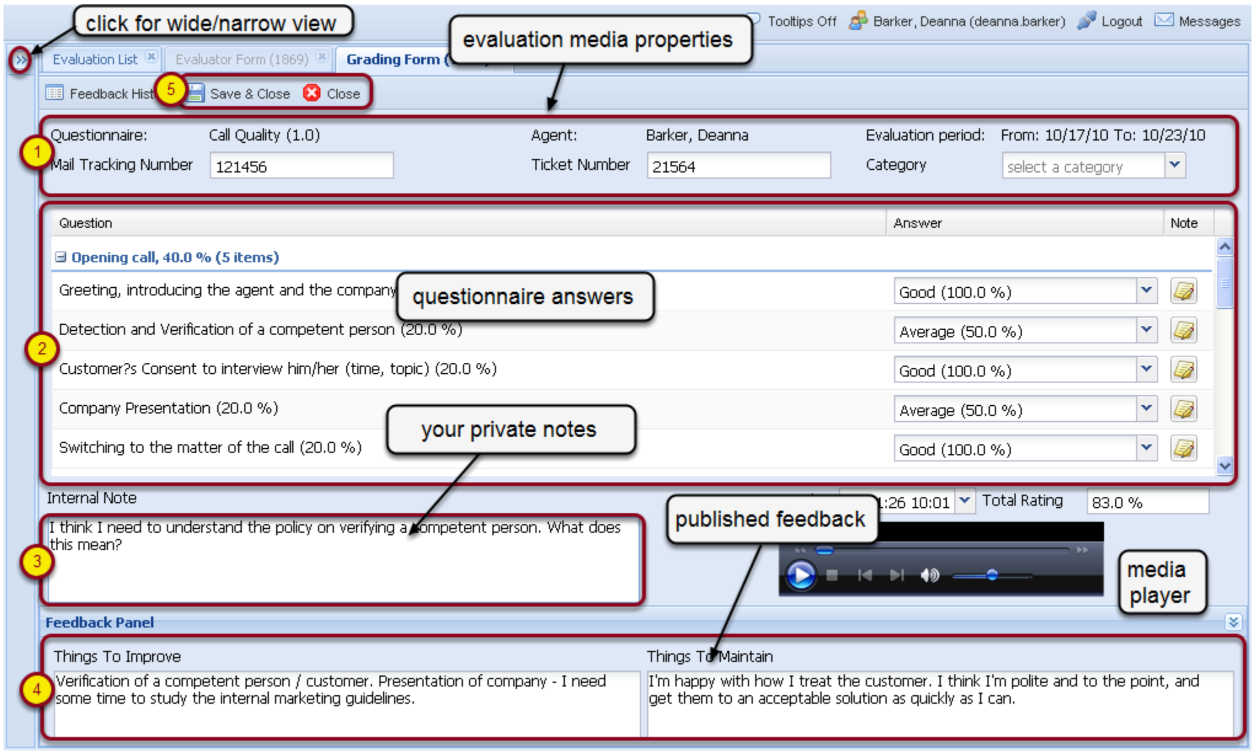

Figure 18: Grading A Media Record

To grade a media record, select (click) the **Evaluate** icon for that record. A form will open, and (if the media type is a call), the media will begin to be played. The **Calling Number**, **Ticket Number** and **Category** can be updated as required.

The questionnaire associated with the evaluation will be displayed in a small window on the form. Scroll down in the window if necessary in order to view all the questions.

Select a suitable answer for each question, stopping and replaying the media as necessary. All questions must be answered for all media records present in the evaluation before the evaluation can be marked as complete.

The **Internal Note** text field can be used for keeping notes about a media record that are only visible to you.

The **Feedback Panel** contains two text fields that can be seen by the evaluated agent. **Things To Maintain** can be used to keep a list of points illustrating areas of good performance by the agent, whereas any areas for improvement should be noted in the **Things To Improve** field.

