



**Genesys Quality Management 8.1**

# **Quality Manager Administration Guide**

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**Document Version:** 81gqm\_ad\_qm\_10-2012\_v8.1.501.00



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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.

This chapter contains the following sections:

[Document Purpose](#)

[Audience](#)

[Document Version](#)

[Typographical Conventions](#)

[Expected Knowledge](#)

[Browser Recommendations and Technical Requirements](#)

[Internet Explorer Security Settings:](#)

[Technical Requirements for Playing Audio and Video Media](#)

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## Document Purpose

This document describes the configuration and administration of the Call Recording software and covers the most important maintenance tasks.

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## Audience

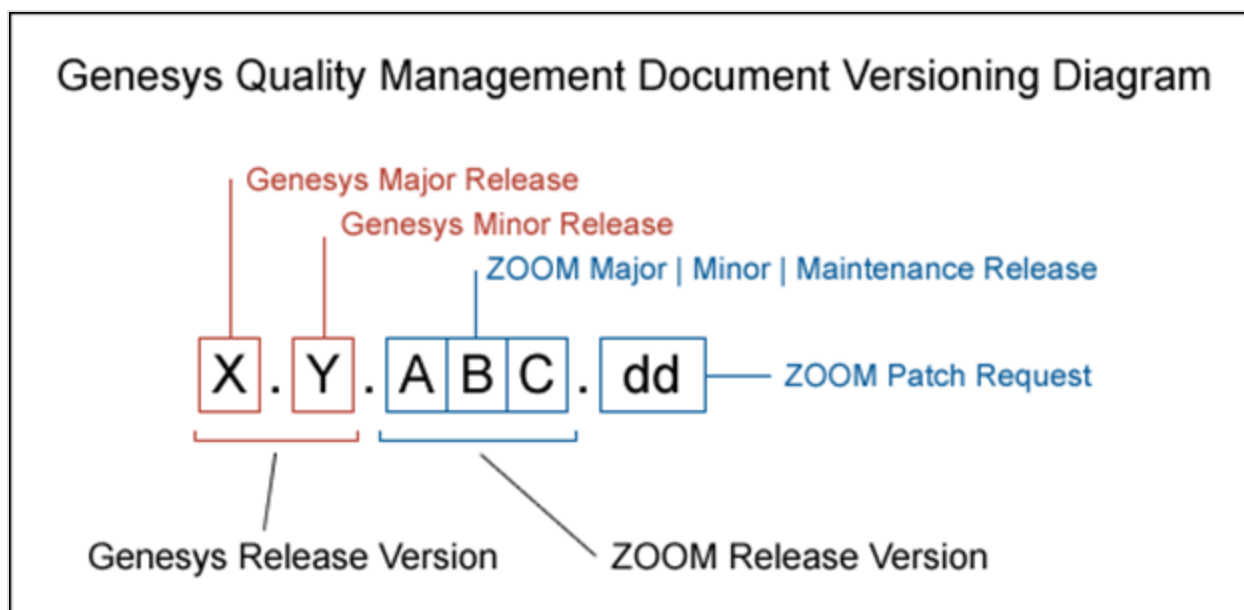
This document is intended for the technicians responsible for system administration and maintenance.

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## 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:



---

## Typographical Conventions

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

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

Referred documents are in italics. For example: see the document *This is a Document* for more information.

Code is placed on a gray background and bordered

Hyperlinks are shown in blue and underlined:

<http://genesyslab.com/support/contact>.

---

## Expected Knowledge

Readers of this document are expected to have the following skills or knowledge:

Basic functionality of Genesys Call Recording system

Knowledge of Red Hat Enterprise Linux or CentOS installation and configuration

Unix-system administration skills.

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## Browser Recommendations and Technical Requirements

A minimum screen resolution of 1024 x 768 is necessary to use the GQM applications comfortably.

The following supported browsers are recommended for the Web GUI. The Windows Media Player is needed for Call Recording. The Java plugin is required for Universal Player in Quality Manager.



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**Important:**

Use Java 6 with *Internet Explorer* or use another Browser. There is a known issue with Java 7 which causes *Internet Explorer* to freeze.

---

The browsers for PCs are shown in order of preference. The fastest performing browsers are first:

1. *Google Chrome*: Please download the latest version. Check issues using the latest browser version before reporting them. You must install the *Windows Media Player* plugin below:

<http://www.google.com/support/chrome/bin/answer.py?hl=en&answer=95697>

2. *Internet Explorer 9*

3. *Internet Explorer 8* with *Google Chrome Frame* plugin. The *Google Chrome Frame* plugin can be obtained here:

<http://code.google.com/chrome/chromeframe/>

4. *Internet Explorer 7* with *Google Chrome Frame* plugin. This version of IE should be upgraded to IE9 as soon as possible.

5. *Firefox 3.6.16+* Admin rights required for installation. You must install the *Windows Media Player* plugin below:

<http://www.interoperabilitybridges.com/windows-media-player-firefox-plugin-download>

6. *Opera 9+*

7. *Safari 5*

8. *Internet Explorer 8* without the *Google Chrome Frame* plugin. The performance is slow.

The following browsers are not recommended:

*Internet Explorer 7* without the *Google Chrome Frame* plugin runs too slowly.

*Internet Explorer 6* is not supported.

---

**Important:**

Use Safari or Firefox with Mac OS 10. There is a known issue with Chrome that causes problems with Universal player.

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

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## Internet Explorer Security Settings:

### Windows XP

The following recommendations are encouraged for the Web GUI running on Windows XP:

- Check that the Call Recording URL is included in the "Trusted sites". If not, include it there. If the user doesn't have administrator privileges, contact the system administrator or set security level of the zone that contains the server to Low.
- Check that there is no proxy enabled in the web browser. If there is, try to disable it. The proxy can affect the functionality.
- Set the security level of trusted sites to Low.

### Windows 7

The following recommendations are encouraged for the Web GUI running on Windows 7:

- Check that the Call Recording URL is included in "Trusted sites". If not, include it there. If the user doesn't have administrator privileges, contact the system administrator or set security level of the zone that contains the server to Low.
- Check that there is no proxy enabled in the web browser. If there is, try to disable it.
- Set the security level of trusted sites to Low.
- Disable protected mode for all zones. If protected mode is Enabled for the internet zone, it will affect the functionality, even if the server is in trusted sites (Internet Explorer only).

---

## Technical Requirements for Playing Audio and Video Media

The following media players are recommended for successful video and audio playback. Please see the Screen Capture Administration Guide for more information about media player configuration.

The media players are listed in order of preference, for the reasons supplied below:

1. *Microsoft Windows Media Player*: Plays all audio and video media on the Windows 7 OS. Previous versions of Windows, for example, Vista and XP, need additional codecs to play video media.  
Download the K-Lite Codec Pack (BASIC or BASIC Mirror versions) from: [http://www.free-codecs.com/K\\_Lite\\_Codec\\_Pack\\_download.htm](http://www.free-codecs.com/K_Lite_Codec_Pack_download.htm).
2. *VLC*: Plays combined video and audio recordings, including dual-screen recordings of 1920x1080 or larger. It is not integrated into browsers, for example, *Internet Explorer* and *Firefox*, for audio playback. *VLC* is recommended for Macs and Linux-based systems for combined audio and video reviewing. *VLC* can be downloaded at: <http://www.videolan.org/vlc/>.
3. *QuickTime*: Plays audio and is integrated into *Internet Explorer*, but does not support playing mp3 audio and H.264 format video together for combined audio and video playback.

## Chapter

# 2

# Installation, Configuration and Operational Requirements

The following chapter describes the installation, configuration settings and operational requirements for Quality Manager.

This chapter contains the following sections:

[Quality Manager Installation](#)

[Quality Manager Configuration Settings](#)

[Scheduled Actions](#)

[Quality Manager Integrations](#)

[Quality Manager Operational Requirements](#)

[Password Configuration for Call Recording and Quality Manager](#)

[Default GQM Password Configuration](#)

---

## Quality Manager Installation

Quality Manager 8.1.50x is bundled with Call Recording 8.1.50x as part of Genesys GQM 8.1.50x therefore it is activated by selecting it in the Services menu during Call Recording setup.

During the GQM setup process, Quality Manager is configured automatically to work with the Call Recording database and any Contact Center integration specified.

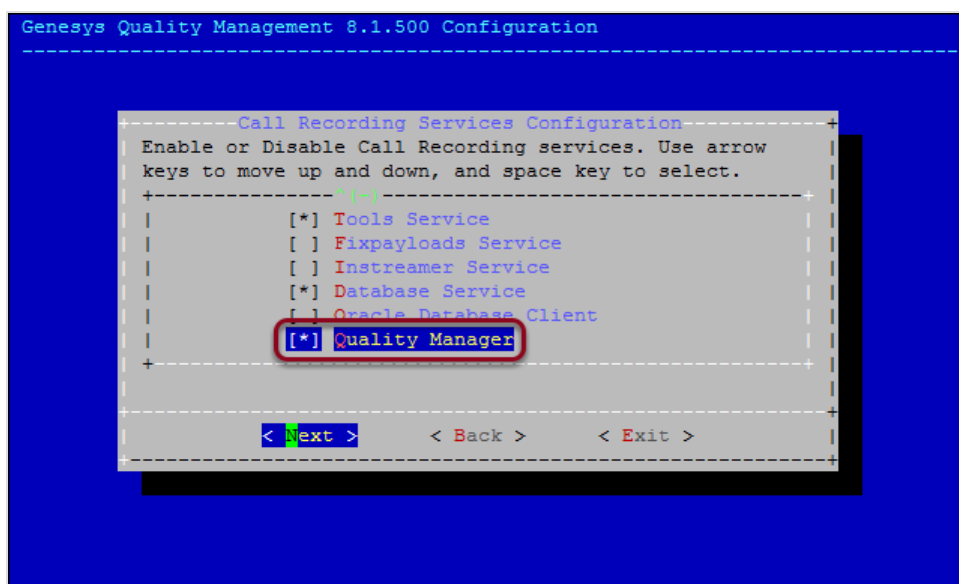


Figure 1: Genesys Call Recording Service Configuration

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### Important:

Oracle database  
Quality Manager 8.0.48x introduced support for Oracle databases. When used with Oracle, Quality Manager can either share the same database as Call Recording, or use an entirely different database server. Oracle configuration is accomplished during GQM setup – refer to the Using Oracle guide for more details about configuration and data migration to/from Oracle.

---

As one of the final steps of the GQM setup wizard, make sure that you confirm the option to increase the memory allocated to the Tomcat web server, which is important for stable operation of Quality Manager.

