Genesys Quality Management 8.0

Quality Manager

User Guide: CC Manager

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

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

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

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Chapter

1 Introduction

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

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

Document Purpose

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

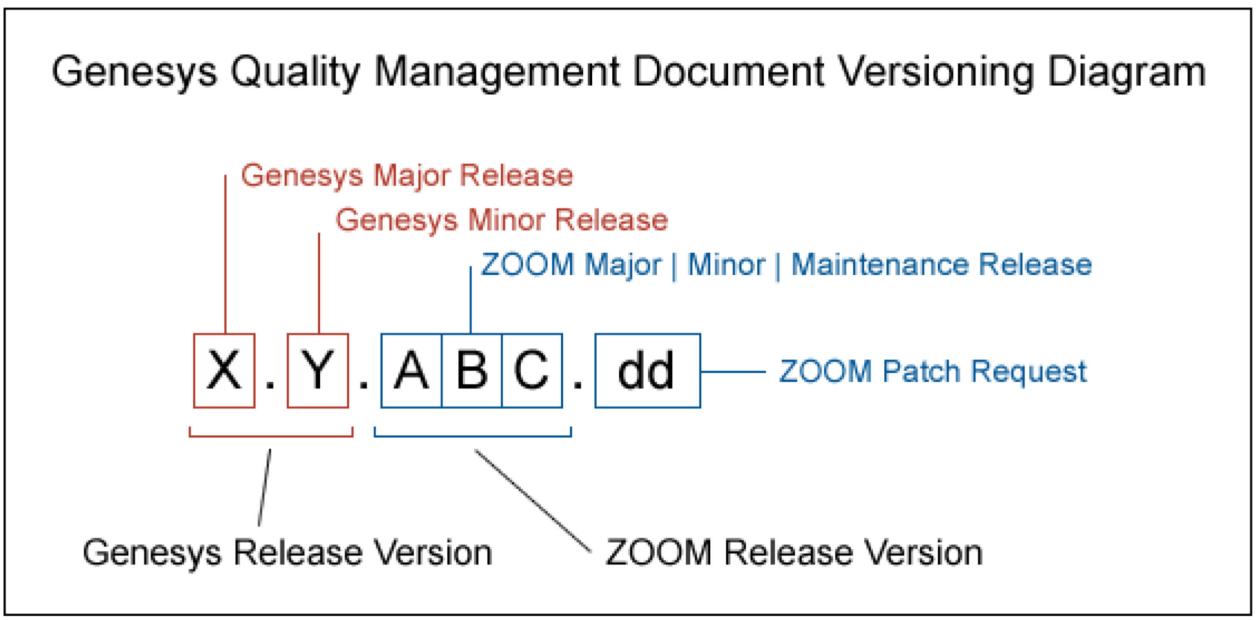
Audience

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
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Related Documents

For other documents related to Genesys Quality Manager please consult:

- *Genesys Quality Manager 8.0 Administration Guide*

Chapter

2 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

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

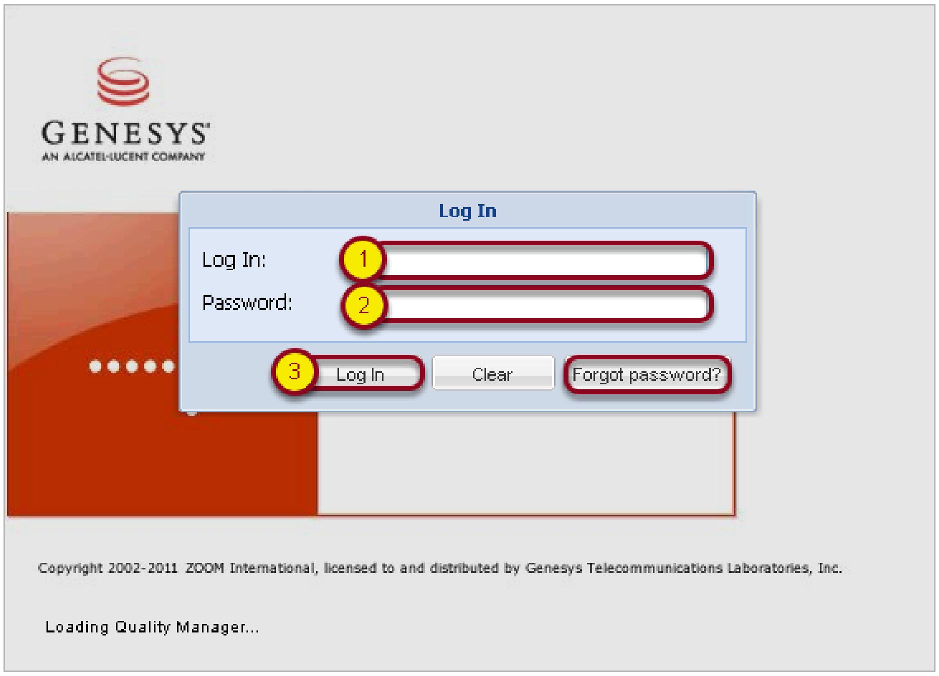


Figure 1: Log In To Genesys Quality Manager

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

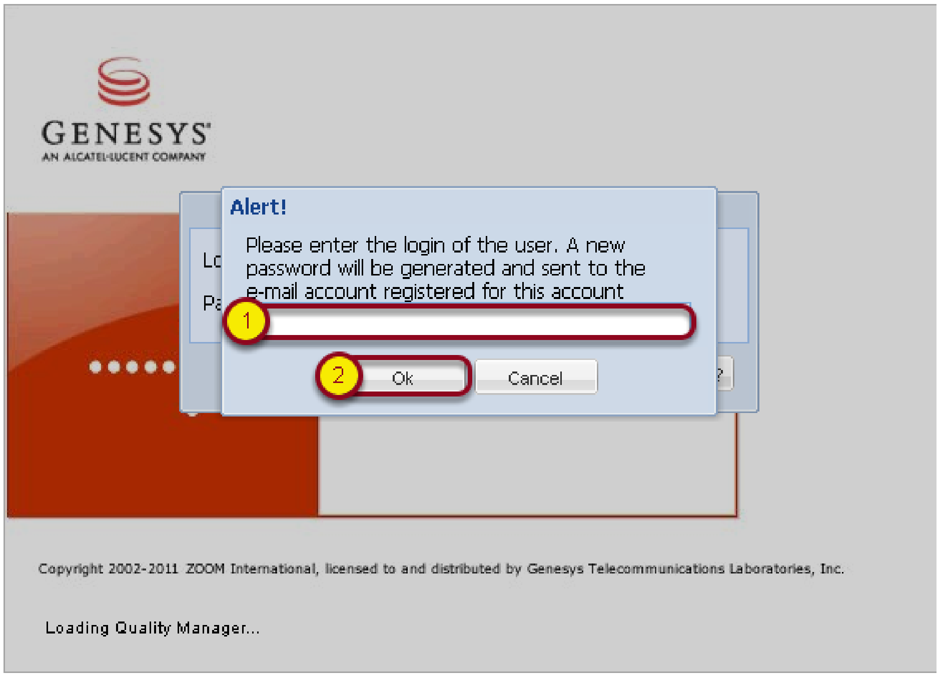


Figure 2: Retrieving a Forgotten Password

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

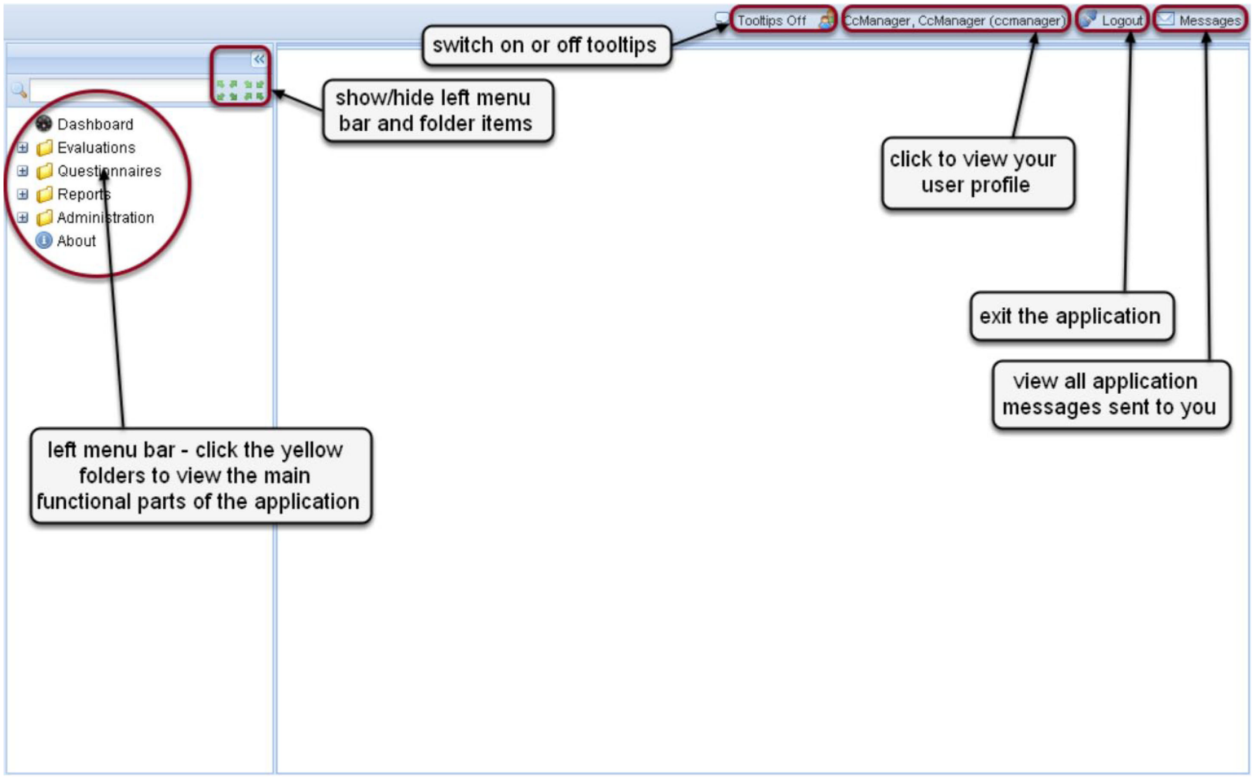


Figure 3: Genesys Quality Manager User Interface

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

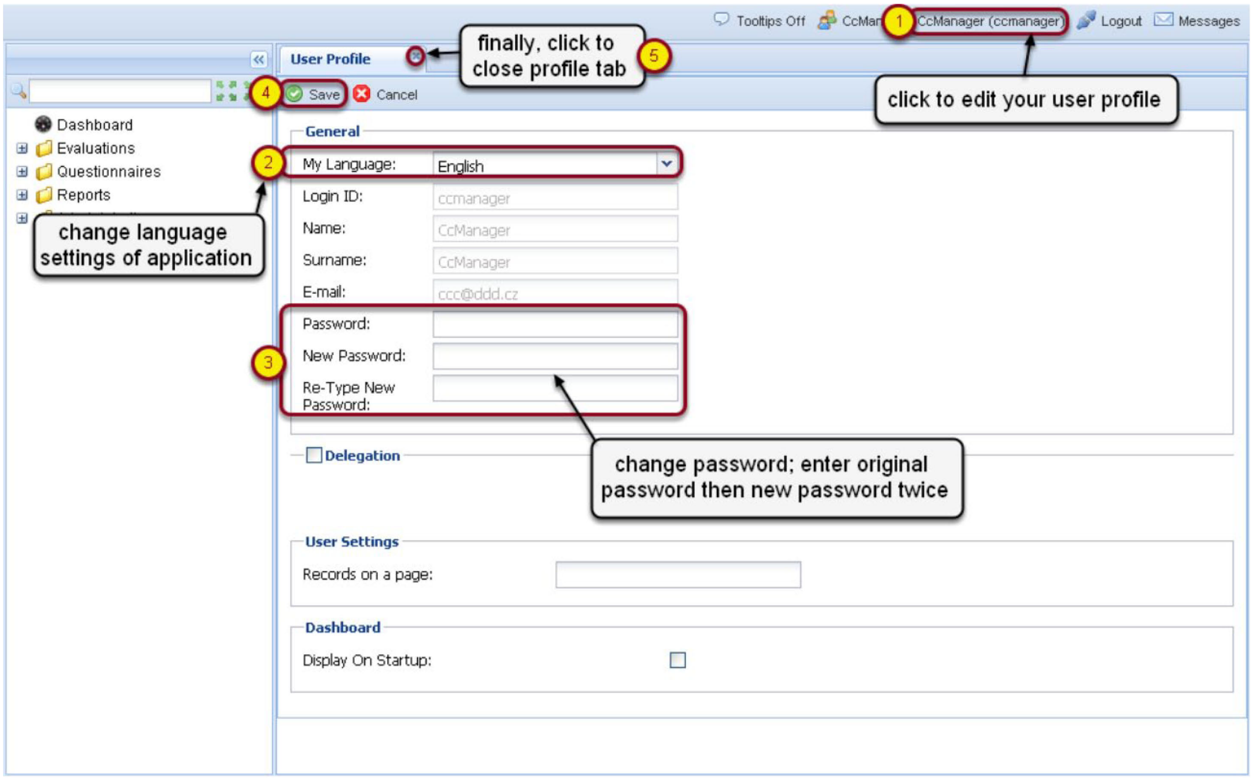


Figure 4: Editing Your User Profile

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

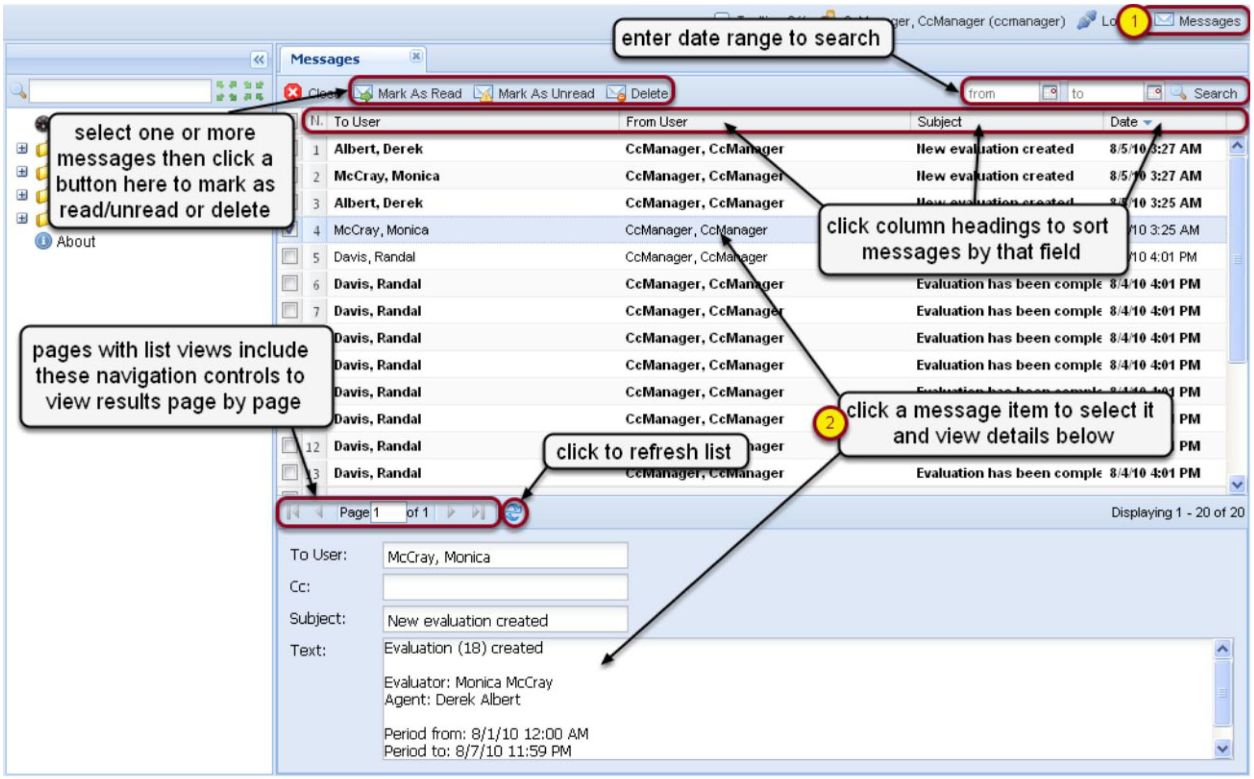


Figure 5: View System Messages

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

4 Questionnaires

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

- Setting Up A Questionnaire
- 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

