

Genesys Quality Management 8.0

Quality Manager

User Guide: CC Manager

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Document Version: 80gqm_us_ccmanager_02-2011_8.0.480.00 v1.00



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Chapter



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

- Document Purpose
- <u>Audience</u>
- Document Version
- Assumed Knowledge
- Conventions Used
- Related Documents

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 Managers.

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

Related Documents

For other documents related to Genesys Quality Manager please consult:

Genesys Quality Manager 8.0 Administration Guide



Chapter



Genesys Quality Manager 8.0.480 Overview

A short introduction giving an overview of the basic functions and features of Genesys Quality Manager 8.0.480, also including technical requirements for users of the application.

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

- Introduction
- Key Features
- User Technical Requirements
- User Guide Outline

Introduction

Genesys Quality Manager is a comprehensive web-based call center quality management application for evaluating and improving agent performance, available as a component of the Genesys Quality Management. Genesys Quality Manager supplies rich reporting features that identify agent strengths and weaknesses in customer service, interactions and communication skills.

Key Features

The main functions of Genesys Quality Manager are as follows:

- **Questionnaire Manager**: allows the creation of numerous agent evaluation questionnaires which are completely customizable for any call center. Each questionnaire can include individual access restrictions and interaction selection criteria.
- **Evaluation Planner**: Genesys Quality Manager provides a tool for planning evaluations based on agent organization and offering in-depth criteria to specify random or specific interactions for evaluation.
- **Evaluation Process**: The quality manager or supervisors can easily perform evaluations according to plan using available audio, video, email or chat media. The system can also enforce participation of quality managers in the evaluation process.
- **Outputs**: Graphical reports empower you to find a weak point in the performance of a specific agent or the whole call center and offer an instant view of an agent's improvement across a range of different time increments. Reports can also provide comparisons between agents and agent groups for evaluating campaigns, trainings etc. Reports can also be exported in MS Excel format enabling other business intelligence tools to be used to provide an expanded view of call center activities.
- **Others**: Other features include flexible role-based user management (including synchronization and authentication with Call Recording and other systems), application-wide search, use of external data in call criteria, evaluation history, audit logging, dashboards, full call center integration and more.

User Technical Requirements

Installed as an integral module of Call Recording, Genesys Quality Manager 8.0 uses the Call Recording database for data storage, but all user interaction is via the web user interface.

The following web browsers are supported:

- Microsoft Internet Explorer 6+
- Mozilla Firefox 1.5+
- Apple Safari 3+

Web browsers require a media player plug-in (Windows Media Player 9+ for Windows PCs, QuickTime for Macs) for audio and video media review, and at least Adobe Flash 9.x runtime installed for viewing reports.

A minimum resolution of 1024x768 is necessary to be able to comfortably use the application.

User Guide Outline

This User Guide is structured as a series of tutorials, to enable a Call Center administrator or supervisor to get a fast-track overview and practical guide to making effective use of Genesys Quality Manager.

After first installing Genesys Quality Manager, it is recommended you read the following sections in this order:

- Log In To Genesys Quality Manager (Overview of User Interface)
- User Management (Adding Users and User Groups)
- Additional Options (System Options)
- Setting Up A Questionnaire (Creating Questionnaires)
- Scheduling An Evaluation (Creating Evaluations)
- Performing An Evaluation (Evaluating Agents)

For new users to the application, following the Guide from start to end as written should be the most helpful.



Chapter

3 Your User Profile and Messages

A short introductory tutorial showing how to access Genesys Quality Manager 8.0, 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
- Retrieving a Forgotten Password
- Genesys Quality Manager User Interface
- Editing Your User Profile
- View System Messages

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.

Note: See the Genesys Quality Management Installation Guide for details of default administrator login passwords after Quality Manager is first installed.

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

Cashboard	User Profile O Save Cancel General	finally, click close profile	to b	Č	er (comanager) 🖉 Logout 🖂 Messages dit your user profile
	My Language:	English	~		
	Login ID:	ccmanager			
H	Name:	CcManager			
change language settings of application	Surname:	-			
(settings of application)		CcManager			
	E-mail:	ccc@ddd.cz			
	Password:				
3	New Password:				
	Re-Type New Password:	1			
	Delegation	,	change pas password the	sword; enter original n new password twice	
	User Settings				
	Records on a page	e:			
	Dashboard Display On Startup				

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 – Languages

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 **Delegation** option allows you to delegate your evaluation activities to another user with evaluation permissions – typically used if you will be unavailable to perform evaluations for a period of time.

Checking this option enables the **Evaluator** and the delegation period (**From**, **To**) to be defined and saved. During this delegation period, the evaluator will then be able to plan and perform evaluations on agents to whom you are assigned as the evaluator.

Note: Evaluator delegation can also be defined for specific users within the User Manager.

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.

Finally, the **Dashboard** section contains the following parameters:

 Display on Startup – check this option if you have defined one or more Dashboard widgets, and would therefore like the Dashboard to be displayed immediately after logging in.

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



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

- <u>Setting Up A Questionnaire</u>
- Importing and Exporting Questionnaires

Setting Up A Questionnaire

A short tutorial to show how to create, configure and manage questionnaires in Genesys Quality Manager 8.0.

Create A New Questionnaire

			Tooltips Off	🔗 Valer, Peter (comanager) 🎤	Logout 🖂 Messages
(*)	Questionnaire List	. 🗵			
2	🖸 Add 🥖 Edit 🤘	Remove 📴 Export 🐔 Import		Enter query	🔍 Search
🗉 📁 Evaluations	Status	Name			Version
Questionnaires Questionnaire Manager ⊕ C Reports ⊕ Administration ④ About	0	Quest			1.0
	H 4 Page 1 o	ri 🕨 😂			Displaying 1 - 1 of 1

Figure 6: Create A New Questionnaire

Click on the **Questionnaires** link in the left menu, then on **Questionnaire Manager** to display the current list of questionnaires in Quality Manager.

Click the **Add** button to add a new, empty questionnaire.

Specify A Name And Version

	🖓 Tooltips Off 🍰 Valer	, Peter (comanager) 🍠 Logout 🖂 Messages
«	Questionnaire List 🕱 Call Quality 🛞	
58 22	🗿 Add Group 😡 Manage Groups 🔄 Properties 🚍 Call Selection Rules 📀 Permissions 🔒 Save A	Copy 🔚 Save & Close
🗉 📁 Evaluations	Questionnaire Name Call Quality Ver. 1.0	🗟 Status: empty - not ready for use!
🖃 💋 Questionnaires 詞 Questionnaire Manager	Group Name Description	Percentage
🗄 📁 Reports	unique name (version)	
Administration About		
		Add Question Remove Question
	Answer Name Answer Description	Compliance Percentage
		The second se
		Add Answer Remove Answer
		[Add Answer] [Kenlove Answer]

Figure 7: Specify A Name And Version

Enter a descriptive name for the questionnaire in the questionnaire **Name** field and an initial **Ver** (version) number (e.g. 1.0). The name and version combination must be unique in Genesys Quality Manager.

Set The Questionnaire Properties

🖓 Tooltips Off 🍰 CcManager, CcManager (ccmanager) 🎤 Logout 🖂 Messa
Call Questionnaire Manager 🗵 Call Quality 🖲
🔍 🖉 🖉 🖉 🖉 Add Group 😺 Manage Gro 1 📰 Properties 🖶 Call Selection Rules 📀 Permissions 🕞 Save A Copy 블 Save & Close
Dashboard Questionnaire Name Call Quality Ver. 1.0 Status: empty - not ready for us
Cuestionnaire: Cuest
Add Answer, Remove Answer

Figure 8: Set The Questionnaire Properties

Click **Properties** on the Questionnaire toolbar to view the current settings for this questionnaire.

Here you can select the scoring system used together with how answers should be sorted and displayed in reports.

Scoring Systems

The scoring systems available are the following:

- **Points**. Each answer (only) can be assigned a point value or "weight" (e.g. 10), with the questionnaire score being the sum of all selected answer points. Answers can use a negative point value (e.g. -10), and must have a value of between -2,147,483,648 and 2,147,483,647.

- **Percent**. Each question group, question and answer must be assigned a percentage value or "weight" (minimum: 1, maximum: 100). The final questionnaire percentage score is calculated by finding the weighted average of the selected answers.

- **Grades**. Each answer must be assigned a grade value or "weight" (minimum: 0.001 equals "best", maximum: 5 equals "worst"), whereas each question and question group must be assigned a percentage weight (minimum: 1, maximum: 100). The final questionnaire score grade is calculated using the same algorithm as for percentages; i.e. the weighted average of the selected answers.

The **Auto-Sort Answers By** options apply to all answer listings, i.e. when viewing/editing questionnaires, during evaluations and in reports for evaluations using this questionnaire. Answers can be listed by the time they were added (**Creation Time**), or by **Weight** (by point, percent or grade value depending on the scoring system used in the questionnaire).

The **Weight for Reports ("q")** option assigns a global weight for this questionnaire when included in a report with multiple questionnaire scores. The allowed weight range is 0.00 to 1.00 (double digit fractions), with the default weight set to 1.00. In all reports, the total score will be calculated as a weighted average of the final scores from each questionnaire.

Note: The scoring system for a questionnaire can be changed after question groups, questions and answers are added, but this will often lead to automatic rounding of the weight values.

For example, if an answer is assigned a weight of 500 under a points scoring system, the system will change this to a weight of 5 (i.e. "worst") when switching to a grade system, which may not be expected or required.

Therefore check all weight values in the questionnaire for accuracy after changing the scoring system used.

Modify these properties as required and click OK.

Add A Question Group



Figure 9: Add A Question Group

Click the **Add Group** button to add a new question group, then enter a suitable **Name** and optional **Description** for this group of questions.

Note: If a percentage or points scoring system is being used, you will also be required to add a percentage Weight value (the level of influence that this question group has on the final questionnaire score).

The sum of the weight values for all question groups must add up to 100 before a questionnaire can be marked complete.

It is a good idea to regularly save your questionnaire. Click the **Save** button (which returns you to the questionnaire list), then double-click on the questionnaire's name (or click **Edit**) to re-open the questionnaire for further editing.

Add A Question

	🖓 Toottips Off 🏼 🖉 Valer, Peter (comanager) 🍠 Logout 🔤 Messages
(%)	Questionnaire List 🕷 Call Quality 🛞
5832	🔕 Add Group 😡 Manage Groups 🔄 Properties 🚍 Call Selection Rules 🥥 Permissions 🔓 Save A Conterr question weight
🗄 💋 Evaluations	Questionnaire Name Call Quality Ver. 1.0 (if required) use!
🖃 💋 Questionnaires 🗊 Questionnaire Manager	Group Name Click here to select question group
🗉 📁 Reports	🛛 Call Opening, 5% (0 items)
Generation Generation	
	Correct Greeting / Introduction Enter question description (100 (5)
	6 Save Cancel
(h)	
LTVI	add optional description
	Answer Name Answer Description Compliante Percentage
	click to add question
	Add Answer, Remove Answer

Figure 10: Add A Question

With the question group selected (see screenshot), click the **Add Question** button at the bottom right of the middle list pane (see screenshot) to add a new question.

Fill in a question name (this is the text that the user will see) and an optional description.

Note: If a percentage or grading score system is being used, enter the percentage weight value that the question will have in this question group.

Click the **Save** button below the description field to add this question to the current group.

Add Further Questions And Groups

				🖓 Tooltips Off 👩	Valer, Peter (comanager) 🎤 Lo	ogout 🖂 Messages		
«)	Questionnaire List 🕱 🕻 Ca	all Quality 🛞						
0. 5.8 3 tr 1 2 8 8 5	🙆 Add Group 🔀 Manag	ge Groups 🔄 Properties	all Selection Rules	📀 Permissions 🔒 S	ave A Copy 📙 Save & Close			
 ■ 📁 Evaluations ■ 📁 Questionnaires □ Questionnaire Manager 	Questionnaire Name Ca	all Quality	Ver. 1.0		📐 Status: incomplete -	not ready for use!		
	Group Name		Description			Percentage		
	🖃 Call Opening, 5% (1 i	tem)				^		
Administration About	Correct Greeting / Introduc	tion				100%		
U ADOUI	□ Body of Call, 40% (6)		ner questions					
	Active Listening	Lana que	estion groups	Sum o	of weights	20%		
	Active Questioning			=	100%	20%		
	Provided Information							
	Call Wrapup					20%		
	Troubleshooting					20%		
	Gall Skills, 35% (11 items)							
	Built Repport (Use of name)					10%		
					Add Question	Remove Question		
	Answer Name	Answer Description			Compliance	Percentage		
					Add Answer	Remove Answer		
	_							

Figure 11: Add Further Questions And Groups

Create further question groups and questions in a similar way.

Note: If a percentage or grades scoring system is being used, ensure that the sum weight of all the questions together is 100%.

Add Answers To A Question



Figure 12: Add Answers To A Question

With an existing question selected, click the **Add Answer** button at the bottom right of the visible screen. Once again, the **Answer Name** is the text that will be presented to the user (and should be unique for this question).

An optional **Description** can be provided, together with the answer's **Weight** (influence) for this question's scoring as before.

The **Compliance** field determines the influence that this answer can have on the whole question group or questionnaire. This gives an evaluator a shortcut to mark a question group or even an entire questionnaire as a complete success or a complete failure, by selecting an answer that contains the appropriate compliance setting.

Compliance Values

The Compliance values have the following meaning:

- **Success all**: if this answer is selected, every question in the current questionnaire gets the value of the answer with the highest weight (having a compliance value of **None**);

- **Success group**: as above, but every question in the current question group gets the value of the answer with the highest weight (having a compliance value of **None**);

- **None**: no overall effect. This is the default compliance setting, and is used for most answers (or all if compliance settings are not required);

- **n/a**: a 'not applicable' setting, the influence of which (on the final score) is specified in Genesys Quality Manager Application Options (see the section about Administrative Options);

- **Fail all**: if this answer is selected, every question in the current questionnaire gets the value of the answer with the lowest weight (having a compliance value of **None**);

- **Fail group**: as above, but every question in the current question group gets the value of the answer with the lowest weight (having a compliance value of **None**).

Save the answer by clicking the Save button under the answer description field.