The **Save** button at the top of the grading form must be clicked in order to keep all modifications made to the form fields. The grading session can therefore be saved and returned to at a later time. The **Close** button closes the grading form.

Complete The Evaluation

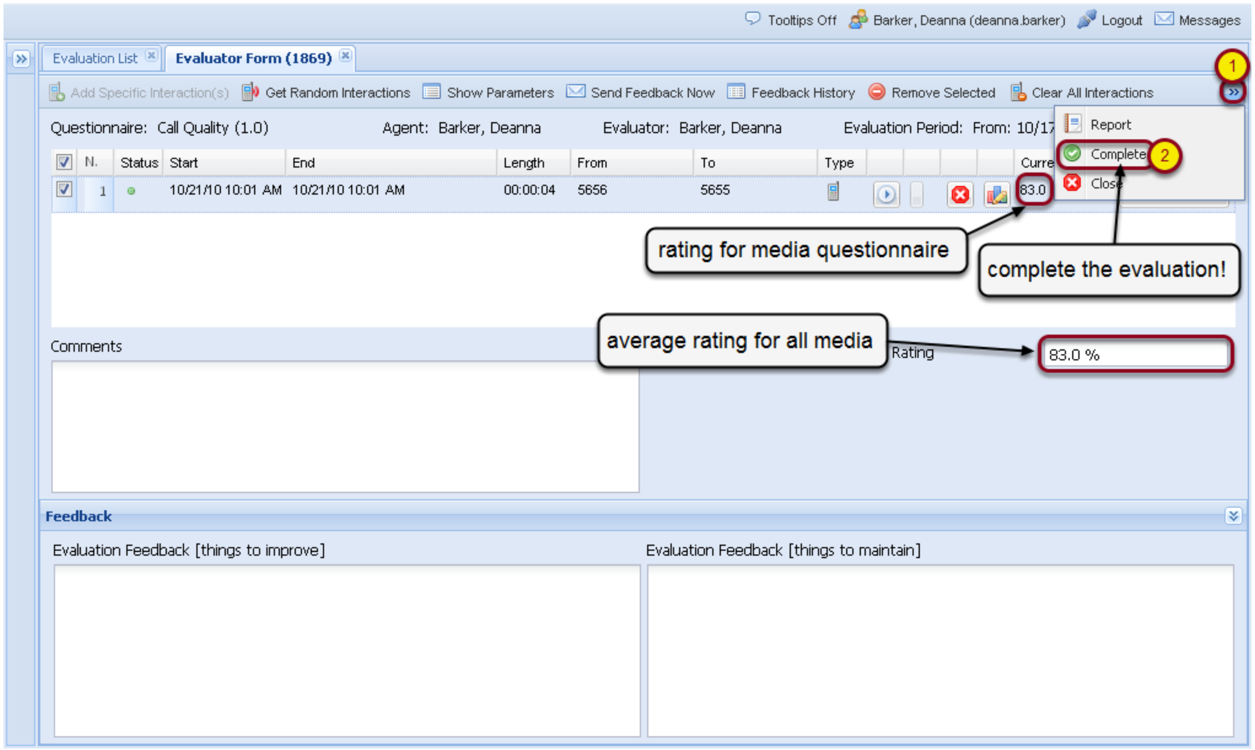

Figure 19: Complete The Evaluation

Once the media record(s) have been fully graded, the evaluation may be marked as completed.

Note: All media records must be graded in order to mark an evaluation as complete, so remove any unnecessary media records before attempting to complete the evaluation.

To complete the evaluation and exit this tab, click the **Complete** button on the toolbar (the button may be hidden when displayed in a small browser window - see hint in the second step of this tutorial). If all media record questionnaires have been fully answered, Genesys Quality Manager marks the evaluation as complete.

The completed evaluation can still be opened from the evaluation list in read-only mode, from which you can review your scores and create a printout or report as required.