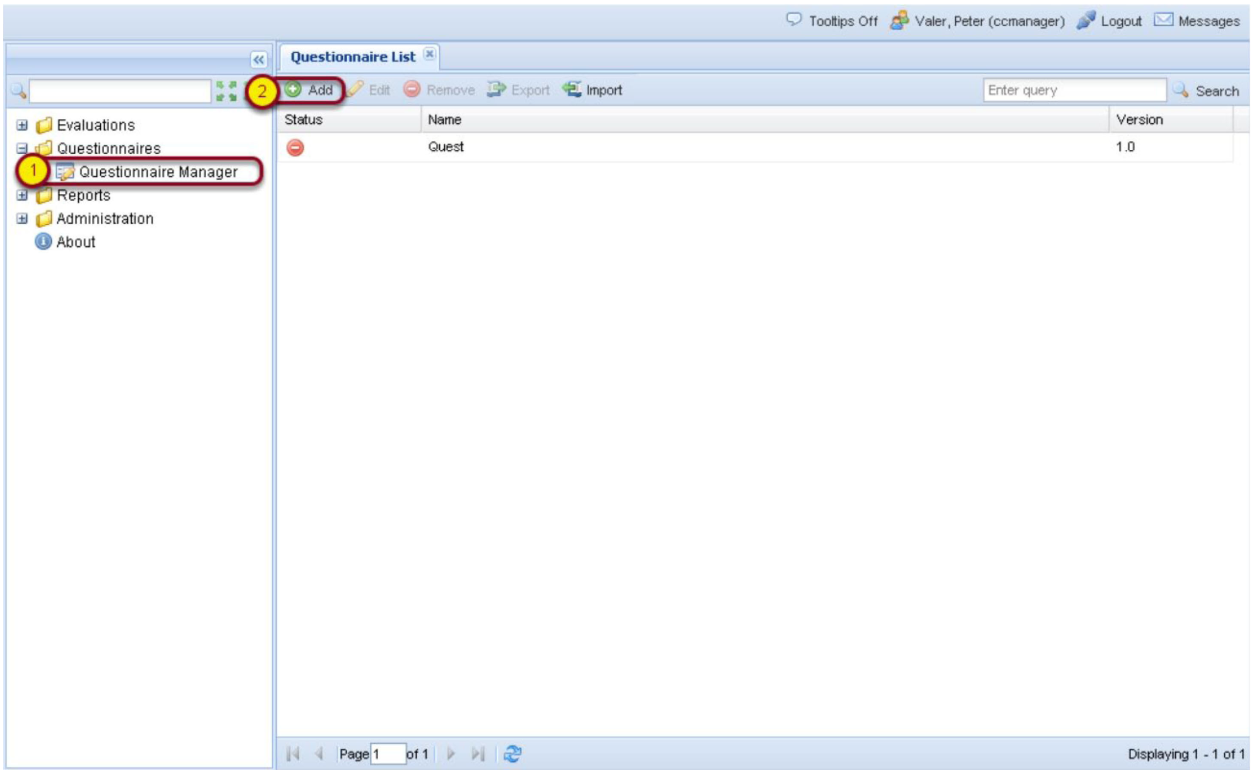


Figure 6: Create A New Questionnaire

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

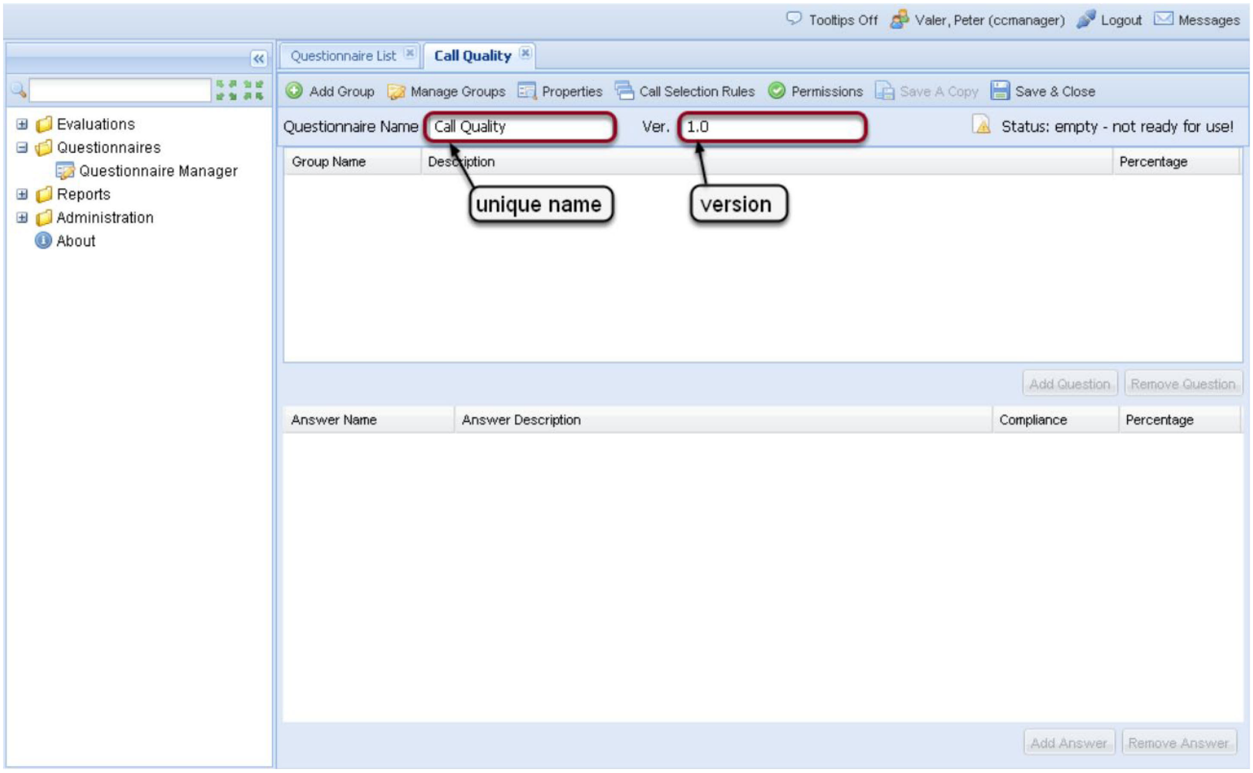


Figure 7: Specify A Name And Version

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

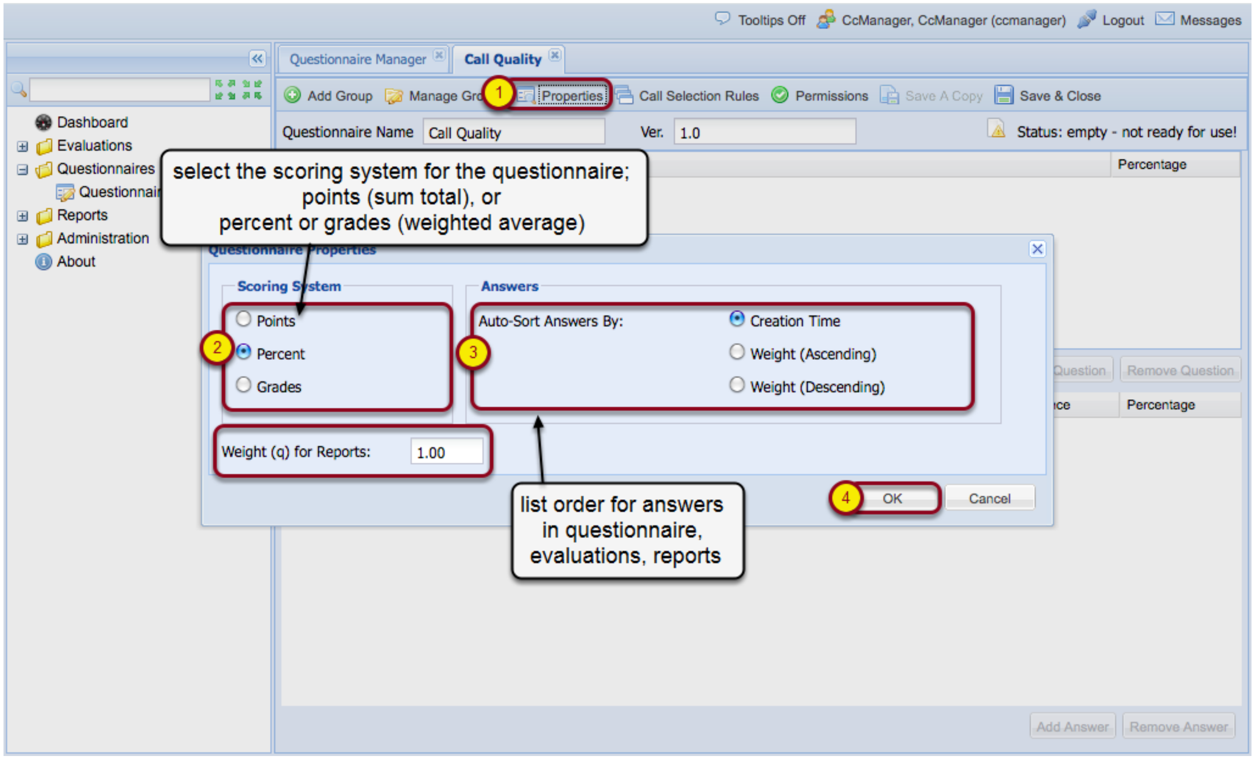


Figure 8: Set The Questionnaire Properties

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

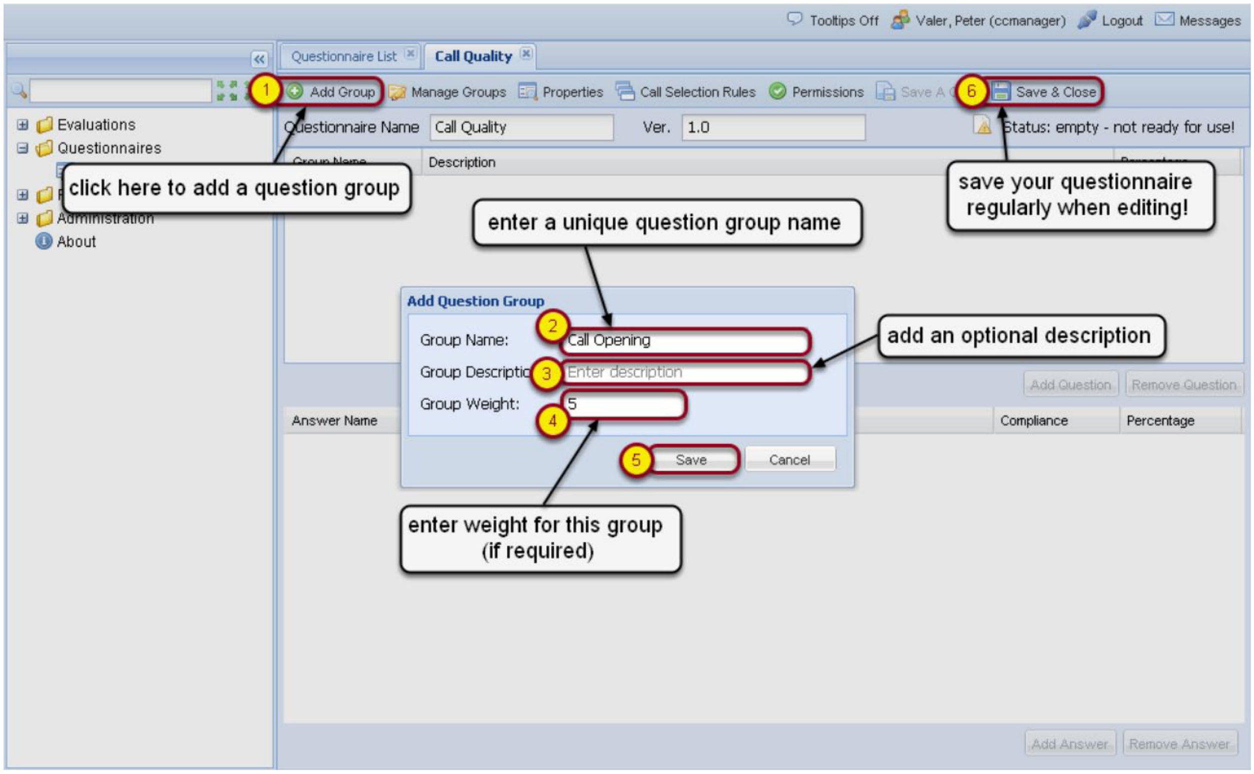


Figure 9: Add A Question Group

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

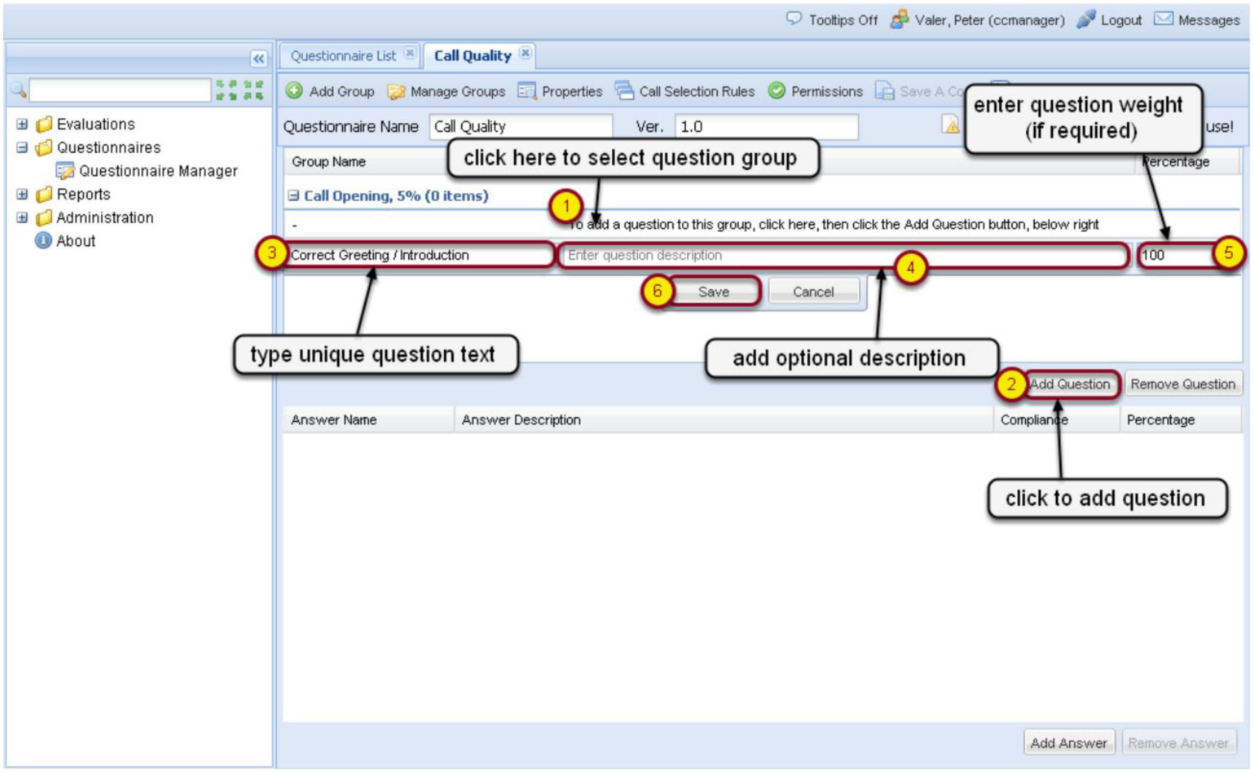


Figure 10: Add A Question

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

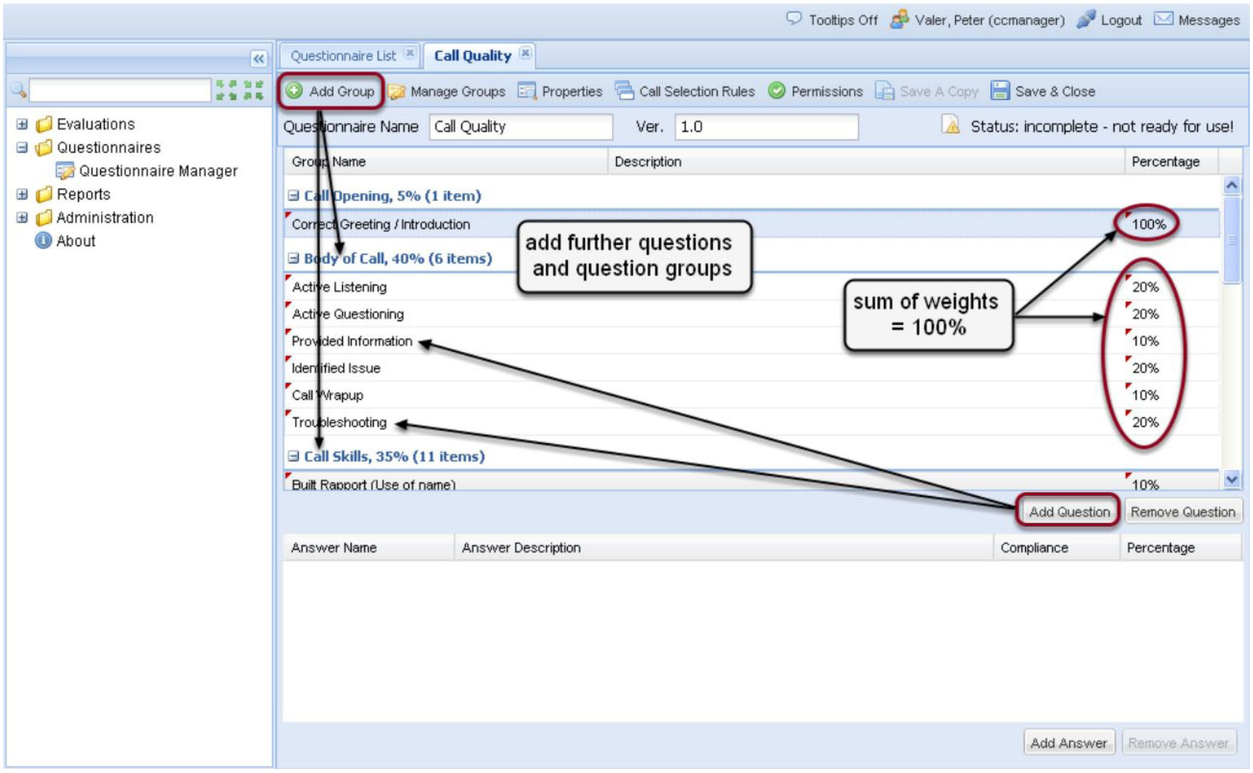


Figure 11: Add Further Questions And Groups

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

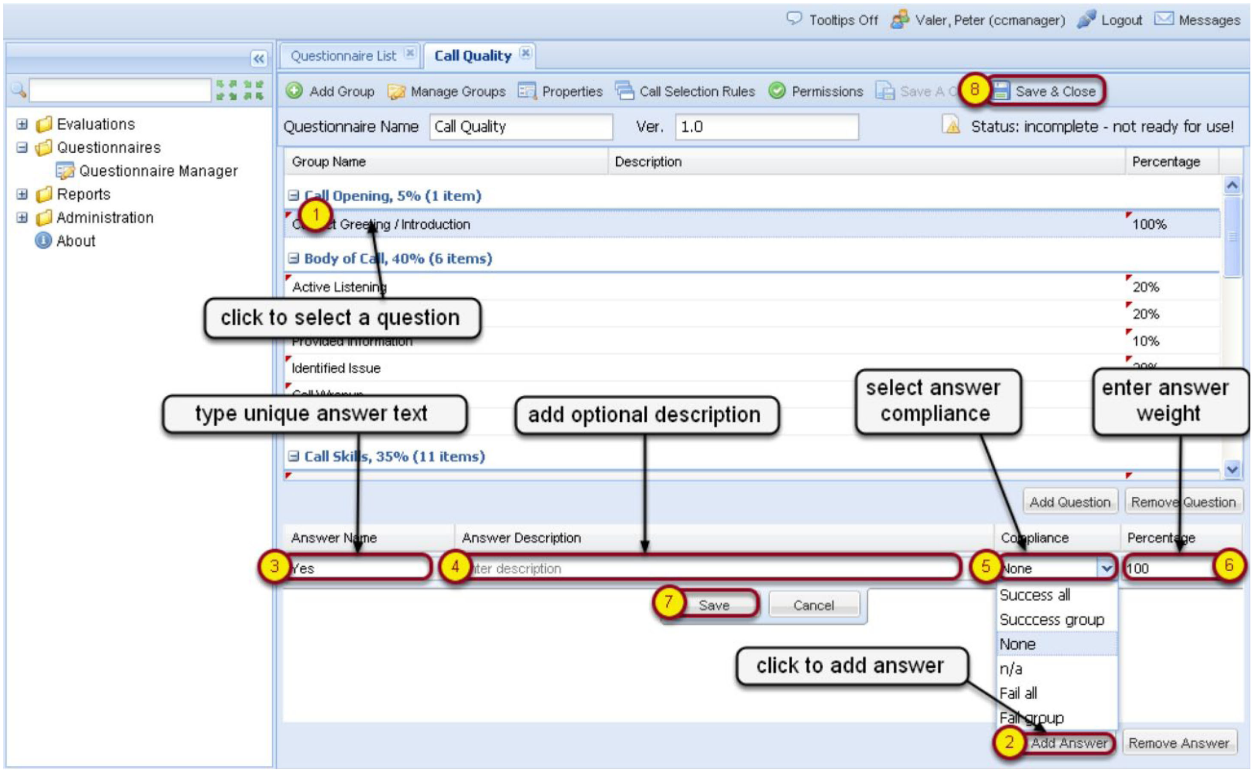


Figure 12: Add Answers To A Question

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

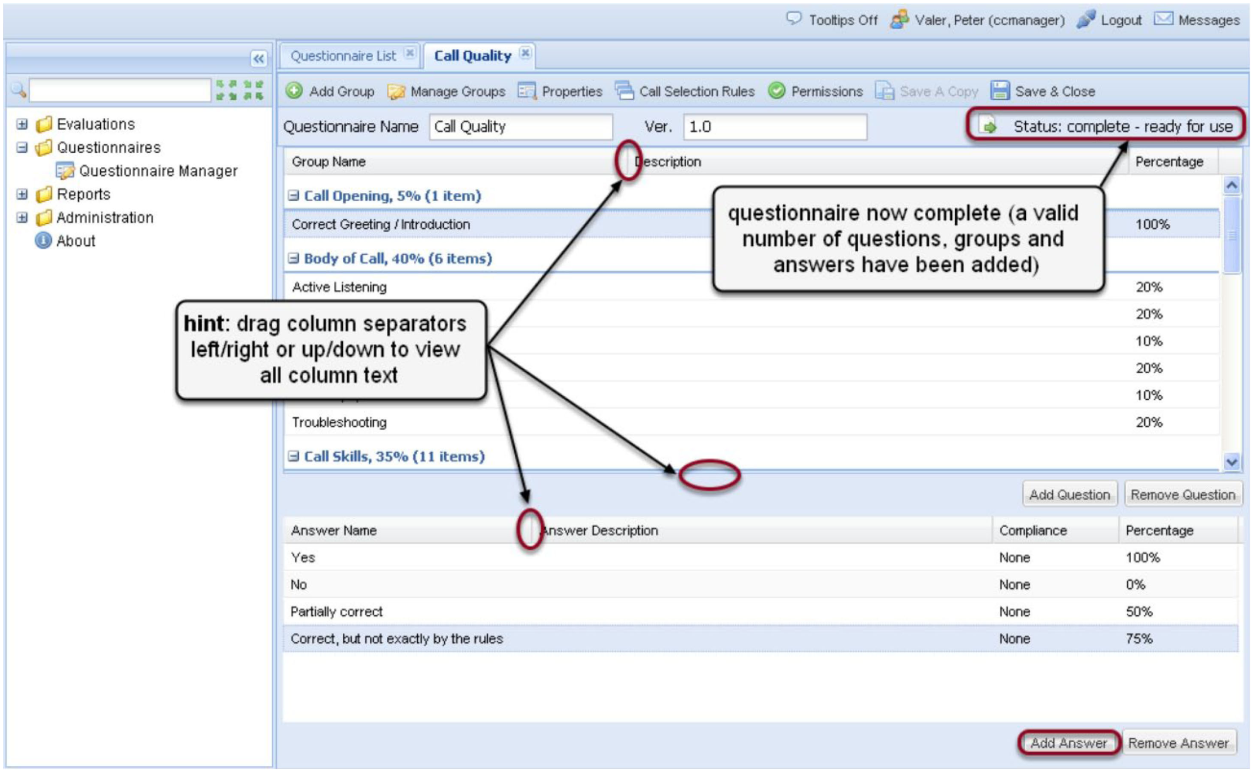


Figure 13: Add Further Answers As Necessary

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)

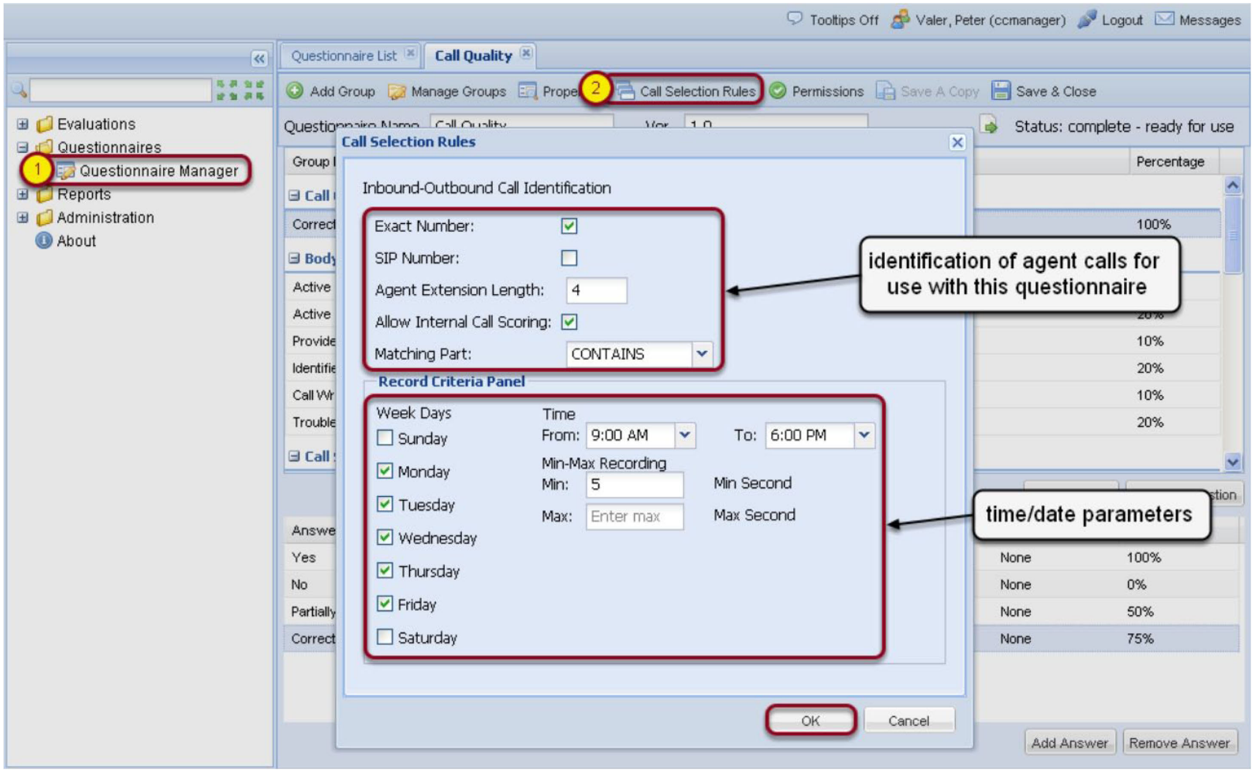


Figure 14:Specify Call Selection Rules (Optional)

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)

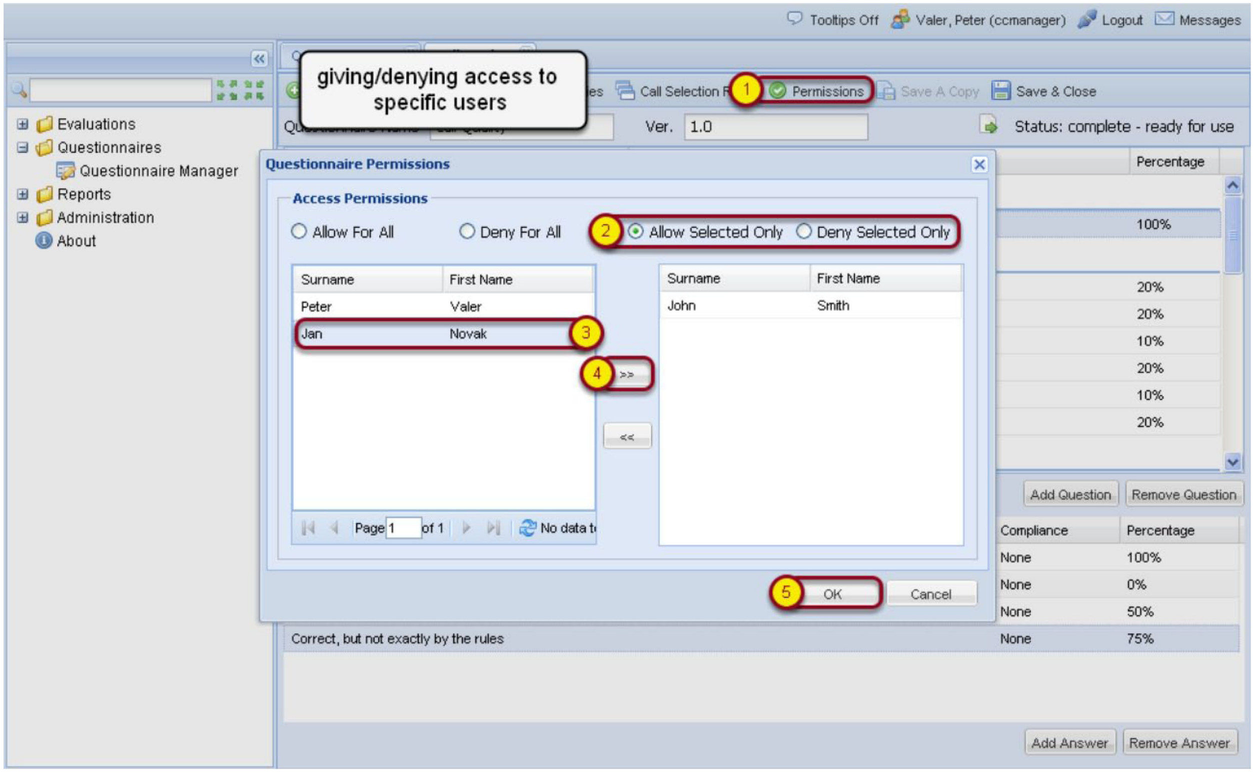


Figure 15: Specify Access Permissions (Optional)

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

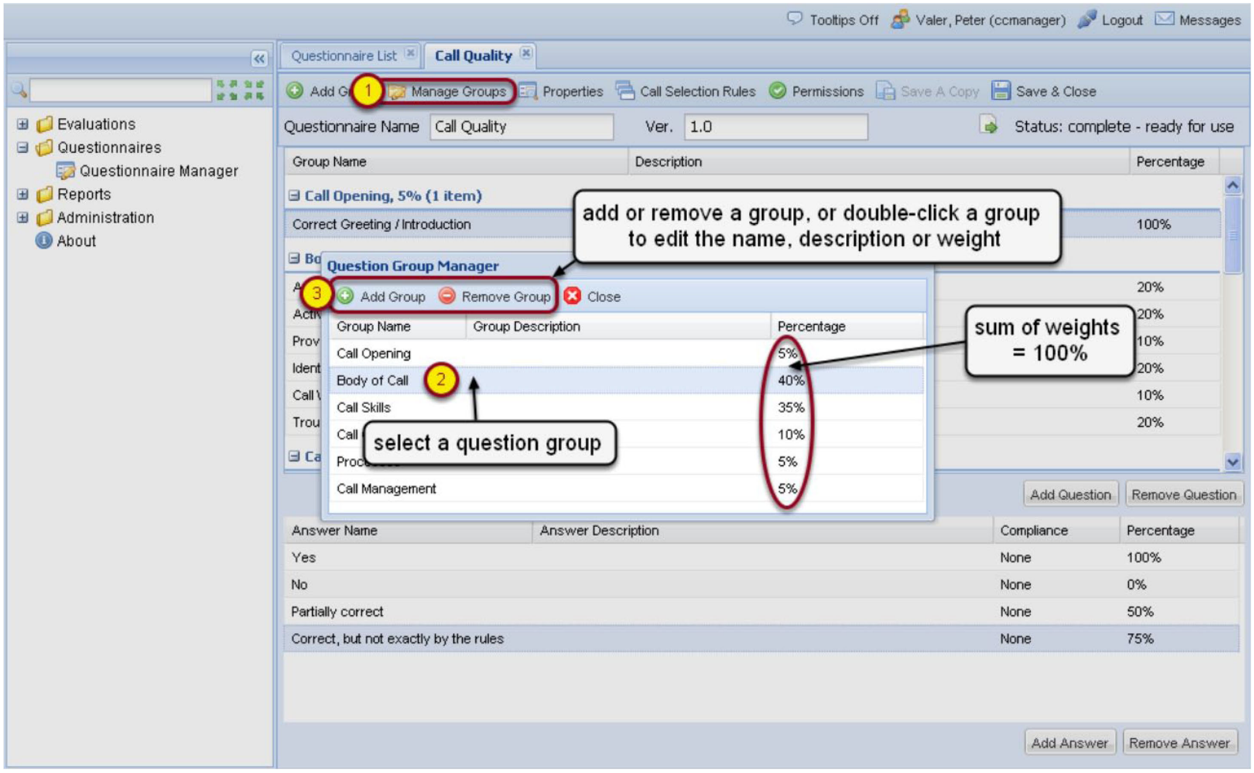


Figure 16: Manage Question Groups

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

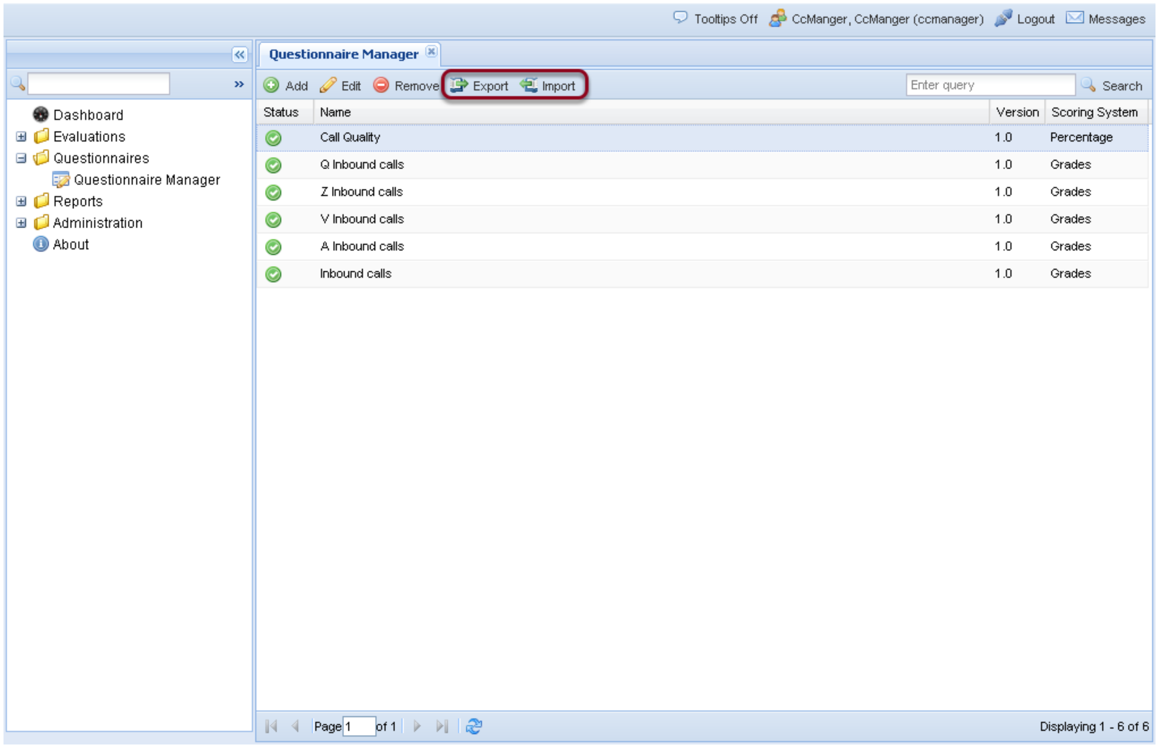


Figure 17: Importing and Exporting Questionnaires

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

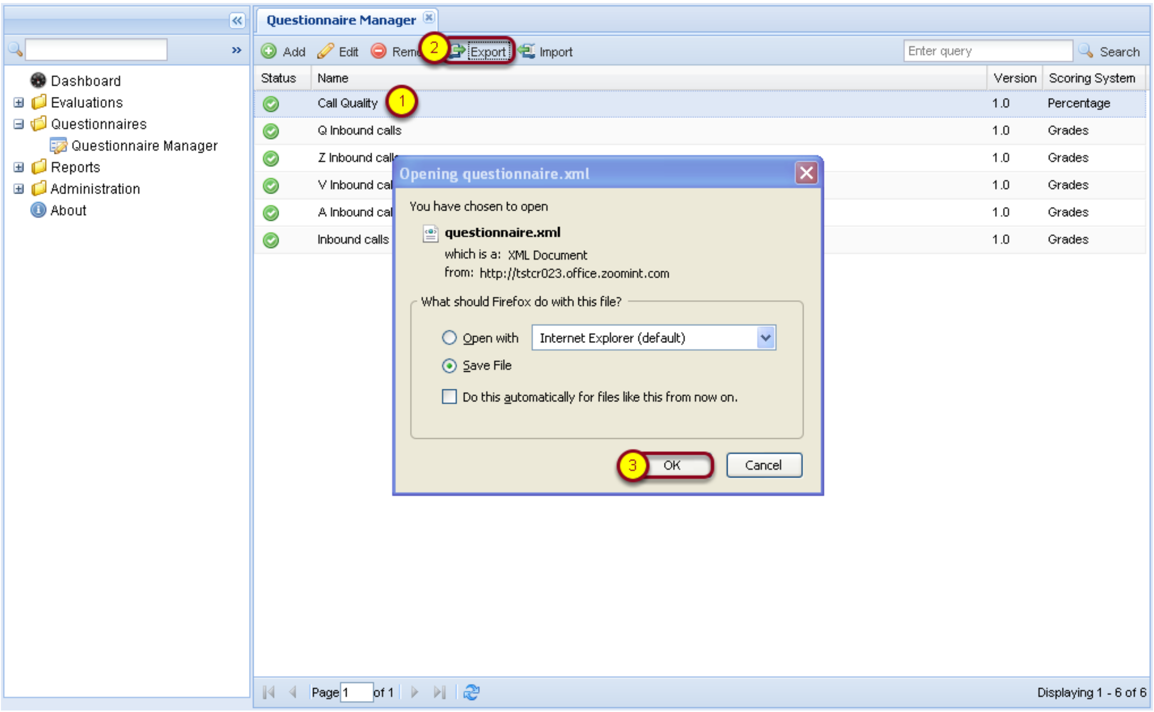
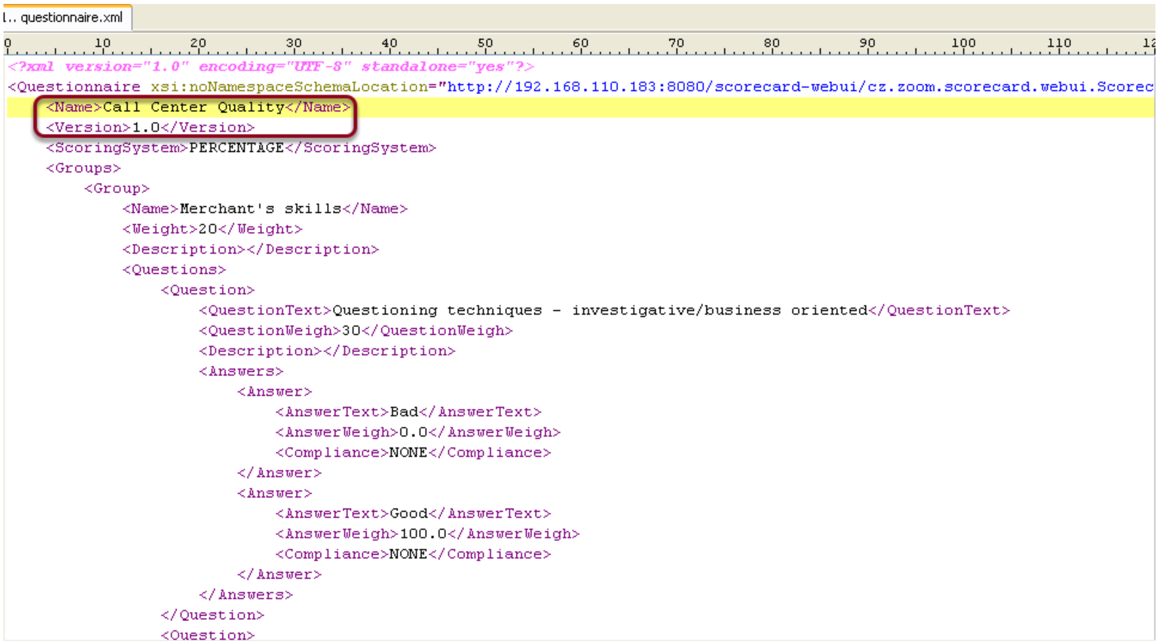


Figure 18: Export Questionnaire

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 `questionnaire.xml`!