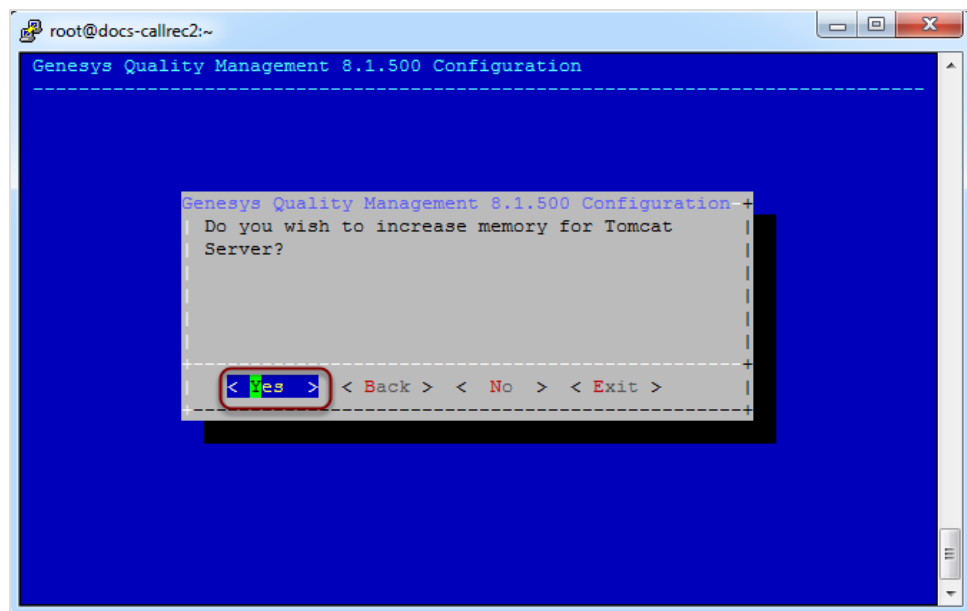


Figure 2: Increase Tomcat Memory Allocation

For more information on Call Recording installation and setup, see the Genesys Implementation Guide.

# Quality Manager Configuration Settings

After Call Recording setup is complete and the Call Recording Web User Interface (UI) is available, view and edit the most important Call Recording configuration settings for Quality Manager by logging in to the Call Recording Web UI as an administrator.

Navigate to **Settings > Configuration > Quality Manager Setup**.

The tab opens.



Figure 3: Quality Manager Configuration - Basic Setup

## Basic Settings

1. The **Basic Setup** section contains the following settings:
  - **Quality Manager database:** the database pool to use for Quality Manager data, which includes saved evaluations, user data, and media location (link) data. Database Pools are defined in **Settings > Call Recording Core > Database**.
  - **Quality Manager Authentication Pool:** the default database pool to use for Quality Manager authentication. This is usually set to the same value as for **Quality Manager database**.

- **Wrap up key:** The external data key that identifies the agent wrapup data, obtained via a Call Recording integration module. This allows Quality Manager to use this value when searching for evaluations, for example. The value for this key should be GEN\_TEV\_CallID for Genesys taken from a custom advanced search **Item key**, specified in the **Advanced Search** column setup in the Web GUI: **Settings > Web UI > Search > Advanced Search**.
- **Agent ID Key:** The external data key that identifies the agent ID in the Contact Center, obtained via a Call Recording integration module. This is essential because Quality Manager uses this value to access specific agent's calls in Call Recording, for example when the calls need to be evaluated. For more information about user setup in Quality Manager, please see the User Management section in the Quality Manager User Guide CC Manager document.

---

**Important:**

The **Agent ID Key** value must be GEN\_TEV\_ThisDN or GEN\_TEV\_AgentID for Genesys and must be the same as the **Item key** value for an Advanced Search column for external integration data, specified in the Web GUI: **Settings > Web UI > Search > Advanced Search**.

If these keys are not the same, Quality Manager reports such as the Interaction Volume chart will not function correctly.

For some integration scenarios, recorded call data is required before external data keys become available for selection in the Web GUI.

---

- **URL to Call Recording stream:** The base URL for access to media files for streaming. Updated only for custom installations and https secure communication.
- **Login for Call Recording Media:** The user account login for Quality Manager to access Call Recording media files.
- **Password for Call Recording Media:** The user account password for Quality Manager.



**Important:**

If the **Password for Call Recording Media** value is changed, users of Quality Manager will not be able to play evaluation media from Call Recording until the web server is restarted, using the following command (run with `root` user permissions):

```
/opt/callrec/bin/rc.callrec_web restart
```

It is therefore recommended that the default randomly generated password is not updated often.

2. The **SMTP Server** section allows you to change the sending email server, from the server set by default, to the server of your choice.
3. **Excel Reports Setup** contains the following settings for exporting reports in spreadsheet format:
  - **Excel Template Path:** This points to the following location on a default Call Recording server installation:  

```
/opt/callrec/web/webapps/scorecard-webui/cz.zoom.scorecard.webui.Scorecard/
```

 This directory location contains the `styles.xlsx` template file.
  - **Lower Grade is Better** checkbox determines which order the grades are sorted in the exported spreadsheet. With the checkbox selected the lower scores are best and are sorted first; the higher numbers are worst and therefore appear last. With the checkbox unselected the reverse is true.

## Rounding Strategy

The Rounding Strategy section allows you to set the number of decimal places that can be used for the weight value of answers in Quality Manager questionnaires.

Rounding Strategy	
Default Scale	2
Points Scale	0
Percentage Scale	1
Grades Scale	3

Figure 4: Rounding Strategy

It is possible to set separate settings for:

- Points Scale
- Percentage Scale
- Grades Scale

## Scheduled Actions

**Scheduled Actions** refers to regularly repeated actions, typically for user synchronization when using an integration module, or mail delivery.

To create a new mailer scheduled action for scheduling email delivery from ScoreCARD:

Figure 5: Quality Manager Configuration - Mailer Scheduled Actions

1. Select **MailScheduler** in the **New Scheduled Action** field.
2. Select values for the following settings:
  - **Start At**: start the mail delivery daemon at this time (hh:mm using 24 hour clock; for example: 23:00).
  - **Periodicity**: run the mail daemon at these intervals: **Every hour** (the **Start At** value is not used), **Daily**, **Weekly**.

Scheduled Actions for integration module functionality are described in the appropriate integration configuration section of this guide:

- [Genesys integration scheduled actions](#)

---

## Quality Manager Integrations

Quality Manager Integrations is the main section where Quality Manager-specific settings are configured for integration modules (Genesys).

More information can be found in the appropriate integration configuration section of this guide:

- [Genesys integration configuration](#)

---

# Quality Manager Operational Requirements

The following are required for administration and operation of GQM Quality Manager 8.1.50x. For resource and installation requirements of the entire GQM, please see the Planning Guide.

- Administrative (root SSH) access to a running, licensed installation of Call Recording 8.1.50x
- A supported web browser
- A valid Quality Manager license (contact <http://genesyslab.com/support/contact> for more information)

---

## Password Configuration for Call Recording and Quality Manager

The Settings for Passwords for both Call Recording and Quality Manager are set in Call Recording. To change the password requirement settings navigate to **Settings > Web GUI > Password configuration** in Call Recording. Here you can configure:

- The minimum number of characters in the password
- The minimum number of lowercase letters (a-z)
- The minimum number of uppercase letters (A-Z)
- The minimum number of numbers (0-9)
- The minimum of non alphanumeric characters
- The password lifetime ( length of time in days that a password may be used)
- The count of recent passwords (these may not be used again until they no longer appear on the list)
- The length of time for which an account is blocked in minutes

This allows passwords to fully comply with PCI DSS, please see the Security Guide for full details.

Where integration with external systems is used, the external system dictates password settings for external users.

## Default GQM Password Configuration

Password configuration	
Minimum characters	<input type="text" value="0"/>
Minimum lowercase characters	<input type="text" value="0"/>
Minimum capital characters	<input type="text" value="0"/>
Minimum numbers	<input type="text" value="0"/>
Minimum non alphanumeric characters	<input type="text" value="0"/>
Count of different recent passwords	<input type="text" value="4"/>
Password lifetime in days	<input type="text" value="90"/>
Unsuccessful logins before logout	<input type="text" value="3"/>
Time for which account is blocked (minutes)	<input type="text" value="30"/>

Figure 6: Password configuration

The figure above shows the default settings for **Password configuration**. **Password configuration** is one of the most important sections on the **Web UI**. The security of your GQM can be improved (or alternatively degraded) by settings found here. Please refer to the section on PCI Compliance in Security Guide for more details. For a secure password policy, ensure you specify values for the following settings:

Setting	Description	Values
<b>Minimum characters</b>	The password must contain at least this number of characters of this type	Recommended: strong passwords have at least 8 characters, formed from a mixture of three types of characters (for example lowercase, capital letters and numbers)

Setting	Description	Values
<b>Minimum lowercase characters</b>		
<b>Minimum capital letters</b>		
<b>Minimum numbers</b>		
<b>Minimum non alphanumeric characters</b>		
<b>Count of different recent passwords</b>	How many times a password must be changed before the same password can be used again	Recommended: at least 4
<b>Password lifetime in days</b>	Number of days before a password has to be changed	Must be between 1 and 365 days (recommended: 90 days)
<b>Unsuccessful logins before lockout</b>	How many times a wrong password can be entered at login before the account is blocked (must be unlocked by an administrator)	Recommended: 3 (must be between 2 and 10)
<b>Time for which account is blocked (minutes)</b>	Length of time an account remains blocked before automatically unblocking without administrator intervention	Must be between 1 and 65535 minutes (about 45.5 days)

Table 1: Password Properties





## Chapter

# 3

## Licensing and Activation

This section gives a step-by-step guide to the licensing and activation of Quality Manager.

This chapter contains the following sections:

[Activating Quality Manager](#)

[Log Out, Refresh Page, Log In as CC Manager](#)

[Logged In as ccmanager](#)

[Default Quality Manager Users](#)

---

# Activating Quality Manager

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## Important:

You only need to do this step if you intend to use Quality Manager. If you have not purchased a Quality Manager license, skip this step.

---

Before you can begin to configure Quality Manager, you will need to upload and install a valid license.

You will need to know the web URL to the Call Recording installation. Genesys Support has sent an un-activated license file. Save this un-activated license file in a location where you can access it easily. Do not rename this file.

## Open Quality Manager in your web browser

Open a web browser and enter the following URL:

```
http://<CallREC server>/scorecard-webui
```

Quality Manager will now open in the browser window. It usually takes a few seconds for the application to load before the login window appears.

## Log In as Administrator

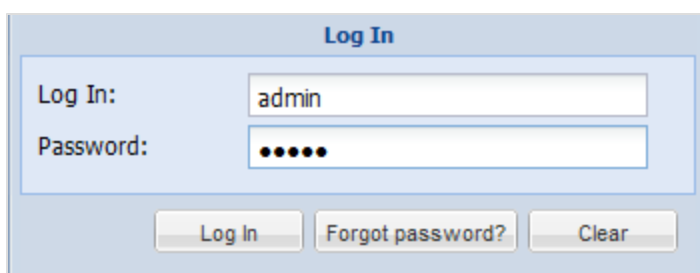
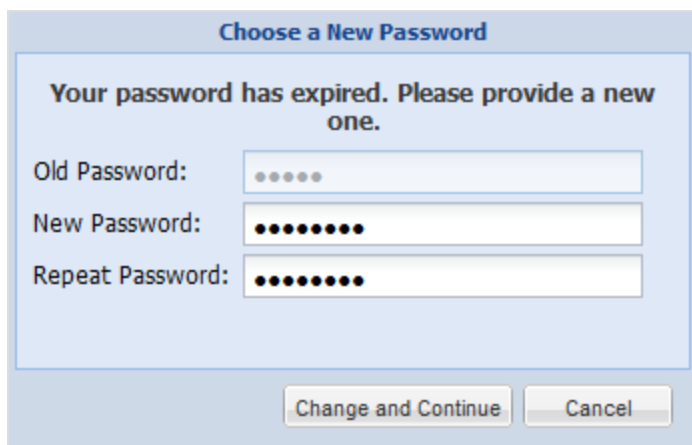


Figure 7: Log in as Administrator

Log in as `admin` and enter the password (default: `admin`). The `admin` account is the only login that will work without a valid license.