Add Further Answers As Necessary

	c.	🖓 Tooltips Off 🏾 🍰 Valer, Peter (comanager) 🚀 Lo	gout 🖂 Messages	
**	Questionnaire List 🗷 Call Quality 🛞			
C. 5.8.52 25.85	🔕 Add Group 😺 Manage Groups 🔄 Properties 🚍 Call Selection Rules 🥥	Permissions 📄 Save A Copy 📄 Save & Close		
🗉 💋 Evaluations	Questionnaire Name Call Quality Ver. 1.0	Status: complet	te - ready for use	
🖃 💋 Questionnaires 🗊 Questionnaire Manager	Group Name Gescription		Percentage	
C Reports Administration Administration About	correct Greening / Introduction	questionnaire now complete (a valid number of questions, groups and answers have been added)		
	column separators or up/down to view		20% 20% 10%	
	I column text		20% 10%	
	Troubleshooting Call Skills, 35% (11 items)		20%	
		Add Question	Remove Question	
	Answer Name Onswer Description	Compliance	Percentage	
	Yes	None	100%	
	No	None	0%	
	Partially correct	None	50%	
	Correct, but not exactly by the rules	None	75%	
		Add Answer	Remove Answer	

Figure 13: Add Further Answers As Necessary

Add the remaining possible answers for the selected question as necessary, then add answers to the other questions in each group by selecting them in turn and adding answers as before.

When the questionnaire is complete (contains a valid balance of question groups, questions and answers), the message at the top right of the questionnaire tab will be updated (see screenshot).

Don't forget to save your progress regularly using the Save button as before!

Specify Call Selection Rules (Optional)

Figure 14:Specify Call Selection Rules (Optional)

Optionally, you can specify a filter for the calls that can be selected for evaluation with this questionnaire. This might be necessary if the questionnaire is only relevant for one specific agent team or individual, for example.

These rules are editable in the Call Selection Rules dialog box, which opens when **the Call Selection Rules** button (2) is clicked on the main Questionnaire toolbar.

Note: Quality Manager cannot currently distinguish between inbound and outbound calls on SIP-based GQM systems, since this involves analyzing the call attached data.

See the *Call Recording Administration Guide* (section 'Detecting Inbound and Outbound Calls') for details on how to detect these calls within the Call Recording Web GUI.

Call Selection Options

The options have the following meaning:

- **Exact Number**: if selected, only calls to/from phone numbers that precisely match the agent's number will be recognized as belonging to the agent (e.g. 1234). Otherwise any number that contains the agent's number (in a position specified by **Matching Part**) is recognized (e.g. 1234 is matched in 22331234);

- **SIP Number**: the agent number must contain the character '@' for recognition of SIP formatted numbers e.g. 1234@example.com;

- **Agent Extension Length**: if any number other than 0, Genesys Quality Manager checks whether the callingnr / originalcallednr is longer than this extension length - this way an external call be determined;

Note that if SIP is being used (and **SIP Number** is enabled), this number must be the complete length; e.g. 1234@example.com requires a value of 17;

- Allow Internal Call Scoring: if selected, this allows the selection of calls between agents that are defined in the Genesys Quality Manager users list;

- Matching Part: if Exact Number is not enabled, this is the part of a call's phone number to search for a known agent extension. Options are: Starts With (extension at beginning of phone number), Ends With (at end of phone number) or Contains (extension can be anywhere within the phone number).

The **Record Criteria Panel** allows the timing of the calls to be specified. Options are:

- Weekdays: select one or more days of the week that are valid;

- Time From/To: a time period within which the call must have occurred

- Min-Max Recording: the minimum or maximum length of the call recording in seconds.

These settings are optional, and apply only to the current questionnaire. Click **OK** to save any changes, or **Cancel** to exit the dialog.

Specify Access Permissions (Optional)

					Tooltips Off A Vale	er, Peter (co	manager) 🍠 Lo	gout 🖂 Messages
«	gi∨ing/deny	ing access to fic users			Permissions	Copy		
Evaluations	Qu			/er. 1.0			Status: comple	te - ready for use
🖃 💋 Questionnaires	Questionnaire Permissi	ons				×		Percentage
	-Access Permissions							^
Gil Administration			000		0			100%
About	Allow For All	O Deny For All		Allow Selected Only	O Deny Selected On			
	Surname	First Name		Surname	First Name			
	Peter	Valer		John	Smith			20%
	Jan	Novak						20%
	<u> </u>							20%
			4>>>					10%
								20%
			~~					20%
								×
							Add Question	Remove Question
	N A Page 1 o	nf 1 🕨 🕅 🎅 No da	ata ti			c	ompliance	Percentage
							lone	100%
				0	5 OK Canc	N	lone	0%
				<u> </u>			lone	50%
	Correct, but not exactly	y by the rules				N	lone	75%
	-							
							Add Answer	Remove Answer

Figure 15: Specify Access Permissions (Optional)

Supervisor access to this questionnaire can be limited or customized by opening the access permissions dialog (**Permissions** button on the questionnaire toolbar (1)).

Access can be granted or blocked for all users, or a subset of users. To create a filtered subset of users, first select either the **Allow Selected Only** or **Deny Selected Only** permissions option, which activates the user selection windows.

Select the appropriate users in the dialog's left panel (using CTRL click on Windows or CMD click on the Mac for multiple selections) and click the upper >> (**Send To Right**) button to add them to the subset.

Existing users with permissions can similarly be removed from the right panel (when **Allow Selected Only** or **Deny Selected Only** are activated) by selecting them in the right panel and clicking the lower << (Send To Left) button.

Finally click OK to save your permissions preferences, or Cancel to exit the dialog.
Manage Question Groups

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«	Questionnaire List 🛎 Call Quality 🗷				
Q 5.4.92 22.45	O Add G	Properties 🗧 Call Selection Rules 🥥	Permissions 📄 Save A Copy	🔚 Save & Close	
🗉 💋 Evaluations	Questionnaire Name Call Quality	Ver. 1.0		👌 Status: complet	e - ready for use
🖃 💋 Questionnaires	Group Name	Description			Percentage
🧊 Questionnaire Manager 🗷 💋 Reports	□ Call Opening, 5% (1 item)				~
🗉 📁 Administration	Correct Greeting / Introduction	add or remo∨e a grou			100%
🕕 About		to edit the name	, description or weigh	nt J	
	Question Group Manager			_	20%
	Add Group 🥥 Remove Group		C		20%
	Prov Call Opening		ercentage SI	um of weights = 100%	10%
	Ident Body of Call 2		0%	- 100 %	20%
	Call \ Call Skills	an a	5%		10%
	Call Select a question	1	0%		20%
	G Ca Proc	group	%		~
	Call Management	5	»	Add Question	Remove Question
	Answer Name A	Answer Description		Compliance	Percentage
	Yes			None	100%
	No			None	0%
	Partially correct			None	50%
	Correct, but not exactly by the rules			None	75%
				Add Answer	Remove Answer

Figure 16: Manage Question Groups

Question groups can be managed most efficiently by clicking on the **Manage Groups** button on the questionnaire toolbar.

This allows you to **Add** or **Remove** question groups (removal of question groups is only possible via this dialog!).

Double-clicking on a question group listed in this dialog will allow you to modify the **Name**, **Description** and **Weight** parameters.

Note: If a percentage or points scoring system is being used, the sum of the weight values for all question groups must add up to 100 before a **questionnaire can be marked** complete.

Importing and Exporting Questionnaires

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🕕 About	A Inbound calls	1.0	Grades
	S Inbound calls	1.0	Grades

Figure 17: Importing and Exporting Questionnaires

The Questionnaire Manager features import and export functionality, enabling powerful manipulation of questionnaires and their contents.

Some typical uses can include:

- Backing up questionnaires and templating
- Fast set up of questionnaires on a new system
- Automated or advanced editing of questionnaires using external text editors and tools

Exporting A Questionnaire

Image: Call Call Call Rem Dashboard Status Name Call Call Call Call Call Call Call <th>«</th> <th>Questi</th> <th>onnaire Manager 🛞</th> <th></th> <th></th>	«	Questi	onnaire Manager 🛞		
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Inbound call Inbound call Inbound call Inbound call which is a: XML Document from: http://tstr023.office.zoomint.com 1.0 What should Firefox do with this file? Open with Internet Explorer (default) Internet Explorer (default) Save File Do this gutomatically for files like this from now on. Do this gutomatically for files like this from now on.		0	V Indound Cal	1.0	Grades
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🛛 🕹 Displaying 1 - 6 of 6		14 4	Page 1 of 1 🕨 🕅 🧬	[Displaying 1 - 6 of 6

Figure 18: Export Questionnaire

To export an existing questionnaire, first select a questionnaire (1) in the Questionnaire Manager and click the Export button (2).

Save the resulting XML file to your computer (3), ideally giving it a more descriptive filename than the default <code>questionnaire.xml</code>!

Modifying An Exported Questionnaire

L. questionnaire.xml
0
<pre><?xml version="1.0" encoding="UTF-6" standalone="yes"?></pre>
Questionnaire xsi:noNamespaceSchemalocation="http://192.168.110.183:8080/scorecard-webui/cz.zoom.scorecard.webui.Scor
<name>Call Center Quality</name>
<version>1.0</version>
<scoringsystem>PERCENTAGE</scoringsystem>
<groups></groups>
<group></group>
<name>Merchant's skills</name>
<weight>20</weight>
<description></description>
<questions></questions>
<question></question>
<questiontext>Questioning techniques - investigative/business oriented</questiontext>
<questionweigh>30</questionweigh>
<description></description>
<answers></answers>
<lasswer></lasswer>
<answertext>Bad</answertext>

<compliance>NONE</compliance>
Answer
<lasser></lasser>

<answerweigh>100.0</answerweigh>
<compliance>NONE</compliance>
Answers
<ouestion></ouestion>

Figure 19: Modifying an Exported Questionnaire

Exported questionnaire files can be viewed and edited in any XML-compatible text editor, including the default 'Notepad' editor provided with your computer's operating system.

One of the most useful edits can be to the name and version values (see figure; the original name has been changed in the example). This enables you to then import a duplicate of the exported questionnaire—the basis of a simple questionnaire templating system.

Importing A Questionnaire - 1

			💭 Tooltips Off 🏾 🍰 CcManger, CcManger (ccmanager)	🍠 Logo	ut 🖂 Messages
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B Cvaluations Coll Cuestionnaires	♀ ×	🗿 Add	Calit 😑 Remove 📴 Ex 1 🗉 Import		🔍 Search
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guestionnaire.xml 2 Browse 3 Import Cancel	About	0	A Inbound calls	1.0	Grades
questionnaire.xml 2 3 inport Cancel		0	Inbound calls	1.0	Grades
		14 4	3 import Cancel		Displaying 1 _ 6 of 6
			Page 1 of 1 🕨 🕅	[Displaying 1 - 6 of 6

Figure 20: Import Questionnaire – 1

To import a questionnaire, click the **Import** button (1) on the Questionnaire Manager screen, then click **Browse** (2) in the import dialog to locate the questionnaire file on your computer and finally **OK** (3) to start the import.

Note

Only valid Quality Manager questionnaire files in XML format can be imported; you will receive an error message if the system doesn't recognize or cannot validate the imported file.

Importing A Questionnaire - 2

			🖓 Toottips Off 🤞	CcManger, CcManger (ccmanager)) 🍠 Logout 🖂 Message:			
«	Questionnaire Manager	🗵 Call Center Quality	×					
»	📀 Add Group 🛛 🍃 Ma	nage Groups 🛛 Eng Propertie:	s 둼 Call Selection Rules 📀 Permissio	ons 📄 Save A 2 🗎 Save &	Close			
😨 Dashboard 🛛 🧃	Questionnaire Name	Call Center Quality	Ver. 1.0	🔵 🔒 Status:	complete - ready for use			
🗄 📁 Evaluations 🖃 📁 Questionnaires	Group Name		Description	-	Percentage			
😨 Questionnaire Manager E 💋 Reports	🗉 Call control, 20.0 %	% (6 items)						
🗉 📁 Reports 🗉 📁 Administration	Following the script				10.0 %			
About	The Language, length o	of sentences, speed of speed	ch		20.0 %			
_	Listening				30.0 %			
	Responding	Responding						
	Overcoming objections		10.0 %					
	Tone / pitch of the call /		20.0 %					
	☐ Closing the call, 20	□ Closing the call, 20.0 % (3 items)						
	Thanks and farewell to		50.0 %					
	Summary after call - re		40.0 %					
	Inviting the customer to call anytime the infoline 10.0 %							
	∃ Opening call, 40.0	% (5 items)						
				Add G	uestion Remove Question			
	Answer Name	Answer Description		Compliance	e Percentage			
	Bad			None	12.0 %			
	Good		None	80.0 %				
	Average		None	42.0 %				
	Very bad			None	0.0 %			
	Excellent			None	100.0 %			

Figure 21: Import Questionnaire – 2

When a questionnaire has been imported successfully, the application will open it for editing.

Ensure that the name and version are correct (1) and then save it after completing any further modifications (2).



Chapter



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

- Scheduling An Evaluation
- Performing An Evaluation

Scheduling An Evaluation

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

Open The Evaluation Planner

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 Administration About 	Group Evaluation O Agent	Evaluation O Self-Evalu	ation	
	Evaluator:] Select All/None G	roup:	Select All/None
	 Buck, Jake (jake.buck) CcManager, CcManager (ccmanager) Daniels, Helena (helena.daniels) Herrera, Graciela (graciela.herrera Hopper, Stephan (stephan.hopper) Johns, Christopher (christopher.joc Olson.Rafael (rafael.olson) Wrapup: 	· · · · · · · · · · · · · · · · · · ·	: In/Outbound V	
		Let.		
		llow Replacement 🔒 Allow Selec	,	
	Media Type Min. Count N.	Start End	Length From	To Type

Figure 22: 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

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«	Evaluation Planner	
C 5 5 2 2 2 2 3 5	📀 Create Evaluations 🛛 Save As Template 🤯 Templates 🛁 Load Ter	emplate 🝷 😫 Close 🧖
 Dashboard Evaluations Evaluation List Evaluation Planner Questionnaires Reports 	Period: Current Week V From: Questionnaire: Call Quality (1.0) Apply To Statistics: V Basic Add Sub-Criteria	1/23/11 To: 1/29/11 V Interaction 2 Count:
 Administration About 	Group Evaluation Agent Evaluation Self-Evalue Evaluator: Select All/None Buck, Jake (jake.buck)	Iluation Group: Velect All/None
	 CcManager, CcManager (ccmanager) Daniels, Helena (helena.daniels) Herrera, Graciela (graciela.herrera) 	
	Hopper, Stephan (stephan.hopper) Johns, Christopher (christopher.johns) Olson. Rafael (rafael.olson)	
	Wrapup: 🔽 Media Directio	on: In/Outbound 💙
	📀 Add Media Type 🤤 Remove 🔢 Allow Replacement 🖳 Allow Sele	election 🕒 Allow random calls selection 📀 Add Interaction
	Media Type Min. Count N. Start End	Length From To Type
	<	

Figure 23: 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. If the questionnaire you wish to use isn't visible, ensure that it is marked as completed in the **Questionnaire Manager** (see Setting Up a Questionnaire).