Re-Open An Evaluation (Optional)

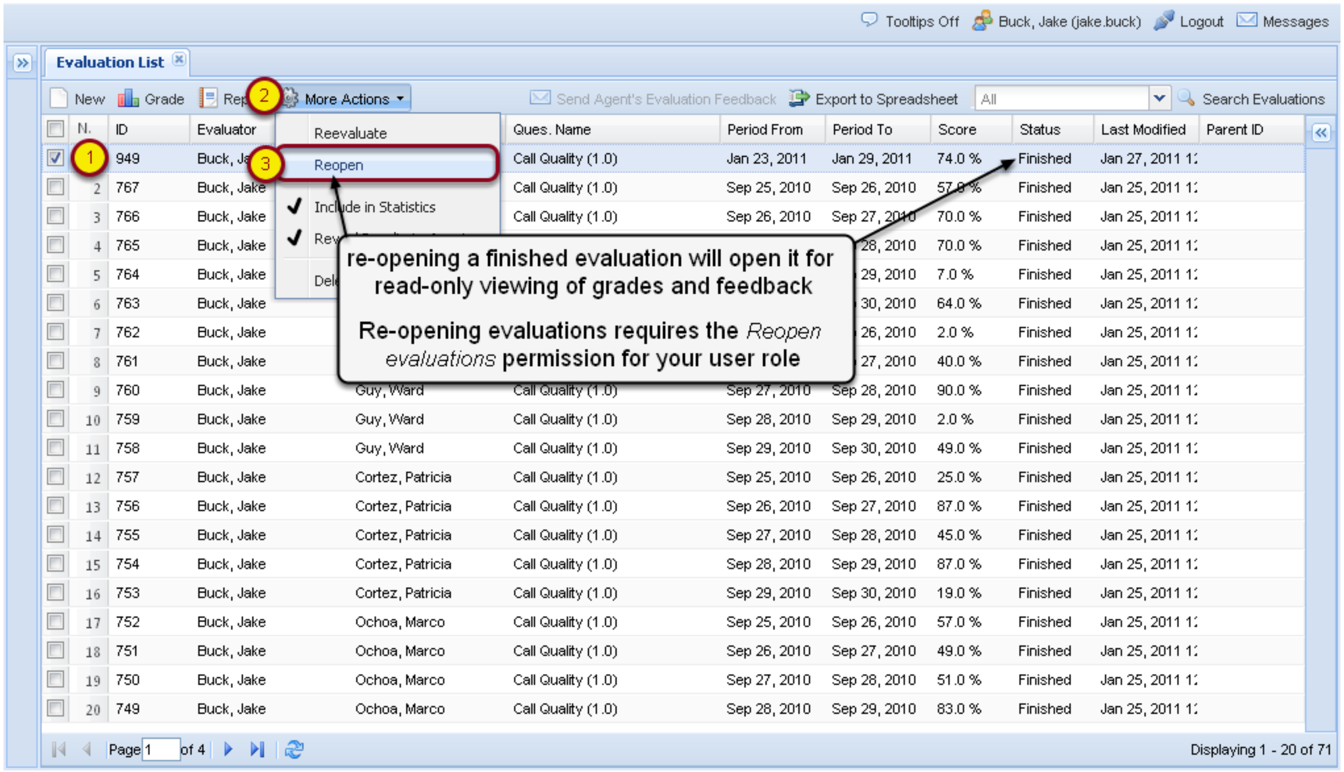

Figure 20: Re-Open An Evaluation (Optional)

After an evaluation is marked as complete, it is assigned the *Finished* status. Finished evaluations cannot be opened again for editing scores unless the custom *Reopen evaluations* permission has been assigned to your agent's role – please check with your Call Center Manager or Administrator.

A user with the *Reopen evaluations* permission can select a *Finished* evaluation and click the *Reopen* button, after which the evaluation will be assigned the status In Progress. If the evaluation is your own self-evaluation, you will be able to modify your grades, otherwise the evaluation will be opened in read-only mode.