Modifying An Exported Questionnaire




```xml
<?xml version="1.0" encoding="UTF-8" standalone="yes"?>
<Questionnaire xsi:noNamespaceSchemaLocation="http://192.168.110.183:8080/scorecard-webui/cz.zoom.scorecard.webui.Scorec
    <Name>Call Center Quality</Name>
    <Version>1.0</Version>
    <ScoringSystem>PERCENTAGE</ScoringSystem>
    <Groups>
        <Group>
            <Name>Merchant's skills</Name>
            <Weight>20</Weight>
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                        </Answer>
                    </Answers>
                </Question>
                <Question>
```

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

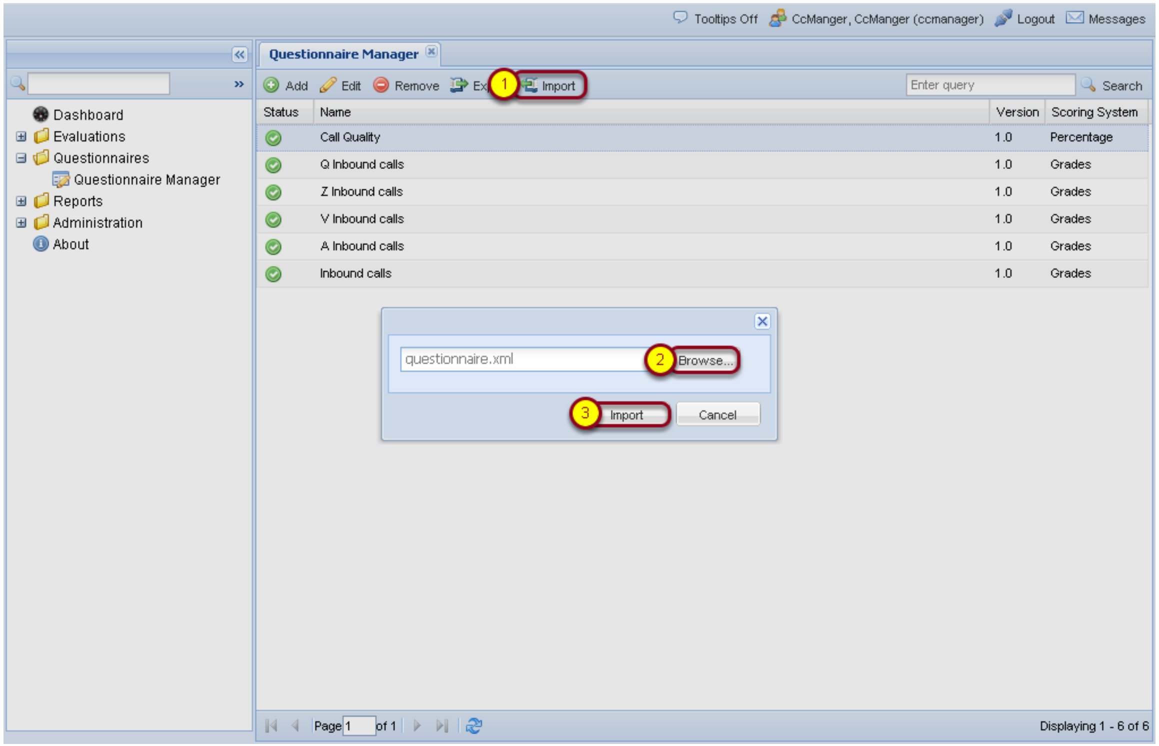

Figure 20: Import Questionnaire – 1

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

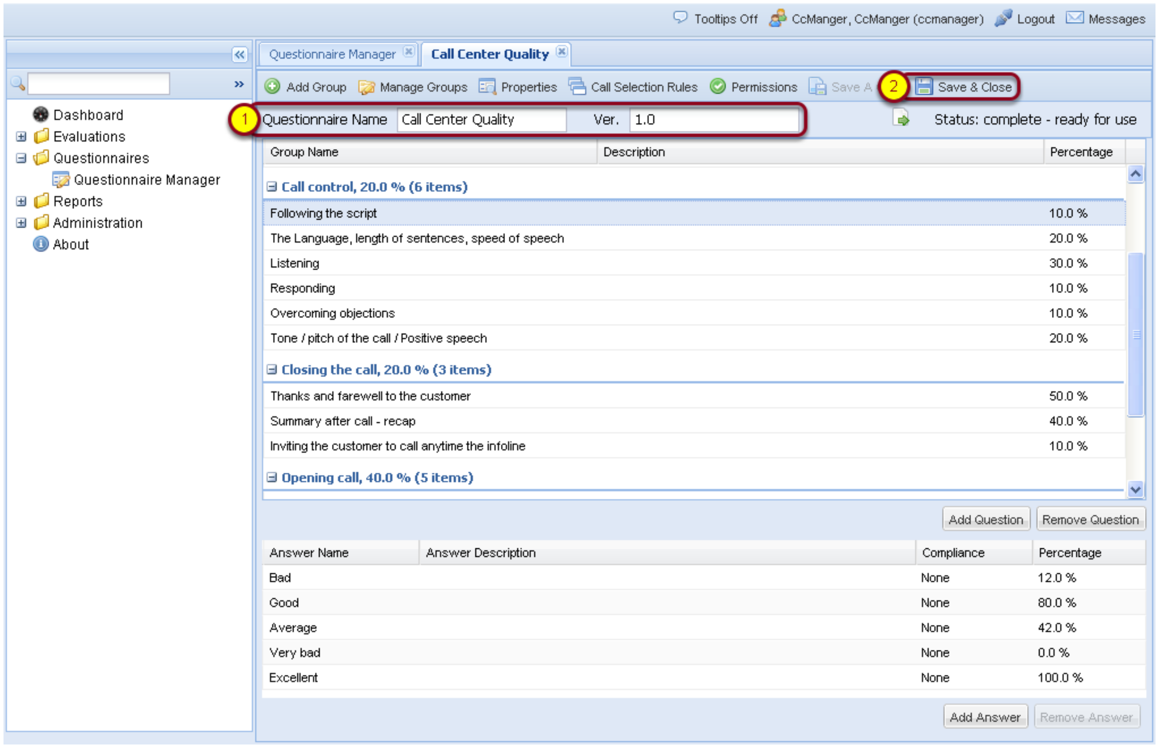

Figure 21: Import Questionnaire – 2

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

5 Evaluations

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

Scheduling An Evaluation

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

Open The Evaluation Planner

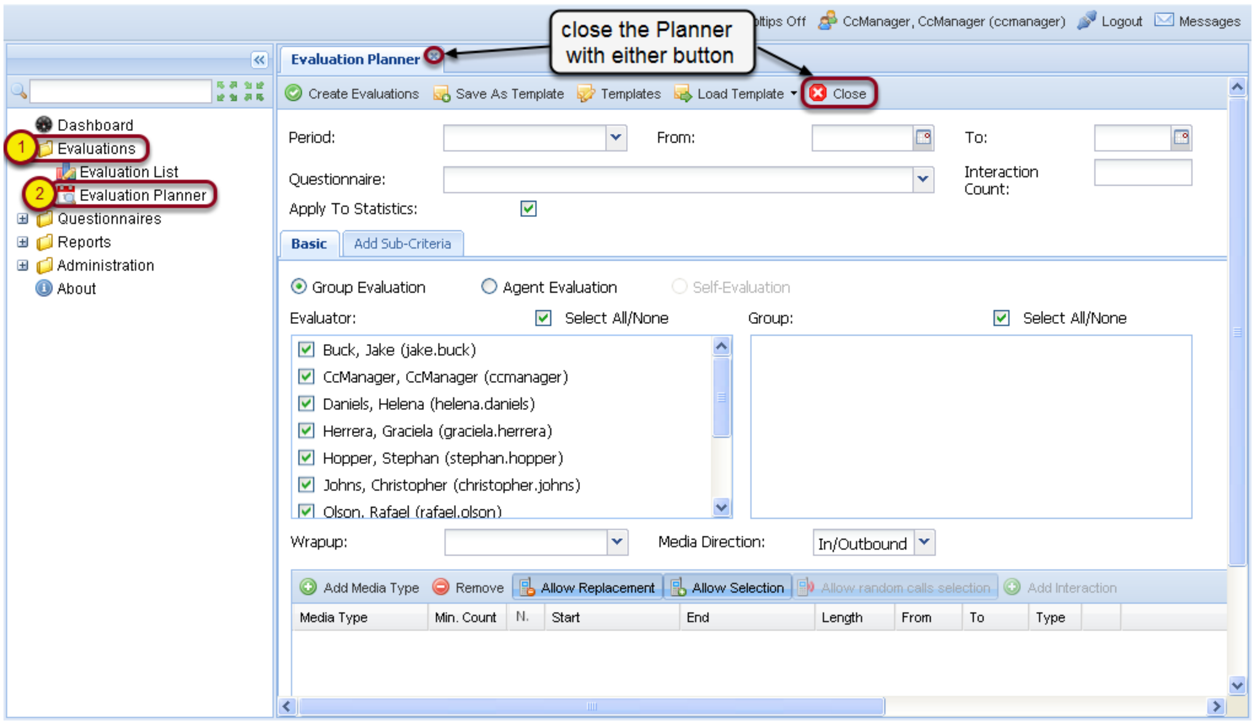

Figure 22: Open The Evaluation Planner

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

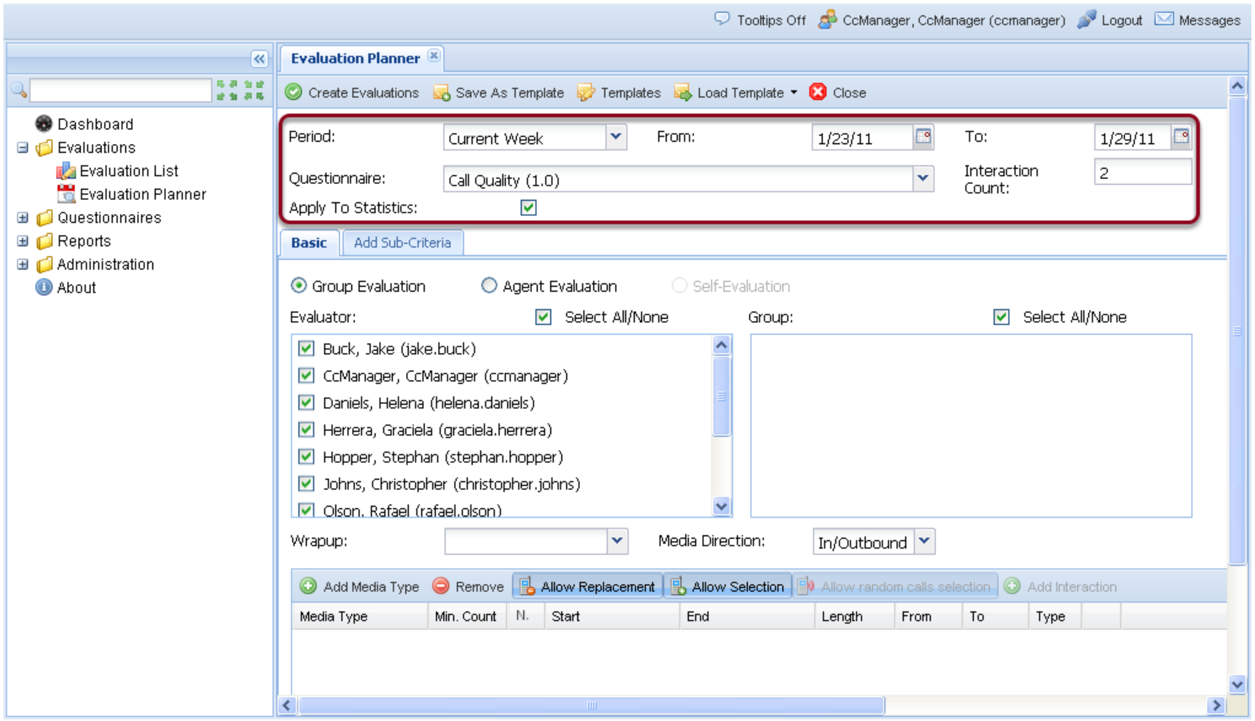

Figure 23:Specify An Evaluation Period And Questionnaire

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

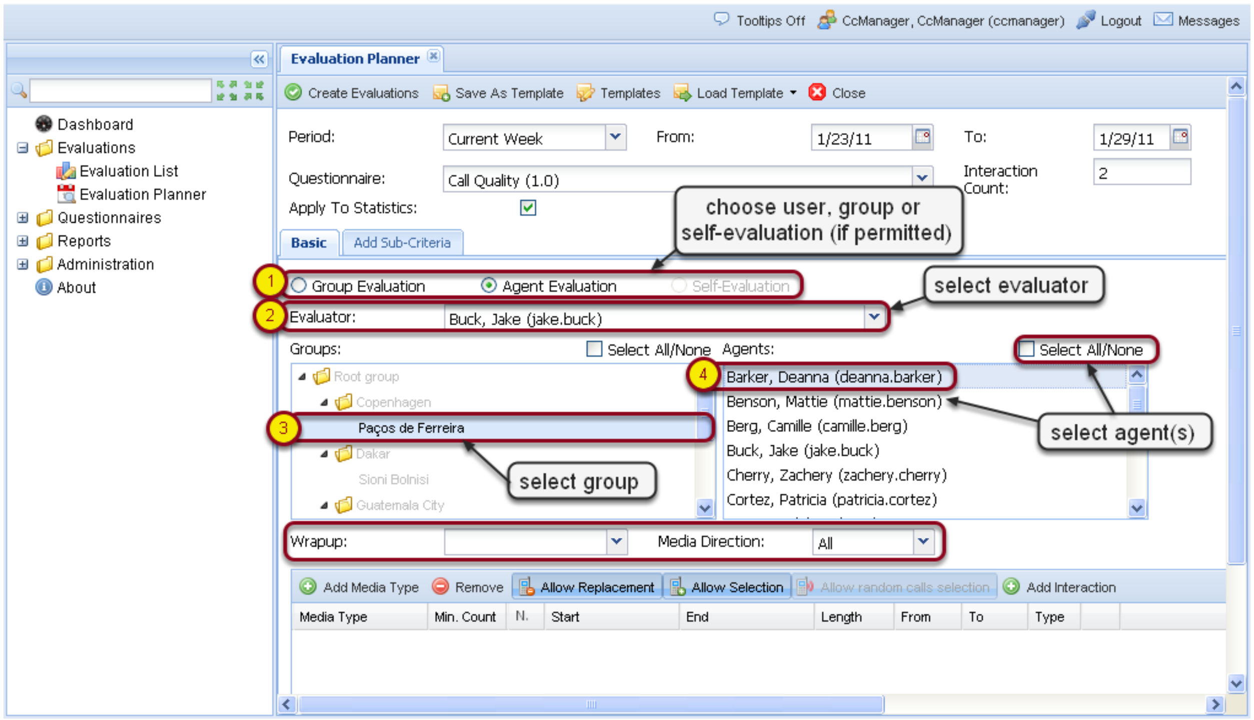

Figure 24: Select A Target User, Group or Self-Evaluation (if permitted)

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 Enabling Agent Self-Evaluation), a further option *Self-Evaluation* is available: *Self-Evaluation*.
If selected, automatically sets the *Evaluator* and *Evaluated Agent* to the currently logged-in 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 starting in 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

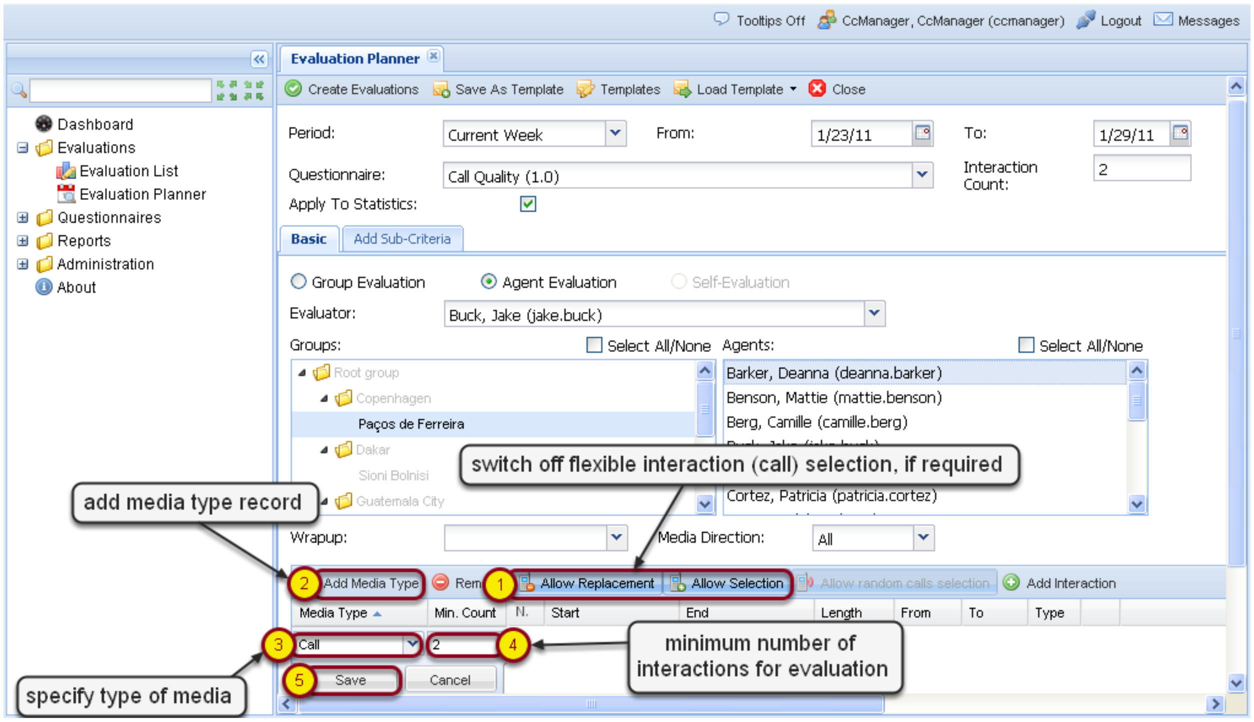

Figure 25: Add Evaluation Media Types

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 Media For Evaluation (Optional)

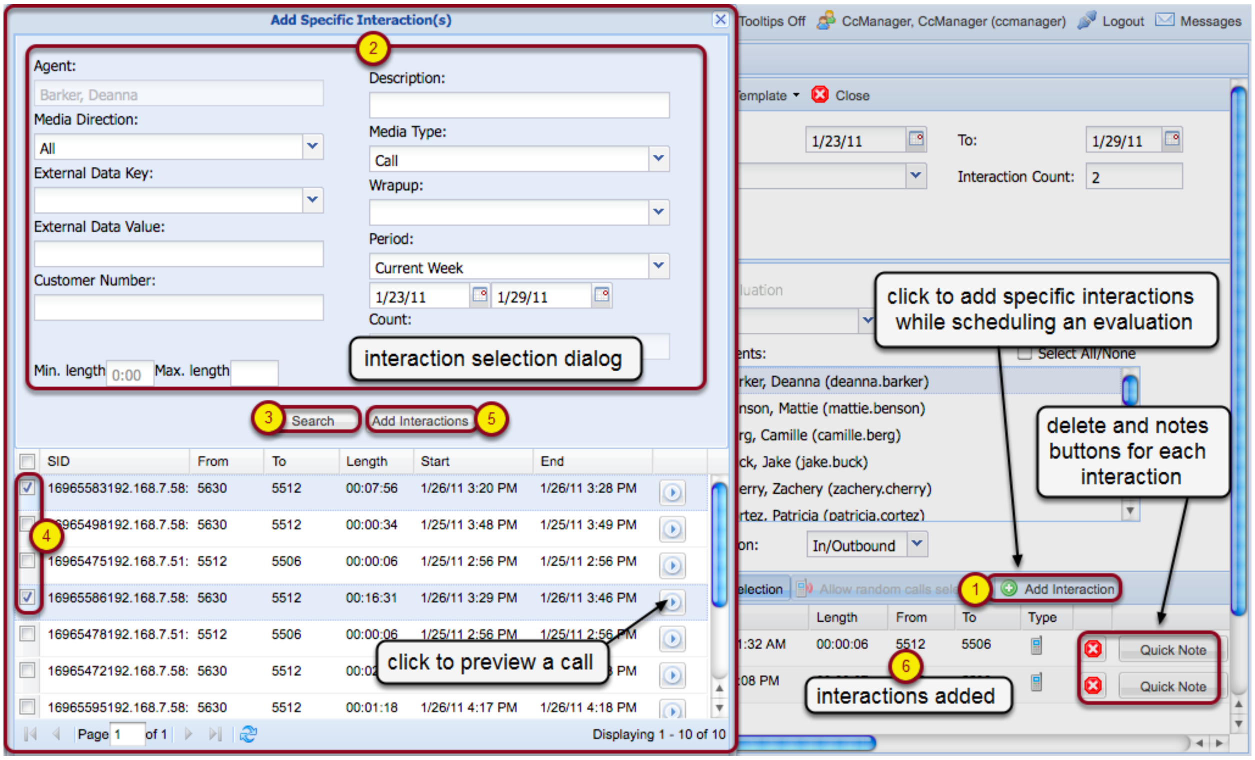

Figure 26: Add Media For Evaluation (Optional)

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)

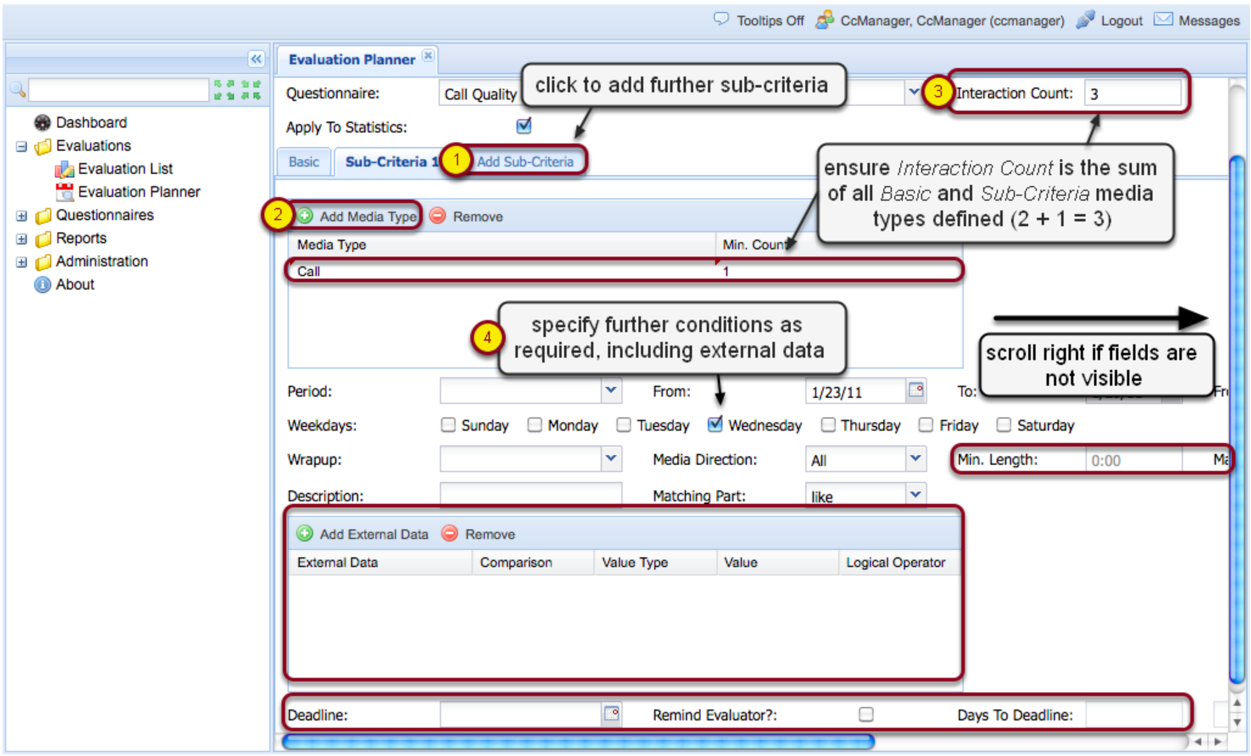

Figure 27: Add Sub-Criteria (Optional)

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)

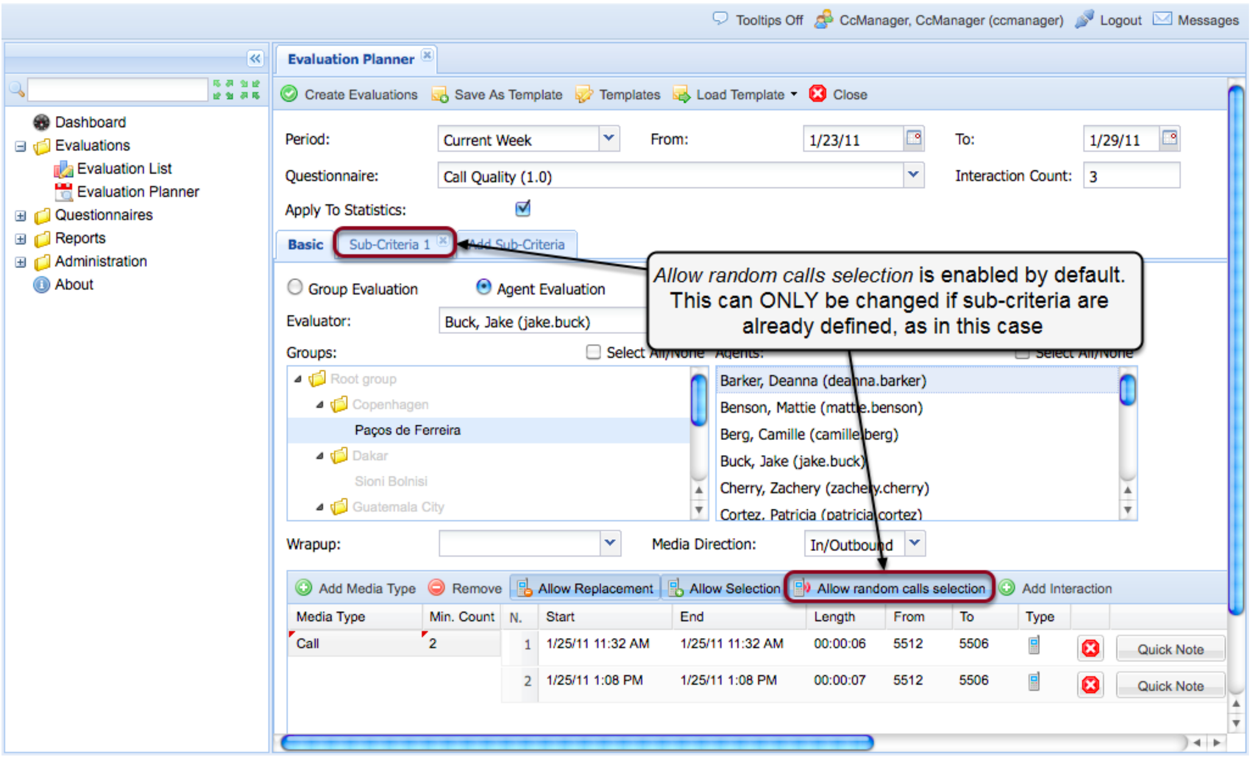

Figure 28: Selection of Random Calls (Optional)