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.

The **Apply To Statistics** option will (if selected) include the results of this evaluation in reports linked to the selected group or agent(s). De-selecting this option is useful if the evaluation is for testing or internal purposes only, and shouldn't affect the agent results.

Select A Target User, Group or Self-Evaluation Options



Figure 24: Select A Target User, Group or Self-Evaluation (if permitted)

On the **Basic** tab, specify an agent group or individual agent(s) for evaluation by selecting **Group Evaluation** or **Agent Evaluation** appropriately.

Note - Agent Self-Evaluation

If the currently logged-in user has been assigned the self-evaluate role in his/her user profile (see <u>Enabling Agent Self-Evaluation</u>), a further option *Self-Evaluation* is available: *Self-Evaluation*.

If selected, automatically sets the *Evaluator* and *Evaluated Agent* to the currently loggedin user. This enables agents to plan and perform their own performance evaluations. See the *Quality Manager Agent User Guide* for more details.

An **Evaluator** must be selected; this is a Genesys Quality Manager user of type **Team** Leader, CC Manager, or Supervisor.

Once the evaluator is selected, the groups for which he/she is responsible are shown in the **Group** list.

For group evaluation, select one or more groups (CTRL + click (Windows) or CMD + click (Mac) for multiple selections).

In the case of agent evaluation, only one group can be selected. Clicking on a group displays the group's agents in the **Agent** list on the right, from which one or more agents

can be selected (again CTRL + click (Windows) or CMD + click (Mac) for multiple selections).

Agent interactions (e.g. calls) can be further filtered by selecting a **Wrapup** value (if one is available) and a limitation on the **Media Direction** (inbound and/or outbound). The **Media Direction** drop down also enables you to specify whether the evaluation should use internal interactions (**INTERNAL**) only or all interactions to that agent (**ALL**). The default is **BOTH**, meaning both inbound and outbound internal and external interactions (e.g. calls) will be sampled.

Important:	If agent usernames or phone extensions are re-allocated (re-used) within			
your organization, please be aware that an evaluation period sta				
	the past may include unwanted calls, made by another agent who was			
	earlier allocated the same username / extension. Ensure the evaluation			
	starting date is not earlier than that of the agent concerned!			

Add Evaluation Media Types

			🖓 Tooltips	Off 🛛 😤 CcManager, CcMa	anager (comanager)	Nessage 📈 🖉	jes
«	Evaluation Planner						
C 5 5 2 2 2 2 3 5	📀 Create Evaluations 🔓	👌 Save As Template 🛛 🐶 Tem	plates 🛛 😽 Load Template	🕶 🔀 Close			^
 Dashboard Evaluations Evaluation List Evaluation Planner Questionnaires Reports 	Period: Questionnaire: Apply To Statistics: Basic Add Sub-Criter	Current Week	From:	1/23/11	To: Interaction Count:	1/29/11 🖪 2	
	 Group Evaluation Evaluator: 	 Agent Evaluation Buck, Jake (jake.buck) 	Self-Evaluation	v			
	Groups:	🗌 Se	lect All/None Agents:		🗌 Sele	ct All/None	
	 Image: Constant of the second s	reira	Benson,	eanna (deanna.barker) Mattie (mattie.benson) mille (camille.berg)			
	4 🎁 Dakar Sioni Bolnisi	switch off flexibl	e interaction (cal	I) selection, if red	quired		
add media type rec		/	Cortez, F	atricia (patricia.cortez)		~	
	Wrapup:	~	Media Direction:	All			
		Rem 1 B Allow Replace	ment B Allow Selection	Allow random calls se	To Type	eraction	
specify type of media	Call 2 5 Save C	ancel	minimum nur interactions for			>	~

Figure 25: Add Evaluation Media Types

Next on the **Basic** tab, specify the types of media to be evaluated. Click the Add Media Type button to add a new **Media Type**. The media types created within GQM 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 Genesys 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 enable sampled calls to be selected or replaced respectively by the evaluator during an evaluation. By default these features are enabled, but clicking either button will disable (restrict) the functionality available during evaluation as expected.

	Add Speci	fic Interact	tion(s)			×	🗙 Tooltips Off 🍰 CcManager, CcManager (ccmanager) 🍠 Logout 🖂 Message
Agent: Barker, Deanna		- 2 Descri	ption:				emplate - 😢 Close
Media Direction:	~	Media	Туре:				1/23/11 To: 1/29/11
All External Data Key:	•	Call			~		V Interaction Count: 2
	*	Wrapu	p:		~		
External Data Value:		Period	:				
Customer Number:		Curre 1/23/ Count:		/11	*		click to add specific interactions while scheduling an evaluation
Min. length 0:00 Max. length		intera	action select	ion dialog			ents: Select All/None rker, Deanna (deanna.barker)
	3 Search	Add In	teractions 5		_		nson, Mattie (mattie benson) rg, Camille (camille berg) delete and notes
SID From	То	Length	Start	End			ck, Jake (jake.buck) buttons for each
16965583192.168.7.58: 5630	5512	00:07:56	1/26/11 3:20 PM	1/26/11 3:28 PM	\bigcirc		erry, Zachery (zachery.cherry)
965498192.168.7.58: 5630	5512	00:00:34	1/25/11 3:48 PM	1/25/11 3:49 PM	\bigcirc		rtez. Patricia (patricia.cortez)
16965475192.168.7.51: 5512	5506	00:00:06	1/25/11 2:56 PM	1/25/11 2:56 PM	\bigcirc		
16965586192.168.7.58: 5630	5512	00:16:31	1/26/11 3:29 PM	1/26/11 3:46 PM		U	election Allow random calls set 1 3 Ald Interaction
16965478192.168.7.51: 5512	5506	00:00:06	1/25/11 2:56 PM	Ŷ			1:32 AM 00:00:06 5512 5506 🕤 🔯 Quick Note
16965472192.168.7.58: 5630	5512	00:02 CII	ck to previev	v a call		-	6 Cos PM (interactions added)
16965595192.168.7.58: 5630	5512	00:01:18	1/26/11 4:17 PM	1/26/11 4:18 PM		T	
🛛 🖣 Page 1 of 1 🕨 🕅	<i>,</i>			Displayir	ng 1 - 10 of	10	

Add Media For Evaluation (Optional)

Figure 26: Add Media For Evaluation (Optional)

When scheduling an evaluation, you may already know which existing interactions should be used. Genesys Quality Manager enables one or more Call or Screen (video) interactions to be selected for use with the evaluation.

To add specific interactions, click the **Add Interaction** button. A selection dialog window opens, in which you can select filter parameters such as a time period or interaction type to find.

Click the **Search** button to display a list of matching interactions, then click the checkbox for each record you wish to add to the evaluation before clicking the **Add Interactions** button.

The chosen interaction(s) appear in the media window as the selection window closes. Added interactions can also be removed from the evaluation by clicking the appropriate removal button (see screenshot), or a quick note can be added for evaluators to reference.

Note: If the currently selected agent does not have an ID (e.g. extension number) specified in their Quality Manager profile, an error message appears in the Add Interaction selection dialog window as follows: "*The agent identifier is set to NONE. Search results will contain results for all agents*". This results in interactions for all agents being displayed in the dialog.

Add Sub-Criteria (Optional)

			🖓 Tooltips O	ff 🍰 CcManager, CcManager (ccmanager) 🔊 Logout 🖂 Messages
«	Evaluation Planner			
SA 122 2135	Questionnaire:	Call Quality Click 1	o add further sub-crit	eria
🛞 Dashboard	Apply To Statistics:			
Evaluations Evaluation List	Basic Sub-Criteria	Add Sub-Criteria		ensure Interaction Count is the sum
Evaluation Elst				of all Basic and Sub-Criteria media
🗄 📁 Questionnaires	2 💿 Add Media Type	Remove		types defined $(2 + 1 = 3)$
Geports Geports Geports	Media Type		Min. Count	
 Administration About 	Call		1	
			y further conditions as d, including external d	ata scroll right if fields are
	Period:		From:	1/23/11 To:
	Weekdays:	Sunday Monda	iy 📃 Tuesday 🗹 Wednesda	y 🗌 Thursday 🗌 Friday 🗌 Saturday
	Wrapup:		 Media Direction: 	All Y Min. Length: 0:00 Mi
	Description:		Matching Part:	like 🗸
	Add External Data	Remove		
	External Data	Comparison	Value Type Value	Logical Operator
	Deadline:		Remind Evaluator?:	Days To Deadline:

Figure 27: 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 the evaluator (**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.

Selection of Random Calls (Optional)

					🖓 Tooltij	os Off 🏾 🍰 CcMa	nager, Ccl	Manager (cci	manager)	🄊 Lo	gout 🖂 Messages
×	Evaluation Planner	0									
C. 5.7 12 2 17 75	Create Evaluations	d Save As	Templ	late 🤯 Templat	es 🛛 🛃 Load Templa	ate 🝷 区 Close					ň
 Dashboard Evaluations Evaluation List Evaluation Planner Questionnaires Reports Administration 	Period: Questionnaire: Apply To Statistics: Basic Sub-Criteria 1	Current W Call Qualit	ty (1.0		From:	1/23/11	•		ion Count	: 3	9/11
(1) About	Group Evaluation • Agent Evaluation • This can ONLY be cha				ection is enabled by default. changed if sub-criteria are						
	Evaluator:	Buck, Jak	e (jak	e.buck)	alr	eady define	ed, as i	in this c	ase		
	Groups:			Select	Anywone Agents:				- Selec	с Ануло	ле
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	Paços de Fe	rreira			Berg, C	amille (camille be	erg)				
	a 🎁 Dakar				Buck, Ja	ke (jake.buck)					
	Sioni Bolnisi				Cherry,	Zachery (zache	y.cherry)				Ă
	a 🎁 Guatemala C	lity			Cortez.	Patricia (patricia	cortez)				Ŧ
	Wrapup:			*	Media Direction:	In/Outbou	nd 🚩				
	O Add Media Type	Remove	B /	Allow Replacemer	nt 🔒 Allow Selection	on 🕑 Allow rand	dom calls s	selection	Add Inte	eraction	
		Min. Count	Ν.	Start	End	Length	From	То	Туре		•
	Call	2	1	1/25/11 11:32 AN	1/25/11 11:32 A	M 00:00:06	5512	5506		8	Quick Note
			2	1/25/11 1:08 PM	1/25/11 1:08 PI	M 00:00:07	5512	5506		8	Quick Note
											v
	C) 4 1

Figure 28: Selection of Random Calls (Optional)

A powerful method of performing evaluations is to automatically select at random the minimum number of calls required for evaluation.

Note: The Allow random calls selection option is enabled by default in the Evaluation Planner, but this setting cannot be changed unless evaluation sub-criteria have been defined, as shown in the figure.

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.

Using Evaluation Templates (Optional)



Figure 29: 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

					Tooltips Of	f 🧟 CcMan	ager, CcN	lanager (ccr	nanager)	🔊 Lo	gout 🖂 Messages
(*)	Evaluation Planner										
	Create Evaluations	🛃 Save As T	empl	late 🤯 Templates	dad Template 🔻	😫 Close					ĩ
 Dashboard Evaluations Evaluation List Evaluation Planner Questionnaires Reports Administration 	Period: Questionnaire: Apply To Statistics: Basic Sub-Criteria 1		(1.0)	- m:	1/23/11	•	To: Interactio	on Count	_	9/11
 About 	 Group Evaluation Evaluator: 	O Age	ent E	Evaluation	O Self-Evaluation	~					
	Groups:	1 evaluatio	n(s)	created					Selec	t All/No	ne
	4 🍯 Root group		,			ia (deanna.	barker)				
	Copenhagen Paços de Fer				2OK	e (mattie.b					
	 A Garage State A Garage State A Garage State A Garage State 					(camille.be jake.buck) ery (zachery cia (patricia.	.cherry)				×
	Wrapup:			✓ Me	edia Direction:	In/Outbour					
	💿 Add Media Type 🌾	Remove	<u></u> 4	Allow Replacement	Allow Selection	Allow rand	om calls s	election	Add Inte	eraction	
		Min. Count N	l.	Start	End	Length	From	То	Туре		u u
	Call	2	1	1/25/11 11:32 AM	1/25/11 11:32 AM	00:00:06	5512	5506		8	Quick Note
			2	1/25/11 1:08 PM	1/25/11 1:08 PM	00:00:07	5512	5506		8	Quick Note
	C									-) 4 Þ (

Figure 30: 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 the evaluator.

Click the Evaluation List from the menu on the left to view the updated list of evaluations.