**Choose a New Password**

**Your password has expired. Please provide a new one.**

Old Password:

New Password:

Repeat Password:

Figure 8: Choosing a New Password

When logging in for the first time, a password change is required. The default password admin can never be used again.

---

**Important:**

If you log in with an incorrect password twice, you will receive the message, "Warning: The next incorrect entry will lead to the account being locked". After the third attempt with the wrong password, the account will be blocked. This will become unblocked after a configurable period, typically half an hour.

---

## Uploading the Un-activated Quality Manager License File

Click **About** in the left hand menu. The tab below opens.

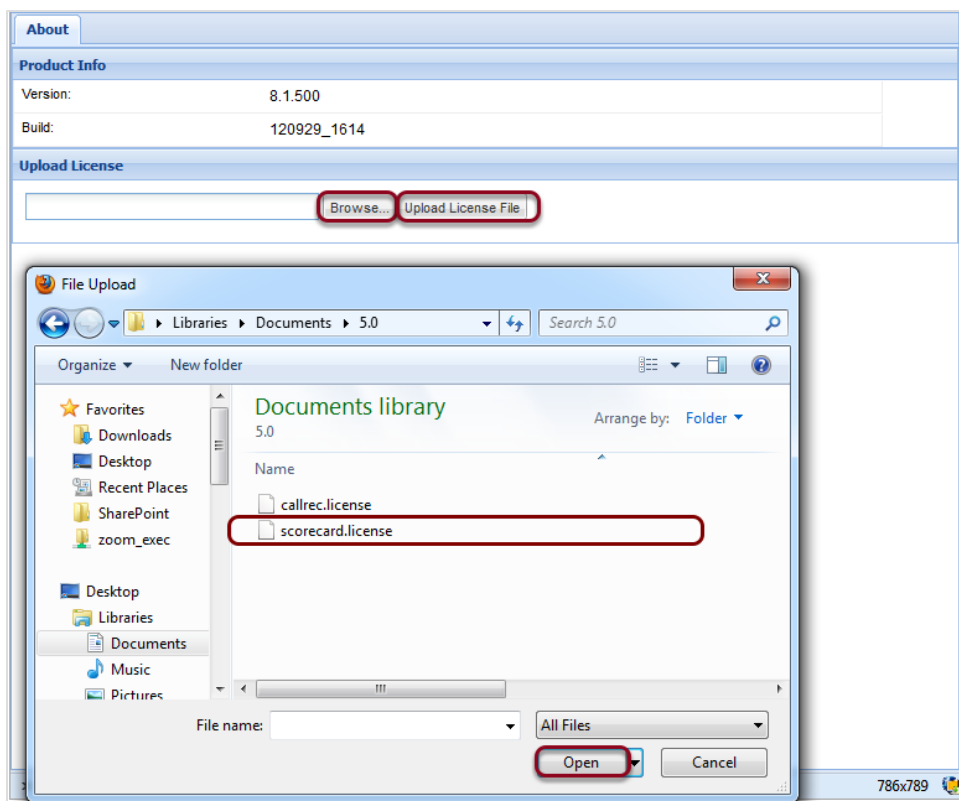


Figure 9: Browse to the License File and Click 'Upload License File'

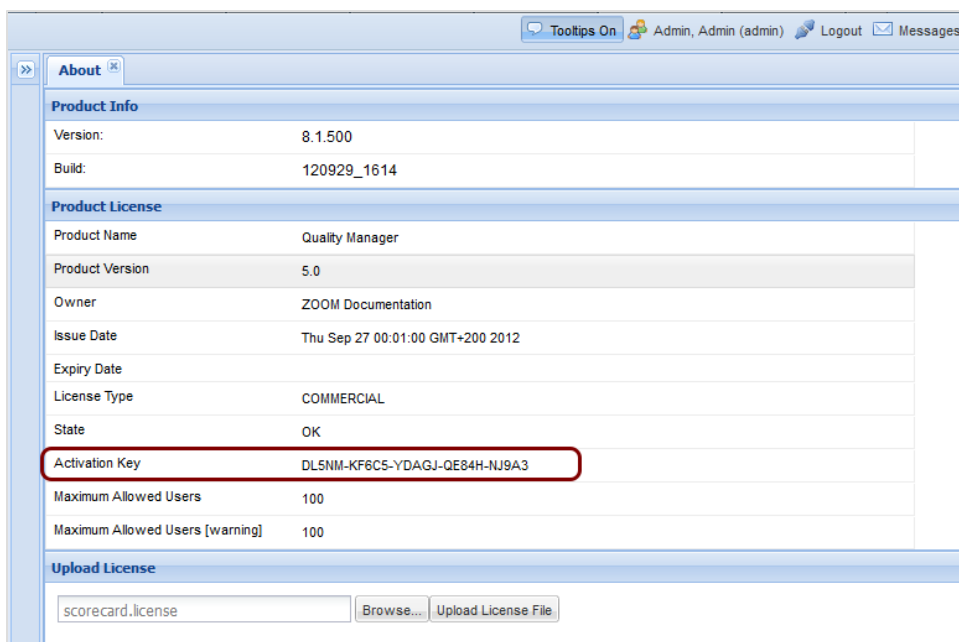
1. Click **Browse**, and navigate to the folder containing the licence file named `scorecard.license`.
2. Select the license file.
3. Click **Open**.
4. Click **Upload License File**.

The license file generates a unique **Activation key** based on information including the MAC addresses of the NICs in the server. If the MAC addresses need to be changed, a new license file will be required. Please contact the email address listed at <http://genesyslab.com/support/contact> for assistance.

**Tip:**

If your import browser is Chrome, the file path may display incorrectly. For example, `C:\fakepath\scorecard.license`. This is an issue with Chrome and does not affect the upload.

## The Activation Key



The screenshot shows the 'About' tab of the Quality Manager application. The 'Product License' section is expanded, displaying the following information:

Product License	
Product Name	Quality Manager
Product Version	5.0
Owner	ZOOM Documentation
Issue Date	Thu Sep 27 00:01:00 GMT+200 2012
Expiry Date	
License Type	COMMERCIAL
State	OK
Activation Key	DL5NM-KF6C5-YDAGJ-QE84H-NJ9A3
Maximum Allowed Users	100
Maximum Allowed Users [warning]	100

Below the license information, there is an 'Upload License' section with a text input field containing 'scorecard.license', a 'Browse...' button, and an 'Upload License File' button.

Figure 10: License is Now Uploaded

Once the un-activated license has been successfully uploaded, the **Activation Key** is visible on the **Product License** section of the **About** tab. Copy and paste the **Activation Key** into a new email and send it to the email address listed at <http://genesyslab.com/support/contact>. Genesys Support will send you an activated license file. Save this file where it can be access easily. Do not rename the file.

**Important:**

If the license file is not accepted, ensure that it is named `scorecard.license`. Try uploading it in either Firefox or Internet Explorer if you have used a different browser, or try again after restarting Call Recording.

If you are still having an issue, contact Service and Support via the email address listed at <http://genesyslab.com/support/contact>.

## Uploading the Activated Quality Manager License File

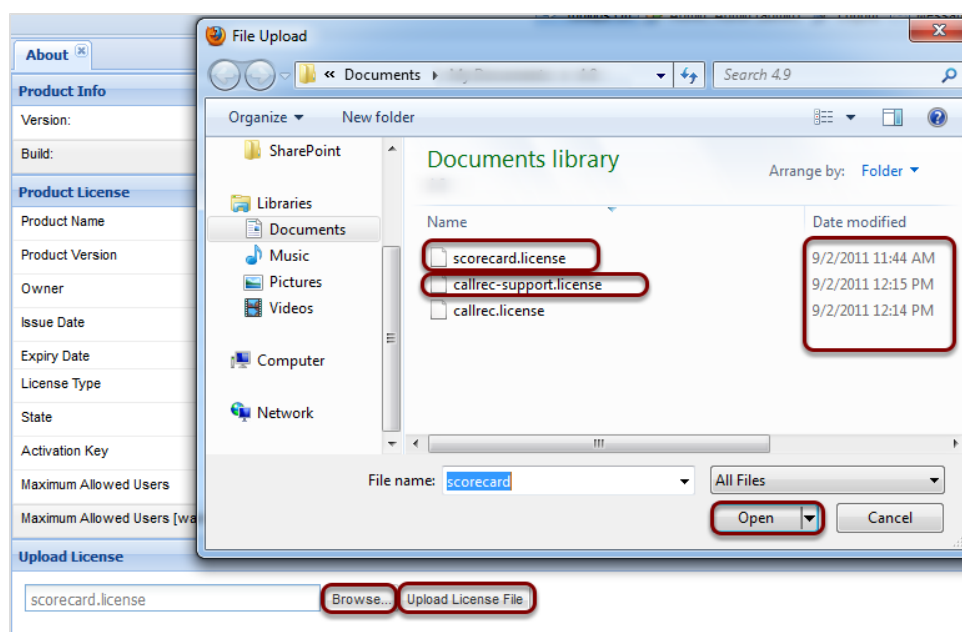


Figure 11: Browse to the License File

1. Click **Browse**, and navigate to the folder containing the activated licence file named `scorecard.license`.
2. Select the license file.
3. Click **Open**.
4. Click **Upload License File**.

Please check the information on the **About** tab.

The GQM web server now has to be restarted. Log in to the server using an ssh client and switch to the root account, as described earlier for the Call Recording license.

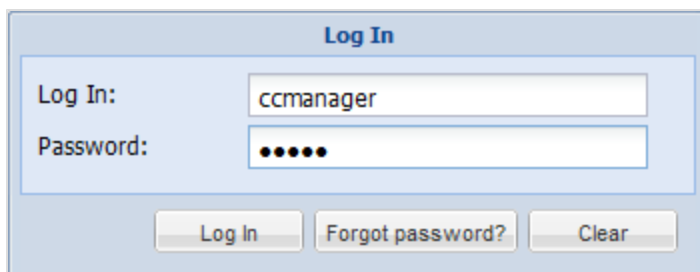
Restart the Web UI using the following command:

```
/opt/callrec/bin/rc.callrec_web restart
```



---

## Log Out, Refresh Page, Log In as CC Manager

A light blue dialog box titled "Log In". It contains two input fields: "Log In:" with the text "ccmanager" and "Password:" with five dots. Below the fields are three buttons: "Log In", "Forgot password?", and "Clear".

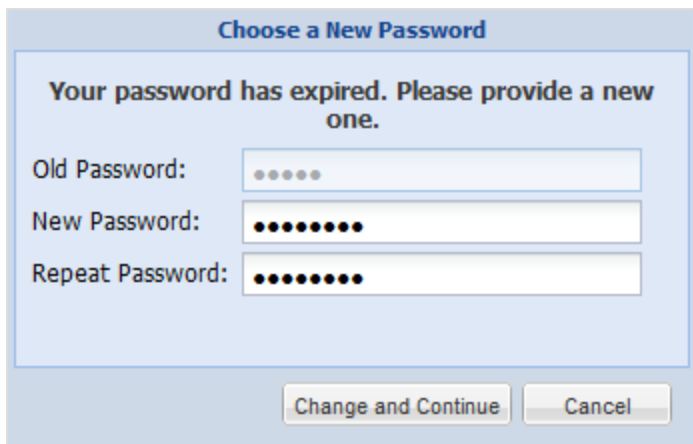
Log In	
Log In:	ccmanager
Password:	•••••
<input type="button" value="Log In"/> <input type="button" value="Forgot password?"/> <input type="button" value="Clear"/>	

Figure 12: Log Out, Refresh the Page and Log In as CC Manager

Log in as Call Center Manager (ccmanager) in order to set up Quality Manager. Log out of the application and refresh the page (click F5 or equivalent in the browser).