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)

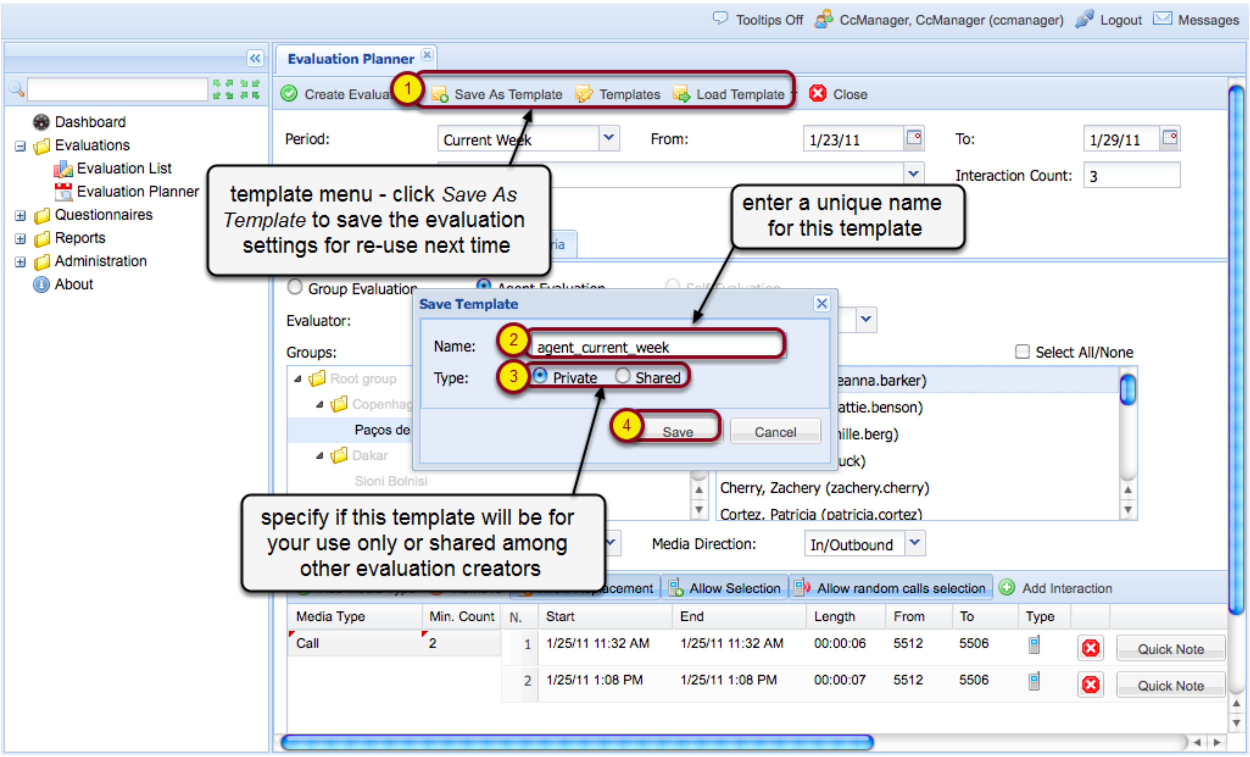

Figure 29: Using Evaluation Templates (Optional)