View Created Evaluations

«	Ev	alua	tion List										
运行 (1) (1) (1) (1) (1) (1) (1) (1) (1) (1)		New	🕼 Ev	aluate 📃 Report	More Actions	 Send Agent's Evaluation 		back 📴	Export to	Spreadshee	et All		
Dashboard		N.	ID	Evaluator	Agent	Ques. Name	Period Fro	Period To	Score (Status	Reveal	Last Modifi P	arent I
Sevaluations		1	949	Buck, Jake	Barker, Deanna	Call Quality (1.0)	Jan 23, 20	Jan 29, 20	0.0 %	Created	\checkmark	Jan 26, 20	
waluation List		2	947	Olson, Rafael	Meadows, Thom:	Cal Quality (1.0)	Sep 25, 20	Sep 26, 20	37.0 %	Finished	\checkmark	Jan 25, 20	
Evaluation Planner		3	946	Olson, Rafael	Meadows, Thoma	Call Quality (1.0)	Sep 26	tor the	ovalu	ation lis	thy	etatue	
Questionnaires		4	945	Olson, Rafael	Meadows, Thoma	Call Quality (1.0)	Sep 27		evalu	auoniis	it by	status	
Administration		5	944	Olson, Rafael	Meadows, Thoma	Call Quality (1.0)	Sep 28, 20	Sep 29, 20	32.0 %	Finished	\checkmark	Jan 25, 20	
About		6	943	Olson, Rafael	Meadowe Thom	Call Quality (1.0)	Sep 29, 20	Sep 30, 20	48.0 %	Finished	\checkmark	Jan 25, 20	
		7	942	Olson, Rafael	silv the cre	ated evaluation	p 25, 20	Sep 26, 20	25.0 %	Finished	\checkmark	Jan 25, 20	
		8	941	Olson, Rafael	Silva, Velma	Call Quality (1.0)	Sep 26, 20	Sep 27, 20	45.0 %	Finished	\checkmark	Jan 25, 20	
		9	940	Olson, Rafael	Silva, Velma	Call Quality (1.0)	Sep 27, 20	Sep 28, 20	80.0 %	Finished	\checkmark	Jan 25, 20	
		10	939	Olson, Rafael	Silva, Velma	Call Quality (1.0)	Sep 28, 20	Sep 29, 20	70.0 %	Finished	\checkmark	Jan 25, 20	
		11	938	Olson, Rafael	Silva, Velma	Call Quality (1.0)	Sep 29, 20	Sep 30, 20	37.0 %	Finished	\checkmark	Jan 25, 20	
		12	937	Olson, Rafael	Yates, Bettie	Call Quality (1.0)	Sep 25, 20	Sep 26, 20	30.0 %	Finished	\checkmark	Jan 25, 20	
		13	936	Olson, Rafael	Yates, Bettie	Call Quality (1.0)	Sep 26, 20	Sep 27, 20	59.0 %	Finished	\checkmark	Jan 25, 20	
		14	935	Olson, Rafael	Yates, Bettie	Call Quality (1.0)	Sep 27, 20	Sep 28, 20	30.0 %	Finished	\checkmark	Jan 25, 20	
		15	934	Olson, Rafael	Yates, Bettie	Call Quality (1.0)	Sep 28, 20	Sep 29, 20	51.0 %	Finished	\checkmark	Jan 25, 20	
		16	933	Olson, Rafael	Yates, Bettie	Call Quality (1.0)	Sep 29, 20	Sep 30, 20	49.0 %	Finished	\checkmark	Jan 25, 20	
		17	932	Olson, Rafael	Bowers, Ed	Call Quality (1.0)	Sep 25, 20	Sep 26, 20	45.0 %	Finished	\checkmark	Jan 25, 20	
		18	931	Olson, Rafael	Bowers, Ed	Call Quality (1.0)	Sep 26, 20	Sep 27, 20	40.0 %	Finished	\checkmark	Jan 25, 20	
		19	930	Olson, Rafael	Bowers, Ed	Call Quality (1.0)	Sep 27, 20	Sep 28, 20	80.0 %	Finished	\checkmark	Jan 25, 20	
		20	929	Olson, Rafael	Bowers, Ed	- 41 6				shed	\checkmark	Jan 25, 20	
					us	e the forward/ba navigate throug				°			

Figure 31: 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.

Note: After an evaluation has been scheduled, it is currently no longer possible to modify the interaction (call) selection parameters for it.

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 An 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 32: 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 An Evaluation

A short tutorial to show how to complete a scheduled agent evaluation in Genesys Quality Manager 8.0.

Evaluations contain one or more media records, each of which must be graded by answering all questions shown in the evaluation's questionnaire. This tutorial describes how to achieve this.

Open The Scheduled Evaluation

								🖓 Toottips Off 🛯 💩 Buck, Jak	e (jake.buck) 🔊 Logout 🖂 Message	
	~	Ev	alua	tion Lisl	: 🗷					
S 2	912 315		NC3	Ev.	aluate) 📃 Report	🍪 More Actions 🔹	· 🖂 Send Agent's Evalu	ation Feedback 🛛 📴 Export to Spre	adsheet All	
🔀 Dashboard			N.	ID	Evaluator	Agent	Ques. Name	Period From Period To Score	Status Last Modifie Parent ID 🌈	
Evaluations			1	949	Buck, Jake	2 Barker, Deanna	Call Quality (1.0)	Jan 23, 201 Jan 29, 201 0.0 %	Created Jan 26, 201	
1 🛃 Evaluation List			2	767	Buck, Jake	Barker, Deanna	Call Quality (1.0)	Sep 25, 201 Sep 26, 201 57.0 %	Finished Jan 25, 201	
Evaluation Planner			3	766	Buck, Jake	Barker, Deanna	Call Quality (1.0)	Sep 26, 201 Sep 27, 201 70.0 %		
E Contemports I About			4	765	Buck, Jake	Barker, Deanna	Call Quality (1.0)	Sep 27, 201 Sep 28, 201 70.0 %	hint: click here	
J About			5	764	Buck, Jake	Barker, Deanna	Call Quality (1.0)	Sep 28, 201 Sep 29, 201 7.0 %	to reveal the	
			6	763	Buck, Jake	Barker, Deanna	Call Quality (1.0)	Sep 29, 201 Sep 30, 201 64.0 %	search dialog if the list is long	
			7	762	Buck, Jake	Guy, Ward	Call Quality (1.0)	Sep 25, 201 Sep 26, 201 2.0 %		
			8	761	Buck, Jake	Guy, Ward	Call Quality (1.0)	Sep 26, 201 Sep 27, 201 40.0 %	Finished Jan 25, 201	
				9	sele	ect an evalu	ation by click	ing on it .0)	Sep 27, 201 Sep 28, 201 90.0 %	Finished Jan 25, 201
			10		Duck, outc		Cun Sciency (1.0)	Sep 28, 201 Sep 29, 201 2.0 %	Finished Jan 25, 201	
			11	758	Buck, Jake	Guy, Ward	Call Quality (1.0)	Sep 29, 201 Sep 30, 201 49.0 %	Finished Jan 25, 201	
			12	757	Buck, Jake	Cortez, Patricia	Call Quality (1.0)	Sep 25, 201 Sep 26, 201 25.0 %	Finished Jan 25, 201	
			13	756	Buck, Jake	Cortez, Patricia	Call Quality (1.0)	Sep 26, 201 Sep 27, 201 87.0 %	Finished Jan 25, 201	
			14	755	Buck, Jake	Cortez, Patricia	Call Quality (1.0)	Sep 27, 201 Sep 28, 201 45.0 %	Finished Jan 25, 201	
			15	754	Buck, Jake	Cortez, Patricia	Call Quality (1.0)	Sep 28, 201 Sep 29, 201 87.0 %	Finished Jan 25, 201	
			16	753	Buck, Jake	Cortez, Patricia	Call Quality (1.0)	Sep 29, 201 Sep 30, 201 19.0 %	Finished Jan 25, 201	
			17	752	Buck, Jake	Ochoa, Marco	Call Quality (1.0)	Sep 25, 201 Sep 26, 201 57.0 %	Finished Jan 25, 201	
			18	751	Buck, Jake	Ochoa, Marco	Call Quality (1.0)	Sep 26, 201 Sep 27, 201 49.0 %	Finished Jan 25, 201	
			19	750	Buck, Jake	Ochoa, Marco	Call Quality (1.0)	Sep 27, 201 Sep 28, 201 51.0 %	Finished Jan 25, 201	
			20	749	Buck, Jake	Ochoa, Marco	Call Quality (1.0)	Sep 28, 201 Sep 29, 201 83.0 %	Finished Jan 25, 201	
		M	4	Page 1	of 4 🕨 🔰	æ			Displaying 1 - 20 of 7	

Figure 33: 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

		ς	🖓 Tooltips Off 🛛 🧟 Buck	:, Jake (jake.buck) 🔊 Logout 🖂 Messages
Evaluation List 🗷 Evaluator Form (949) 🗷				
Add Interactions 🚯 Add Random Interactions 🤤	Remove 📃 Report 🖂 Send	Feedback 🛄 Feedback Histor	ry 🕕 Evaluation Info	Reveal Results to Agent 📀 Complete
Questionnaire: Call Quality (1.0)	Agent: Barker, Deanna	Evaluator: Buck, Jake	Evaluation Perio	d: From: 1/23/11 To: 1/29/11
N. Status Start End	Length From	То	Туре	Current Rating
	her add a random selec able interactions, or cho add specific interactio	bose to		
Comments			Total Rating	0.0 %
Feedback				*
Evaluation Feedback [things to improve]		Evaluation Feedback [thi	ings to maintain]	

Figure 34: 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).

If no existing interactions were specified during the scheduling of the evaluation, the new evaluation will not yet have any interactions (media records) associated with it. The next two steps illustrate the two methods of adding interactions for evaluation.

Add Random Media For Evaluation

			Ç	🗅 Toottips Off 🛯 🐣 Buck, Jake (jake.buck) 🎤 Logout 🖂 Messages
>>	Evaluation List 🛞 Evaluator Form (949) 🗷			
	🚯 Add Interactions 🚯 Add Random Interactions 🔾 R	emove 📃 Report 🖂 Send	Feedback 🔲 Feedback Histor	y 🕕 Evaluation Info 🛛 🗹 Reveal Results to Agent 📀 Complete
	Questionnaire: Call Quality (1.0)	Agent: Barker, Deanna	Evaluator: Buck, Jake	Evaluation Period: From: 1/23/11 To: 1/29/11
	N. Status Start End	Length From	То	Type Current Rating
	1 • 1/26/11 3:20 PM 1/26/11 3:28 PM	00:07:56 5630	5512	🗐 💽 💋 🚺 0.0 % Quick Note
	2 • 1/25/11 2:56 PM 1/25/11 2:56 PM	00:00:06 5512	5506	🗏 🚺 😂 🛃 0.0 % 🛛 Quick Note
	3 • 1/25/11 2:51 PM 1/25/11 2:53 PM	00:02:05 5630	5512	🔎 📀 😫 👪 0.0 % Quick Note
	Comments		play media	
				Total Rating
			44	 **
	Feedback			*
	Evaluation Feedback [things to improve]		Evaluation Feedback [thi	ngs to maintain]

Figure 35: Add Random Media For Evaluation

If the evaluation uses agent calls, the quickest method to get some interactions (media records) is to click the **Get Random Interactions** button.

This will retrieve the minimum number of appropriate agent calls, 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. 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.

Add Specific Media For Evaluation

	Ad	d Specific Interaction(s)	×	(jake.buck) 🍠 Logout 🖂 Messages
🛞 Evalua 👔 ist 🗏 Evaluator Fo	Agent:			
🔒 Add Interactions 🕑 Add Ran	Barker, Deanna	Description:		Reveal Results to Agent 📀 Complete
Questionnaire: Call Quality (1.0	Media Direction:	Media Type:		om: 1/23/11 To: 1/29/11
N. Status Start	External Data Key:	Call	~	Current Rating
click here to add	External Data Value:	Vrapup:	~	0.0 % Quick Note
specific interactions		Period:		Quick Note
3 • 1/25/11 2:51 Pt	Customer Number:	Current Week	/11	interactions finally
Comments		Count:	,	appear in the list
	Min. length 0:00 Max. length	Search Add Interactions 5		
Feedback	SID From To	Length Start	End	*
	16965586192.168.7.58:1 5630 55*	12 00:16:31 1/26/11 3:29 PM	1/26/11 3:46 PM 💽 📤	
Evaluation Feedback [things to	4965478192.168.7.51:1 5512 551	06 00:00:06 1/25/11 2:56 PM	1/25/11 2:56 PM	
	0965595192.168.7.58:1 5630 55	12 00:01:18 1/26/11 4:17 PM	1/26/11 4:18 PM 💽 📲	
	16965498192.168.7.58: 5630 55	12 00:00:34 1/25/11 3:48 PM	1/25/11 3:49 PM	
	16965589192.168.7.58:; 563 intera	ection selection dialog	1/26/11 3:47 PM 💽 📃	
	16965446192.168.7.51:(5512 550	06 00:00:03 1/25/11 11:21 AM	1/25/11 11:21 AM 💽 🛃	

Figure 36: Add Specific Media For Evaluation

Alternatively, you can select one or more specific interactions to be added for evaluation by clicking the **Add Interaction(s)** button.

After the interaction selection dialog box opens, specify some filters (period, media type etc.) as necessary and click the **Search** button.

Ensure the required interactions have are checked for inclusion (see screenshot) and click the **Add Interactions** button. These interactions will appear in the main evaluation window, ready for use.

Change (Update) Media For Evaluation

										Ӯ Tooltips Off 🛛 👌 Buck,	Jake (jake.buck) 🚽	🔊 Logout 🖂 Messa
	Evalu	atio	n List 💌	Evaluator Form	i (949) 🗷							
	🔥 Ai	d In	eraction	s 🍺 Add Random	Interactions 🥥 R	Remove	📃 Report 🕻	🖂 Send F	eedback 🔲 Feedback Hist	ory 🕕 Evaluation Info	🗹 Reveal Result	s to Agent 🛛 📀 Compl
	Ques	tion	naire: (Call Quality (1.0)		Agent:	Barker, Deanna		Evaluator: Buck Jake	Evaluation Period	: From: 1/23/11	To: 1/29/11
		N.	Status	Start	End		Length	From	remove media	Туре	Current Ra	ting
		1	•	1/26/11 3:30 PM	1/26/11 3:46 PM		00:16:31	5630	5512	T 🔊 🖾	0.0 % 🚺	Quick Note
		2	٥	1/25/11 2:56 PM	1/25/11 2:56 PM		00:00:06	5512	5506		0.0 %	Quick Note
		3	٥	1/25/11 3:48 PM	1/25/11 3:49 PM		00:00:34	5630	5512	-	0.0 %	Quick Note
	Com								replace med	Total Rating		
	Feedl	hack							Ć		-•	
ľ				oack [things to im	prove]				Evaluation Feedback [tl	nings to maintain]		
L												
L												
L												

Figure 37: Change (Update) Media For Evaluation

The ability to change or update the list of media records available for evaluation is dependent on the **Allow Call Replacement** option when scheduling an evaluation.

If **Allow Call Replacement** is permitted, the calls shown for evaluation can be removed or replaced. This may be useful if the calls are of an inferior quality, and not suitable for use in the evaluation. If replaced, an alternative call will be offered, which still fulfills the evaluation's interaction parameters.

Note: In order to complete an evaluation, every media record listed in an evaluation must be fully graded!

Grading A Media Record

Evaluation List Evaluator Form (949) Grading Form (9	ation media p		is Off 🛛 🔗 Buck, Jake (jake.k	ouck) 🔊 Logout 🖂 Messages
E Feedback Hist 5 Save & Close 2 Close	4			
Questionnaire: Call Quality (1.0)	Agent:	Barker, Deanna	Evaluation period: Fro	m: 1/23/11 To: 1/29/11
Mail Tracking Number 105574	Ticket Number	35466	Category se	lect a category 💌
Question			Answer	Note
∃ Opening call, 40.0 % (5 items)				<u>^</u>
Greeting, introducing the agent and the company (20.0 %)			Average (50.0 %)	
Detection and Verification of a competent person (20.0 %)	questionn	aire answers		▼
Customer?s Consent to interview him/her (time, topic) (20.0 %)			Average (50.0 %) Bad (0.0 %)	
Company Presentation (20.0 %)	r evaluator		Good (100.0 %)	
Internal Note		Play 15	:30:00 15:46:30 🔽 Tota	al Rating 4.0 %
A fair representation of Deanna's abilities. Needs some more training in	i this respect.	feedback for ag	ent 🕪	≫ media player
Feedback Panel				
Things To Improve		Things To Maintain		
Ustening and understanding the client / customer Courtesy rather than impatience		Excellent dentification of the iss	ue and provision of a suita	able supported solution

Figure 38: 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 evaluators (not to agents).