Log in as ccmanger with the default password admin.

When logging in for the first time, a password change is required. The default password admin can never be used again.

A light blue dialog box titled "Choose a New Password". It contains a message: "Your password has expired. Please provide a new one." Below the message are three input fields: "Old Password:" with five dots, "New Password:" with eight dots, and "Repeat Password:" with eight dots. At the bottom are two buttons: "Change and Continue" and "Cancel".

Choose a New Password	
Your password has expired. Please provide a new one.	
Old Password:	•••••
New Password:	••••••••
Repeat Password:	••••••••
<input type="button" value="Change and Continue"/> <input type="button" value="Cancel"/>	

Figure 13: Choosing a New Password

---

**Important:****New passwords must have:**

- at least 8 characters
  - with at least one character a number (0-9)
  - at least one character a lowercase letter (a-z)
  - one character an upper case letter (A-Z)
- 

---

**Important:**

If you log in with an incorrect password twice you receive the message "Warning: The next incorrect entry will lead to the account being locked". After the third attempt with the wrong password the account will be blocked. This will become unblocked after a configurable period.

---

---

## Logged In as ccmanager

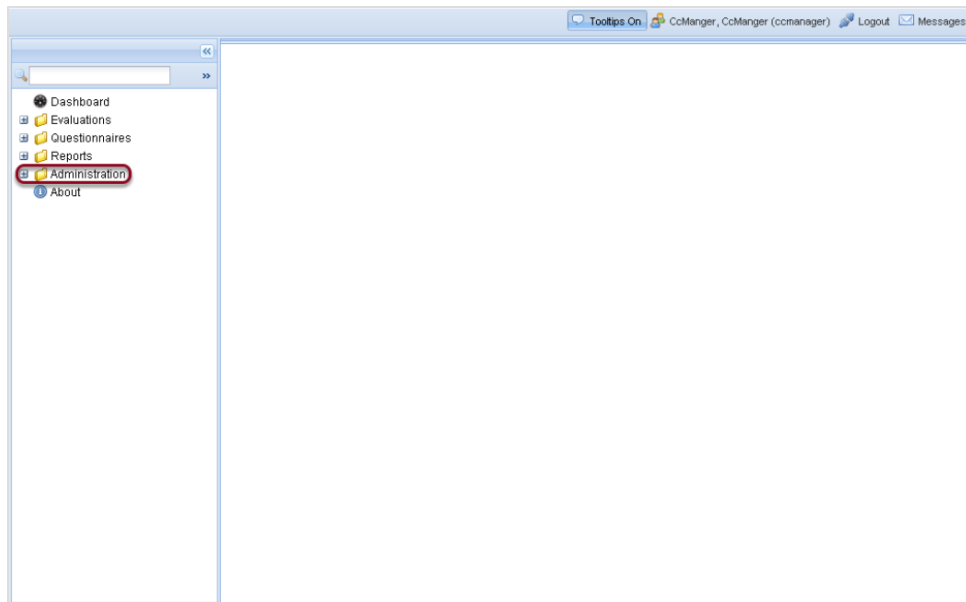
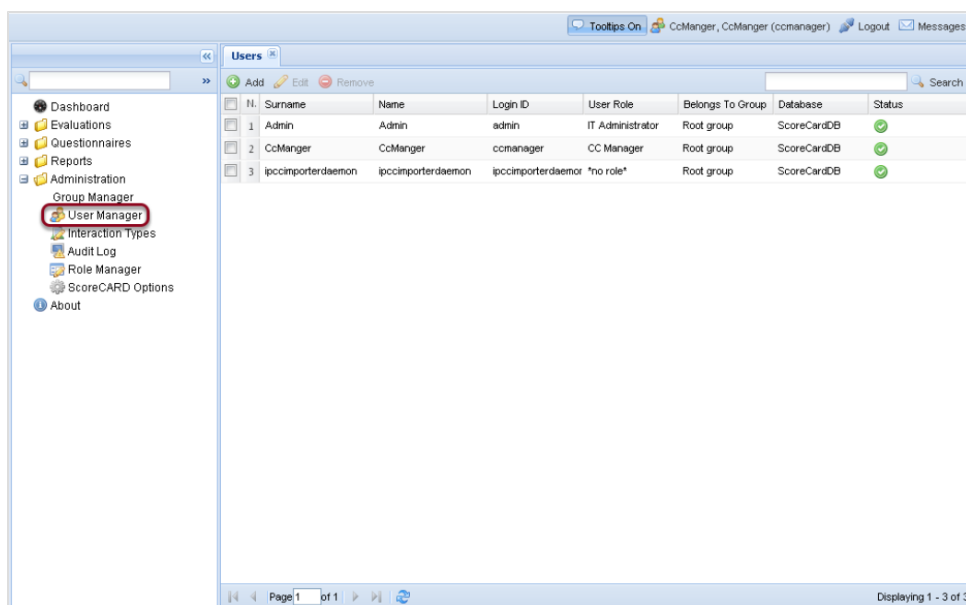


Figure 14: Logged in as CC Manager

Once logged in as `ccmanager`, users and groups can be configured (see the Quality Manager User Guide for more information).

## Default Quality Manager Users



The screenshot shows the 'Users' management interface. On the left is a navigation tree with 'User Manager' highlighted. The main area displays a table of users with columns: N, Surname, Name, Login ID, User Role, Belongs To Group, Database, and Status. Three users are listed: 'Admin', 'CcManger', and 'ipccimporterdaemon'. The 'ipccimporterdaemon' user is highlighted with a red box in the original image.

N	Surname	Name	Login ID	User Role	Belongs To Group	Database	Status
1	Admin	Admin	admin	IT Administrator	Root group	ScoreCardDB	✓
2	CcManger	CcManger	ccmanager	CC Manager	Root group	ScoreCardDB	✓
3	ipccimporterdaemon	ipccimporterdaemon	ipccimporterdaemon	*no role*	Root group	ScoreCardDB	✓

Figure 15: Default Quality Manager Users

Click **Administration > User Manager** to display the default users that Quality Manager installs.

The Quality Manager user 'ipccimporterdaemon' is added in to the database schema during the initial installation.

It is used only for synchronization with Genesys CIM (if used), and has no other use.

If required, an administrator can create a different user with synchronization privileges, and delete this default one. In this case the `wbscimimporter` script must be provided with proper user access (permission) credentials.

### Important:

Note that importing users from Genesys CIM must be performed with an empty Quality Manager database (i.e. after Quality Manager installation but before adding any other users within Quality Manager).



## Chapter

# 4

# Genesys Synchronization

The Quality Manager Genesys Importer can import and synchronize user and group information from a Genesys Configuration Server. The synchronization is only one-way (from the Genesys Configuration Server to Quality Manager), and you can configure whether local changes made to Genesys users and groups in Quality Manager are retained or overwritten during a synchronization operation.

Genesys users imported into Quality Manager can be authenticated directly against Genesys Configuration Server or a third party authentication service such as Microsoft Active Directory. In this scenario, no local user passwords are stored within Quality Manager.

This chapter contains the following sections:

[Genesys Importer Features](#)

[Quality Manager Genesys Configuration](#)

[User Synchronization Option](#)

[Scheduling Genesys Synchronization](#)

[Integration Data Definition](#)

---

## Genesys Importer Features

The following actions can be performed by the Genesys synchronization tool to data in Quality Manager based on updated data from Genesys Configuration Manager:

- Add or remove agents.
- Add or remove team lists.
- Add or remove agent to/from team lists.
- Move agents between team lists.
- Make an agent a supervisor and vice-versa.
- Delete non-empty team list.
- Supervisor logs in as a normal user.

The Genesys Importer for Quality Manager enables Genesys user data to be mapped to the Quality Manager user data structures in an entirely configurable manner, even if Virtual Agent Groups (VAGs) are used in the Configuration Server. Further, by using the Annex configuration feature in Genesys Configuration Manager, imported user groups may be structured as a multi-tier group hierarchy within Quality Manager.

---

### Important:

The Importer is run at regular intervals, defined by the settings in the **Scheduler** section of Quality Manager Genesys Configuration. This will overwrite any local role settings for users that you have configured in Quality Manager.

---

## Preparation for Importing

Genesys Configuration Manager does not currently support agent group hierarchy. It is possible to create many subordinate folders and put various agent groups into them, but it is not possible to place an agent group below another agent group.

To be able to import the agents and supervisors successfully and allow the supervisors to evaluate their staff you must first create a group for the supervisors in Configuration Manager. Then you must create groups for the agents in Configuration Manager and link each group to particular supervisors.

1. Create a Virtual Agent Group (VAG) for the supervisors to be imported for example with the name `GQM_Supervisors` in Configuration Manager.
2. Add the usernames of the supervisors to be imported to the VAG `GQM_Supervisors`.
3. Create an annex to the VAG `GQM_Supervisors` with an annex name = `import` and a value = 2.

Default key name:	<code>import</code>
Possible values:	0,1,2
Description:	0 = Do not import group and agents 1 = Import group only (no agents) 2 = Import group and agents

Table 2: Annex Import Parameter

4. Create a VAG for each group of agents to be imported each with a unique group name in Configuration Manager, for example `GQM_Team_A` for the first group, `GQM_Team_B` for the second group, `GQM_Team_C` for the third group, `GQM_Team_D` for the fourth group, and so on. Each VAG must have a different **SkillNumber** defined in Configuration Manager.
5. Add the usernames of the agents for each group to their appropriate VAG.
6. Create an annex to each agent VAG with an annex parameter = `import` and a value = 2.

To specify a multi-tier hierarchy when importing into Quality Manager, each agent group can have a link to a parent group defined in its Annex property. In this case, the Importer will create a multi-tier hierarchy of groups.

7. Create an annex to each agent VAG with an annex parameter = `Supervisor` and value = `x`, where `x` is one or more user names of the supervisor (evaluator) for that group contained in the VAG `GQM_Supervisors`. If there is more than one supervisor that can evaluate the group, the extra values can be entered, separated by commas. This will set which supervisors will be able to evaluate this group.

The following figure shows the `supervisor` parameter added to an agent group's **Annex** property in Genesys Configuration Manager.