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

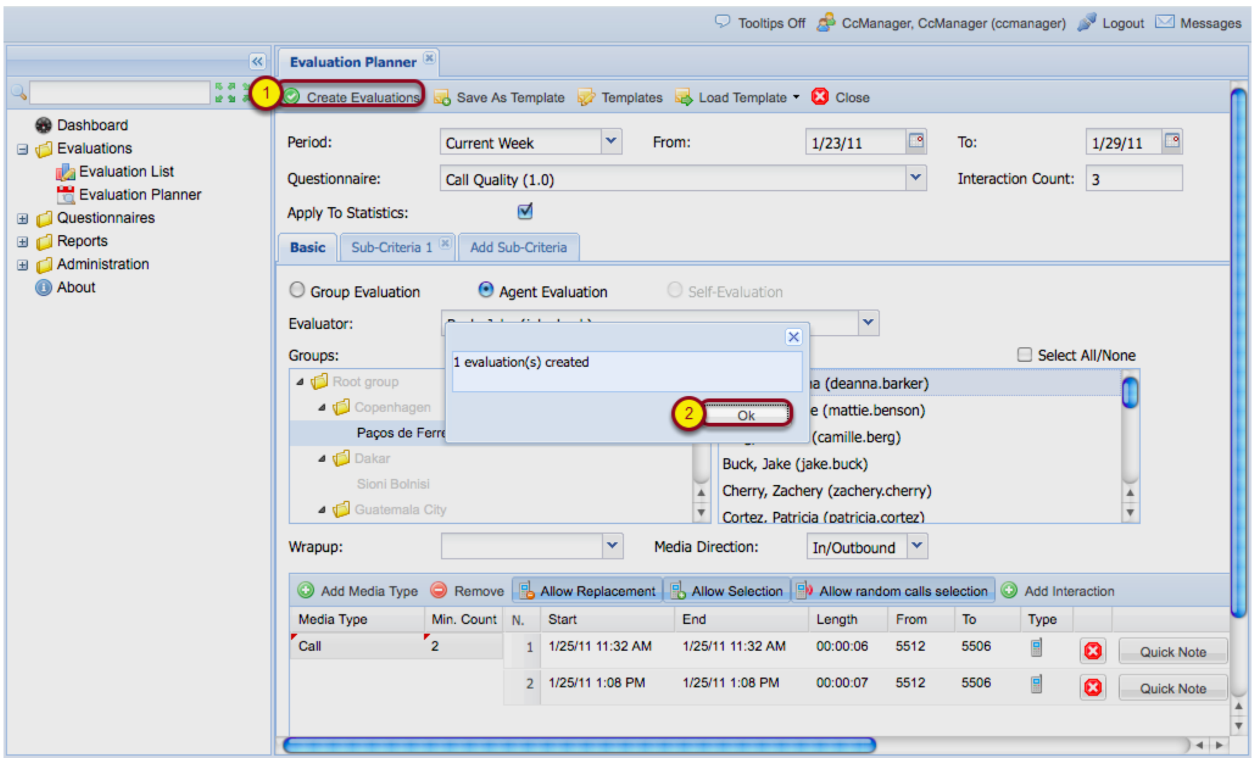

Figure 30: Schedule (Create) The Evaluation

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

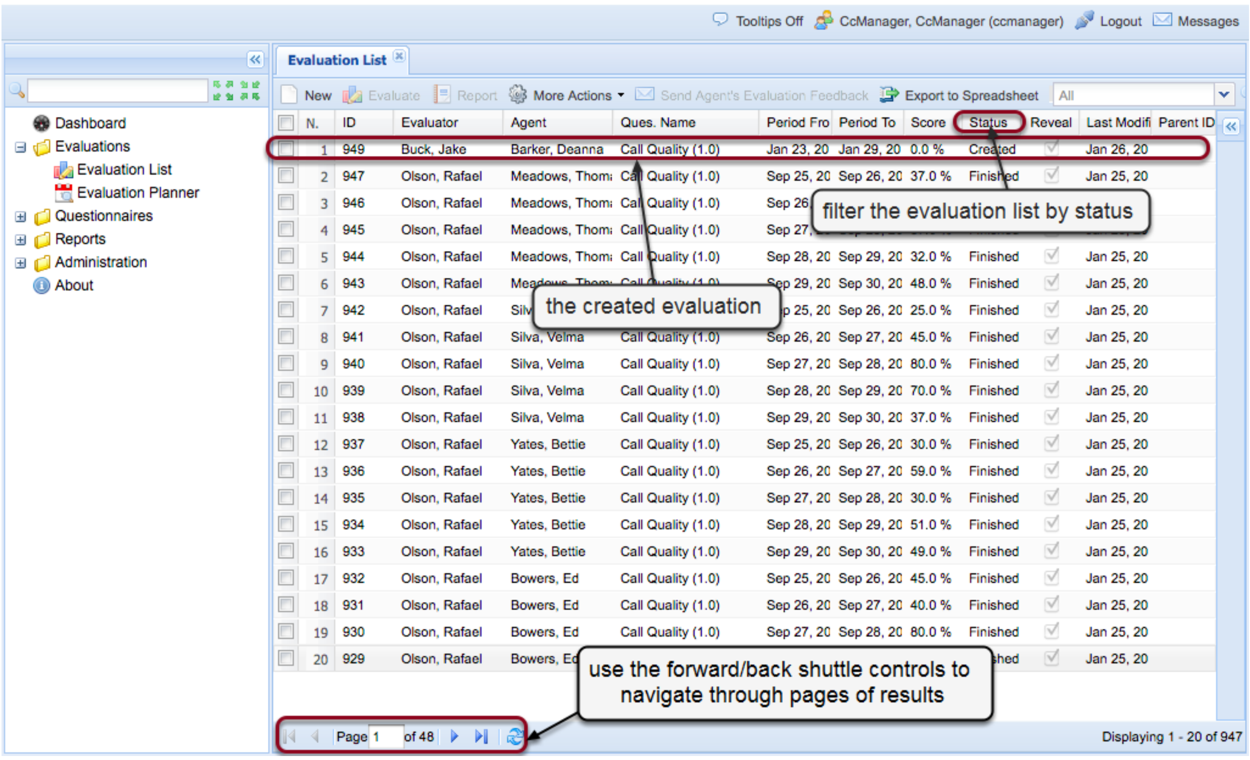

Figure 31: View Created Evaluations

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

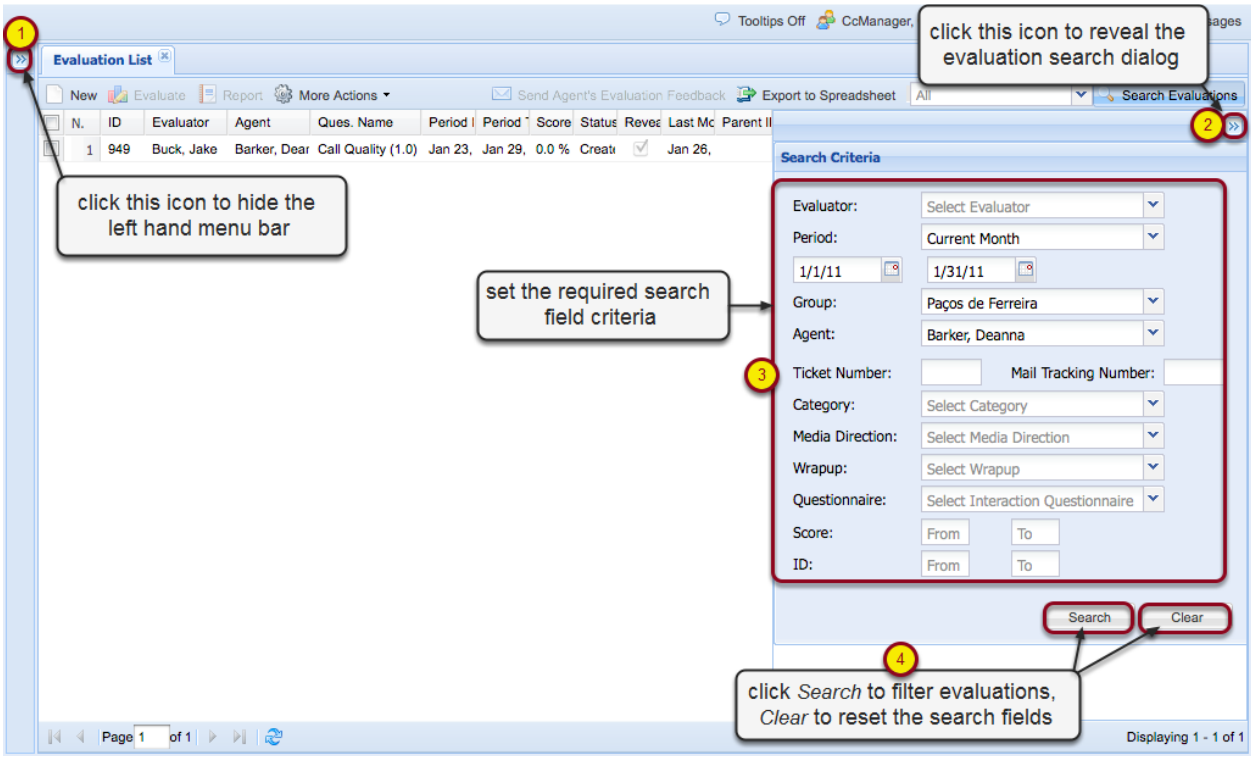

Figure 32: Searching For Evaluations

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

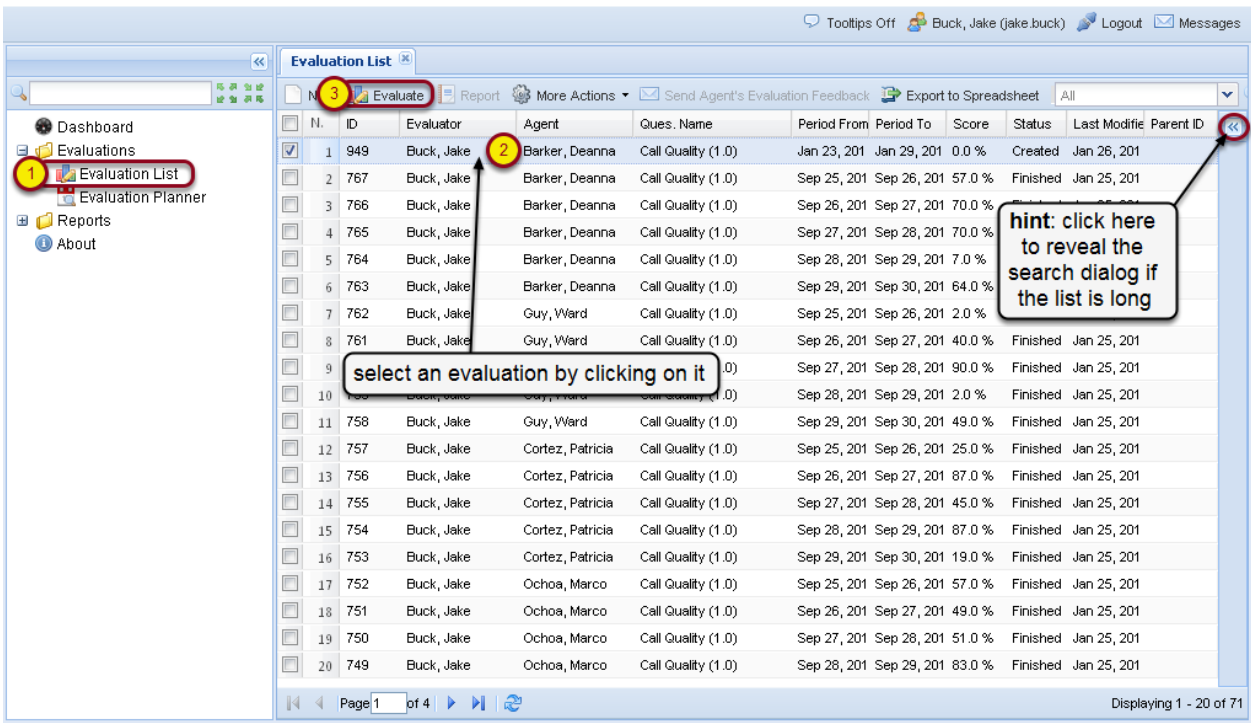

Figure 33: Open The Scheduled Evaluation

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

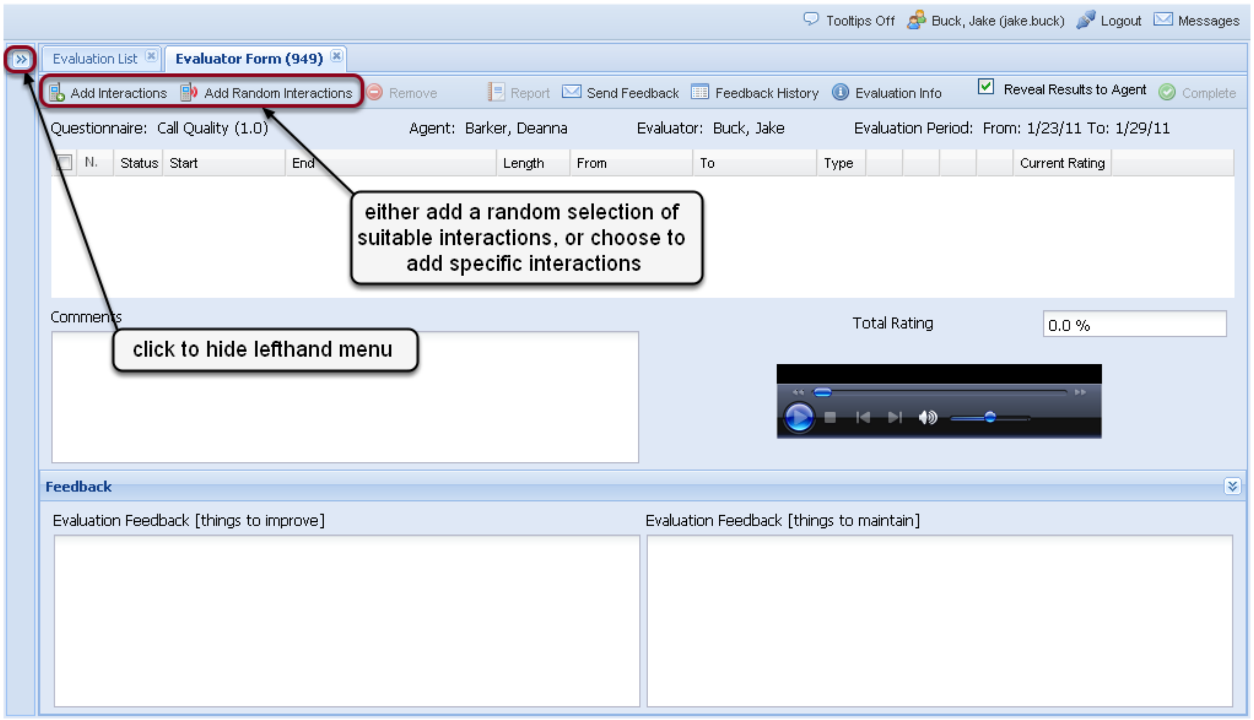

Figure 34: The Evaluator Screen

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

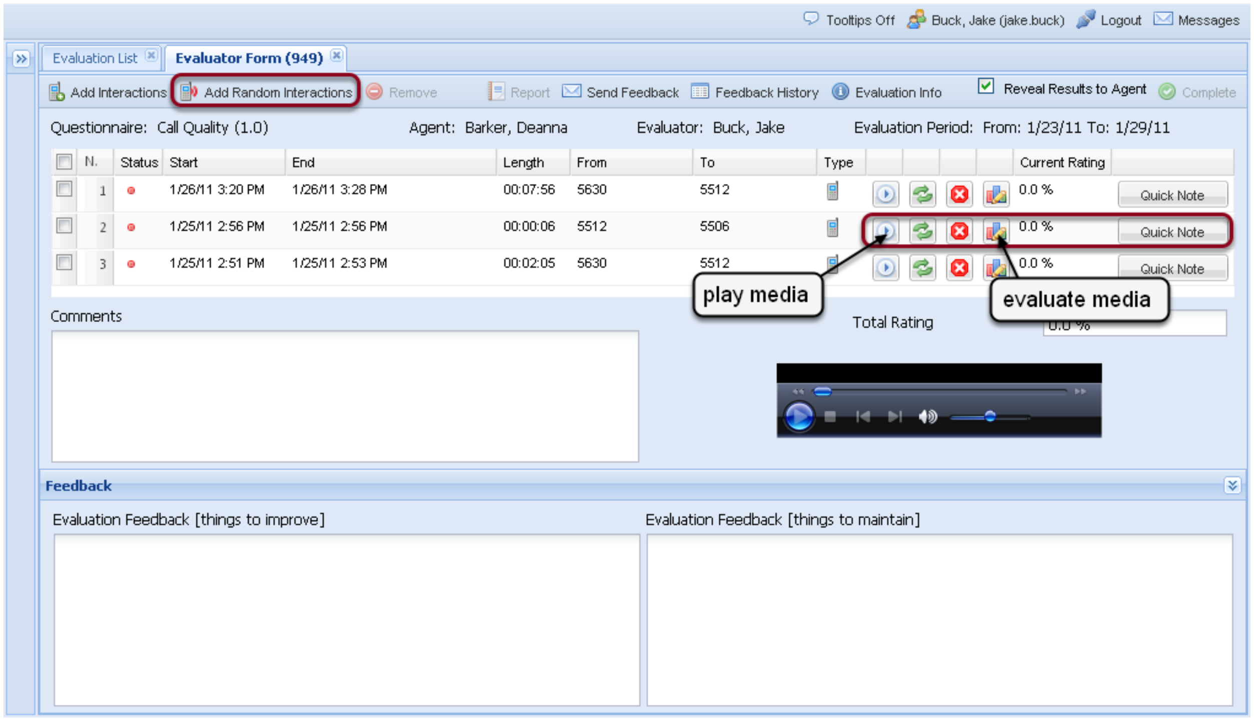

Figure 35: Add Random Media For Evaluation

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

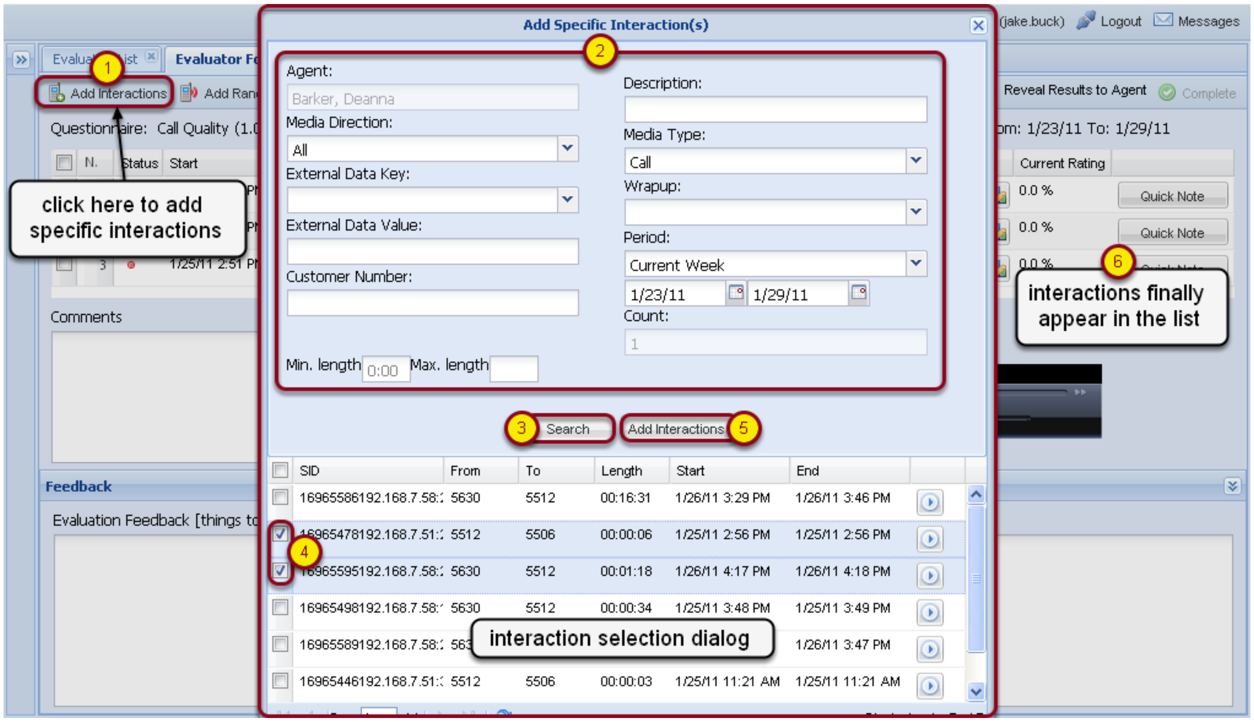

Figure 36: Add Specific Media For Evaluation

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

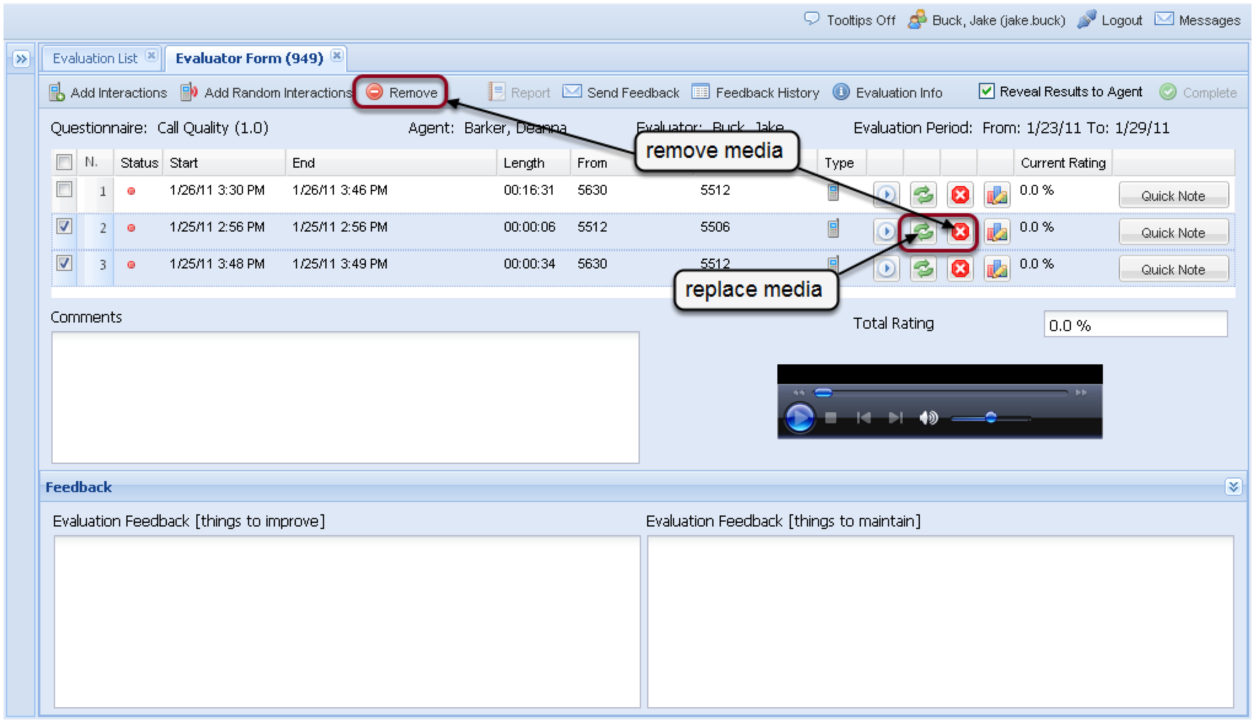

Figure 37: Change (Update) Media For Evaluation

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

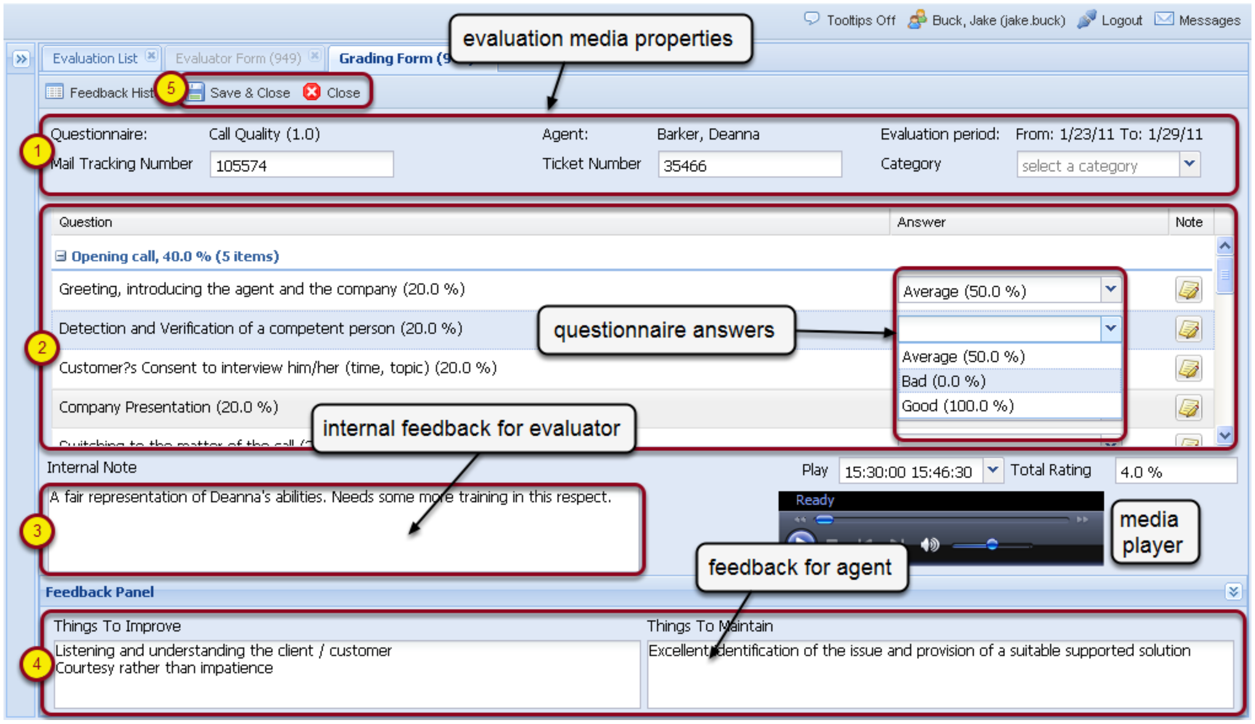

Figure 38: Grading A Media Record

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

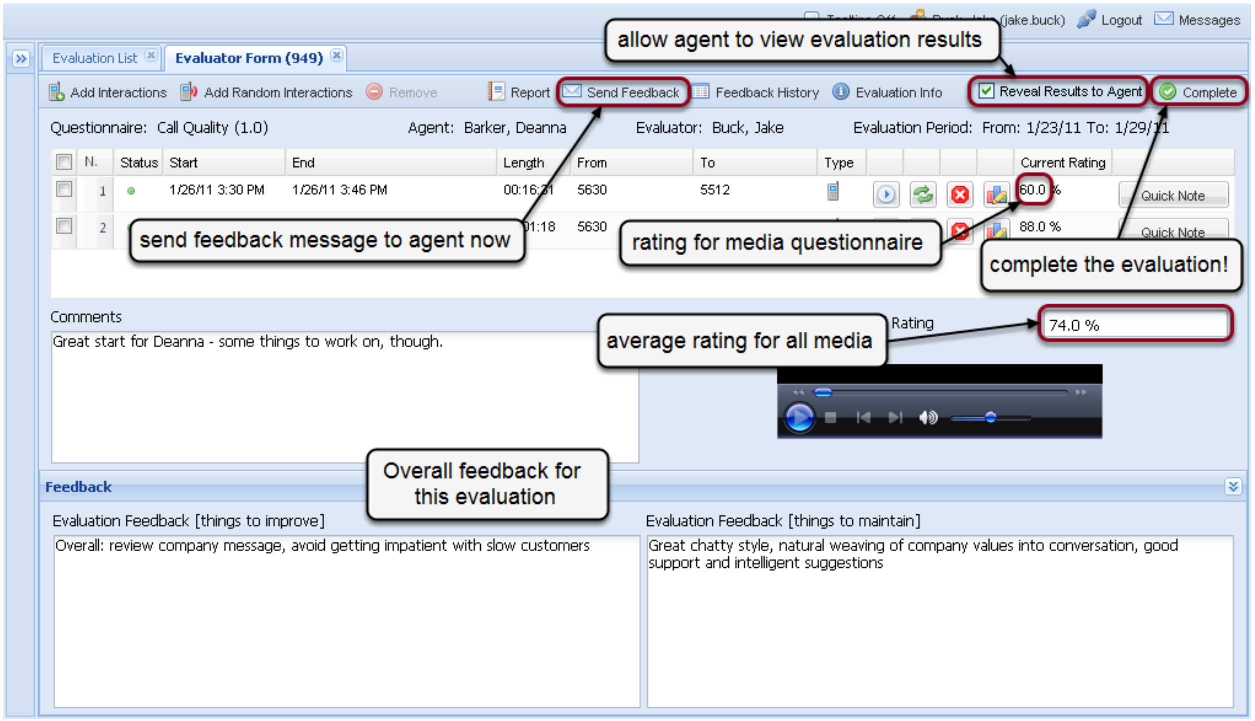

Figure 39: Complete The Evaluation

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)

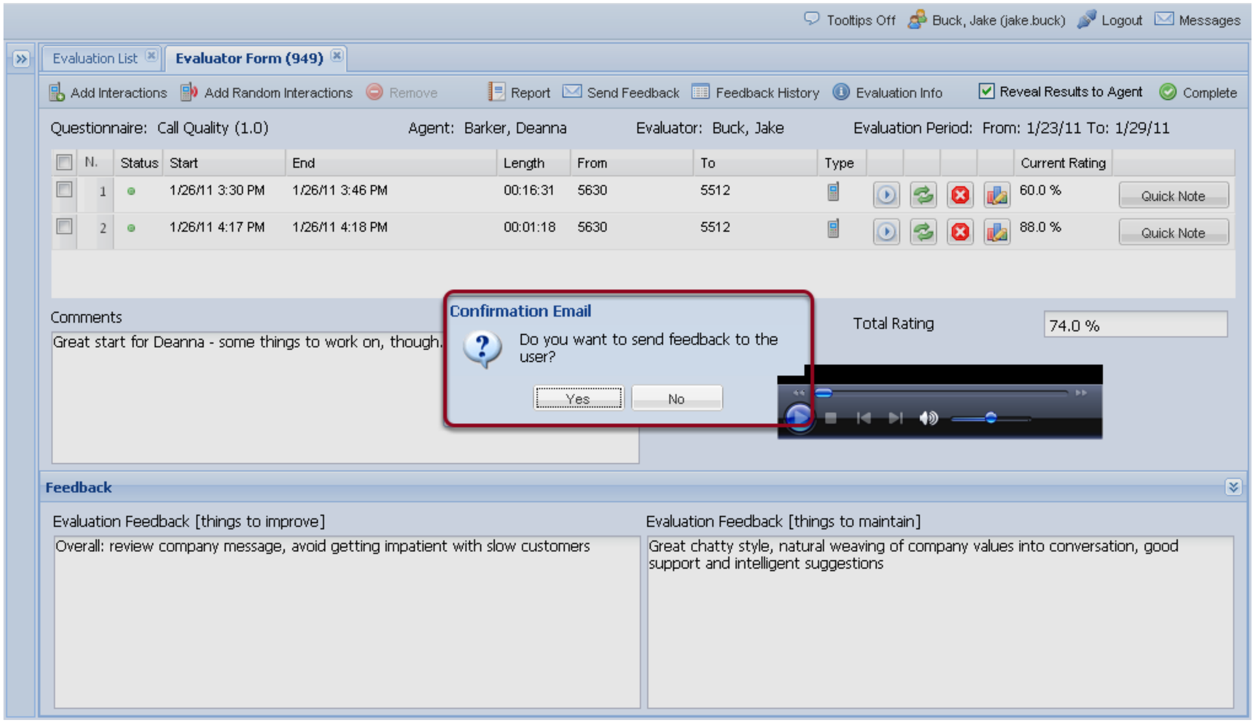

Figure 40: Send Feedback To Agent (Optional)

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 Re-Open An Evaluation. 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)

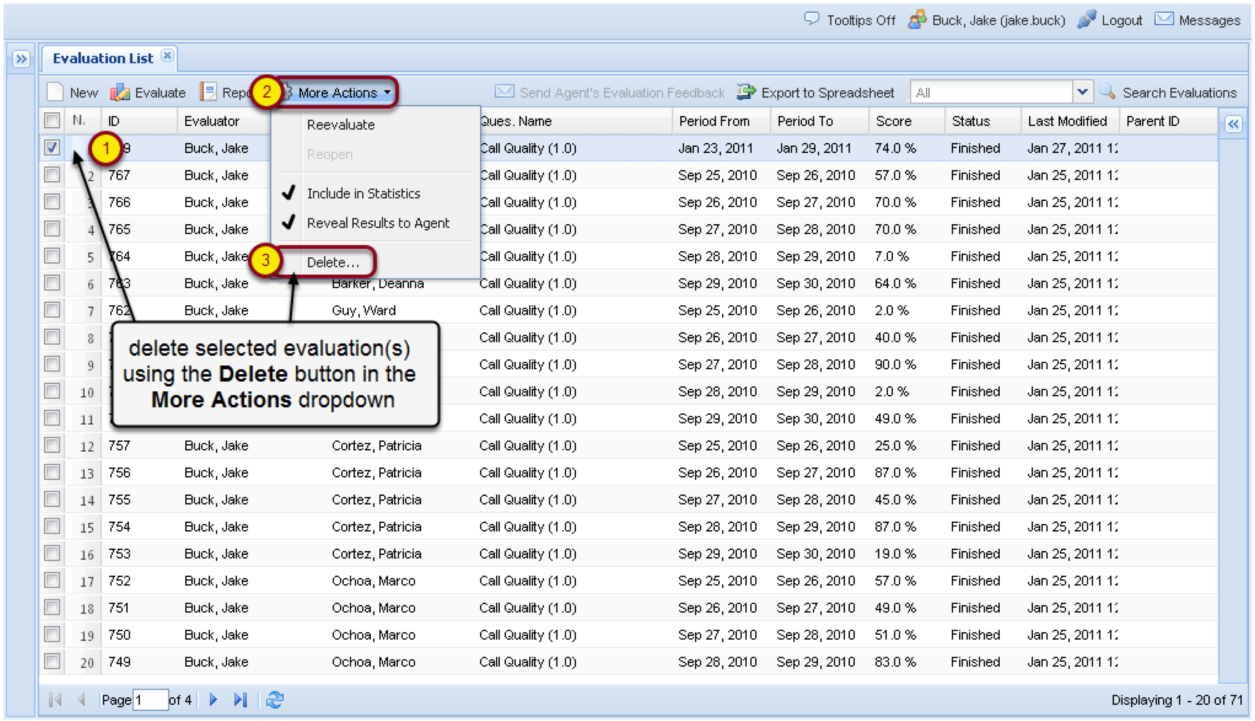

Figure 41: Deleting Evaluations (Optional)

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 Re-Defining User Roles). 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)

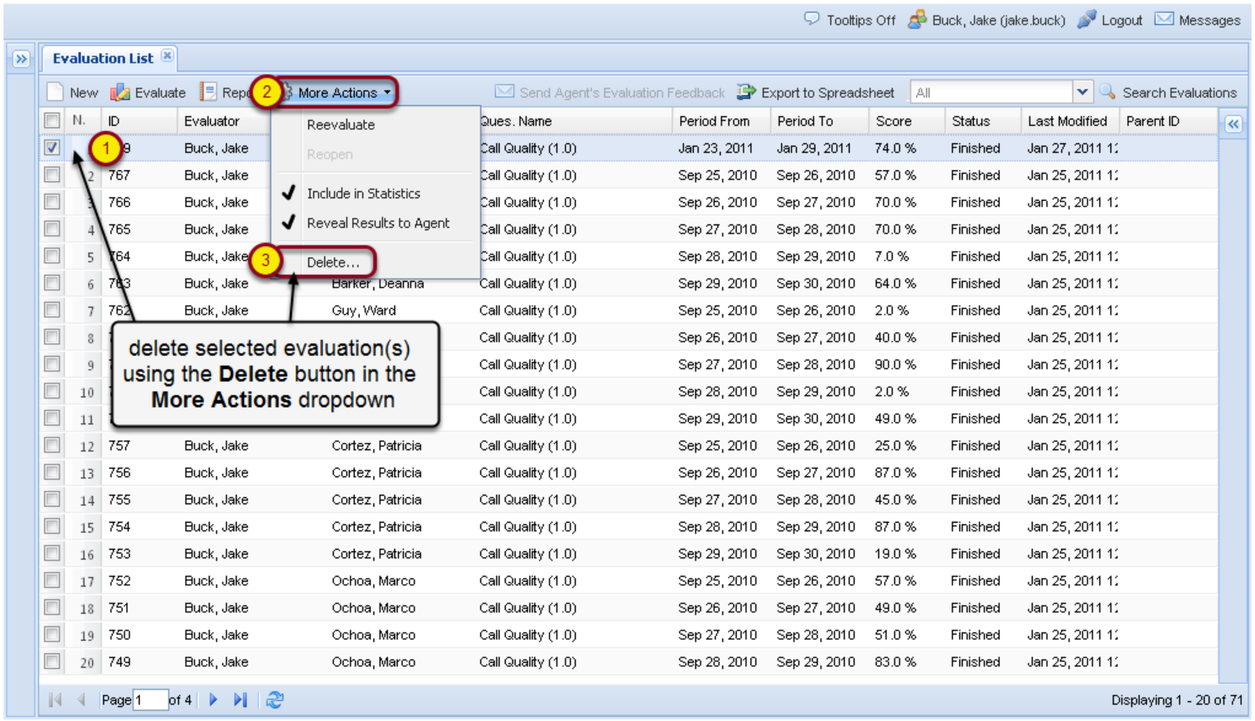

Figure 42: Re-Use The Evaluation - 1 (Optional)

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)

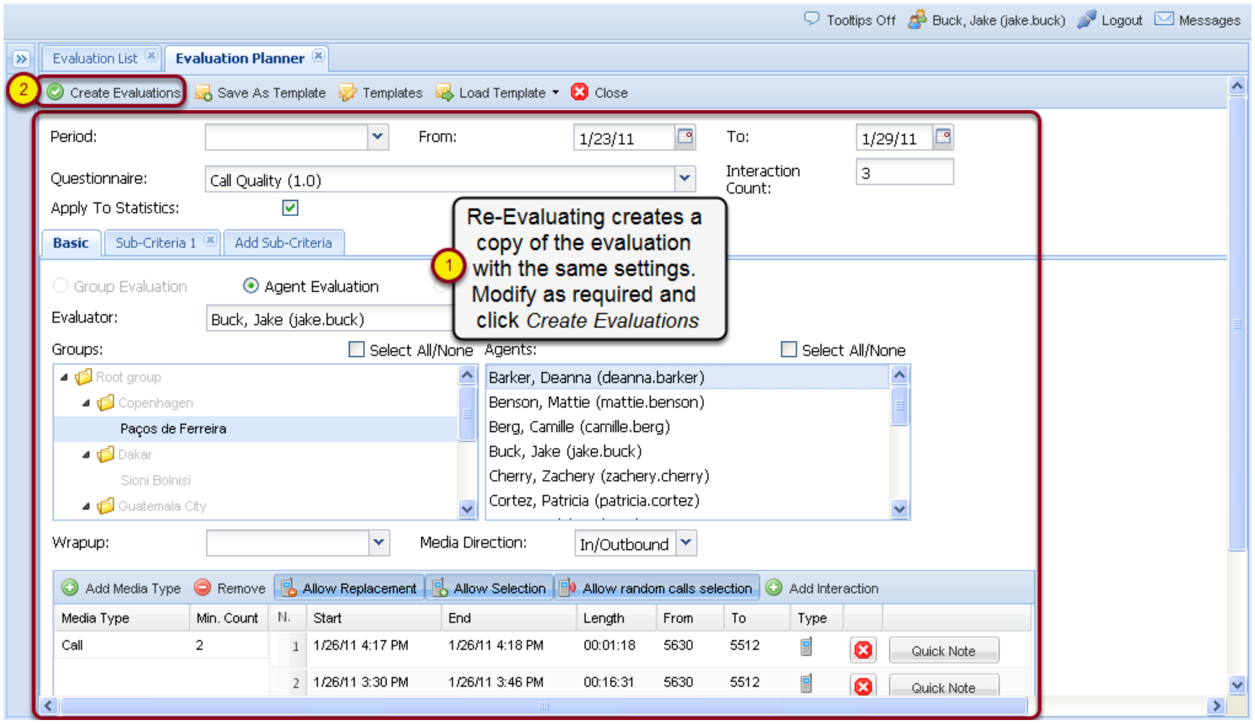

Figure 43: Re-Use The Evaluation - 2 (Optional)

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)

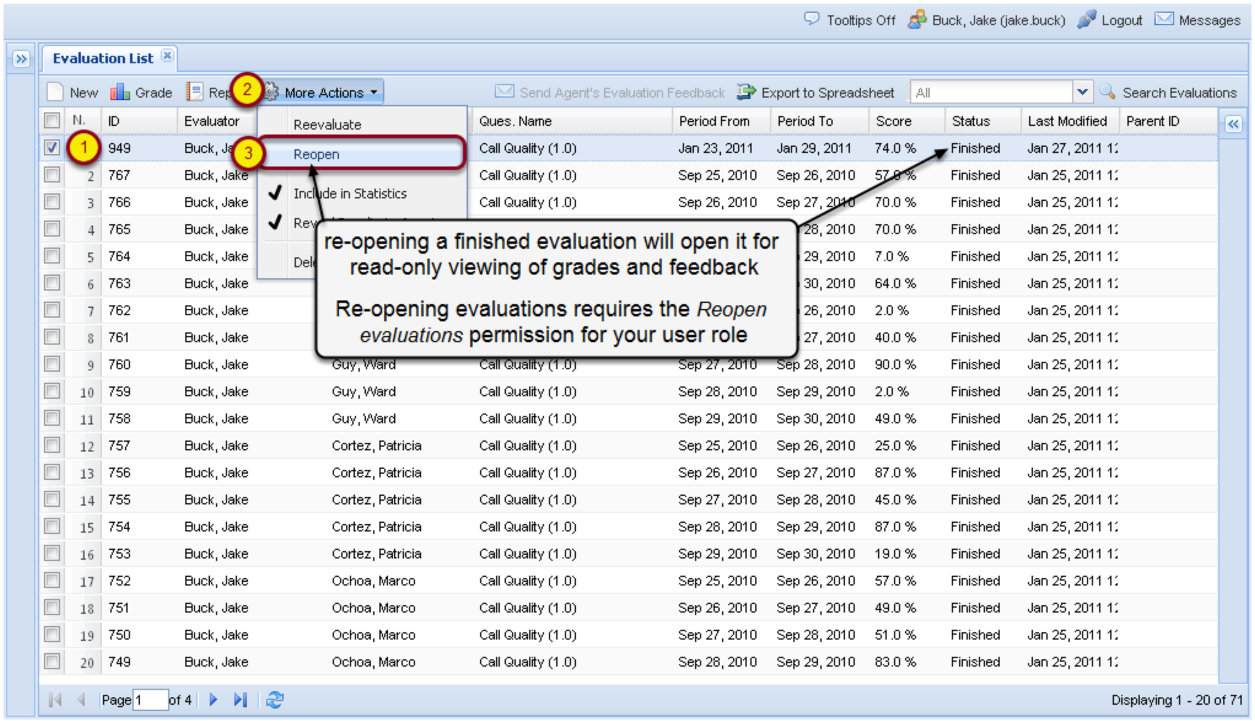

Figure 44: Re-Open An Evaluation (Optional)

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 Re-Defining User Roles).

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

6 Reporting

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:

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

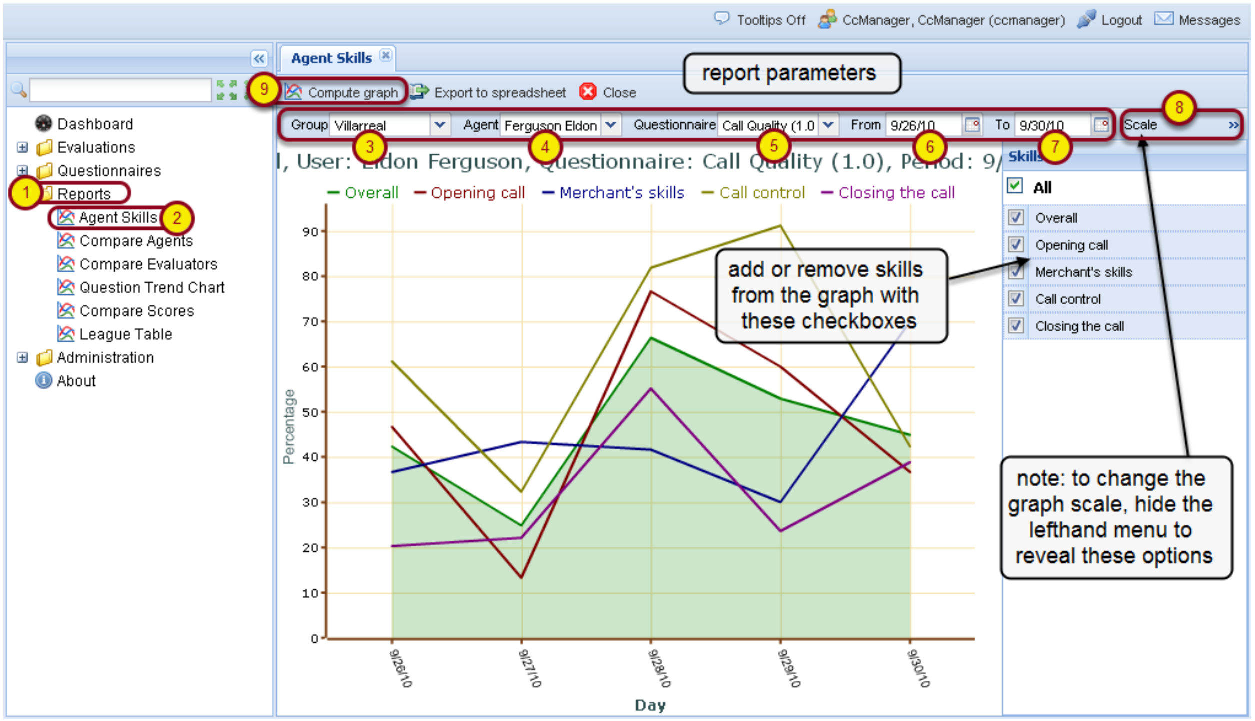

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Figure 45: Setting Up A Report

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

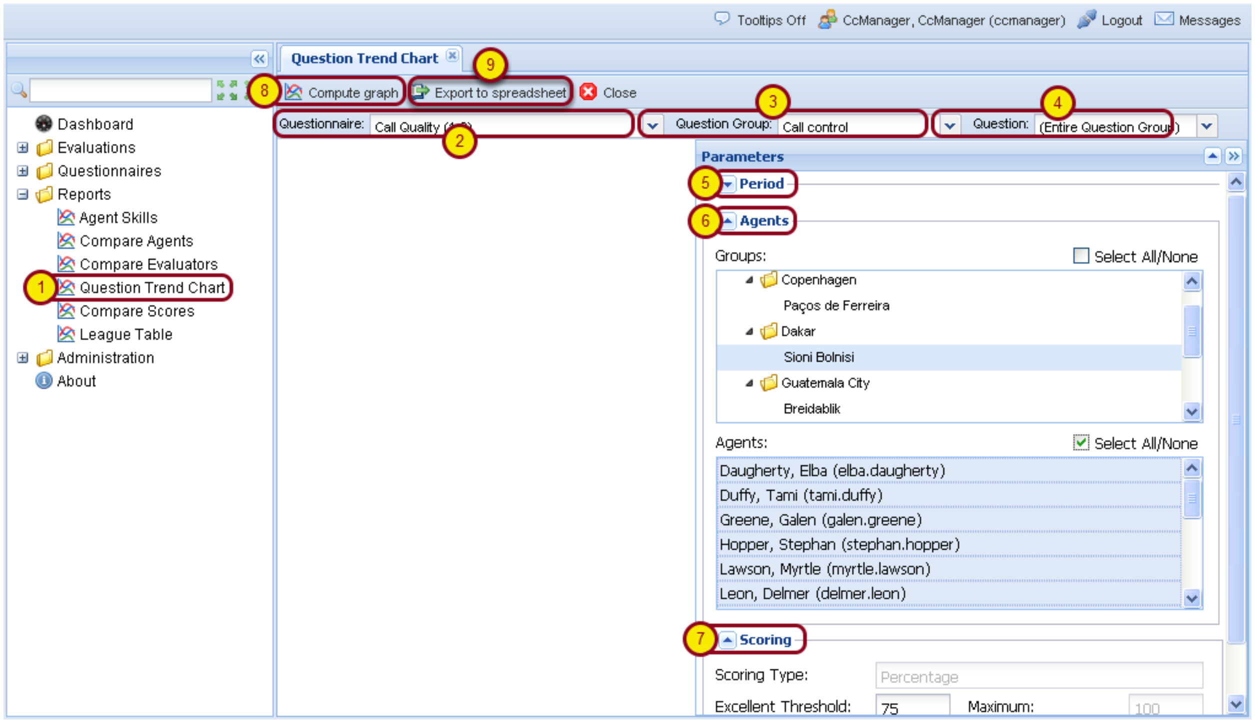

Figure 46: Question Trend Chart – 1

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

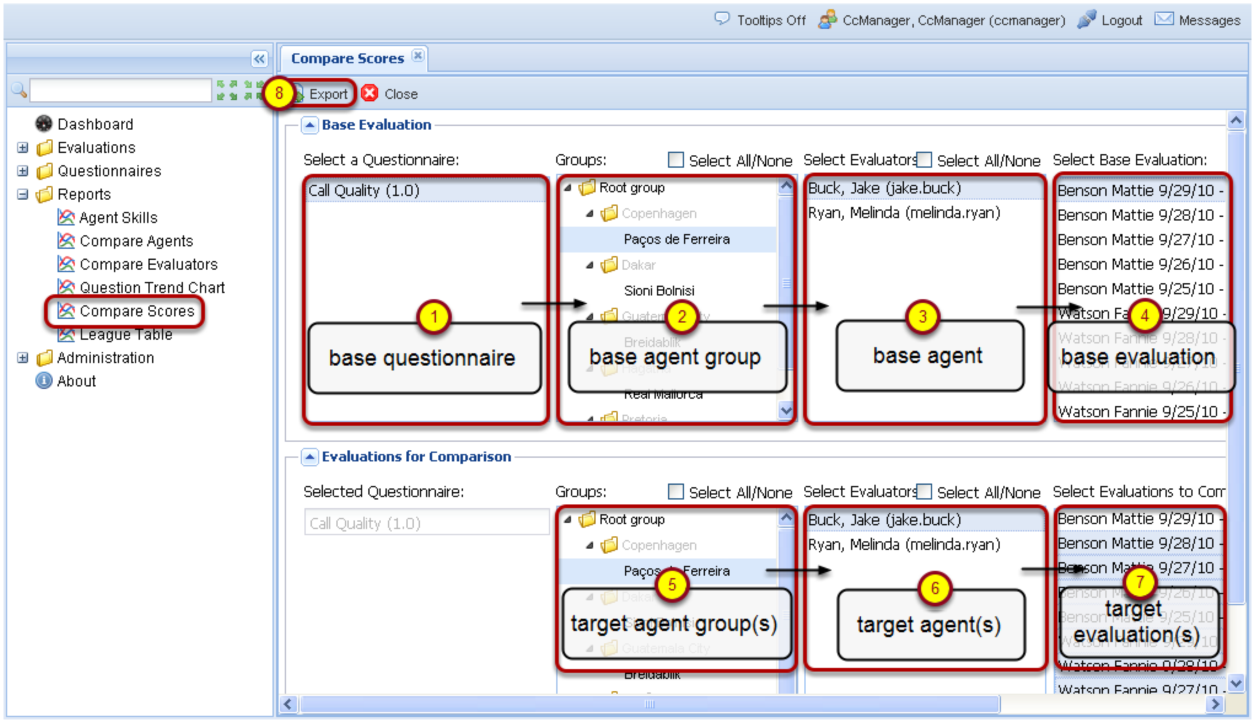

Figure 48: Compare Scores Report – 1

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

	A	B	C	D	E	F	G	H	I
1	**Compare Scores**								
2	**Questionnaire:**		**Call Quality (1.0)**						
3									
4	*Group/Question name*								
5			Base Evaluation, Deanna Barker, 20/10/10, Eval Id: 1741	Deanna Barker, 20/10/10, Eval Id: 1742	Deanna`s Diff	Deanna Barker, 20/10/10, Eval Id: 1743	Deanna`s Diff	Deanna Barker, 20/10/10, Eval Id: 1744	Deanna`s Diff
6	**Opening call**		4.00%	0.00%	-4.00%	24.00%	20.00%	28.00%	24.00%
7		Greeting, introducing the agent and the company	10.00%	0.00%	-10.00%	20.00%	10.00%	0.00%	-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%	20.00%
10		Company Presentation	0.00%	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 orient	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%	0.00%	-10.00%	10.00%	0.00%	0.00%	-10.00%
17	**Call control**		18.00%	0.00%	-18.00%	20.00%	2.00%	0.00%	-18.00%
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