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 39: Complete The Evaluation

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

To complete the evaluation and exit this tab, click the **Complete** button on the toolbar. If all media record questionnaires have been fully answered, Genesys Quality Manager marks the evaluation as complete by assigning it the **Finished** status (visible afterwards in the **Evaluation List**).

Even before completion, you can optionally send feedback to the agent (text in the feedback fields on this tab) by clicking the **Send Feedback Now** button. You can also view feedback from earlier evaluations for the same agent by clicking the **Feedback History** button.

Send Feedback To Agent (Optional)

				🖓 Tooltips Off 🛛 📥 Buck,	Jake (jake.buck) 🎤 Logout 🖂 N
Evaluation List 🗷 Evaluator F	orm (949) 🗷				
🚯 Add Interactions 🏼 🗐 Add Ran	dom Interactions 🤤 Remove	📃 Report 🖂	Send Feedback 🔲 Feedback H	History 🕕 Evaluation Info	🔽 Reveal Results to Agent 🛛 📀
Questionnaire: Call Quality (1.	0) Agen	t: Barker, Deanna	Evaluator: Buck, Jake	e Evaluation Period	: From: 1/23/11 To: 1/29/11
N. Status Start	End	Length F	rom To	Туре	Current Rating
□ 1	M 1/26/11 3:46 PM	00:16:31 5	630 5512	🗉 💽 🛃 🛚	0.0 % Quick N
2 • 1/26/11 4:17 P	M 1/26/11 4:18 PM	00:01:18 5	330 5512	🗉 💽 😂 🗵	📔 👪 88.0 % 🛛 🗌 Quick N
Great start for Deanna - some	things to work on, though.	Do you w user?	ant to send feedback to the	Total Rating	74.0 %
Feedback			No		-•
Feedback Evaluation Feedback [things to	o improve]	Yes		E Id >	**************************************

Figure 40: Send Feedback To Agent (Optional)

After marking an evaluation as complete, you are offered the option to send feedback to the evaluated agent (again from the information in the feedback text fields).

This invites the agent to log in to Genesys Quality Manager to view their evaluated performance. After selecting **Yes** or **No**, the evaluator form is closed.

Note: A completed evaluation cannot be re-opened for editing again unless the custom *Reopen Evaluations* role has been assigned to the user – see <u>Re-Open An</u> <u>Evaluation</u>. This would normally be an exceptional occurrence. Completed evaluations can be opened in read-only view, where they can be printed or used as a source for a report.

Deleting Evaluations (Optional)

	tion List 🔌		More Actions	🖂 Send Agent's Eval	uation Feedback 🛛 📴 E	Export to Spread	sheet All		🗸 🔍 Search Eva
N.	ID	Evaluator	Reevaluate	Ques. Name	Period From	Period To	Score	Status	Last Modified Parent ID
.(19	Buck, Jake		Call Quality (1.0)	Jan 23, 2011	Jan 29, 2011	74.0 %	Finished	Jan 27, 2011 1:
2	767	Buck, Jake		Call Quality (1.0)	Sep 25, 2010	Sep 26, 2010	57.0 %	Finished	Jan 25, 2011 1:
1	766	Buck, Jake	 Include in Statistics 	Call Quality (1.0)	Sep 26, 2010	Sep 27, 2010	70.0 %	Finished	Jan 25, 2011 1:
4	765	Buck, Jake	Reveal Results to Agent	Call Quality (1.0)	Sep 27, 2010	Sep 28, 2010	70.0 %	Finished	Jan 25, 2011 1:
5	64	Buck, Jake	Delete	Call Quality (1.0)	Sep 28, 2010	Sep 29, 2010	7.0 %	Finished	Jan 25, 2011 1:
6	783	Buck, Jake	Barker, Deanna	Call Quality (1.0)	Sep 29, 2010	Sep 30, 2010	64.0 %	Finished	Jan 25, 2011 1:
7	762	Buck, Jake	Guy, Ward	Call Quality (1.0)	Sep 25, 2010	Sep 26, 2010	2.0 %	Finished	Jan 25, 2011 1:
8		to solartad	evaluation(s)	Call Quality (1.0)	Sep 26, 2010	Sep 27, 2010	40.0 %	Finished	Jan 25, 2011 1:
9	1		e button in the	Call Quality (1.0)	Sep 27, 2010	Sep 28, 2010	90.0 %	Finished	Jan 25, 2011 1:
10		•	is dropdown	Call Quality (1.0)	Sep 28, 2010	Sep 29, 2010	2.0 %	Finished	Jan 25, 2011 1:
11				Call Quality (1.0)	Sep 29, 2010	Sep 30, 2010	49.0 %	Finished	Jan 25, 2011 1:
12	757	Buck, Jake	Cortez, Patricia	Call Quality (1.0)	Sep 25, 2010	Sep 26, 2010	25.0 %	Finished	Jan 25, 2011 1:
13	756	Buck, Jake	Cortez, Patricia	Call Quality (1.0)	Sep 26, 2010	Sep 27, 2010	87.0 %	Finished	Jan 25, 2011 1:
14	755	Buck, Jake	Cortez, Patricia	Call Quality (1.0)	Sep 27, 2010	Sep 28, 2010	45.0 %	Finished	Jan 25, 2011 1:
15	754	Buck, Jake	Cortez, Patricia	Call Quality (1.0)	Sep 28, 2010	Sep 29, 2010	87.0 %	Finished	Jan 25, 2011 1:
16	753	Buck, Jake	Cortez, Patricia	Call Quality (1.0)	Sep 29, 2010	Sep 30, 2010	19.0 %	Finished	Jan 25, 2011 1:
17	752	Buck, Jake	Ochoa, Marco	Call Quality (1.0)	Sep 25, 2010	Sep 26, 2010	57.0 %	Finished	Jan 25, 2011 1:
18	751	Buck, Jake	Ochoa, Marco	Call Quality (1.0)	Sep 26, 2010	Sep 27, 2010	49.0 %	Finished	Jan 25, 2011 1:
19	750	Buck, Jake	Ochoa, Marco	Call Quality (1.0)	Sep 27, 2010	Sep 28, 2010	51.0 %	Finished	Jan 25, 2011 1:
20	749	Buck, Jake	Ochoa, Marco	Call Quality (1.0)	Sep 28, 2010	Sep 29, 2010	83.0 %	Finished	Jan 25, 2011 1:

Figure 41: Deleting Evaluations (Optional)

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 in the **More Actions** dropdown. If this button cannot be clicked, you will need to assign the **Evaluate Agents** permission to your role (see <u>Re-Defining User Roles</u>). This applies to any other role that will need to delete (self) evaluations.

Important: Deleting (Self) Evaluations

Only the original creator (not necessarily evaluator) of an evaluation has the right to delete it.

This limitation is important for self evaluations.

The role creating self evaluations (e.g. **Agent**) must be assigned the **Evaluate Agents** permission in addition to the **Self-Evaluate** permission, in order to be allowed to both create and delete those evaluations. Without the Agent being assigned the **Evaluate Agents** permission, no-one on the system will be able to delete these self evaluations.

Re-Use The Evaluation - 1 (Optional)

New	🚺 Evalu	ate 📃 Rep 🔽	More Actions 🔹	🖂 Send Agent's Evalu	uation Feedback 🛛 📴 E	Export to Spread:	sheet All		🗸 🔍 Search Ev	/aluati
N.	ID	Evaluator	Reevaluate	Ques. Name	Period From	Period To	Score	Status	Last Modified Parent ID	
.(1)9	Buck, Jake		Call Quality (1.0)	Jan 23, 2011	Jan 29, 2011	74.0 %	Finished	Jan 27, 2011 11	
2	767	Buck, Jake		Call Quality (1.0)	Sep 25, 2010	Sep 26, 2010	57.0 %	Finished	Jan 25, 2011 1:	
1	766	Buck, Jake	 Include in Statistics 	Call Quality (1.0)	Sep 26, 2010	Sep 27, 2010	70.0 %	Finished	Jan 25, 2011 1:	
4	765	Buck, Jake	Reveal Results to Agent	Call Quality (1.0)	Sep 27, 2010	Sep 28, 2010	70.0 %	Finished	Jan 25, 2011 1:	
5	64	Buck, Jake	Delete	Call Quality (1.0)	Sep 28, 2010	Sep 29, 2010	7.0 %	Finished	Jan 25, 2011 1:	
6	743	Buck, Jake	Harker, Deanna	Call Quality (1.0)	Sep 29, 2010	Sep 30, 2010	64.0 %	Finished	Jan 25, 2011 1:	
7	762	Buck, Jake	Guy, Ward	Call Quality (1.0)	Sep 25, 2010	Sep 26, 2010	2.0 %	Finished	Jan 25, 2011 1:	
8	dole	to coloctod	evaluation(s)	Call Quality (1.0)	Sep 26, 2010	Sep 27, 2010	40.0 %	Finished	Jan 25, 2011 1:	
9			e button in the	Call Quality (1.0)	Sep 27, 2010	Sep 28, 2010	90.0 %	Finished	Jan 25, 2011 1:	
10			s dropdown	Call Quality (1.0)	Sep 28, 2010	Sep 29, 2010	2.0 %	Finished	Jan 25, 2011 1:	
11			3 dropdown	Call Quality (1.0)	Sep 29, 2010	Sep 30, 2010	49.0 %	Finished	Jan 25, 2011 1:	
12	757	Buck, Jake	Cortez, Patricia	Call Quality (1.0)	Sep 25, 2010	Sep 26, 2010	25.0 %	Finished	Jan 25, 2011 1:	
13	756	Buck, Jake	Cortez, Patricia	Call Quality (1.0)	Sep 26, 2010	Sep 27, 2010	87.0 %	Finished	Jan 25, 2011 1:	
14	755	Buck, Jake	Cortez, Patricia	Call Quality (1.0)	Sep 27, 2010	Sep 28, 2010	45.0 %	Finished	Jan 25, 2011 1:	
15	754	Buck, Jake	Cortez, Patricia	Call Quality (1.0)	Sep 28, 2010	Sep 29, 2010	87.0 %	Finished	Jan 25, 2011 1:	
16	753	Buck, Jake	Cortez, Patricia	Call Quality (1.0)	Sep 29, 2010	Sep 30, 2010	19.0 %	Finished	Jan 25, 2011 1:	
17	752	Buck, Jake	Ochoa, Marco	Call Quality (1.0)	Sep 25, 2010	Sep 26, 2010	57.0 %	Finished	Jan 25, 2011 1:	
18	751	Buck, Jake	Ochoa, Marco	Call Quality (1.0)	Sep 26, 2010	Sep 27, 2010	49.0 %	Finished	Jan 25, 2011 1:	
19	750	Buck, Jake	Ochoa, Marco	Call Quality (1.0)	Sep 27, 2010	Sep 28, 2010	51.0 %	Finished	Jan 25, 2011 1:	
20	749	Buck, Jake	Ochoa, Marco	Call Quality (1.0)	Sep 28, 2010	Sep 29, 2010	83.0 %	Finished	Jan 25, 2011 11	

Figure 42: 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 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)

📀 Create Evaluations	🛃 Save As	Temp	ate 🤯 Templates	🛃 Load Template 🝷	😢 Close						
Period:			▼ F	rom:	1/23/11		To:		1/2	9/11 📑)
Questionnaire:	Call Qualit	y (1.	0)			*	Interact Count:	ion	З		
Apply To Statistics:		~		Re-Evalua	ating crea	ites a					
Basic Sub-Criteria	1 🗷 🛛 Add Su	ıb-Cri	teria	copy of t							
O Group Evaluation	• A	gent	Evaluation	with the s Modify as	same sett	ings.					
Evaluator:	Buck, Jak	e (ja	ke.buck)	click Cre	ate Évalua	ations	J				
Groups:			📃 Select A	II/None Agents:				🗌 Selec	t All/No	one	
4 🥼 Root group					anna (deanna					^	
a 🎁 Copenhager					attie (mattie.						
Paços de Fi	erreira				lle (camille.be (jake.buck)	rg)				_	
a 🧔 Dakar Sioni Bolnis					chery (zacher	v.cherrv)					
🖌 💋 Guatemala (ricia (patricia					~	
Wrapup:			▼ [Media Direction:	In/Outbou	ind 🍸					
Add Media Type	🤤 Remove	8	Allow Replacement	Allow Selection	👂 Allow rand	om calls se	lection 😳	Add Inter	raction		
Media Type	Min. Count	N.	Start	End	Length	From	То	Туре			
Call	2	1	1/26/11 4:17 PM	1/26/11 4:18 PM	00:01:18	5630	5512		8	Quick Note	

Figure 43: 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.