Deleting Evaluations (Optional)

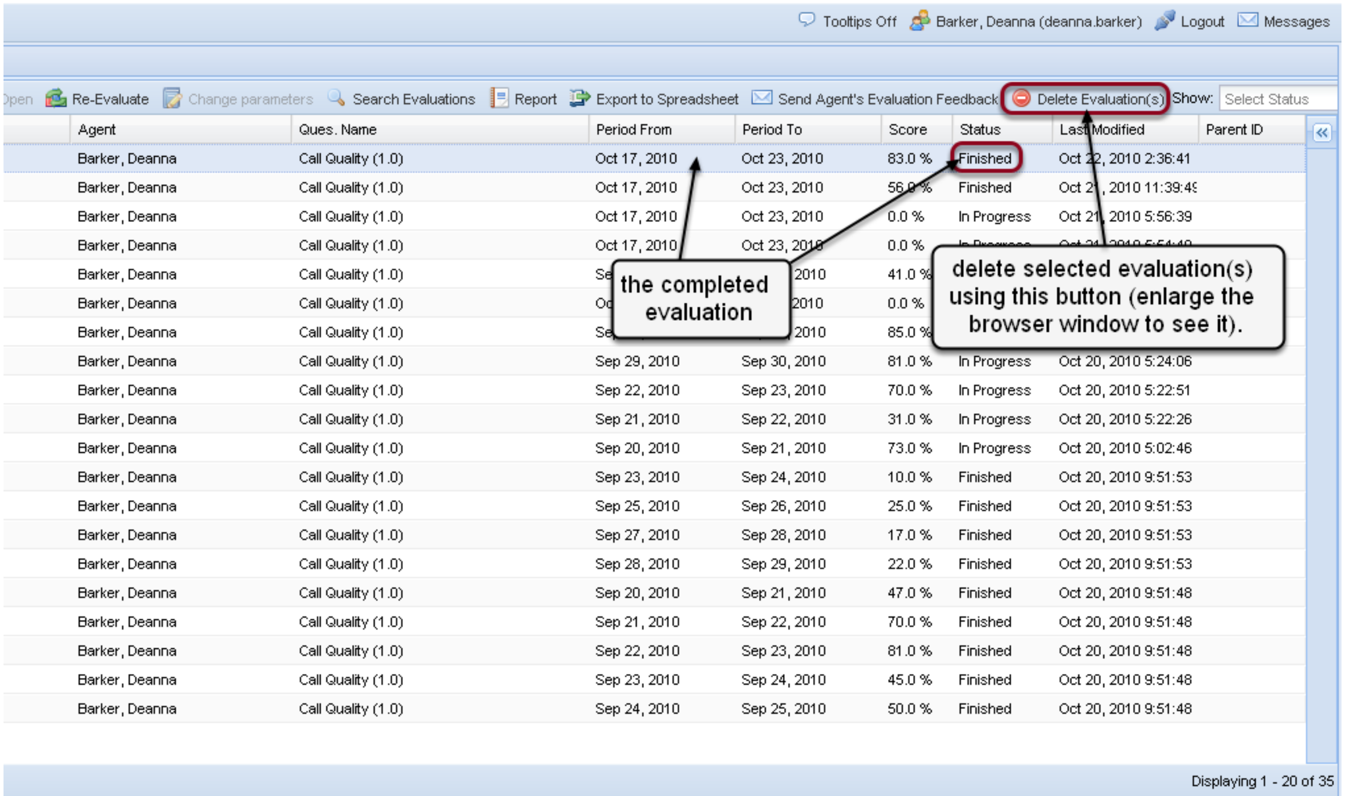

Figure 21: Deleting Evaluations

The evaluation list now shows the completed evaluation with a **Finished** status.

To delete an evaluation that you have created (having **Created**, **In Progress** or **Finished** status), select the evaluation(s) and click the **Delete Evaluation(s)** button. If you cannot see this button, enlarge your browser window (see screenshot). If this button cannot be clicked, you do not have permission to use it – please check with your administrator.