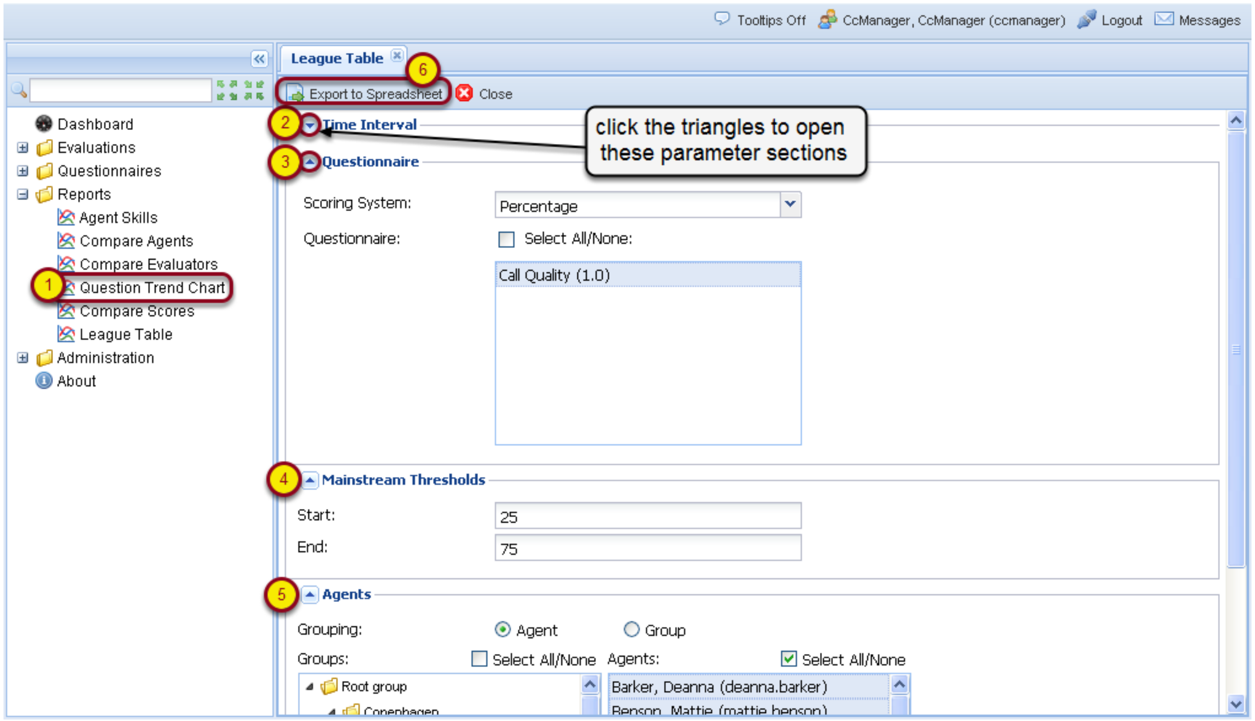

Figure 50: League Table – 1

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

League Table

Questionnaire	Call Quality (1.0)
From:	9/26/2010
To:	9/29/2010

#	Name	Surname	Login	Group	Average Score
1.	Patricia	Cortez	patricia.cortez	Paços de Ferreira	52.56%
2.	Eva	Sanders	eva.sanders	Paços de Ferreira	51.52%
3.	Charlie	Lester	charlie.lester	Paços de Ferreira	51.19%
4.	Marco	Ochoa	marco.ochoa	Paços de Ferreira	50.13%
5.	Ward	Guy	ward.guy	Paços de Ferreira	49.97%
6.	Fannie	Watson	fannie.watson	Paços de Ferreira	47.90%
7.	Camille	Berg	camille.berg	Paços de Ferreira	47.89%
8.	Natalie	Mccall	natalie.mccall	Paços de Ferreira	46.95%
9.	Mattie	Benson	mattie.benson	Paços de Ferreira	46.03%
10.	Zachery	Cherry	zachery.cherry	Paços de Ferreira	45.78%
11.	Alisha	Workman	alisha.workman	Paços de Ferreira	44.94%
12.	Stefanie	Winters	stefanie.winters	Paços de Ferreira	43.58%
13.	Deanna	Barker	deanna.barker	Paços de Ferreira	42.96%
14.	Ivy	Young	ivy.young	Paços de Ferreira	36.12%
Average Score					46.97%

1.Call Quality 1.0

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

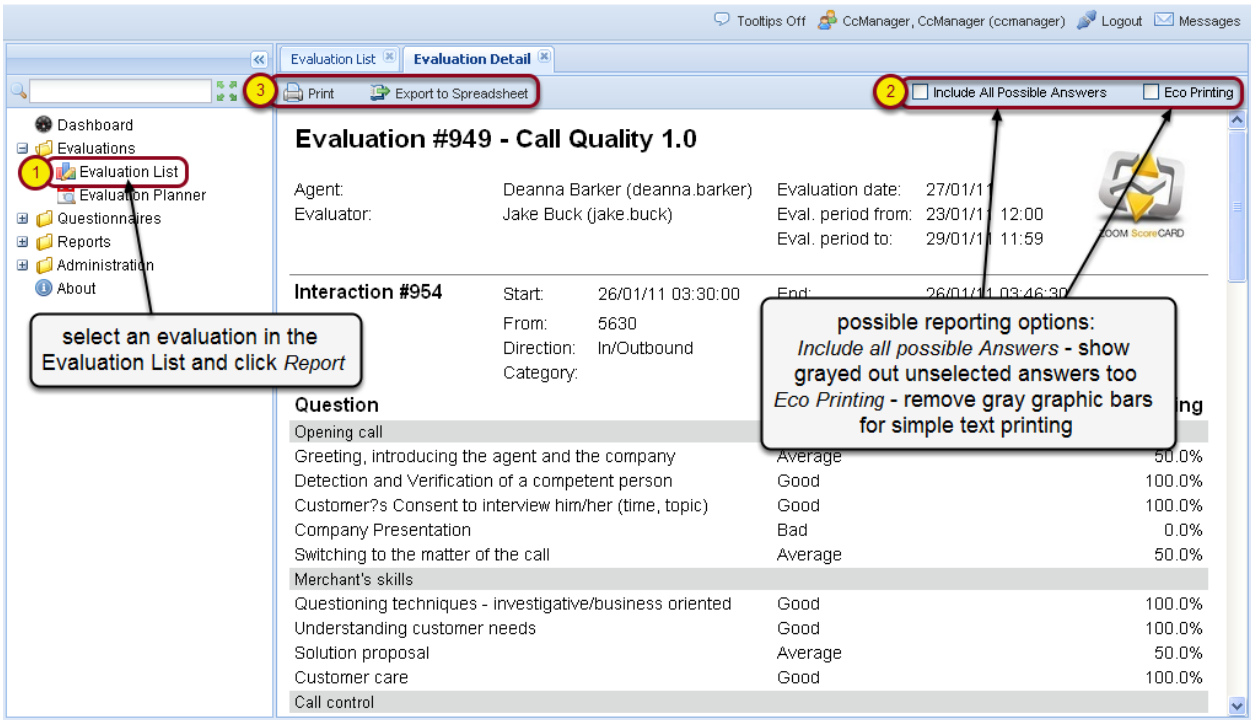

Figure 52: Reports for a Single Evaluation

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

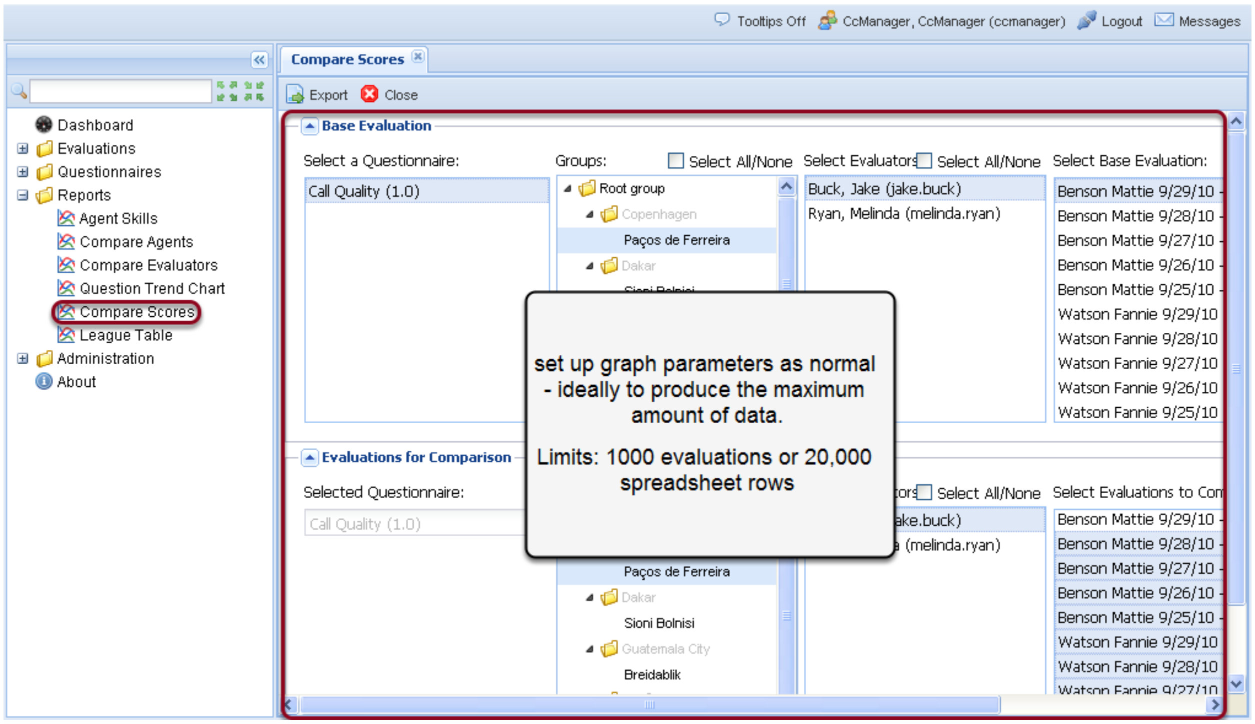

Figure 53: Exporting Graph Data to a Spreadsheet - 1

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.

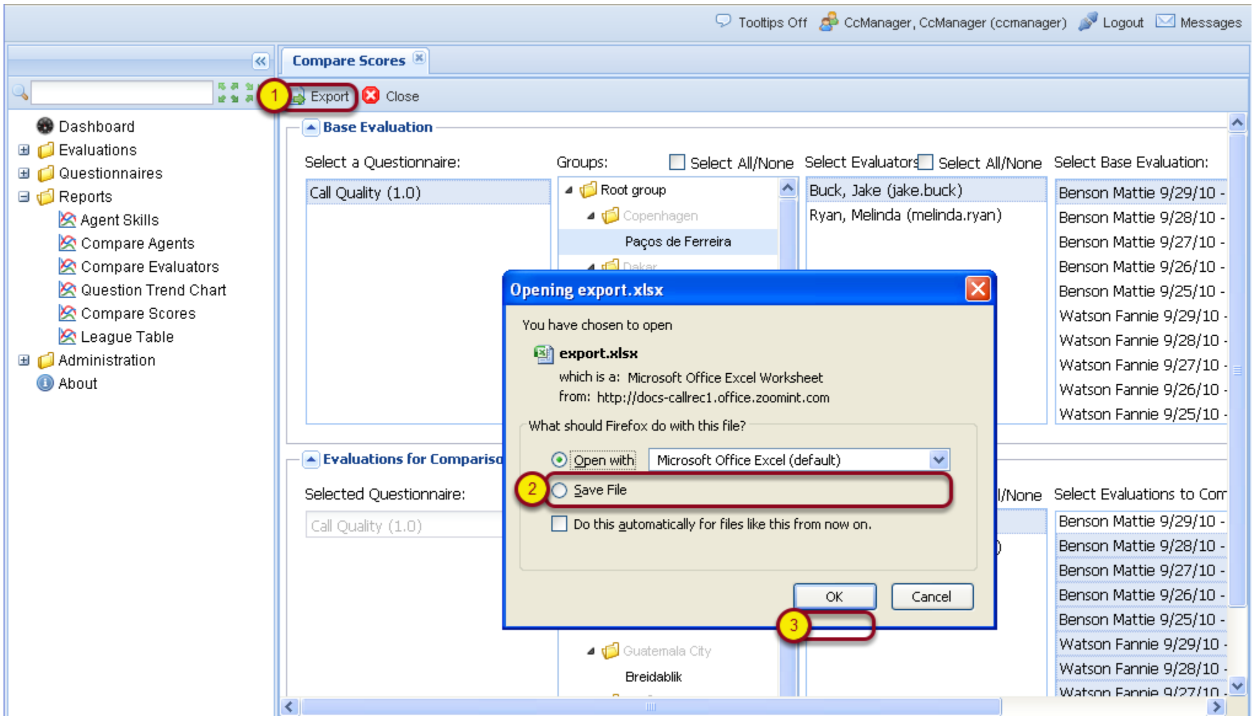

Figure 54: Exporting Graph Data to a Spreadsheet - 2

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.

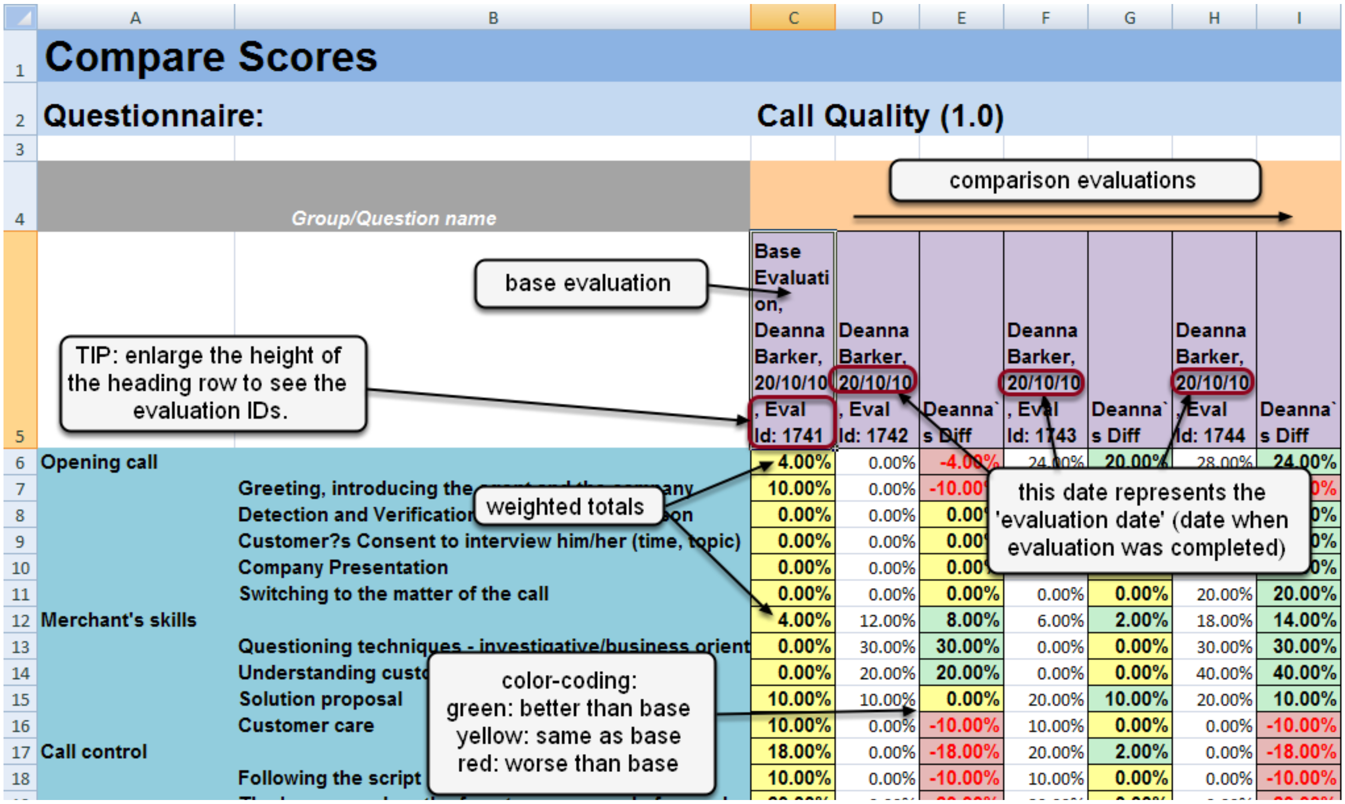

Figure 55: Exported Graph (Compare Evaluations) in Spreadsheet Format

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

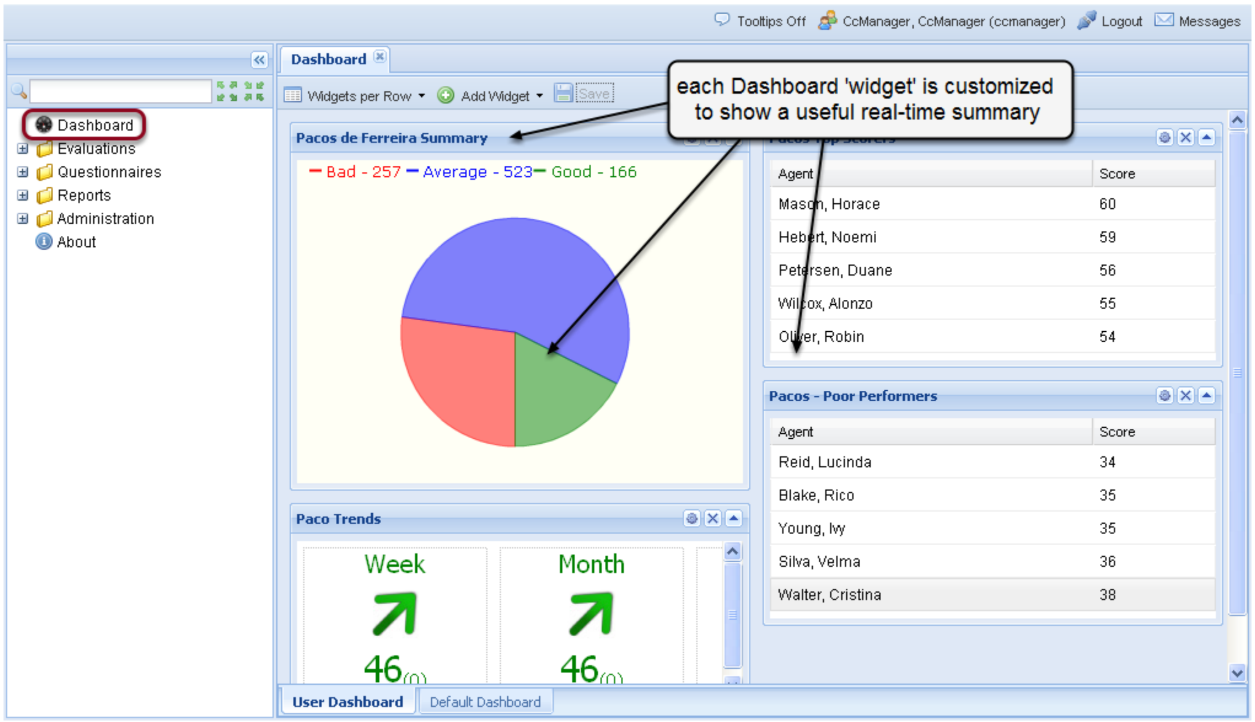

Figure 56: The Genesys Quality Manager Dashboard

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-to-the-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