Re-Open An Evaluation (Optional)

Ev	alual	tion List 🗵										
	New	📊 Grade	E Rep	🚱 More /	Actions 💌	🖂 Send Agent's Evalu	ation Feedback 🛛 📴 E	xport to Spreads	sheet All		🗸 🔍 Search I	Evaluati
	N.	ID	Evaluator	Reev	valuate	Ques. Name	Period From	Period To	Score	Status	Last Modified Parent I	D
	(1)	949	Buck, Ja	Reop	ben	Call Quality (1.0)	Jan 23, 2011	Jan 29, 2011	74.0 %	Finished	Jan 27, 2011 1:	
	2	767	Buck, Jake	. 1		Call Quality (1.0)	Sep 25, 2010	Sep 26, 2010	57.8%	Finished	Jan 25, 2011 1:	
	3	766	Buck, Jake	· 1	ide in Statistics	Call Quality (1.0)	Sep 26, 2010	Sep 27, 2010	70.0 %	Finished	Jan 25, 2011 1:	
	4	765	Buck, Jake	✓ Rev	re-opening a	finished evaluation	will open it fo	28, 2010	70.0 %	Finished	Jan 25, 2011 1:	
	5	764	Buck, Jake	Dele		iewing of grades and		29, 2010	7.0 %	Finished	Jan 25, 2011 1:	
	6	763	Buck, Jake 📙	_	read-only v	lewing of grades a	ind recuback	30, 2010	64.0 %	Finished	Jan 25, 2011 1:	
	7	762	Buck, Jake		Re-opening	evaluations require	es the Reopen	26, 2010	2.0 %	Finished	Jan 25, 2011 1:	
	8	761	Buck, Jake		evaluation	s permission for yo	ur user role	27, 2010	40.0 %	Finished	Jan 25, 2011 1:	
	9	760	Buck, Jake		Guy, Ward	Call Quality (1.0)	Sep 27, 2010	Sep 28, 2010	90.0 %	Finished	Jan 25, 2011 1:	
	10	759	Buck, Jake		Guy, Ward	Call Quality (1.0)	Sep 28, 2010	Sep 29, 2010	2.0 %	Finished	Jan 25, 2011 1:	
	11	758	Buck, Jake		Guy, Ward	Call Quality (1.0)	Sep 29, 2010	Sep 30, 2010	49.0 %	Finished	Jan 25, 2011 1:	
	12	757	Buck, Jake		Cortez, Patricia	Call Quality (1.0)	Sep 25, 2010	Sep 26, 2010	25.0 %	Finished	Jan 25, 2011 1:	
	13	756	Buck, Jake		Cortez, Patricia	Call Quality (1.0)	Sep 26, 2010	Sep 27, 2010	87.0 %	Finished	Jan 25, 2011 1:	
	14	755	Buck, Jake		Cortez, Patricia	Call Quality (1.0)	Sep 27, 2010	Sep 28, 2010	45.0 %	Finished	Jan 25, 2011 1:	
	15	754	Buck, Jake		Cortez, Patricia	Call Quality (1.0)	Sep 28, 2010	Sep 29, 2010	87.0 %	Finished	Jan 25, 2011 1:	
	16	753	Buck, Jake		Cortez, Patricia	Call Quality (1.0)	Sep 29, 2010	Sep 30, 2010	19.0 %	Finished	Jan 25, 2011 1:	
	17	752	Buck, Jake		Ochoa, Marco	Call Quality (1.0)	Sep 25, 2010	Sep 26, 2010	57.0 %	Finished	Jan 25, 2011 1:	
	18	751	Buck, Jake		Ochoa, Marco	Call Quality (1.0)	Sep 26, 2010	Sep 27, 2010	49.0 %	Finished	Jan 25, 2011 1:	
	19	750	Buck, Jake		Ochoa, Marco	Call Quality (1.0)	Sep 27, 2010	Sep 28, 2010	51.0 %	Finished	Jan 25, 2011 1:	
	20	749	Buck, Jake		Ochoa, Marco	Call Quality (1.0)	Sep 28, 2010	Sep 29, 2010	83.0 %	Finished	Jan 25, 2011 11	

Figure 44: 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 the user's role (see <u>Re-Defining User</u> <u>Roles</u>).

A user with the Reopen evaluations permission can select a *Finished* evaluation and click the *Re-open* button, after which the evaluation will be assigned the status In Progress.

Note: After re-opening an evaluation, only the assigned evaluator can view and modify the evaluation scores. There is currently no permission that will enable a user role to view/modify evaluations for which the user is not the assigned evaluator.



Chapter



A short tutorial to show how to create and export evaluation charts and reports in Genesys Quality Manager 8.0.480.

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

- Setting Up A Report
- Reports For A Single Evaluation
- Exporting Report Data
- Dashboards

The following types of reports (displaying visual graphs) can be created:

- Agent Skills: select an agent, questionnaire, evaluation period and question group(s) (skill(s)) to view an agent's skill profile
- **Compare Agents**: select a questionnaire, evaluation period and question group ('skill') to view a comparison between agents' skills
- **Compare Evaluators**: select an agent, questionnaire and evaluation period to compare how different evaluators scored this agent
- Question Trend Chart: displays overall trends in agent and agent groups evaluations over time (categorized by average score into 'Good', 'Average' and 'Bad' rankings)
- Compare Scores: a report enabling the comparison of evaluators' performance, either for a single call or agent
- League Table: based on the 'Averages per Questionnaire for Agent' report, but sorted according to final score and permitting the selection of multiple questionnaires (aggregate average)
- Each report is set up using the parameter fields, after which the **Compute Graph** button is clicked to generate the report graph. Parameters can still be modified after report creation, but each time the **Compute Graph** button must again be clicked to regenerate the report and resulting graph.
- Report graphs can either be printed out using the standard browser print dialog (CTRL + P for Windows, CMD + P for Mac), or the graph itself can be saved as a static graphic image via right-click on the generated graph -> Save Image Locally.
- Alternatively, report data can be exported in Excel 2007+ (.xlsx) spreadsheet format - see the Exporting Report Data section.

Setting Up A Report



Figure 45: Setting Up A Report

All reports in Genesys Quality Manager can be accessed from the **Reports** section of the left-hand menu. The following example report setup is typical for the **Agent Skills Compare Agents** and **Compare Evaluators** reports..

Click on **'Reports'** (1) in the left-hand menu, then click on the required report (2) in the left-hand menu (for example - the **Agent Skills** report).

In this case, specify an agent group (3), an agent (4), a questionnaire (5), an evaluation start date (6), an evaluation end date (7), and an initial report scale (8). Any of these parameters can be changed again later if necessary. When all required parameters have appropriate values, you will be able to click the **Compute graph** (9) button to create the report, or the **Export to** spreadsheet button to export the report directly in Excel 2007 spreadsheet format (.xlsx) (see Exporting Report Data).

The remaining reports are more complex, and their setup is explained in the following sections.

Question Trend Chart - 1

		💭 Tooltips Off 🛛 🥵 CcManager, CcManager (coman	ager) 🔊 Logout 🖂 Messages
×	Question Trend Chart 🛎 👩		
Q 5.7 (8	🖄 Compute graph 🖨 Export to spreadsheet) 😢 Close		
🚯 Dashboard	Questionnaire: Call Quality	uestion Group: Call control	(Entire Question Group)
🗉 📁 Evaluations		Parameters	 >
🖽 📁 Questionnaires		5 Period	
🖃 🃁 Reports			
🖄 Agent Skills		6 Agents	
🖄 Compare Agents		Groups:	Select All/None
Compare Evaluators		a Gubups. ▲ ∰ Copenhagen	
Question Trend Chart		Paços de Ferreira	
Compare Scores		aços de remena	
🖄 League Table			=
Comparison Administration		Sioni Bolnisi	
 About 		a 📁 Guatemala City	
		Breidablik	×
		Agents:	Select All/None
		Daugherty, Elba (elba.daugherty)	<u>^</u>
		Duffy, Tami (tami.duffy)	≣
		Greene, Galen (galen.greene)	
		Hopper, Stephan (stephan.hopper)	
		Lawson, Myrtle (myrtle.lawson)	
		Leon, Delmer (delmer.leon)	✓
		7 Scoring	
		Scoring Type: Percentage	
		Excellent Threshold: 75 Maximum:	100

Figure 46: Question Trend Chart – 1

The **Question Trend Chart** is particularly well suited to observing the overall progress of large numbers of agents and groups over a period of time.

Average values for finished agent evaluations during each unit of time (e.g. per month) are calculated and sub-divided into three groups: 'Good', 'Average' and 'Bad'. The number of agents in each of these three groups is then plotted on the chart for each time unit (e.g. month) and trend lines connected between points.

Click on Reports -> Graphs -> Question Trend Chart (1) in the menu to display the Trend Chart parameters screen.

Select a Questionnaire (2) and optionally a question group (3) or question (4) to base the analysis on, together with from and to dates (5) to limit the range of evaluations analyzed.

Specify the target(s) of the report by selecting one or more agent groups (all are selected by default, so you may need to uncheck those not required in the graph).

Finally, the Scoring parameters (7) enable you to determine the threshold (boundary) values for the report groupings.

The Good threshold is the minimum value for an agent score to be included in the top rated group (default is 75%). Similarly, the Bad threshold is the maximum value for an agent score to be included in the worst rated group (default is 25%). All agent scores that fall between these two thresholds are included in the Average group.
Click the Compute Graph (8) button to begin the chart creation process. If you receive a message warning about no data being available for the specified parameters, you will need to modify your parameter values - for example change the to or from dates, questionnaire specified, etc. - then click the Compute Graph button again.

Click the Export to Spreadsheet (9) button to create a tabular version in downloadable spreadsheet format (.xlsx).

Question Trend Chart - 2



Figure 47: Question Trend Chart – 2

After a short while the finished Trend Chart should be displayed. Good, Average and Bad group trends are displayed as green, blue and red lines respectively.

In the example above, the chart shows that although in Q2 the number of average evaluations increased (and good evaluations decreased), by Q3 the number of good scores had already improved.

Compare Scores Report - 1



Figure 48: Compare Scores Report – 1

The Compare Scores report enables the comparison of the performance and scoring of evaluators. The following two modes are possible:

- call-based comparison ("head to head"); compare the scoring by two evaluators for one specific call

- agent-based comparison ("general comparison"); compare the scoring by two evaluators for a specified agent

Click on Reports -> Compare Scores to display the parameters page. The first row of boxes define the parameters for the 'base evaluation', from which all comparisons are made. Select a questionnaire (1) to use, an agent group (2) and agent (3), then finally one evaluation (only one can be selected here).

The second row of boxes define the parameters for all other evaluations that will be compared to the base evaluation. The questionnaire is now automatically selected. Select one or more target agent groups (5), one or more target agents (6) and one or more target evaluations (7) for comparison. Click OK (8) to start the process of creating the report.

Compare Scores Report - 2

	А	В	С	D	F	F	G	н	
	Compare		U	U	-		0		
1	oompare	000163							
2	Questionnai	re:	Call (Quality	v (1.0)				
2	Quootionnan		Juni	a dant,	, (,				
4		Group/Question name		1					
			Base						
			Evaluati						
			on,						
			Deanna			Deanna		Deanna	
			Barker,	1 · · ·		Barker,		Barker,	
			20/10/10		_ .	20/10/10	L .	20/10/10	L .
_			, Eval	1	Deanna`	·	Deanna`	,	Deanna`
5	Opening call		Id: 1741 4.00%	<u></u>	s Diff -4.00%	Id: 1743 24.00%	S DIT 20.00%		s Diff 24.00%
0 7	Opening can	Greeting, introducing the agent and the company	4.00%			24.00%	10.00%		
8		Detection and Verification of a competent person	0.00%	0.00%	0.00%	20.00%	20.00%	10.00%	10.00%
9		Customer?s Consent to interview him/her (time, topic)	0.00%	0.00%	0.00%	20.00%	20.00%	-	20.00%
10		Company Presentation	0.00%		0.00%	0.00%	0.00%	20.00%	20.00%
11		Switching to the matter of the call	0.00%	0.00%	0.00%	0.00%	0.00%	20.00%	20.00%
12	Merchant's skills	-	4.00%	12.00%	8.00%	6.00%	2.00%	18.00%	14.00%
13		Questioning techniques - investigative/business orien	t 0.00%	30.00%	30.00%	0.00%	0.00%	30.00%	30.00%
14		Understanding customer needs	0.00%	20.00%	20.00%	0.00%	0.00%	40.00%	40.00%
15		Solution proposal	10.00%	10.00%	0.00%	20.00%	10.00%	20.00%	10.00%
16		Customer care	10.00%		-10.00%	10.00%	0.00%	0.00%	-10.00%
	Call control		18.00%			20.00%	2.00%	0.00%	
18		Following the script	10.00%	0.00%	-10.00%	10.00%	0.00%	0.00%	-10.00%

Figure 49: Compare Scores Report – 2

A sample spreadsheet is shown above. All evaluation values are shown in columns. The first evaluation displayed is the base evaluation, while the remaining evaluations shown are those selected for comparison to the base evaluation.

The first column of figures for an evaluation displays the simple average value for that question (or weighted average value for question groups). The second column of figures displays the calculated difference between this evaluation's value and the base evaluation.

Note: Question groups (together with their assigned weight (w)) are listed in bold on the left side of the report, each followed by the list of questions it contains. Values shown in red are a negative difference (i.e. this evaluation contained a higher mark for the question / question group than the base evaluation).

League Table - 1

			🖓 Tooltips Off	* 💤 CcManager, CcManager (ccmanager) 🚀 Logout 🖂 Message	88
(*)	League Table				
Q 5.7 92 2 2 3 75	Export to Spreadsheet 🔀 Cl	ose			
🗑 Dashboard	2 Jime Interval		ck the triangles to o	nen	^
🗉 📁 Evaluations			ese parameter sect		
🗉 📁 Questionnaires 🔰	3 Questionnaire				
🖃 🃁 Reports	Scoring System:	Percentage	~		
🖄 Agent Skills 🖄 Compare Agents	Questionnaire:	Select All/None	o'		
Compare Agents	Question in allie.				
Question Trend Chart		Call Quality (1.0)			
🖄 Compare Scores					
🖄 League Table					
Administration About					
U ADOUT					
	4 Mainstream Thresholds				
	Start:	25			
	End:	75			
	Linu.	75			
	5 Agents				
	Grouping:	💿 Agent	🔘 Group		
	Groups:	Select All/None Ag	gents: 🗹 🤄	Select All/None	
	4 🥼 Root group	_ B.	arker, Deanna (deanna.bark		
	🔺 📹 Conenhagen	B	enson. Mattie (mattie hensi	on)	~

Figure 50: League Table – 1

The League Table report provides a simple way to create an agent 'leader board', with the highest performing agents overall or for a given questionnaire / agent group being clearly seen in rank order.

Click Reports -> League Table (1) to display the parameters for this report. You must specify from / to dates (2) to limit the number of finished evaluations analyzed, then a scoring system (e.g. Percentage) and one or more questionnaires (3) as the source of the evaluations.

Further criteria can optionally be specified (4): Mainstream limits the range of scores to upper / lower limits, and Agent / Agent Group allows the League Table to be confined to a subset of agents (default is that all are included).

Finally the Grouping option (5) displays the ranked results at Agent level (default) or at Group level (useful when agent groups need to be directly compared).

Click **OK** (6) to generate the report as a downloadable spreadsheet file (.xlsx).