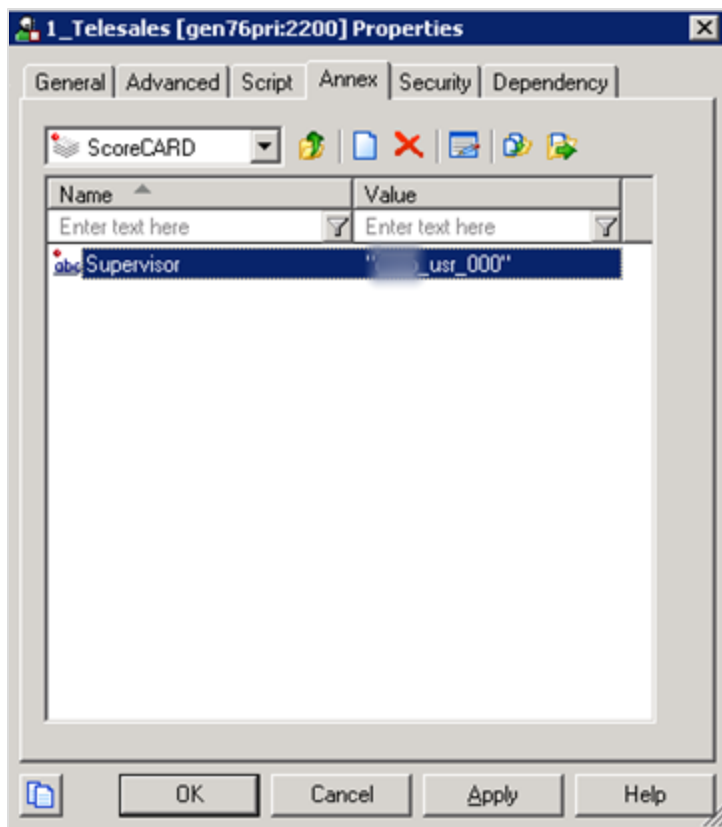


Figure 16: Genesys Annex Supervisor Parameter - Single Value

8. Create an annex to the Virtual Agent Group agents with an annex name = `parent-group` and a value = `GQM_Supervisors`.

To specify a parent group for an agent or agent group, add the following parameter to its **Annex** tab in the properties dialog, Quality Manager section:

Default key name:	<code>parent-group</code>
Possible values:	<code>[string]</code>
Description:	<code>string</code> refers to the name of the super-ordinate group or folder

Table 3: Annex Parent-Group Parameter

9. Ensure that Quality Manager includes the supervisor role in the [Role Manager](#) in the **Administration** section of Quality Manager. If the supervisor role is deleted or missing, the **Supervisor role equivalent** option in [Quality Manager Options](#) must be set to a different existing role name (not `supervisor`), otherwise the Importer will fail.

## Importing Agent Groups and Related Users

During an import operation, the Genesys Importer crawls the agent group structure that you have created in the Configuration Server and, based on filtering values, will import and then re-construct the group structure within Quality Manager. Only users that are members of selected groups will be imported. Selected groups may further be filtered at group or user level using the Annex value.

By default, all groups under the top **agent groups** folder in Configuration Manager will be imported. If a **Root Folder** is specified in the **Advanced Options** section of [Quality Manager Genesys Configuration](#), all users and groups under this folder will be imported instead.

During an import synchronization, if an imported agent is disabled or removed from the Customer Interaction Management Platform (or CIM), the Importer sets the user's status in Quality Manager to **de-activated**. Agent records are not deleted from Quality Manager automatically, since evaluations may be associated with that agent.

---

### Important:

Agents marked as disabled in Configuration Manager are imported but marked as inactive by the Importer and are not visible in Quality Manager. However, agent groups marked as disabled in Configuration Manager are imported but not marked inactive by the importer. Therefore, disabled agent groups are currently visible in Quality Manager.

---

## Importing Virtual Agent Groups

Virtual Agent Groups (VAGs) contain agents with a specific skill, as defined in the script section of the respective VAG. The Importer treats VAGs in the same way as regular agent groups or folders and filtering can also be applied to them.

## Advanced Filtering by Annex Value

By adding further parameters in the **Annex** tab of an agent or agent group's properties in Configuration Manager, advanced filtering and user import management can be specified.

For each of the following parameters, it is assumed that an Annex section named (by default) Quality Manager has been defined in the agent or group's properties dialog. Each parameter is added as a key/value pair in that section.

The section name and key names can be changed in the **Annex Options** section of [Quality Manager Genesys Configuration](#), but it is recommended to leave them unchanged.

### Filtering imported groups by specific Annex value

Filtering imported agent groups can be necessary for the following reasons:

- You may not want to import certain agents or agent groups within the target agent group structure.
- The structure of VAGs may contain duplicate records, so not all members of certain agent groups should be imported.

To add a filter for an agent or agent group, add the following parameter to its **Annex** tab in the properties dialog, Quality Manager section:

Default key name:	<code>import</code>
Possible values:	0,1,2
Description:	0 = Do not import group and agents 1 = Import group only (no agents) 2 = Import group and agents

Table 4: Annex import parameter

The default behavior of the Importer is to import all agent groups and their member agents, unless both, Annex processing is enabled and these keys are present.

### Specify Agent Group Supervisors by specific Annex value

Although the supervisor or manager for an agent group can be specified in the **Supervisor** field (in the **Advanced** tab of the agent group properties dialog), this is often not flexible enough for organizations using Genesys CIM; for example, more than one manager for a group cannot be specified this way.

In order to accommodate other different methods of specifying supervisors (such as via specific skills), the Genesys Importer can be explicitly given the usernames of supervisors for a particular agent group.

To specify one or more supervisors or managers for an agent group, add the following parameter to its **Annex** tab in the properties dialog, Quality Manager section:

Default key name:	<b>supervisor</b>
Possible values:	[string],[string],...
Description:	<code>string</code> refers to the username of a user who will be assigned a manager role of this agent group in Quality Manager. Further usernames can be added, separated by commas.

Table 5: Annex supervisor parameter

The following figure shows multiple supervisors added to an agent group for import.

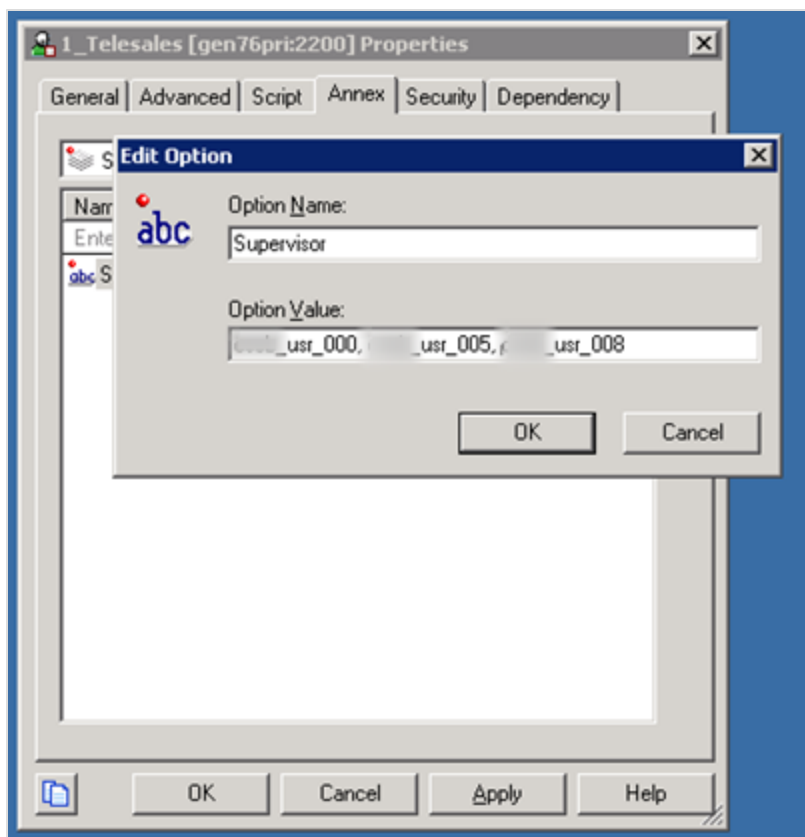


Figure 17: Genesys Annex supervisor parameter - multiple values

## Authentication against Genesys Configuration Manager

Imported users are authenticated against the Genesys Configuration Manager. If a specified user is not (or no longer) present in Configuration Manager, access is declined and the event noted in the Quality Manager event log.

If the Configuration Server uses a secure (TLS) connection, ensure that the **Use Secure Connection** parameter is checked in the Genesys Configuration Server section of [Quality Manager Genesys Configuration](#).

---

## Quality Manager Genesys Configuration

The Genesys integration configuration for Quality Manager can be viewed and modified in the Call Recording Web UI by navigating to **Settings > Configuration > Quality Manager > Integrations** section.

When Genesys GIM or Genesys Driver is selected during GQM setup, a Genesys integration setting group is automatically added in the **Integrations** section. However, integration setting groups can be added and removed manually by using the appropriate **New** and **Remove** buttons in the **Integrations** section.

ScoreCARD Integrations

Genesys ScoreCARD Integration

Genesys Configuration Server

Genesys Config Server Primary Address	//gen76pri:2200
Genesys Config Server Secondary Address	//gen76sec:2200
User Name	default
Password	••••••••
Application Name	CallREC GIM
Use Secure Connection	<input type="checkbox"/>
Request Time	1000
Connection Character Set	Local Encoding ▾

Advanced Options

Tenant Name	
Root Folder	
Enable Annex Based Filtering	<input type="checkbox"/>

Annex Options

Section Name	ScoreCARD
Option name for "Import"	import
Option name for "Parent Group"	parent-group
Option name for "Supervisor"	supervisor

Remove

Figure 18: Quality Manager Configuration - Genesys Integration

The Genesys integration setting group contains the following settings:

#### 1. Genesys Configuration Server

The following settings should be pre-configured in the Configuration Server before entering them here, and will usually be populated by the values specified during GQM setup.

- **Genesys Config Server Primary Address, Genesys Config Server Secondary Address:** The main and secondary IP address or Fully Qualified

Domain Name (FQDN) for your Genesys Configuration Server.

- **User Name, Password:** The username and password that allows the application to have access to the Configuration Server.
- **Application Name:** The Application Name for the integration module.
- **Use Secure Connection:** Check this setting if the Configuration Server requires a secure (TLS, or Transport Level Security) connection. This is not related to (and independent of) Key Manager settings in GQM.
- **Request Time:** The maximum length of time (in seconds) for the integration module to wait before terminating the connection to the Configuration Server.
- **Connection Character Set:** The character set used for the connection to the Configuration Server. Default is **Local Encoding**, which uses the character set specified for the Call Recording server. The remaining character sets enable a custom character set to be specified if the Configuration Server requires it.

## 2. Advanced Options

The Advanced Options concern the method of agent filtering during synchronization between integration module and Configuration Server.

- **Tenant Name:** The name of the **Tenant** in Configuration Manager when Configuration Server is configured for multiple tenants. If this field is left blank in a multi-tenant scenario, the Importer will process the parent tenant (**Environment**), losing tenant agent group hierarchy and causing inconsistencies if different tenants use the same agent or agent group name.
- **Root Folder:** The name of a folder in Configuration Manager under which all folders and agent groups are to be imported. If this is left blank, all folders and groups under the top agent groups folder will be imported.
- **Enable Annex Based Filtering:** Filtering and exclusion of agents and agent groups is possible using Annex filtering, which is enabled by checking this box. If enabled, the Annex of the agent or agent group in Configuration Manager must contain the required import key, otherwise the importer will import the whole group and associated agents by default. See [Genesys Importer Features](#) for more information on Annex configuration.

## 3. Annex Options

If the **Enable Annex Based Filtering** option in **Advanced Options** is checked, the following settings allow customization of the key values used for Annex configuration in Configuration Manager. However, it is recommended that the default settings are used.

- **Section Name:** The name of the Quality Manager configuration section in the Annex (default: `ScoreCARD`).
- **Option Name for "Import":** (default: `import`).



- **Option Name for "Parent Group":** (default: `parent-group`).
- **Option Name for "Supervisor":** (default: `supervisor`).