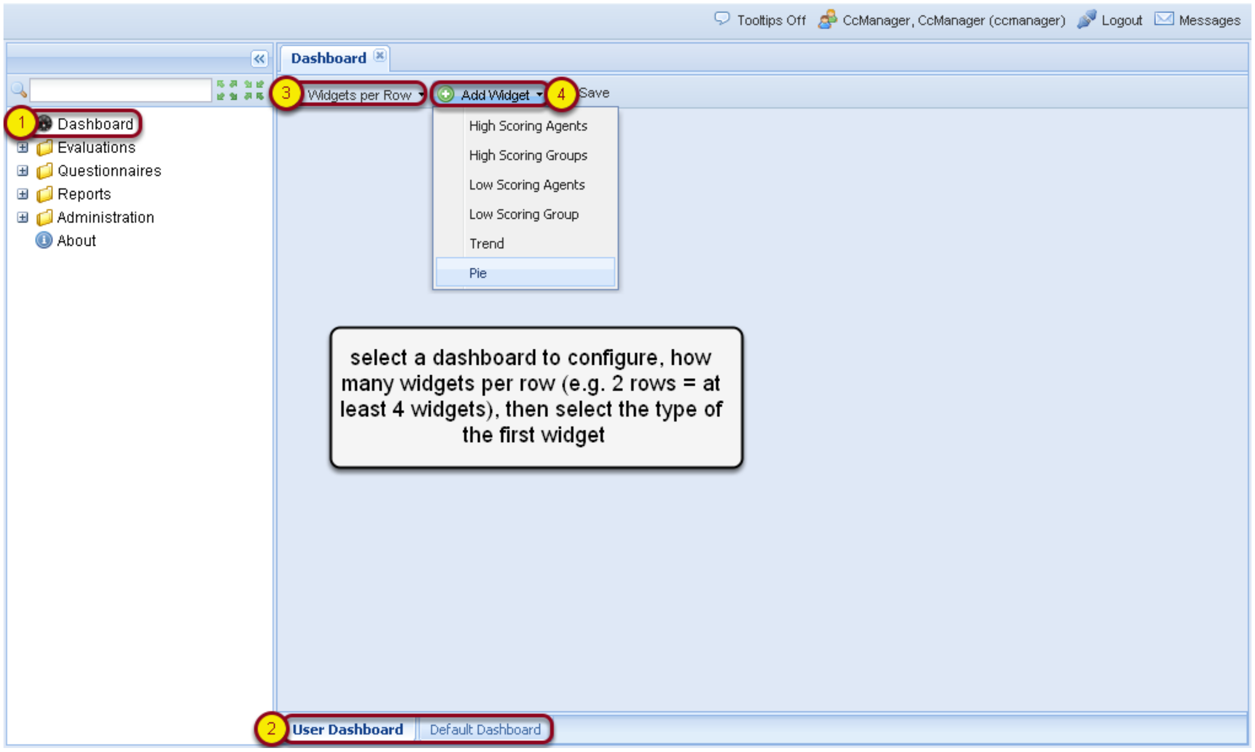

Figure 57: Setting Up a Dashboard – 1

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

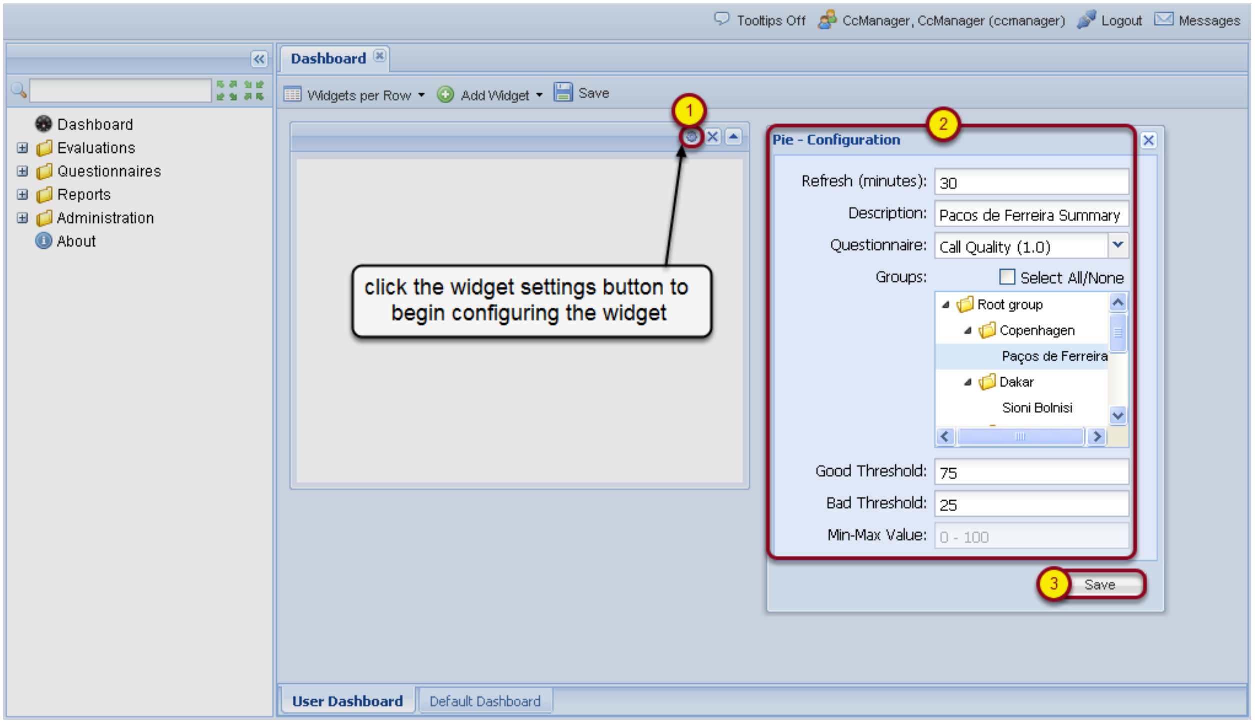

Figure 58: Setting Up a Dashboard – 2

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

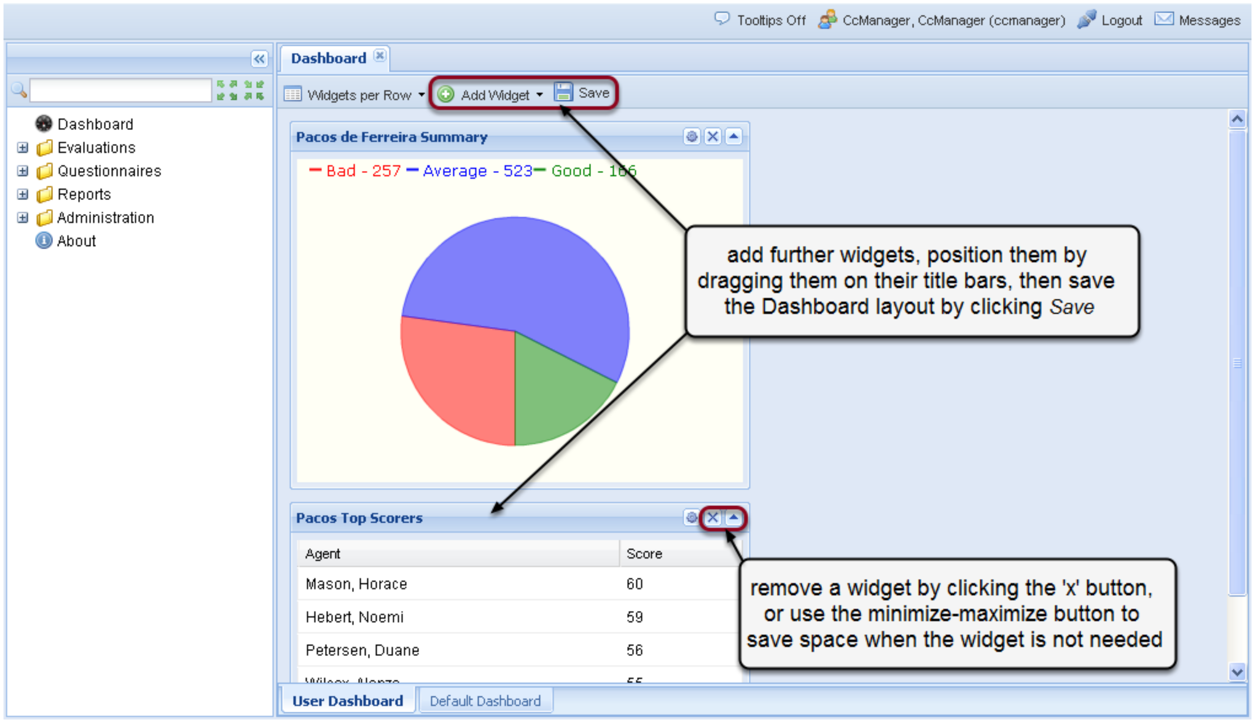

Figure 59: Setting Up a Dashboard – 3

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

7 Administration

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

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

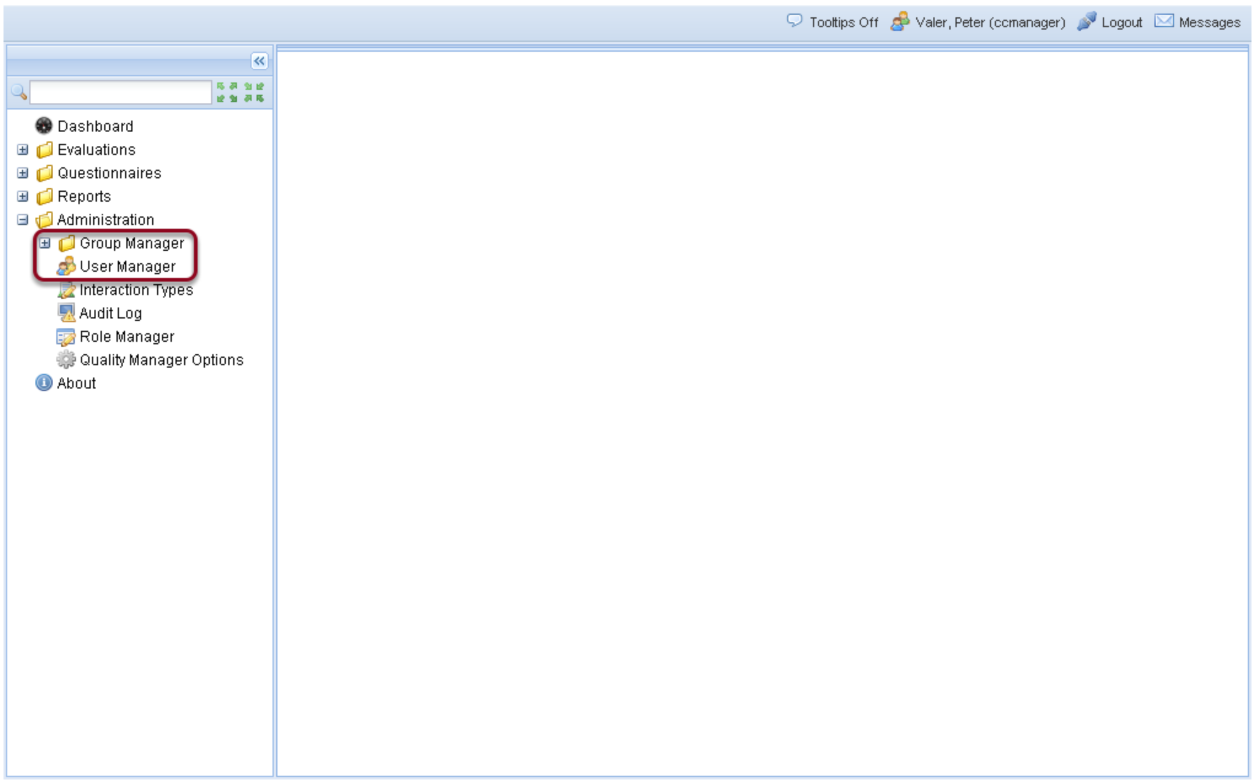

Figure 60: Groups And Users In Genesys Quality Manager

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

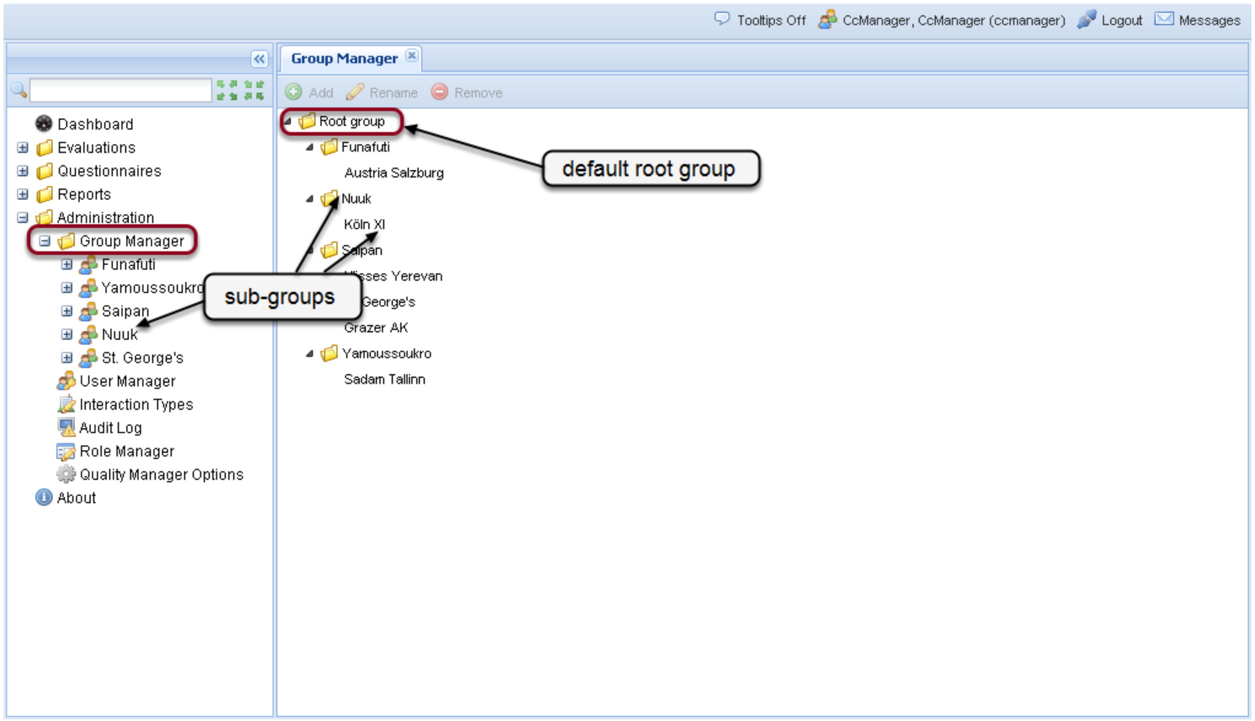

Figure 61: The Group Manager

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

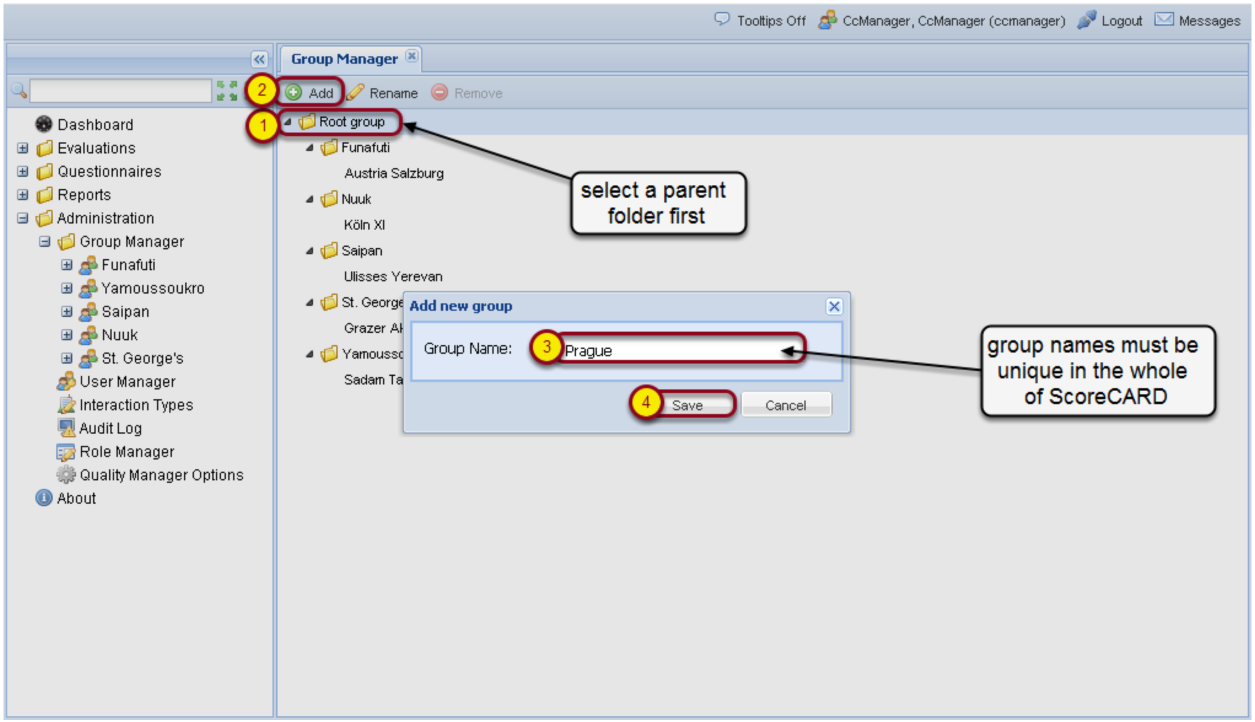

Figure 62: Creating A User Group

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

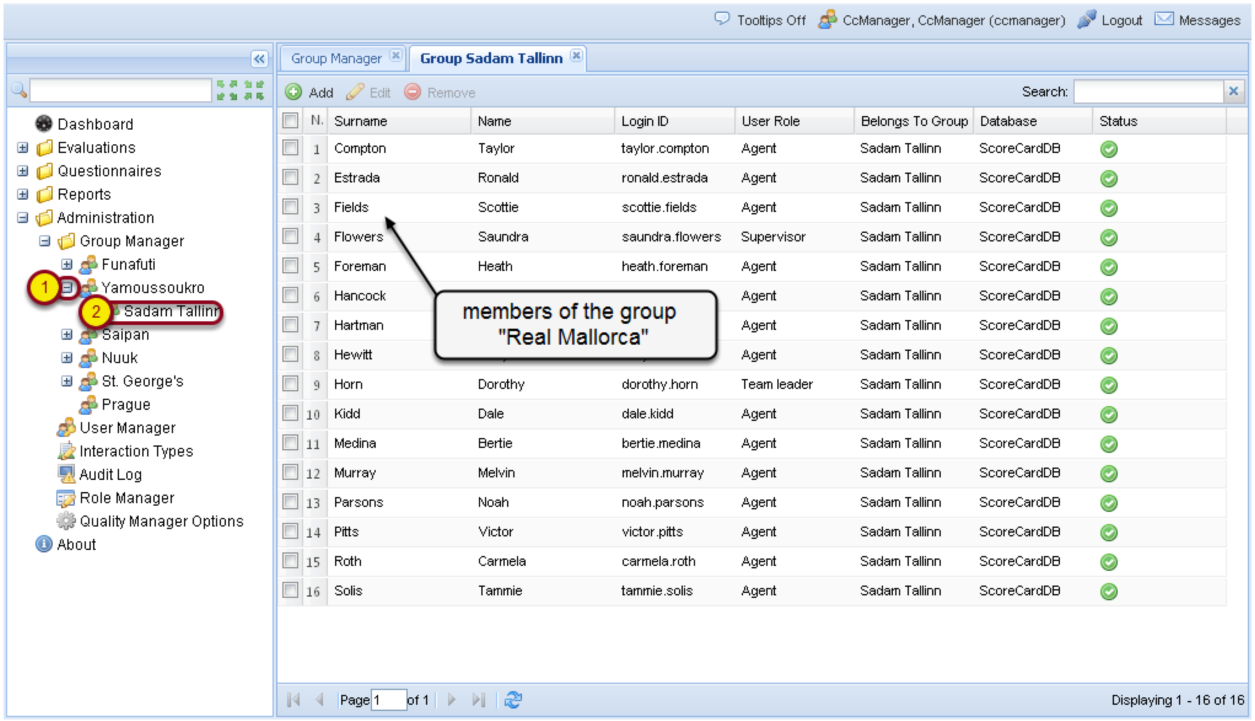

Figure 63: Viewing Users In Groups

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)

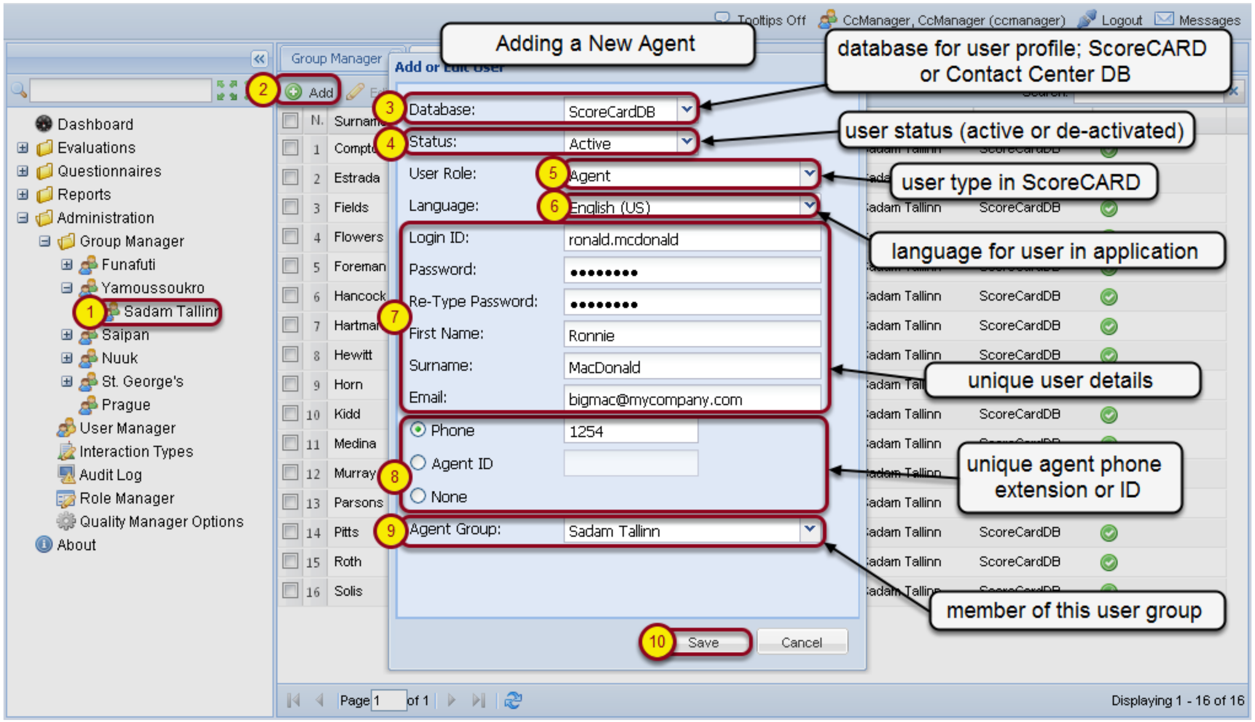

Figure 64: Adding A User (Agent)