League Table - 2

A	В	С	D	E	F	G	Н	1	J	К
Leagu	ie Ta	ble								
Questio	nnaire		Quality (1.0))						
From:		9/26/2	010							
_		9/29/2								
To:		912912	010							
_										
					Average					
#	Name	Surname	Login	Group	Score					
1.	Patricia	Cortez	patricia.cortez	Paços de Ferreira	52.56%					
2.	Eva		eva.sanders	Paços de Ferreira	51.52%					
3.	Charlie		charlie.lester	Paços de Ferreira	51.19%					
0 4 .		Ochoa	marco.ochoa	Paços de Ferreira	50.13%					
1 5. 2 6 .	Ward	Guy Watson	ward.guy	Paços de Ferreira	49.97% 47.90%					
2 6. 3 7.	Camille		fannie.watson camille.berg	Paços de Ferreira Paços de Ferreira	47.90%					
4 8 .	Natalie	-	natalie.mccall	Paços de Ferreira	46.95%					
5 9 .		Benson		Paços de Ferreira	46.03%					
6 10 .	Zachery			Paços de Ferreira	45.78%					
7 11.	-	-		Paços de Ferreira	44.94%					
8 12 .	Stefanie	Winters	stefanie.winters	Paços de Ferreira	43.58%					
9 13 .	Deanna	Barker	deanna.barker	Paços de Ferreira	42.96%					
0 14.	lvy	Young	ivy.young	Paços de Ferreira	36.12%					
1 Average Sco	re				46.97%					
→ → I.Call Q	uality 1.0	2						1		

Figure 51: League Table – 2

An example League Table report is shown above, grouped by agent. This spreadsheet can be printed or further processed manually or with other tools.

Reports for a Single Evaluation

		🖓 To	oltips Off 🛭 🧟 CcManager, CcManager (ccmanager) 🎾 Logout 🛛 Mess	sages
«	Evaluation List 🛞 Evaluation	Detail 🗵		
Q 5 # 3	📄 Print 🛛 📴 Export to Sprea	dsheet	2 🗌 Include All Possible Answers 👘 Eco Pri	nting
Dashboard Gevelopment Gevelopment	Evaluation #949) - Call Quality 1.0		^
Evaluation List Evaluation Planner Questionnaires G Reports Administration	Agent: Evaluator:	Deanna Barker (deanna.barker) Jake Buck (jake.buck)	Evaluation date: 27/01/1 Eval. period from: 23/01/1 12:00 Eval. period to: 29/01/1 11:59	Ξ
(1) About	Interaction #954	Start: 26/01/11 03:30:00	End: 26/01/11 03:46:30	•
select an evaluation in Evaluation List and click		From: 5630 Direction: In/Outbound Category:	possible reporting options: Include all possible Answers - show grayed out unselected answers too Eco Printing - remove gray graphic bars for simple text printing	
	Greeting, introducing the Detection and Verification Customer?s Consent to i Company Presentation	0 1 2	Average 50.0% Good 100.0% Good 100.0% Bad 0.0%	
	Switching to the matter of Merchant's skills	f the call	Average 50.0%	
	Questioning techniques - Understanding customer	investigative/business oriented needs	Good 100.0% Good 100.0% Average 50.0%	
	Solution proposal Customer care Call control		Average 50.0% Good 100.0%	

Figure 52: Reports for a Single Evaluation

The most useful Quality Manager evaluation reports can be created by selecting one or more evaluations (using CTRL click on Windows or CMD click on the Mac for multiple selections) in the Evaluation List and clicking the *Report* button. A simple text-based report is created, which has the following options:

Include All Possible Answers: show all possible answers (with those not selected grayed out)

Eco Printing: create a simpler text-based version of the report, with graphical borders removed for more economic printing

This report can be printed out or saved as an Excel file (.xlsx) file with the *Print* and *Export to Spreadsheet* buttons respectively.

Exporting Report Data



Figure 53: Exporting Graph Data to a Spreadsheet - 1

All graph data can be exported to a Microsoft Excel 2007 or above (.xlsx) spreadsheet file, simply by configuring the graph parameters as before and clicking the Export to Spreadsheet button at the top of each graph.

Note: The Compare Scores and League Table 'graphs' do not actually create any visual graphs in Quality Manager 8.0; rather they enable the Compare Scores and League Table reports to be downloaded in spreadsheet format only.



Figure 54: Exporting Graph Data to a Spreadsheet - 2

A downloadable .xlsx file will be created within a short space of time (how this appears depends on the browser you are using).

Important:

In Genesys Quality Manager 8.0, the export to spreadsheet feature has the following performance limits:

- Max: 1000 evaluations can be exported in one export operation
- Max: 20,000 total rows of evaluation data can be exported in one export operation

These limitations will be improved in an upcoming release, however it may be necessary to run the export function several times with varying graph parameters to obtain all the data required.

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16		Customer care	green: better than base	10.00%				0.00%	0.00%	-10.00%
17	-		yellow: same as base	18.00%			-	2.00%		-18.00%
18		Following the script	red: worse than base	10.00%	6 0.00%	-10.00%	10.00%	0.00%	0.00%	-10.00%

Figure 55: Exported Graph (Compare Evaluations) in Spreadsheet Format

The downloaded file can be viewed in Microsoft Excel version 2007 and above and other programs that can read the Excel .xlsx format. It can also be used for upload to other tools for further processing or analysis.

Tip – Looking Up Evaluations:

Evaluations are identified by their evaluation ID, which is included in a header row of exported graph data, but is normally hidden from view. Increase the height of this row (normally row 5) to see the IDs (see screenshot above). Using an ID number, you can search for the specific evaluation in Quality Manager using the evaluation list search (enter the same ID into 'From' and 'To' ID fields).

Dashboards

An introduction to setting up and managing widget dashboards for a fast real-time overview of call center performance in Genesys Quality Manager.

The Genesys Quality Manager Dashboard



Figure 56: The Genesys Quality Manager Dashboard

The Genesys Quality Manager **Dashboard** is available to users with certain roles within Genesys Quality Manager (Team Leader, Supervisor, CC Manager).

It enables a varying number of information boxes ('widgets') to be configured, giving the user a quick summary of evaluation data such as high/poorly performing agents and groups, in a simple visual format.

Data is taken directly from the Genesys Quality Manager database, so reflects an up-tothe-minute overview of your call center's performance.

Two dashboards are available - **Default** is for all Dashboard users, which can be set up to give a generic top-level performance overview, whereas the **User** dashboard can be customized by each individual Dashboard user for his/her own custom requirements.

Setting Up a Dashboard - 1

(*)
5 A 2 B
💋 Questionnaires
📁 Reports
W About
2
Dashboard C Evaluations Q Questionnaires

Figure 57: Setting Up a Dashboard – 1

A dashboard can only be properly set up when agents, groups and questionnaires have been defined. It is also helpful to have some representative data available, to ensure a correct indication of performance.

After switching to the **Dashboard** view, choose the **Widgets per Row** to use for widget display. For example, two rows are used in the first screenshot above, enabling four widgets to be shown.

Create the first widget by clicking the **Add Widget** button and selecting one of the following types:

- **High/Low Scoring Agents/Groups** - a text-based list of the top or bottom scoring agents/groups for a particular questionnaire. The maximum number to display can be specified using the **Count** parameter

- **Trend** - displays the average score trend from a specified questionnaire for an agent group (or all groups), with numbers comparing this week/month to last week/month

- **Pie** - the pass / fail criteria (**Good** / **Bad Threshold**) from a specified questionnaire are used to show a pie chart of agent categories (good/average/bad) for a group or all groups. The threshold values can be modified in the widget.

Setting Up a Dashboard - 2

Image: Construction of the section		🖓 Tooltips Off 🏾 💁 CcManager, CcManager (comanager) 📝 Logout 🖂 Mes	sages
Dashboard Deschoard Questionnaires Add/Wdget settings button to begin configuring the widget	«	Dashboard 🛞	
Dashboard Questionnaires Adout Click the widget settings button to begin configuring the widget Good Thresholt: 75 Bad Thresholt: 55 Bad Thresh	C	🔠 Widgets per Row 🔻 🕗 Add Widget 👻 🔚 Save	
User Dashboard Default Dashboard	 Dashboard Evaluations Questionnaires Reports Administration 	Image: Configuration of the settings button to begin configuring the widget Pie - Configuration Click the widget settings button to begin configuring the widget Groups: Call Quality (1.0) Groups: Copenhagen Paços de Ferreira View Dakar Sioni Bolnisi Good Threshold: 75 Bad Threshold: 25 Min-Max Value: 0 100	
		User Dashboard Default Dashboard	

Figure 58: Setting Up a Dashboard – 2

In this example, a **Pie** widget has been chosen. An empty widget frame will appear. Click the settings button to configure the widget (see screenshot).

In the widget configuration dialog box, select a target agent group. Use the checkbox to select all or no groups and use CTRL (Win) or CMD (Mac) while selecting to add or remove groups from your selection. Select a questionnaire, since this will provide the default **Good** and **Bad Threshold** and **Min-Max Value** (range). The threshold values can now be modified if required.

The Refresh (minutes) option specifies how often the widget check for the latest data. It is recommended that this value shouldn't be too low (i.e. set to above 5 minutes), to avoid browser performance issues with multiple widgets refreshing together.

Click **Save** to apply the settings and display the widget.

Note: If a **Description** is not provided for a widget during configuration, Genesys Quality Manager will display settings information in the title bar of the widget instead, which may not be very attractive!

Setting Up a Dashboard - 3



Figure 59: Setting Up a Dashboard – 3

After saving the widget configuration, the widget attempts to display the data as appropriate. It may be necessary to re-configure the widget several times before the desired results are obtained.

Further widgets can be added, moved to different positions by click-dragging them on their title bars (the mouse cursor changes to a cross when dragging is possible), or widgets can be minimized and removed as necessary (see screenshot).

After completing widget configuration, click the **Save** button next to the **Add Widget** button to save the Dashboard layout (the Save button is disabled if no changes need to be saved).

Note: For performance reasons, no more than 20 dashboard widgets can be added to a dashboard.

Chapter 6: Reporting



Chapter



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

- User Management
- Additional Options

User Management

A short tutorial to show how to create, modify and remove users and groups in Genesys Quality Manager 8.0.

Groups And Users In Genesys Quality Manager



Figure 60: Groups And Users In Genesys Quality Manager

Users within Genesys Quality Manager (including agents, team leaders, supervisors, CC managers and administrators) are always contained within at least one User Group.

User Groups (also known simply as groups) can have multiple levels (i.e. a hierarchy) and can help to organize Genesys Quality Manager users; for example they can be used to allow the easy evaluation of a specific team of agents.

These group levels and users are managed within the Group Manager, while the User Manager provides a simple method of performing bulk operations on the full list of Genesys Quality Manager users.

The Group Manager



Figure 61: The Group Manager

Most group and user management can be performed in the Group Manager, accessible in the Administration menu.

Clicking the **Group Manager** menu item opens a tree view of the current groups in Genesys Quality Manager. Sub-groups can be viewed by pressing the small black symbols next to the parent groups.

Creating A User Group



Figure 62: Creating A User Group

Adding new groups can only be performed in the Group Manager (tree view) and only when an existing group is selected.

Click the **Add** button and enter a unique name for this group, then click the **Save** button to create the group under (inside) the currently selected group.

Note: Every group name must be unique within the whole application, so it is suggested you use a sensible naming convention for groups, such as LocationFunction (e.g. UKSales).

Viewing Users In Groups

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		4 Page	1 of 1 🕨	▶ 2					Displaying 1 - 16 of

Figure 63: Viewing Users In Groups

Users in a particular group can be viewed by selecting the appropriate group name under the **Group Manager** menu item.

If no groups have yet been created, users are all present in the default 'Root' group and can only be viewed and managed in the **User Manager**.

Adding A User (Agent)



Figure 64: Adding A User (Agent)

Adding a user to the currently selected group is as simple as clicking the **Add** button and entering the appropriate details in the dialog box.

The simplest case is for an agent user type.

Specify a **Database** for this user. If you are creating a new user in Genesys Quality Manager, select the Genesys Quality Manager database (default) and fill in an appropriate **Login** and **Password**.

The **Active** setting indicates whether this user is available in Genesys Quality Manager for evaluations and reporting. Agent profiles that are no longer relevant and/or available should have their **Active** setting set to **De-Activated**.

Important!

When Genesys Quality Manager user profiles are marked as deactivated, they can no longer log in to Genesys Quality Manager. A user with administrator or CC Manager permissions must first re-activate these accounts and reset their passwords before they have login permissions again.

The **User Role** (in this case Agent) is the selection that decides what permissions and features will be available to the user in Genesys Quality Manager.

The **Language** selection is the default language that the Genesys Quality Manager interface will be presented in when the user logs in; however he/she can modify this setting in his/her user profile.

You will need to ensure the user has a valid **First Name**, **Surname** and **Email** address (which will be used for system notifications).

Both a **Phone** number and **Agent ID** can be specified, but only one of these can be chosen as the default method of identifying this agent. In most cases the phone number can be used.

Check that the correct **Agent** (user) **Group** has been specified, and click the **Save** button to create the user profile.

When viewing a list of users, double-clicking on the user record (or selecting the user and clicking the **Edit** button) allows the user profile to be modified.

The User Manager

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(User Manager)		5	Barnes	Marva	marva.barnes	Agent 🧲			
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]) About		9	Burt	Hiram	hiram.burt	Agent	Austria Salzburg	ScoreCardDB	\bigcirc
		10	Carey	Avis	avis.carey	Agent	Grazer AK	ScoreCardDB	\bigcirc
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		13	Cohen	Alta	atta.cohen	Agent	Austria Salzburg	ScoreCardDB	\bigcirc
		14	Compton	Taylor	taylor.compton	Agent	Sadam Tallinn	ScoreCardDB	\bigcirc
		15	Cotton	Parker	parker.cotton	Agent	Köln XI	ScoreCardDB	\bigcirc
		16	Dennis	Monte	monte.dennis	Audit Supervisor	St. George's	ScoreCardDB	Ø
		17	Dotson	Greta	greta.dotson	Audit Supervisor	Nuuk	ScoreCardDB	Ø
		18	Estrada	Ronald	ronald.estrada	Agent	Sadam Tallinn	ScoreCardDB	\bigcirc
		19	Fields	Scottie	scottie fields	Agent	Sadam Tallinn	ScoreCardDB	

Figure 65: The User Manager

The User Manager can also be accessed under the Administration section of the menu.

Clicking on **User Manager** displays a list of all the users known to Genesys Quality Manager, which can make user search or bulk editing of user profiles easier. Again, double-clicking on a user record (or selecting a user and clicking the **Edit** button) allows the user's profile to be modified.

Adding Another User Type

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				4 Save	Cancel
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Figure 66: Adding Another User Type

Users can be added in the User Manager too, by clicking the **Add** button, or edited by selecting the user and clicking the **Edit** button. If the user type being created (or modified) is not 'agent', then the **Add** *or* **Edit User** dialog box is expanded to show the group assignment.

Group assignment allows the user to be recognized as an evaluator for one or more groups in Genesys Quality Manager (those shown in the right panel named **Groups Assigned to Supervisor**). To assign a group to the current user, select (click) a group within the **Groups** panel and click the **Add** button.