## User Synchronization Option

Quality Manager user profiles that are imported from Genesys can be configured to either discard all modifications made to them within Quality Manager during synchronization (synchronization 'on'), or to retain all locally-modified settings (synchronization 'off'). In the latter case, the user profile is effectively skipped during synchronization, including the user password, which is always authorized against the user's Genesys password.

By default, all imported users have synchronization switched on. To switch on/off synchronization for a Genesys-imported user profile, select the user in the **User Manager** or within the **Group Manager** and click **Edit**. A check mark in the **Synchronized** checkbox indicates synchronization is activated.

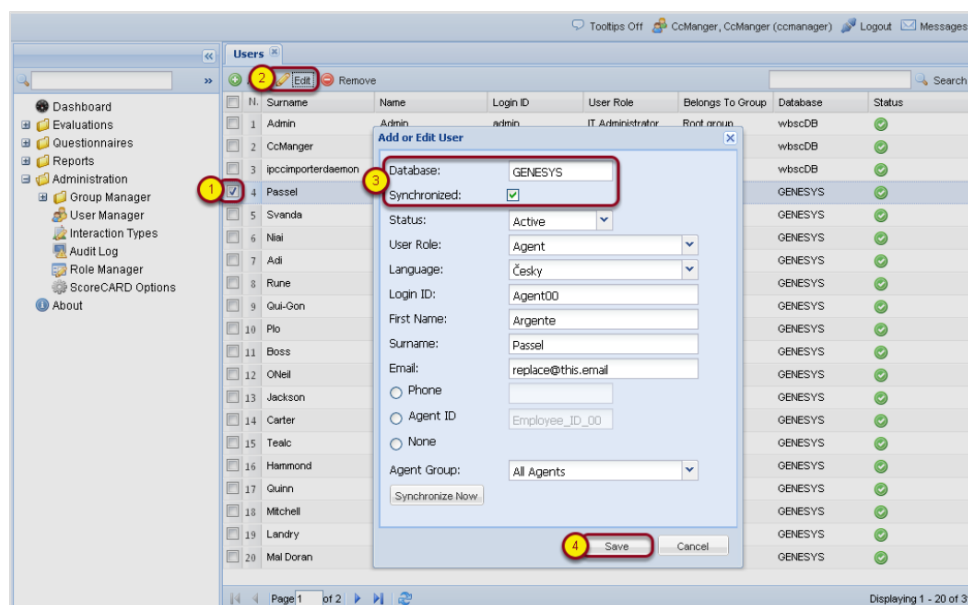


Figure 19: User Profile Synchronize Setting for a Genesys Imported User in Quality Manager

## Scheduling Genesys Synchronization

Genesys synchronization can be scheduled either in the Call Recording Web GUI, or at the command line as a cron job. The web-based interface is more accessible, but scheduling and running synchronization at the command line can be preferable for fine tuning during the implementation phase.

Before running Genesys synchronization for the first time, ensure that you have uploaded a valid license to Quality Manager and logged in to Quality Manager as `ccmanager` at least once, due to the PCI DSS requirement to change passwords on first access.

### Web-based Configuration

The Scheduler section of Genesys Quality Manager Configuration is used to configure when and how often the Genesys importer daemon is run. After initial installation, no scheduling is defined, so by default no import synchronization takes place without this section being updated.

Scheduled Actions	
<b>Scheduler</b>	Genesys User Import Scheduler <span>Remove</span>
<b>Start At</b>	23:00
<b>Periodicity</b>	Daily
<b>Default Language (Country Code)</b>	US
<b>Source</b>	GENESYS
<b>Scorecard Authorized User Login</b>	ccmanager
<b>Scorecard Authorized User Password</b>	MyPassword
<b>New Scheduled Action</b>	Genesys User Import Scheduler <span>New</span>

Figure 20: Quality Manager Configuration - Genesys Scheduled Actions

To schedule the running of the Genesys Importer:

1. Select the Genesys **User Import Scheduler** option in the **New Scheduled Action** field and click **New**.
2. The following options are revealed:
  - **Start At:** Start the mail delivery daemon at this time (hh : mm using 24 hour clock; for example: 23 : 00).

- **Periodicity:** Run the mail daemon at these intervals: **Every hour** (the **Start At** value is not used), **Daily**, **Weekly**.
- **Default Language (Country Code):** The country code indicating the language settings for import. This should match the language settings for your Genesys Customer Interaction Management Platform.
- **Source:** Normally GENESYS (this should not be changed).
- **Quality Manager Authorized User Login, Password:** A Quality Manager login user account and password for the importer. It is recommended that a dedicated importer user account is created in Quality Manager with administrative privileges.

## Configuration at the Command Line

The importer script can be set to run at pre-defined intervals (such as daily at midnight) using the Unix [Cron](#) scheduling tool. During Call Recording installation, a Call Recording cron job list is defined, so it is recommended that the Quality Manager Genesys Importer is added to this list, rather than configuring it elsewhere.

To add the Genesys Importer to the list of Call Recording cron jobs, you will require root user permissions.

Edit the file at `/etc/cron.d/callrec` and add the following command as a single line (modifying the `wbscimporter` tool parameters as necessary):

```
# Web Scorecard Genesys importer
0 1 * * * root [ -x /opt/callrec/bin/wbscimporter ] &&
/opt/callrec/bin/wbscimporter -c localhost -C US -u ccmanager -p admin -t
GENESYS
```

The above example schedules Quality Manager every night at 01:00 (1:00 am) local time. More information about cron syntax can be found on the Internet, such as on the [Ubuntu Linux community pages](#).

The `wbscimporter` tool parameters can be viewed using the `--help` option, as follows:

```
# /opt/callrec/bin/wbscimporter --help
usage: Ipcc/Genesys to Scorecard user importer
  -c,--configurationIP <arg>    URL to configuration manager
  -C,--country <arg>           default country that will be assigned to
                                users US, CZ, RU ...
  -h,--help                     this help
  -l,--logger <arg>            log4j properties
  -p,--password <arg>          password of user
```

<code>-t,--targetdatabase &lt;arg&gt;</code>	Name of database in scorecard table database that will be associated with imported users for authorization.
<code>-u,--username &lt;arg&gt;</code>	username of user, under his rights import will be started

---

**Important:**

After running a synchronization operation, restart the Web Server in order to see any immediate changes within Quality Manager:

```
/opt/callrec/bin/rc.callrec_web restart
```

---

## Integration Data Definition

Quality Manager synchronization only receives data from Genesys - it never writes or updates the Genesys Configuration Server XML in any way.

During synchronization, Genesys XML data is mapped to the Quality Manager database according to the following table:

Key in Genesys XML file	Table in Quality Manager	Column in Quality Manager
CfgPerson/firstName	sc_users	Name
CfgPerson/lastName	sc_users	Surname
CfgPerson/userName	sc_users	Login
CfgAgentGroup/CfgGroup/managerDBIDs/DBID	sc_users	Role - Supervisor, or Agent
CfgAgentGroup/agentDBIDs/DBID	sc_users	User group belongs
CfgPerson/employeeID	sc_users	AgentId
CfgPerson/state	sc_users	Status
CfgAgentGroup/CfgGroup/name	ccgroups	ccgroupName

Table 6: XML Data Mapping

The Primary Key in the Quality Manager database is the column `ExternalId`.



## Chapter

# 5

## Setting Up Data Export

Quality Manager data exports can be customized at two levels:

- Exported spreadsheet reports, which are obtained by pressing the Export button on the report screen, can be customized by modifying the Report Export Template spreadsheet.
- Excel can be connected directly to the Quality Manager database tables to provide direct read-only connection to virtually all Quality Manager data.

This chapter contains the following sections:

[Customizing the Report Template Spreadsheet](#)

[Excel Database Integration](#)



# Customizing the Report Template Spreadsheet

The appearance of the data in the exported Excel report files can be customized by updating the Report Export Template. This spreadsheet file controls the visual formatting of headings and data cells.

Skills of Otis Andrews, login otis.andrews							
Questionnaire: Better Call (2.0)							
Date	Question Group						
	Opening call	Merchant's skills	Call control	žluťoučký kůň	Closing the call	Overall	Overall with weight
7/8/2010	90.00%	80.00%	100.00%	20.00%	60.00%	70.00%	76.00%
7/27/2010	90.00%	50.00%	100.00%	20.00%	15.50%	55.10%	61.10%
8/17/2010	30.00%	60.00%	100.00%	20.00%	5.50%	43.10%	37.10%
10/21/2010	100.00%	70.00%	100.00%	20.00%	5.50%	59.10%	67.10%

Figure 21: Exported Spreadsheet, Showing Default Formatting

The template file simply contains labeled cells for each type of visual format used on report data exports. The following types of Excel cell formats can be modified:

- Alignment (excluding merge cells)
- Font
- Borders
- Fill (background color)

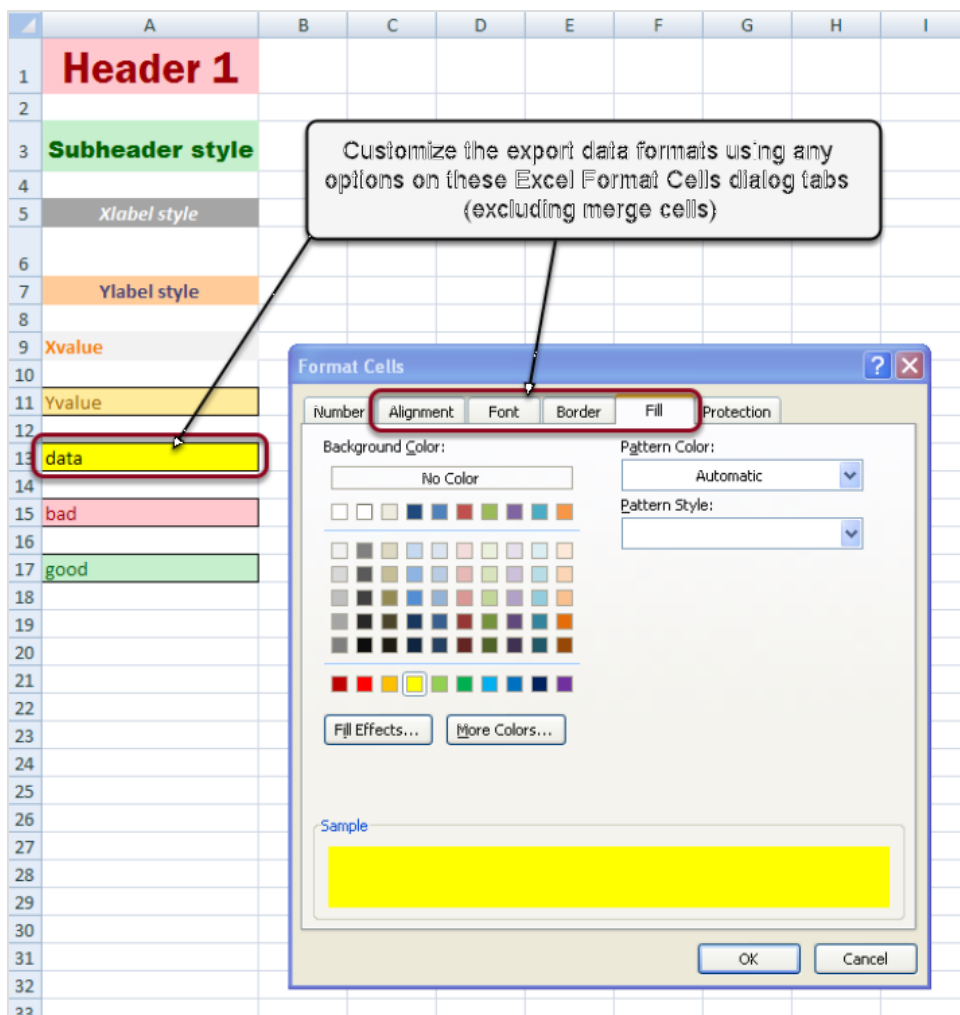


Figure 22: Customizing the Export Template Spreadsheet

The Report Export Template file (`styles.xlsx`) is located in the Quality Manager application's web root directory on the server. Updating this template file therefore requires server administrator permissions.