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

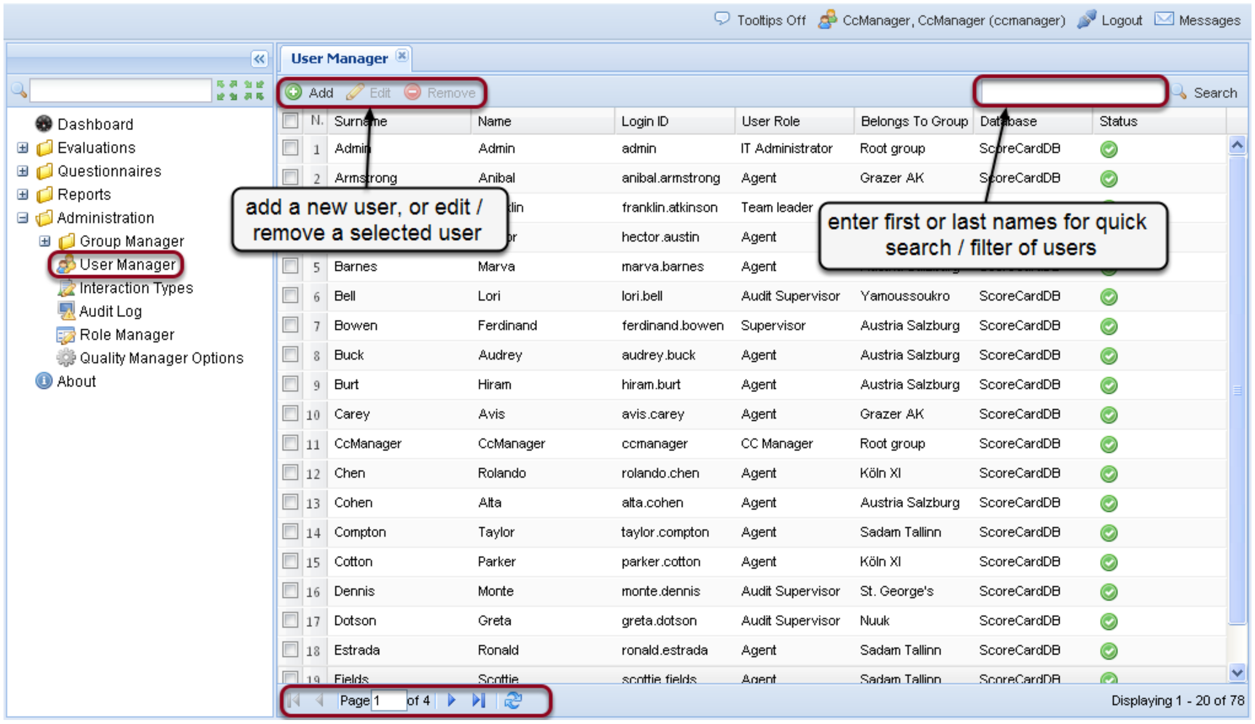

Figure 65: The User Manager

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

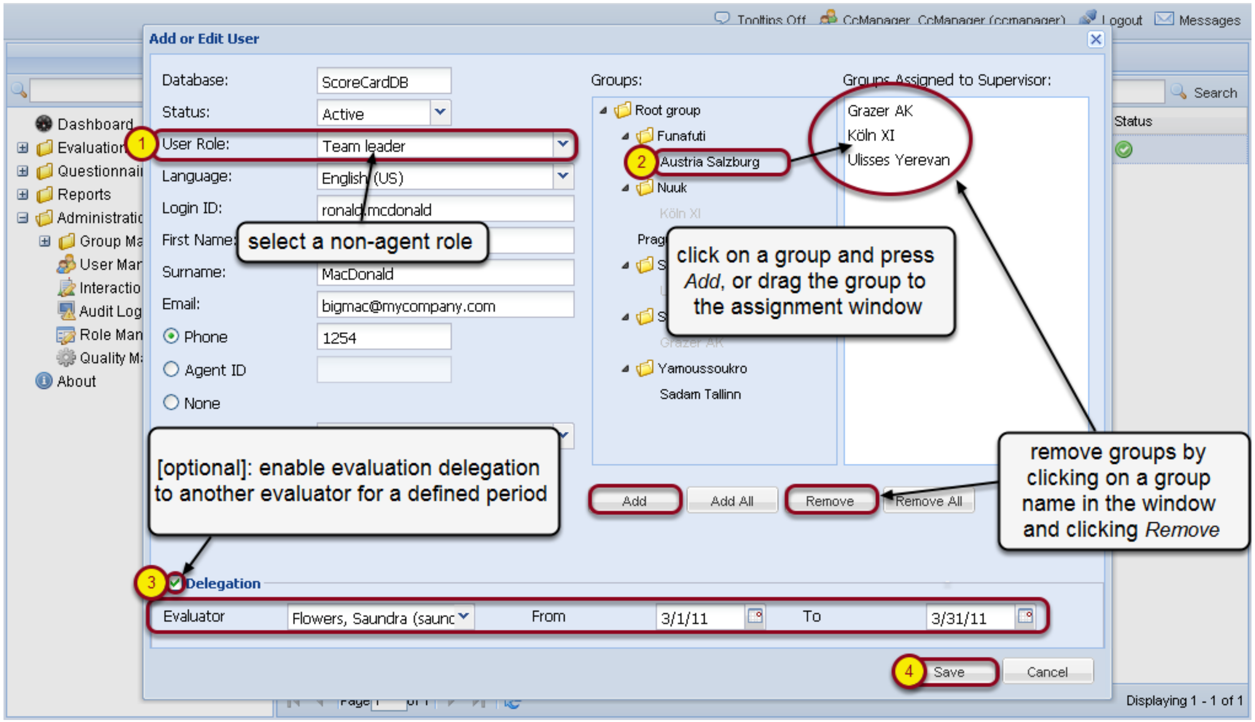

Figure 66: Adding Another User Type

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

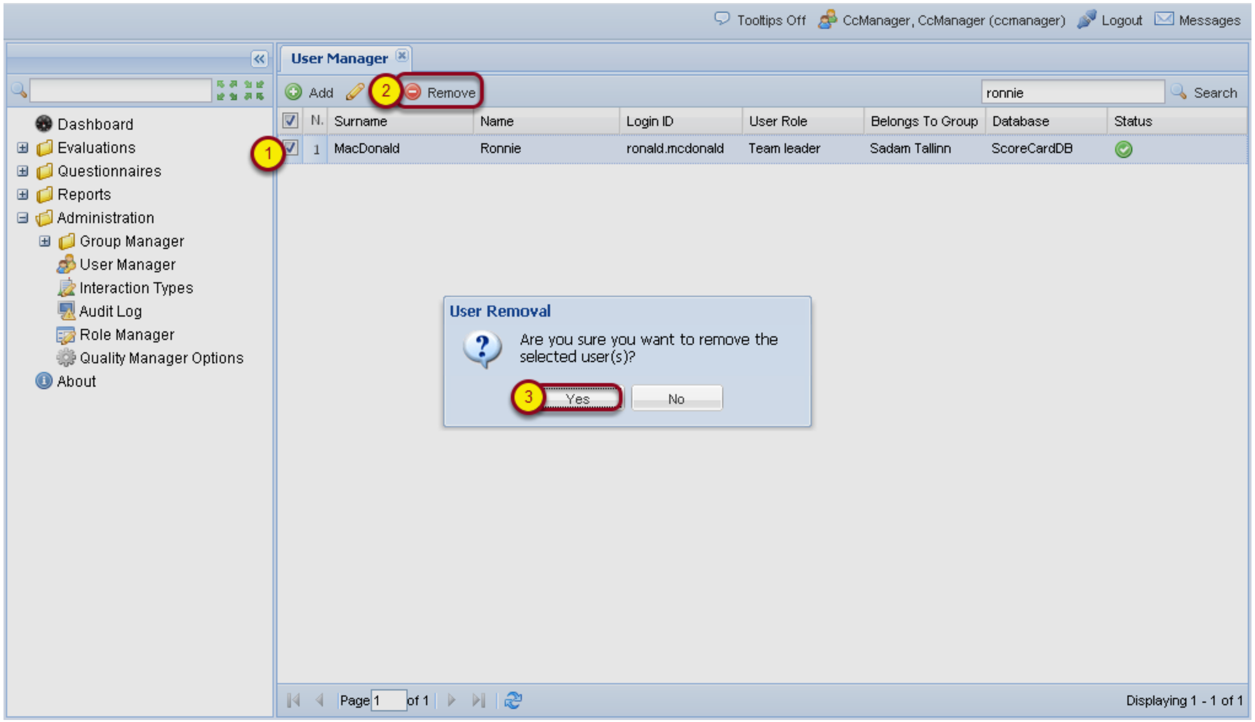

Figure 67: Removing Users

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

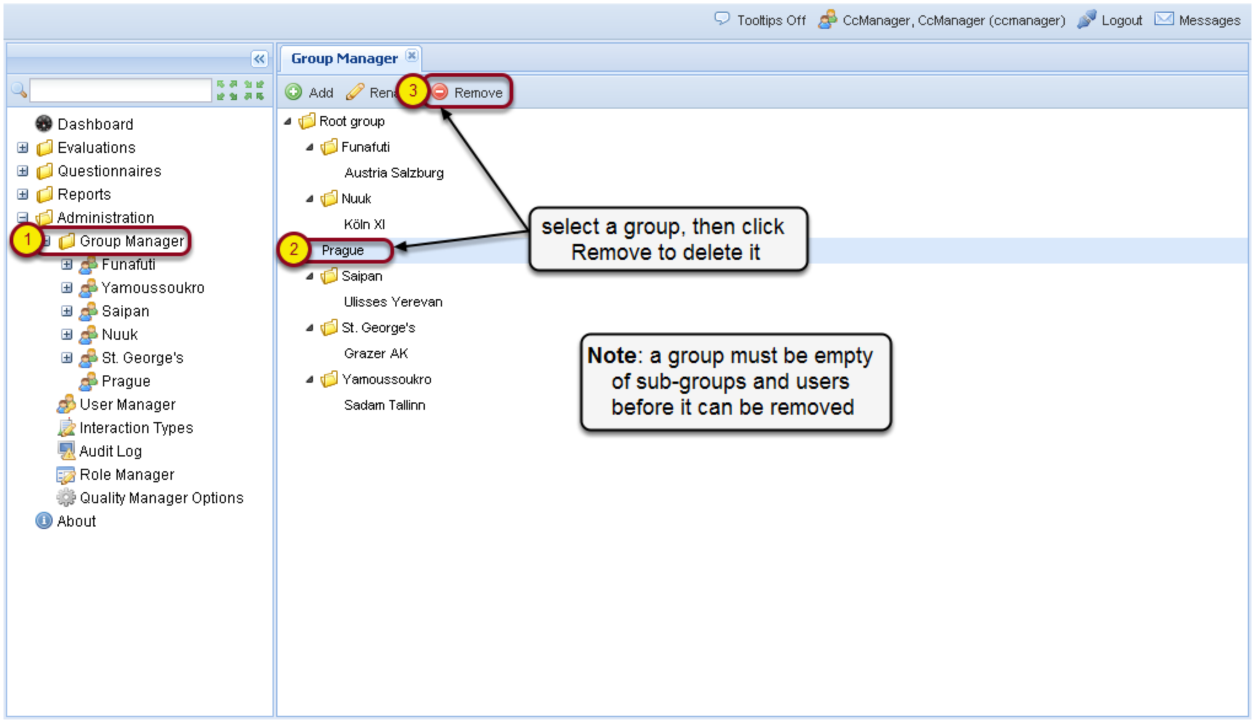

Figure 68: Removing a User Group

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

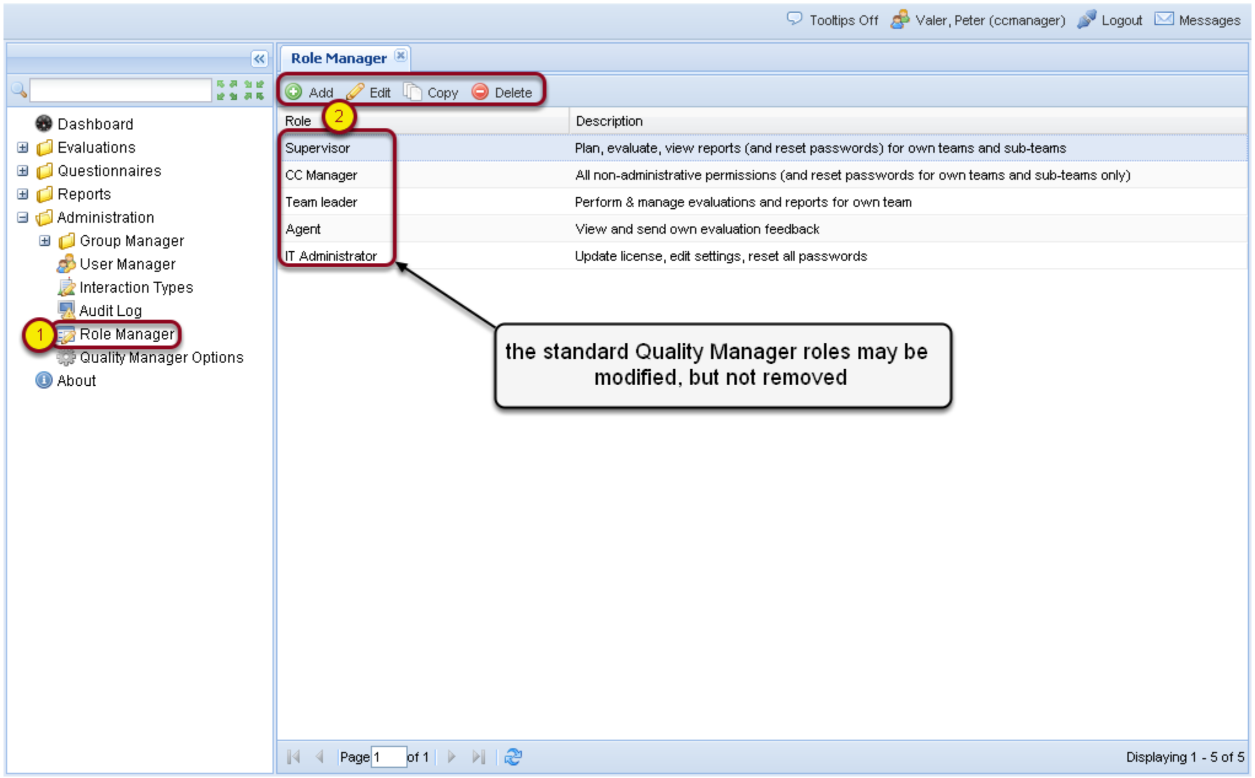

Figure 69: The Role Manager

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

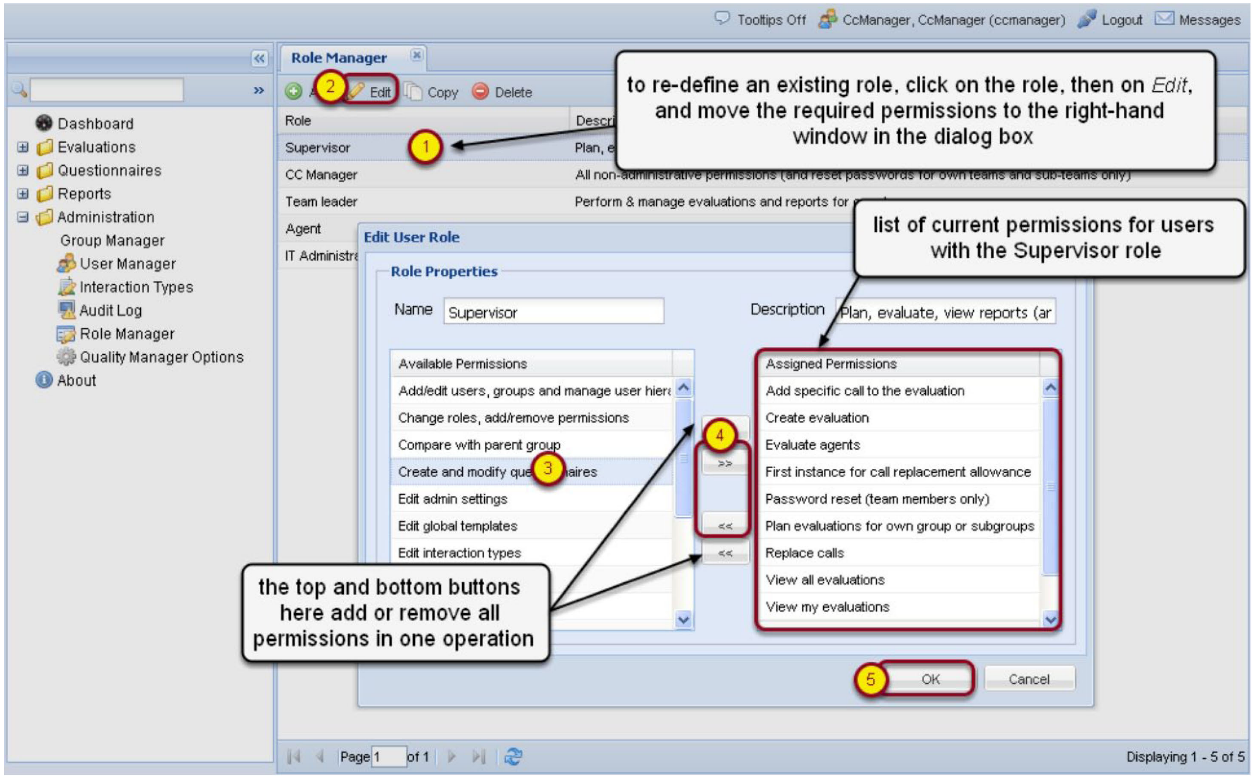

Figure 70: Re-Defining User Roles

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.

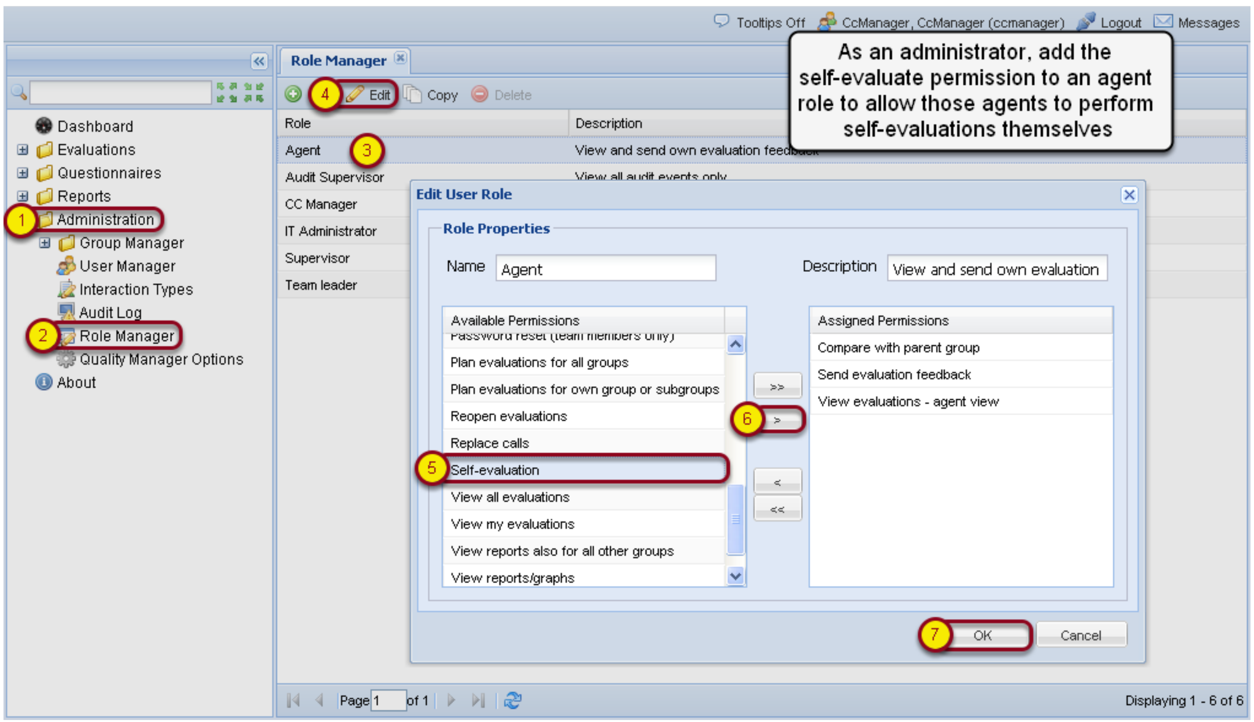

Figure 71: Enabling Agent Self-Evaluation

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 Application Options.

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

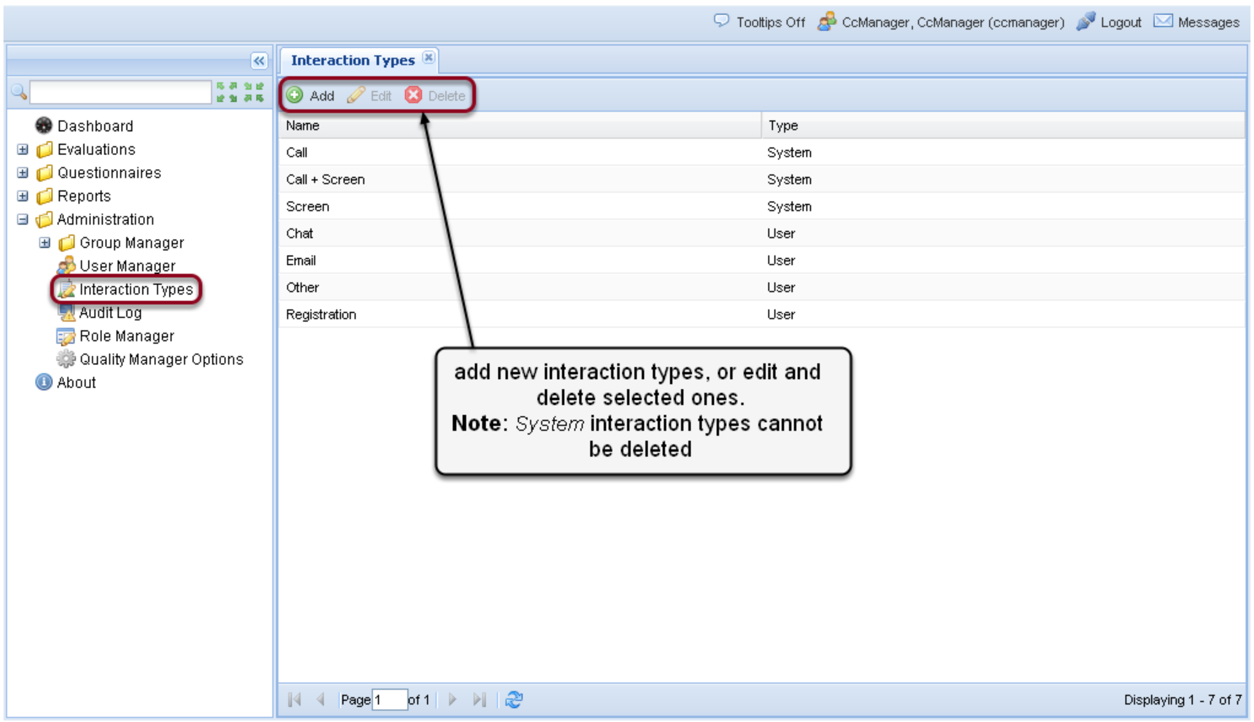

Figure 72: Interaction Types

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

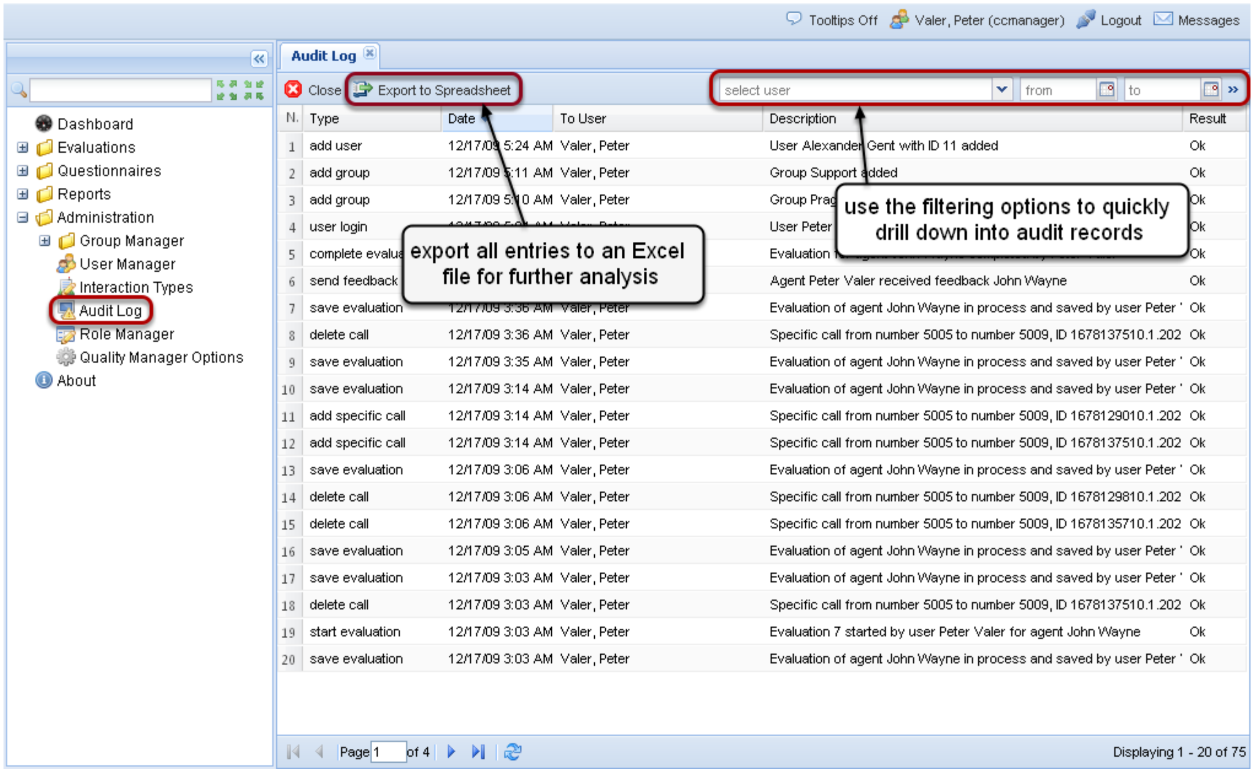

Figure 73: Audit Log

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

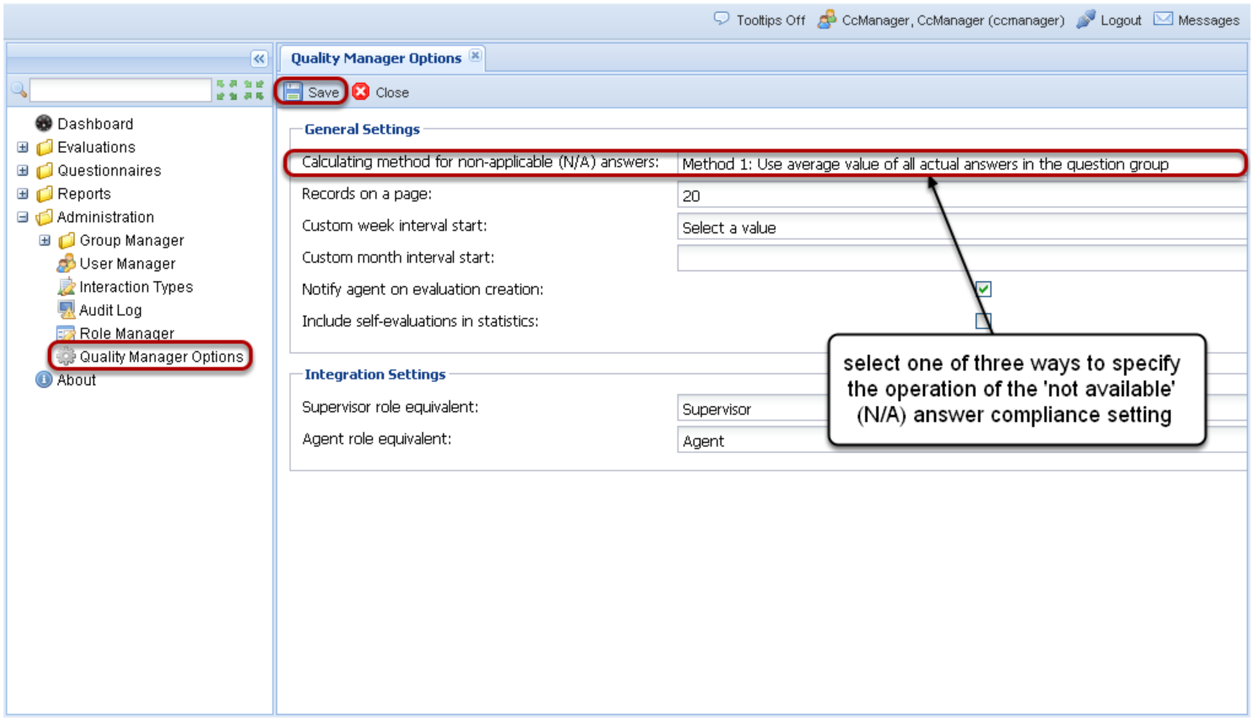

Figure 74: Genesys Quality Manager Application Options

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.

Genesys Quality Manager Administrative Options

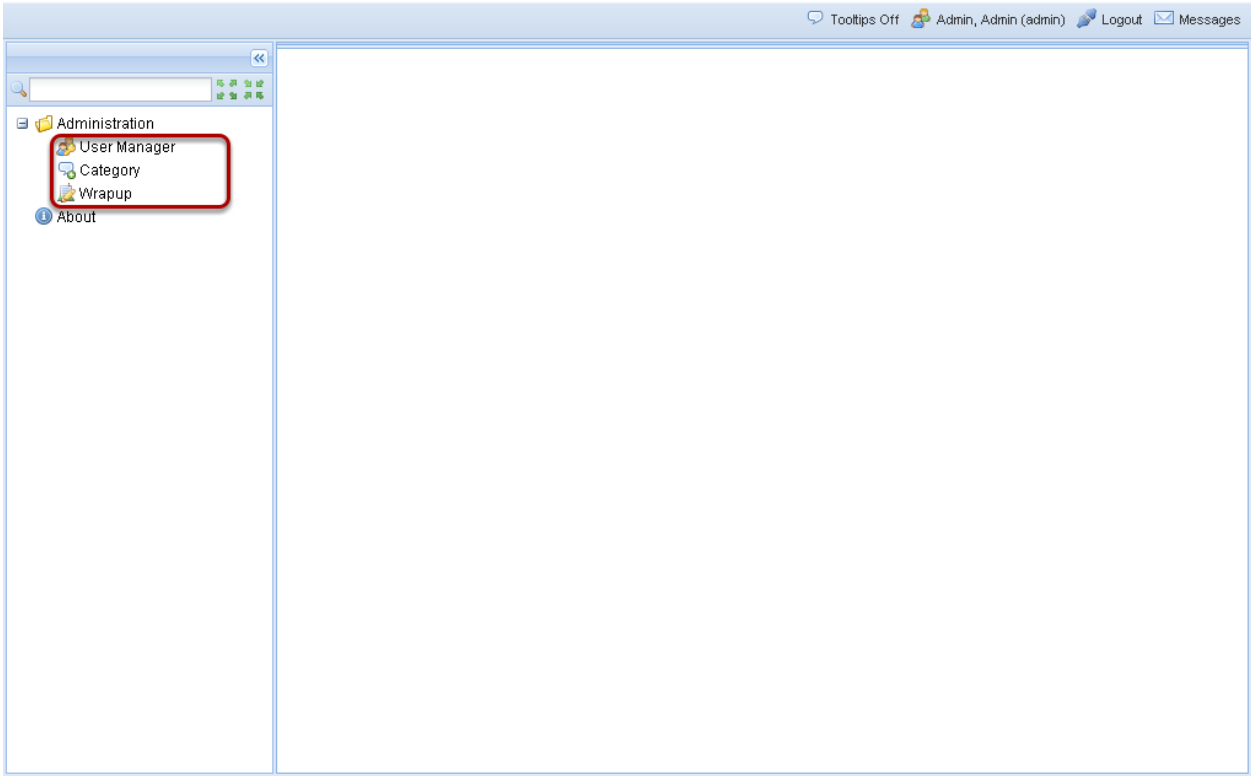

Figure 75: Genesys Quality Manager Administrative Options

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 The User Manager, 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

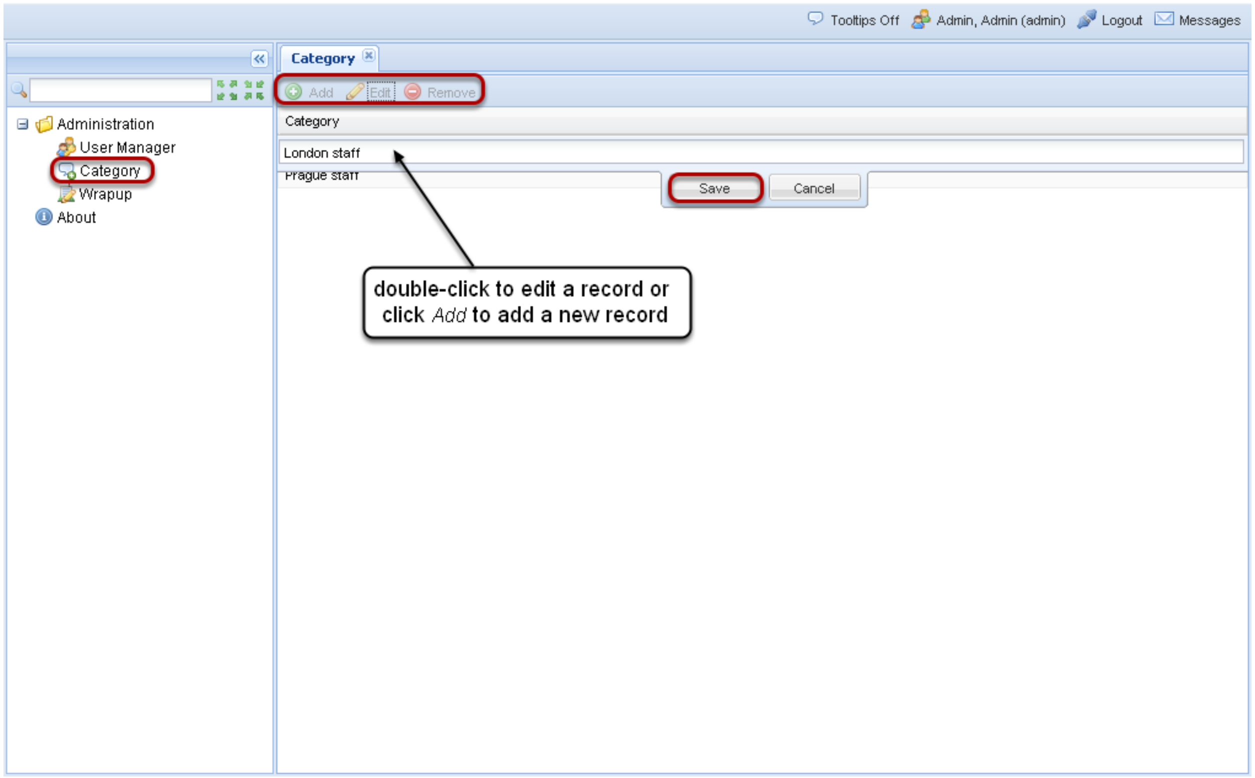

Figure 76: Category Management

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

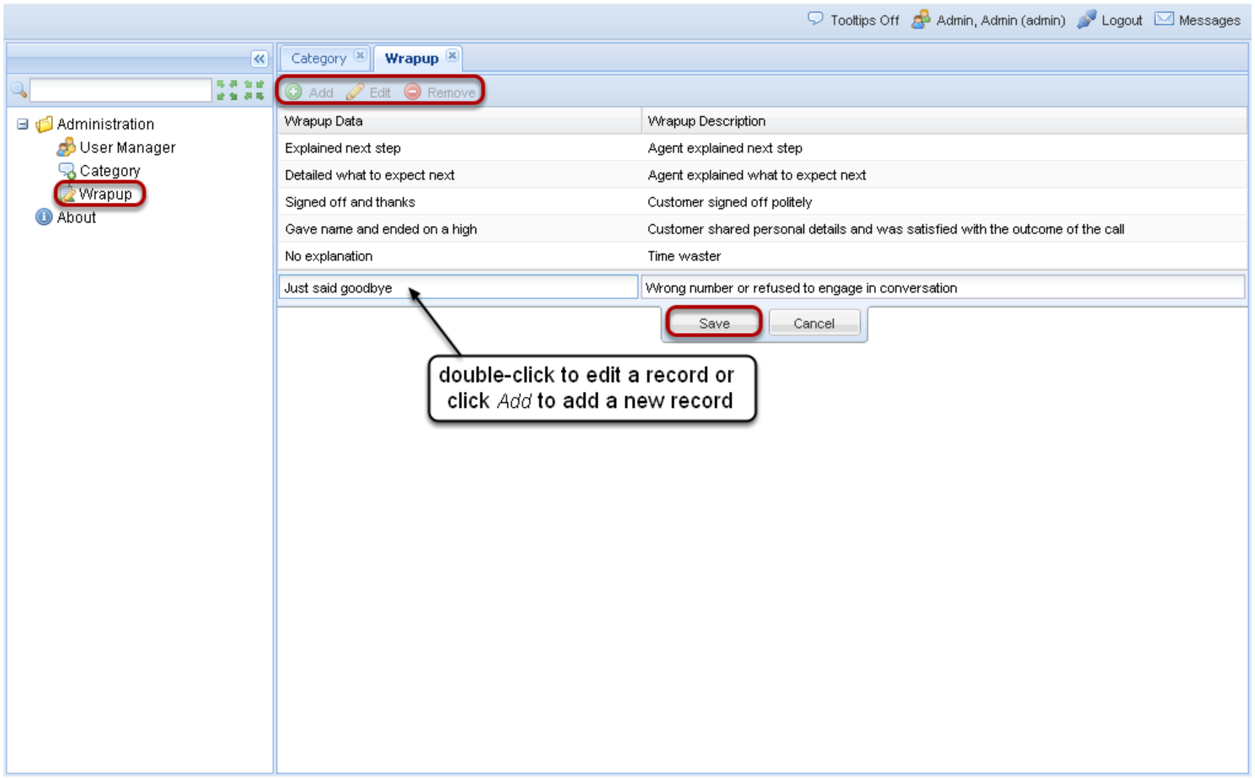

Figure 77: Wrapup Data

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

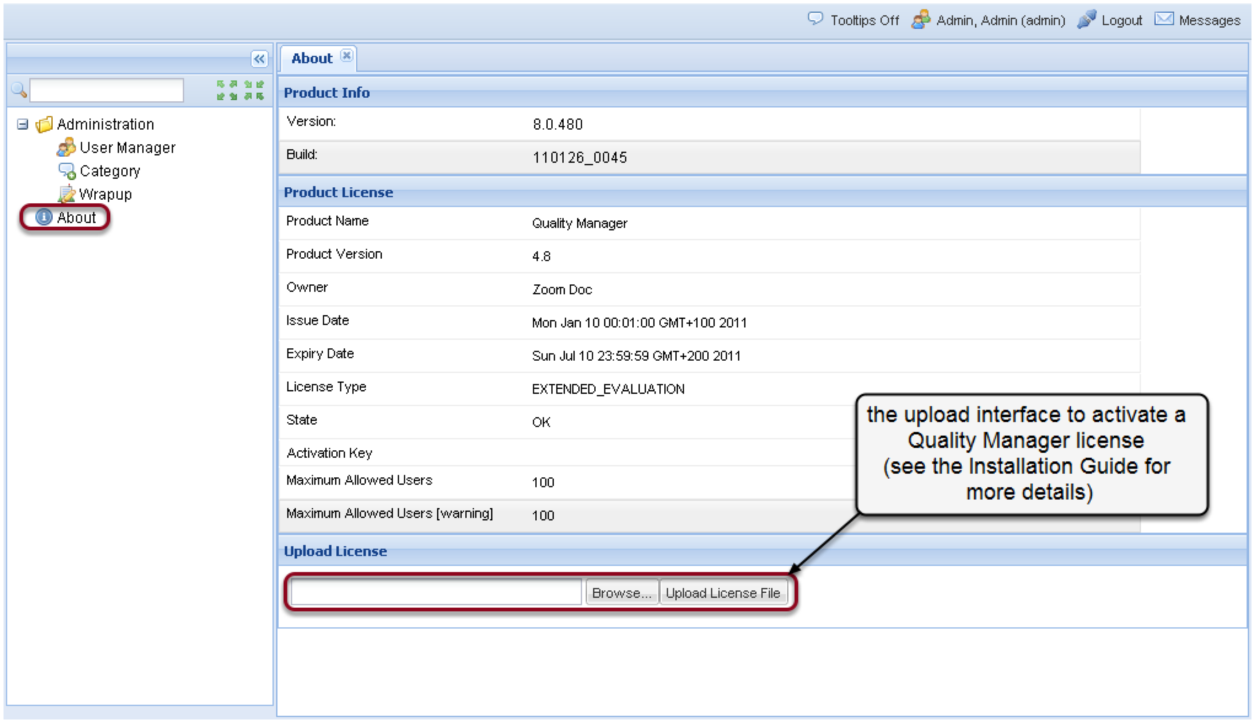

Figure 78: About Tab

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

8 Requesting Technical Support

Technical Support from VARs

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

Technical Support from Genesys

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

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

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