The **Add All** button allows all available groups to be assigned in one operation, whereas the **Remove All** button removes all group assignments.

To remove a single group assignment, select (click) an assigned group in the right panel and click the **Remove** button.

Delegation enables another evaluator to inherit the same evaluation permissions for a pre-defined period (e.g. during an evaluator's vacation). This can be enabled by clicking the **Delegation** checkbox, after which the target evaluator and the delegation period can be defined and saved. During this period, the target evaluator will then be able to evaluate agents assigned to the original evaluator.

Finally, click the **Save** button to update the user profile, or **Cancel** to exit the profile editor dialog without saving changes.

Removing Users

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🗉 📁 Evaluations 🚺 🚺	1	MacDonald	Ronnie	ronald.mcdonald	Team leader	Sadam Tallinn	ScoreCardDB	٢	
 Questionnaires Reports Administration Group Manager User Manager Interaction Types Audit Log Role Manager Quality Manager Options About 		U	ser Removal Are you sure selected user 3 Yes	you want to remo (s)? No	ve the				
		Page 1 of 1	N 2					Displa	aying 1 - 1 of 1

Figure 67: Removing Users

Users can be removed from Genesys Quality Manager in either the User Manager or when a group is selected in the left hand menu under the Group Manager.

In either case, select (click on) the user and click the **Remove** button in the toolbar. Click the **Yes** button in the confirmation dialog that appears to confirm permanent user deletion.

Removing a User Group



Figure 68: Removing a User Group

Removing a user group can only be performed in the Group Manager (when the **Group Manager** item in the left hand menu is clicked).

Only an empty group (containing neither users nor sub-groups) can be deleted, by selecting (clicking on) it in the tree view and clicking the **Remove** button in the toolbar.

If the group can be deleted, confirm the deletion in a similar way to user deletion to permanently delete the user group from Genesys Quality Manager.

The Role Manager



Figure 69: The Role Manager

Although Genesys Quality Manager supplies a number of standard user roles (including 'Agent', 'Team Leader', 'Supervisor', 'CC Manager', 'IT Administrator'), is useful to be able to customize the permissions for each role, or create your own custom role structure. Any user who has been assigned the permission **Change roles**, add/remove permissions can modify user roles in Genesys Quality Manager.

The **Role Manager** enables existing roles to be modified (**Edit**), or new roles to be created (**Add**), optionally based on an existing role (**Copy**), or removed (**Delete**). Note that the standard roles cannot be removed. The **Edit**, **Copy** and **Delete** actions require a role to be selected first for them to operate on.

Re-Defining User Roles



Figure 70: Re-Defining User Roles

As an example, imagine that you wish to enable users with a role of Supervisor to create and modify questionnaires.

Clicking on **Supervisor** in the list of roles, then **Edit** to open the **Edit User Role** dialog box, allows the current permissions for the Supervisor role to be modified.

Clicking on a permission (in this example: Create and modify questionnaires) in the left window and moving it over to the right window using the >> button adds this permission to the role. Conversely, moving a permission from the right window to the left using the << button removes this permission for this role.

Clicking **OK** saves any modifications and immediately applies these permissions to all users who are assigned this role.

Note: After modifying an existing role for the currently logged-in user, you may need to log out and in again for the new permission properties to be enabled.

Enabling Agent Self-Evaluation

A typical example of role modification is to enable agents to plan and perform evaluations of their own performance (self-evaluations). By default, this is disabled for agents in Quality Manager, so this **Self-evaluation** permission must be added to the Agent role(s) in Quality Manager as shown. Agents will now see the **Evaluations** menu item, but only be allowed to plan and perform evaluations for themselves. See the *Quality Manager Agent User Guide* for more information.

If only a subset of agents is allowed to perform self-evaluations, it will be necessary to create a second custom Agent role that includes this permission.

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۲۵۰ ۲۵۰ ۲۵۰ ۲۵۰ ۲۵۰	Role Manager	As an administrator, add the self-evaluate permission to an agent role to allow those agents to perform
🚳 Dashboard 🗉 📁 Evaluations	Role	Description self-evaluations themselves
Questionnaires Reports Administration Group Manager Group Manager Audit Log Role Manager Quality Manager Options About	Audit Supervisor CC Manager IT Administrator Supervisor Team leader	Adeva: all audit events: only Edit User Role Role Properties Name Agent Description View and send own evaluation Available Permissions Compare with parent group Plan evaluations for own group or subgroups Send evaluation feedback Plan evaluations 6 Seplace calls 5
	14 4 Page 1	View reports also for all other groups View reports also for all other groups View reports/graphs

Figure 71: Enabling Agent Self-Evaluation

By default, Quality Manager does not include the results of self-evaluations in reports and graphs, since these results are generally subjective in nature. However, if self-evaluations are to be reported (e.g. Quality Manager is configured to only run self-evaluations), this setting can be changed in the <u>Application Options</u>.

Additional Options

A short tutorial to show the use of additional administrative options in Genesys Quality Manager 8.0 for users with CC Managers or Administrator permissions

Interaction Types



Figure 72: Interaction Types

Interaction Types, which define the types of interaction that Genesys Quality Manager can process in evaluations and reports, can be modified (renamed) on the Interaction Types screen to suit your Call Center setup.

Note that System interaction types cannot be renamed or removed.

Audit Log

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🛙 📁 Reports	3	add group	12/17/09 5:0 AM	M Valer, Peter	Group Prag	use the filtering options to quickly	Ok
Administration	4	user login	ADM TOD COL AN	• \/-l 0-t	User Peter	drill down into audit records	Ok
■ C Group Manager S User Manager Interaction Types Audit Log Role Manager	5	complete evalue exp	ort all entri	es to an Excel	Evaluation		Ok
	6	send feedback	file for furth	ner analysis	Agent Peter	valer received feedback John Wayne	Ok
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🌼 Quality Manager Options	9	save evaluation	12/17/09 3:35 AM	√l Valer, Peter	Evaluation of	agent John Wayne in process and saved by user Peter	' Ok
🕕 About	10	save evaluation	12/17/09 3:14 AM	√l Valer, Peter	Evaluation of	agent John Wayne in process and saved by user Peter	' Ok
	11	add specific call	12/17/09 3:14 AM	√l Valer, Peter	Specific call	from number 5005 to number 5009, ID 1678129010.1.202	2 Ok
	12	add specific call	12/17/09 3:14 AM	√l Valer, Peter	Specific call	from number 5005 to number 5009, ID 1678137510.1.202	2 Ok
	13	save evaluation	12/17/09 3:06 AM	vl Valer, Peter	Evaluation of	agent John Wayne in process and saved by user Peter	' Ok
	14	delete call	12/17/09 3:06 AM	vl Valer, Peter	Specific call	from number 5005 to number 5009, ID 1678129810.1.202	? Ok
	15	delete call	12/17/09 3:06 AM	vl Valer, Peter	Specific call	from number 5005 to number 5009, ID 1678135710.1.202	2 Ok
	16	save evaluation	12/17/09 3:05 AM	vl Valer, Peter	Evaluation of	agent John Wayne in process and saved by user Peter	' Ok
	17	save evaluation	12/17/09 3:03 AM	vl Valer, Peter	Evaluation of	agent John Wayne in process and saved by user Peter	' Ok
	18	delete call	12/17/09 3:03 AM	M Valer, Peter	Specific call	from number 5005 to number 5009, ID 1678137510.1.202	2 Ok
	19	start evaluation	12/17/09 3:03 AM	⁄l Valer, Peter	Evaluation 7	started by user Peter Valer for agent John Wayne	Ok
	20	save evaluation	12/17/09 3:03 AM	/ Valer, Peter	Evaluation of	agent John Wayne in process and saved by user Peter	' Ok
		4 Page 1 of 4	N 2			Displaying	1 - 20 of

Genesys Quality Manager tracks all user interaction within the application by keeping an audit log. By default, this is only available to users with CC Manager status.

Clicking on the **Audit Log** item in the Administrative menu displays a list of the most recent events in Genesys Quality Manager.

Since there will normally be a lot of log entries generated, use the filtering options (user name, from and to date range, event type) to help reduce the list to the events you are interested in. Alternatively, export all entries to an Excel 2007+ spreadsheet file (.xlsx) for further analysis.

Genesys Quality Manager Application Options

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«	Quality Manager Options 🛞		
् • • • • • •	Save 🛛 Close		
 Dashboard Evaluations Questionnaires Arministration Administration Croup Manager User Manager Interaction Types Audit Log Role Manager Quality Manager Options About 	General Settings Calculating method for non-applicable (N/A) answers:	Method 1: Use average value of all actual answers in the question group	
	Records on a page: Custom week interval start: Custom month interval start: Notify agent on evaluation creation: Include self-evaluations in statistics:	20 Select a value	
	Integration Settings Supervisor role equivalent: Agent role equivalent:	Supervisor Agent	

Figure 74: Genesys Quality Manager Application Options

Genesys Quality Manager application level options (Call Recording application user login etc.) can be viewed and modified by a user with CC Manager permissions in the **Genesys Quality Manager Options** section of the Administration menu.

One of the most important options here is the **non-applicable** (n/a) setting, which controls how the **n/a** compliance setting for questionnaire answers is calculated (see Setting Up A Questionnaire for context).

These options are global for all questionnaires, and have the following meaning:

- **Method 1**: Use the average value (arithmetic mean) of all the submitted answers in the question group to define the score for all non-applicable answers (i.e. the score depends on which answers have already been selected)

- **Method 2**: Use the average value (arithmetic mean) of all possible answers for the question groups to define the score for all non-applicable answers (i.e. the score does not depend on which answers have already been selected)

- **Method 3**: Skip the n/a answer (i.e. exclude this question from the final group score, so n/a answers are ignored)

The following two options (role equivalents) enable customization of which permissions role setting a user receives if he/she has an agent or supervisor profile in an IP Call Center application synchronized with Genesys Quality Manager.

The **Records on a page** setting is a global count of how many list rows appear on a single list page (e.g. the evaluation list). Increasing this number can reduce the number of result pages, but also slow down page builds / refreshes.

The following two settings (interval starts) enable cultural time settings to be designated, e.g. in the US, the first day of the week is Sunday, whereas in most of Europe it is Monday (this can be specified in **Custom week interval start**).

Notify agent on evaluation creation notifies agents automatically that an evaluation has been created for them. This allows them to follow the progress of the evaluation and (if they are given the view report permission) to view the results.

Include self-evaluations in statistics is switched off by default. Since self-evaluations are subjective, including their results in statistics could affect results considerably. However, checking this option will include self-evaluations in all reporting.

Ensure that all details are correct before saving any changes to the options using the **Save** button.

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Administration	
	Wality Manager Administrative Options

Genesys Quality Manager Administrative Options

Figure 75: Genesys Quality Manager Administrative Options

The following settings are only available to Call Center Administrators by default, when logging in with Genesys Quality Manager Administrator account.

Categories and **Wrapups** are described below. **User Manager** has already been described for Call Center Managers in the section <u>The User Manager</u>, and is provided here as a convenience for administrators. However, in the administrator interface, this is a limited form of the User Manager, only allowing the Genesys Quality Manager administrator to reset passwords for users, but not change or view any other settings.

Category Management

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×	Category ®
Q 5.8 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2	🔘 Add 🥜 Edit 🤤 Remove
🗉 🧔 Administration	Category
User Manager Category Wrapup About	London staff Prague statt double-click to edit a record or click Add to add a new record

Figure 76: Category Management

Genesys Quality Manager Categories are used for classifying agent calls during evaluation.

Clicking on the **Category** menu item enables you to view, add and remove category records using the **Add** and **Remove** buttons (if available, or double-clicking on an existing category to edit it).

Category names must be unique within the application.

Wrapup Data

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×	Category 🗷 Wrapup 🗷			
۵۵ ۲۵ ۲۵ ۲۵ ۵۳ ۲۵ ۲۵ ۵۳ ۲۵ ۲۵	🕟 Add 🥒 Edit 🥥 Remove			
🖃 խ Administration	Wrapup Data	Wrapup Description		
🧀 User Manager	Explained next step	Agent explained next step		
Category	Detailed what to expect next	Agent explained what to expect next		
(I) About	Signed off and thanks	Customer signed off politely Customer shared personal details and was satisfied with the outcome of the call Time waster Wrong number or refused to engage in conversation		
U ADUU	Gave name and ended on a high			
	No explanation			
	Just said goodbye			
	double-click to edit a click Add to add a n			

Figure 77: Wrapup Data

If Genesys Quality Manager has access to an IPCC database, call wrapup data (text entered by an agent at the end of a call) is available for further categorizing and filtering calls.

The **Wrapup** manager allows an administrator to manually enter wrapup data along with a description, enabling Genesys Quality Manager to recognize and filter this IPCC data when searching for agent calls.

In a similar manner to the categories above, use the **Add** and **Remove** buttons (if available, or double-clicking on a wrapup record to edit it) to manage Wrapup records. Again, each wrapup data record has to be unique within Genesys Quality Manager.

About Tab

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	About 🗵		
5 A SI 2 2 A	Product Info		
🖃 📁 Administration	Version:	8.0.480	
🧀 User Manager 🤜 Category	Build:	110126_0045	
💑 Wrapup	Product License		
(About	Product Name	Quality Manager	
	Product Version	4.8	
	Owner	Zoom Doc	
	Issue Date	Mon Jan 10 00:01:00 GMT+100 2011	
	Expiry Date	Sun Jul 10 23:59:59 GMT+200 2011	
	License Type	EXTENDED_EVALUATION	
	State	ок	the upload interface to activate a
	Activation Key		Quality Manager license (see the Installation Guide for
	Maximum Allowed Users	100	more details)
	Maximum Allowed Users (warning)	100	
	Upload License		
		Browse Upload License File	
	<u></u>		

Figure 78: About Tab

The About tab displays information about the currently installed Genesys Quality Manager application, including version information, product license details and an upload interface to install/activate a new license.

A valid Genesys Quality Manager license is required immediately after Genesys Quality Manager installation in order to unlock the product (only a Genesys Quality Manager administrator can log in to an unlicensed instance of Genesys Quality Manager). See the *Genesys Quality Manager Administration Guide* for more details.



Chapter



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@genesvslab.com
Europe, Middle East, and Africa	+44-(0)-1275-45-7002	support@genesvslab.com
Asia Pacific	+61-7-3368-6868	support@genesyslab.com.au
Malaysia	1-800-814-472 (toll-free) +61-7-3368-6868	support@genesvslab.com.au
India	1-800-407-436379 (toll-free) +91-(022)-3918-0537	support@genesvslab.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.