Re-Use The Evaluation - 1 (Optional)

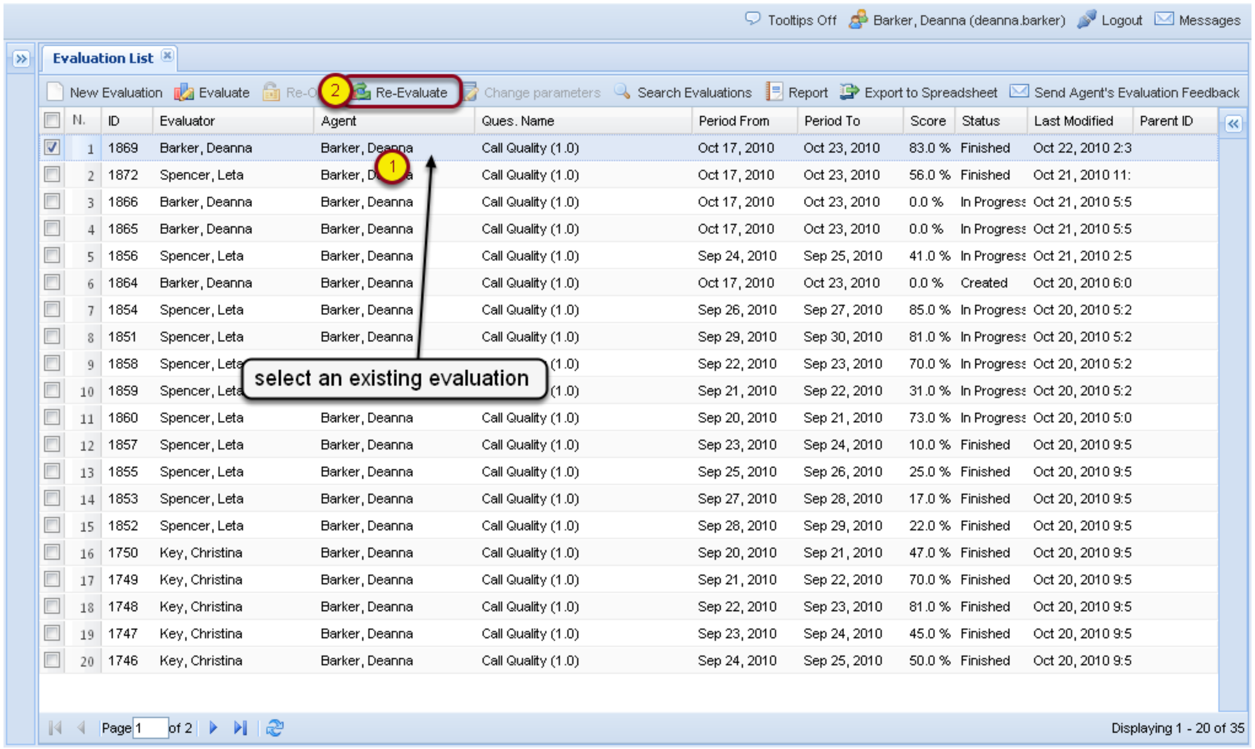

Figure 22: Re-Use The Evaluation - 1 (Optional)

An existing evaluation (with any evaluation status) can be re-used, in order to quickly set up and perform self-evaluations with the same parameters for the same or other agents.

Typical usage scenarios are either to evaluate the same agent (and/or his/her calls) using the same or a different evaluator, or to create the same evaluation for multiple evaluators in order to find 'common ground' in how they score the same interactions.

To re-use an existing evaluation, select an evaluation by clicking on it, and click the **Re-Evaluate** button in **the More Actions** dropdown.