On a default Call Recording server installation, the location of this file is in the following directory:

```
/opt/callrec/web/webapps/scorecard-  
webui/cz.zoom.scorecard.webui.Scorecard/
```

After updating the template file, it may be necessary to restart the web server at the command line:

```
/opt/callrec/bin/rc.callrec_web restart
```

Exported report data should now reflect the updated formats in the `styles.xlsx` spreadsheet file.

---

**Tip:**

Downloading files from and uploading files to the Call Recording Linux server can be achieved using a program such as [WinSCP](#). If the server is using default settings, you will only be able to log in using the non-root `admin` account (same default password as for root), which has a default starting directory of `/home/admin`.

---

---

## Excel Database Integration

The most powerful method of analyzing Quality Manager data on a Windows PC is provided by connecting the Quality Manager database to Microsoft Excel. The procedure described below assumes the following:

- Quality Manager is licensed, functional, and using the default PostgreSQL database for data storage.
- You have administrator permissions to the GQM installation including root SSH permissions.
- You have at least installation permissions on the Windows XP, Vista, or Windows 7 client PC running Microsoft Excel.
- The client PC is connected via IP network to the Quality Manager database server, typically the GQM server for standalone installations.
- You are familiar with Linux file editing commands, relational database structures, and SQL syntax.

### Setup Instructions

Setup consists of three stages:

- Create a read-only user on the Quality Manager database server.
- Set up the ODBC source on the client PC running Excel.
- Import the ODC query files for use with Excel.

### Create a Read-only Database User

The procedure described below is performed by first connecting to the main GQM server via SSH. This can be achieved using tools such as [PuTTY](#), SecureCRT, or similar.

1. Connect to the server using SSH. By default, the login username is `admin` and the password is `zoomcallrec`.
2. Ensure you have super-user privileges by switching to the root account (the default password is the same):

```
su -
```

3. Open the file at `/opt/callrec/data/psql/pg_hba.conf` and add a line like the following to enable access from the client PC, where the PC's IP address and range are very narrowly defined, ideally an individual static

IP address. The following example allows connection from IP addresses in the range 192.168.10.0 - 192.168.10.255:

```
host all all 192.168.10.0/24 md5
```

4. Save the file, then run the following command to apply this configuration change to the database:

```
/etc/init.d/postgresql reload
```

5. Start up the PSQL tool, logging in to the database as the postgres user:

```
psql -U postgres callrec
```

The following commands in this step are all database commands in SQL format. For best results, press ENTER after you type or paste in each individual line.

6. Create the database user. You can replace the sample username: `excel` and password: `excel1234` with your own preferences, but ensure you update the remaining commands appropriately:

```
CREATE ROLE excel WITH PASSWORD 'excel1234';
```

7. Allow this user to log in:

```
ALTER ROLE excel LOGIN;
```

8. Allow this user to view the callrec and wbsc schemas, for Call Recording and Quality Manager respectively:

```
GRANT USAGE ON SCHEMA callrec TO excel;  
GRANT USAGE ON SCHEMA wbsc TO excel;
```

9. Grant select (read permission) on the tables from the schema:

```
GRANT SELECT ON wbsc.answers TO excel;  
GRANT SELECT ON wbsc.companies TO excel;  
GRANT SELECT ON wbsc.criteria TO excel;  
GRANT SELECT ON wbsc.evalanswers TO excel;  
GRANT SELECT ON wbsc.evalcalls TO excel;  
GRANT SELECT ON wbsc.evaluations TO excel;  
GRANT SELECT ON wbsc.questforms TO excel;  
GRANT SELECT ON wbsc.questiongroups TO excel;  
GRANT SELECT ON wbsc.questions TO excel;
```

```
GRANT SELECT ON wbsc.sc_users TO excel;  
GRANT SELECT ON wbsc.subevaluation TO excel;  
GRANT SELECT ON wbsc.user_belongsto_ccgroup TO excel;  
GRANT SELECT ON wbsc.ccgroups TO excel;  
GRANT SELECT ON wbsc.callwrapups TO excel;  
GRANT SELECT ON wbsc.interaction_types TO excel;  
GRANT SELECT ON wbsc.categories TO excel;  
GRANT SELECT ON wbsc.database TO excel;  
GRANT SELECT ON wbsc.languages TO excel;  
GRANT SELECT ON wbsc.user_role TO excel;  
GRANT SELECT ON wbsc.roles TO excel;
```

10. Exit the PSQL utility (type `\q` and press ENTER) and end the SSH session.

## Set up the ODBC Source

The following procedure is performed on a Windows PC with administrative permissions. You need to know the following information before starting:

- The type of Operating System (32-bit or 64-bit). This can be determined using the following Microsoft Support page:  
<http://windows.microsoft.com/en-us/windows7/find-out-32-or-64-bit>.
- The type of Microsoft Excel installation (32-bit or 64-bit). This can be seen in Excel 2007 by viewing the **File > Help > About Microsoft Excel** section.

Depending on the type of Excel installation you have, proceed as follows:

### Excel 64-bit

1. Unzip and install the PostgreSQL ODBC driver after downloading the latest zipped MSI installation package from the following URL:  
<http://www.postgresql.org/ftp/odbc/versions/msi/>. The 64-bit drivers are named with the suffix `-x64.zip`.
2. Open the following Windows dialog panel: **Administrative Tools > Set up data sources (ODBC)**, or paste the following at a Windows command prompt:  
`%systemdrive%\Windows\system32\odbcad32.exe`
3. On the **Drivers** tab, ensure that the PostgreSQL drivers are listed, then click **Add** on the **User DSN** tab.

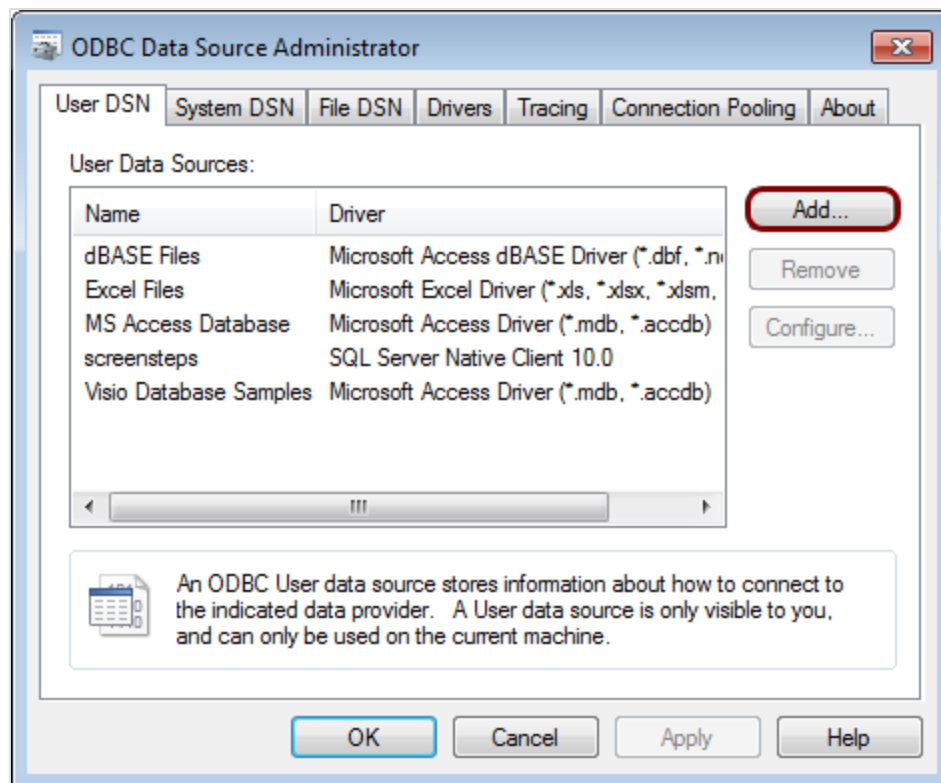


Figure 23: Add an ODBC User DSN

4. Select the **PostgreSQL Unicode(x64)** driver.

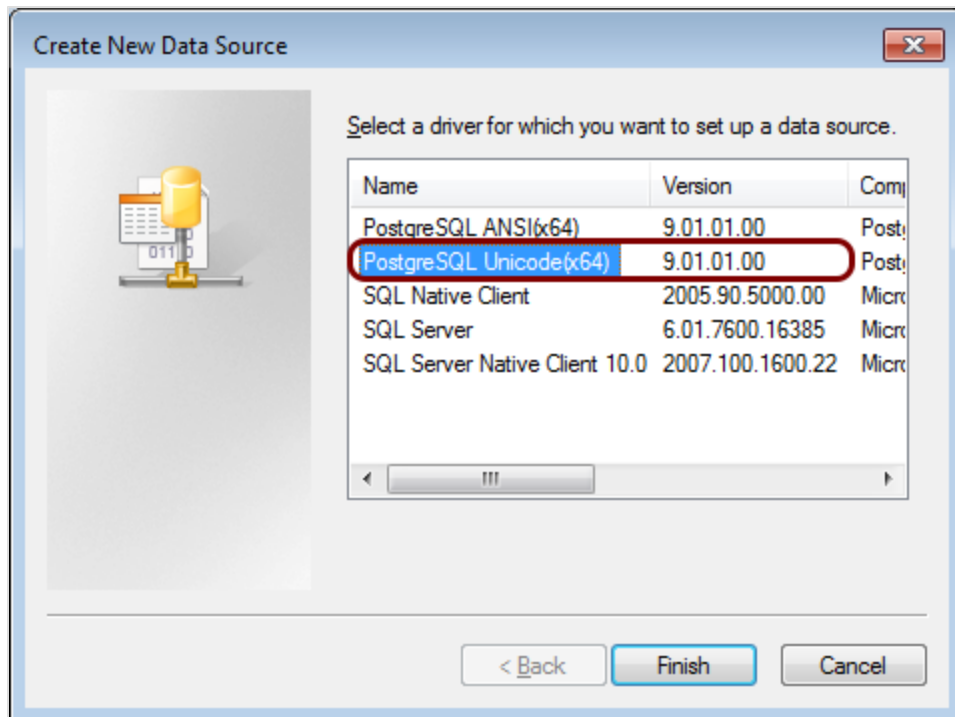


Figure 24: Select the Postgres ODBC Unicode Driver

5. Configure the database server access credentials for the database user created earlier.

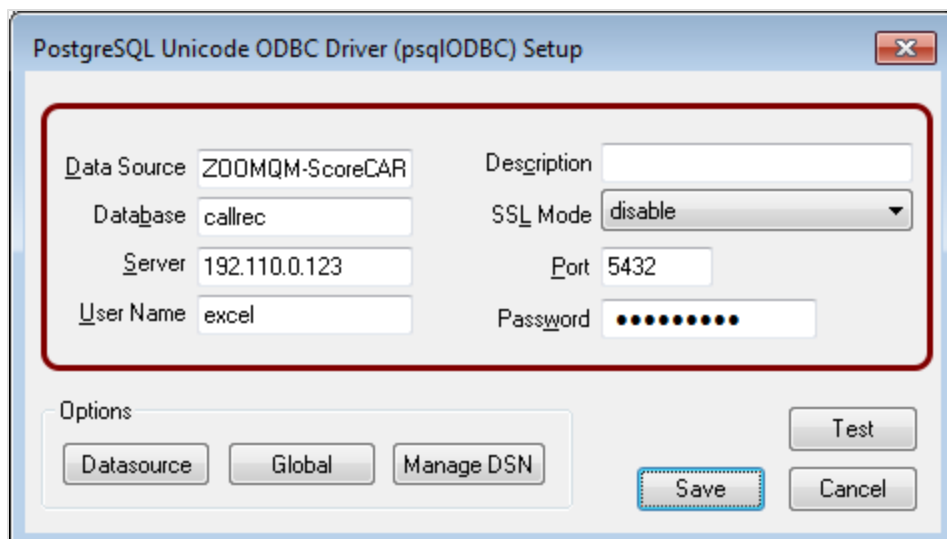


Figure 25: Configure the ODBC Server Parameters



Use the following parameters, modifying the **Server**, **Port**, **Username**, and **Password** fields as required. The **Data Source** field must be set to the value shown to run the sample ODC database queries unmodified.