Re-Use The Evaluation - 2 (Optional)

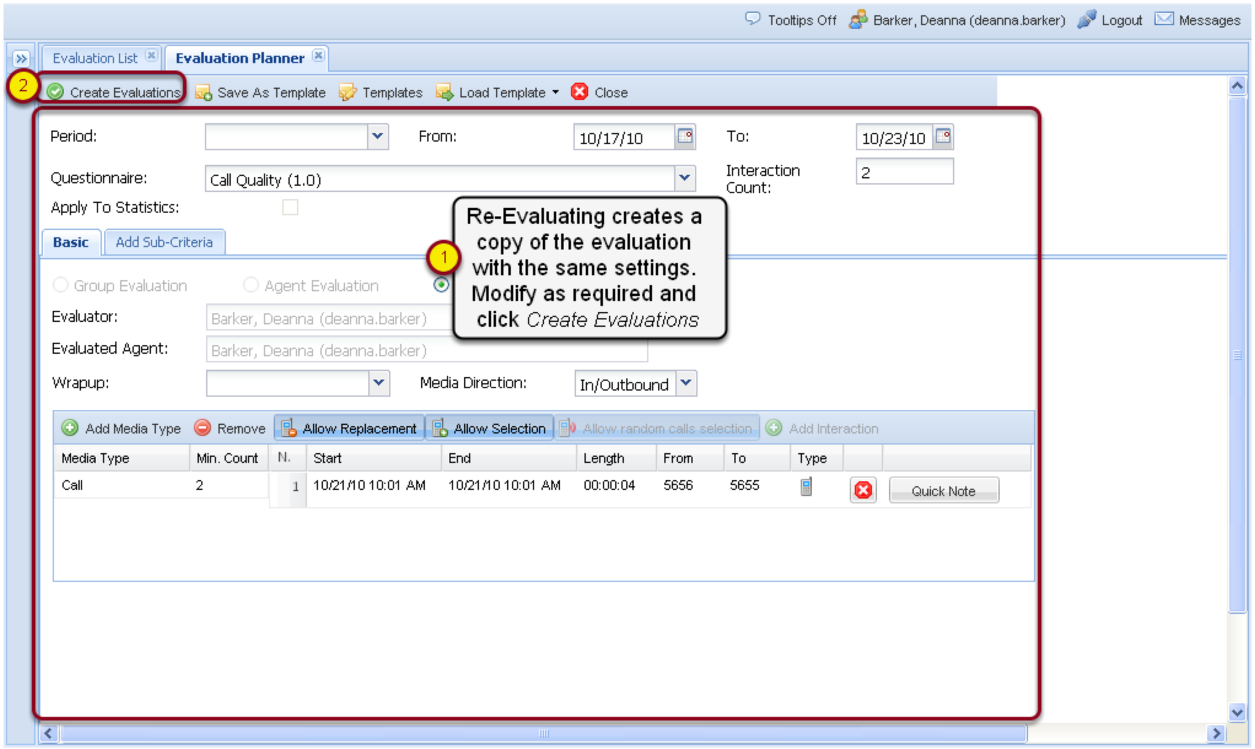

Figure 23: Re-Use The Evaluation - 2 (Optional)

The **Evaluation Planner** is opened again, this time with the criteria pre-populated with the original evaluation's values.

Any of these can be modified as necessary, then the **Create Evaluations** button pressed as before. A new evaluation is created and appears in the evaluation list.

Chapter

4 Requesting Technical Support

Technical Support from VARs

If you have purchased support from a value-added reseller (VAR), please contact the VAR for technical support.

Technical Support from Genesys

If you have purchased support directly from Genesys, contact Genesys Technical Support at the following regional numbers:

Region	Telephone	E-Mail
North America and Latin America	+888-369-5555 (toll-free) +506-674-6767	support@genesyslab.com
Europe, Middle East, and Africa	+44-(0)-1275-45-7002	support@genesyslab.com
Asia Pacific	+61-7-3368-6868	support@genesyslab.com.au
Malaysia	1-800-814-472 (toll-free) +61-7-3368-6868	support@genesyslab.com.au
India	1-800-407-436379 (toll-free) +91-(022)-3918-0537	support@genesyslab.com.au
Japan	+81-3-6361-8950	support@genesyslab.co.jp

Before contacting Genesys technical support, refer to the *Genesys Technical Support Guide* for complete contact information and procedures.