- **Data Source:** ZOOMQM-ScoreCARD
- **Description:** leave blank.
- **Database:** callrec
- **Server:** (GQM server IP address or fully qualified domain name).
- **Port:** 5432
- **Username:** excel
- **Password:** excel1234

6. Click **Test** to check the connection, then **Save**.

### Excel 32-bit

Follow steps 1-6 above (the screens will vary), with the following differences:

- **Step 1:** Ensure you download a 32-bit MSI installation file (without the `x-64.zip` suffix), then unzip and install it.
- **Step 2:** On a 64-bit Windows system, you will need to run the 32-bit ODBC Administrator dialog box to see the 32-bit PostgreSQL ODBC drivers. Paste the following at a Windows command prompt:  
`%systemdrive%\Windows\SysWoW64\odbcad32.exe`
- **Step 4:** Select the **PostgreSQL Unicode** driver.

### Import the ODC Files

Sample database queries have been provided in ODC (Office Database Connection) format. The samples can be imported into the Office Data Connections list to display data (such as the list of Quality Manager evaluations and details of individual questionnaires, evaluations and users).

These ODC query files are included in a zip archive named 'GQM Documentation Resource Bundle'. Please ask your Account Manager for this file.

To test the sample queries, download and unzip the ODC files to a temporary folder on the client PC. Then do the following:

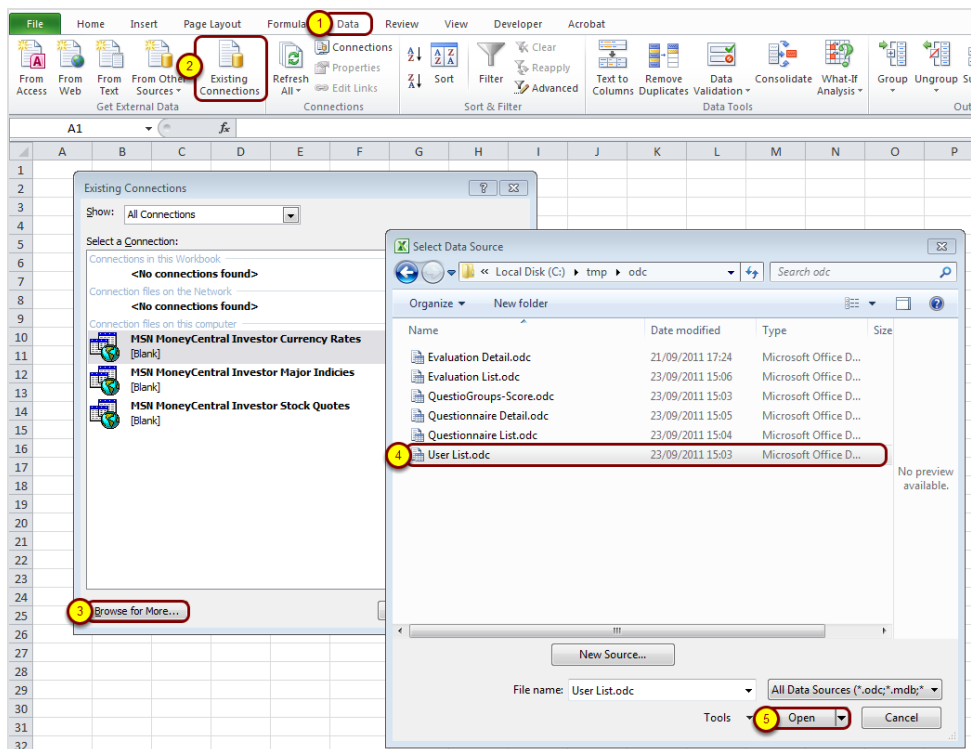


Figure 26: Importing an ODC Query to Excel

1. Open Excel and click the **Data** menu.
2. Click **Existing Connections**.
3. In the **Existing Connections** dialog, click **Browse for More....**
4. Navigate to the location of your unzipped ODC files in the **Select Data Source** dialog and select a file.
5. Click **Open**. If the ODBC data connection you set up earlier is correctly configured, the **Import Data** dialog opens.

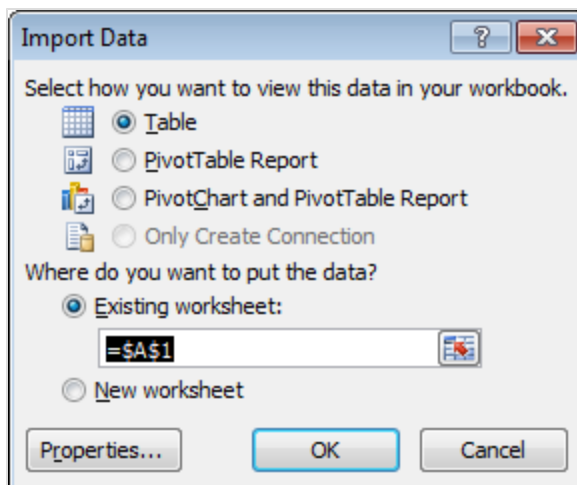


Figure 27: Excel Import Data Dialog

6. In the **Import Data** dialog, decide where and in what format to place the data and click **OK**.

**Note:** Start with the **Table** format until you are familiar with the data structure.

	userid	name	login	database	sync	status	phone	agentid	identifier_used
1	Admin	Admin	admin		1 0	ACTIVE	12345	123	PHONE
2	CcManager	CcManager	ccmanager		1 1	ACTIVE	12345	123	PHONE
3	ipccimporterdaemon	ipccimporterdaemon	ipccimporterdaemon		1 0	ACTIVE	12345	123	PHONE

Figure 28: User Data Imported into Excel

7. The data is imported. Data is refreshed both when the saved workbook is re-opened and when clicking **Refresh**.

---

**Tip:**

There is no 'remove' option in the Excel **Existing Connections** dialog. However, to remove unnecessary external data connections from this dialog, simply delete the appropriate ODC files or their shortcuts in the `My Data Sources` directory. The following example will open this location on a Windows 7 PC: `%UserProfile%\Documents\My Data Sources`.

---

## Modifying ODC SQL Queries

Although SQL queries in individual ODC files can be edited in any text editor, there is the danger of errors creeping in due to the character-escaped SQL syntax that is used. A more robust method is to modify the SQL query in Excel after import. This does require that the ODC connection has been successfully imported into Excel using the setup procedure above:

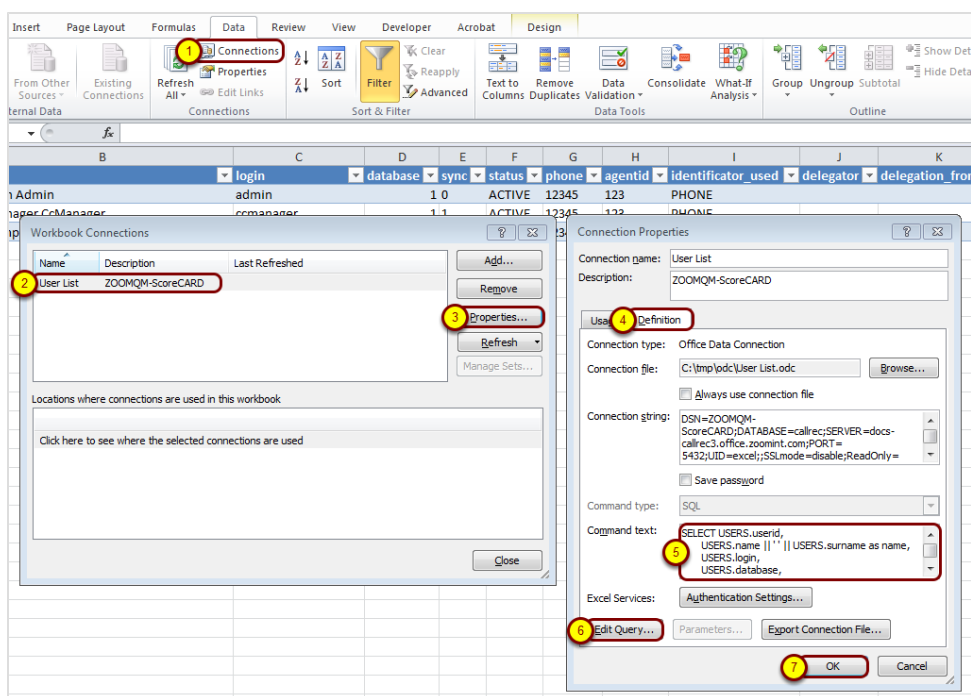


Figure 29: Modifying an ODC Connection Query in Excel

1. In the Excel **Data** menu, click **Connections** to open the **Workbook Connections** dialog.
2. Ensure the ODC connection is displayed and select it.
3. Click **Properties...** to open the **Connection Properties** dialog.
4. Click the **Definition** tab.
5. **EITHER:** View and modify the SQL query directly.
6. **OR:** Edit the query in Microsoft Query. If an error states that: "This query cannot be edited in the Query Wizard", you can still edit the SQL directly by clicking **SQL** in Microsoft Query after acknowledging the error. Close the Wizard to return to the **Connection Properties** dialog.

7. Click **OK** to commit the changes, then accept any ODC file modification requests, after which the data will be refreshed from the database according to your updated SQL query.

## Chapter

# 6

# Administration

The following chapter describes the Administration tasks available including how to manage groups and users.

This chapter contains the following sections:

[User Management](#)

[Additional Options](#)

# User Management

A short tutorial to show how to create, modify, and remove users and groups in Genesys Quality Manager 8.1.50x. All tasks in the User Management section require a ccmanger login. If you are currently logged in to Quality Manager, log out, refresh your web browser, and log in with a ccmanger login and password.

The default log in is ccmanger with the default password admin.

## Groups And Users In Quality Manager

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

The group hierarchy 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 Quality Manager users.

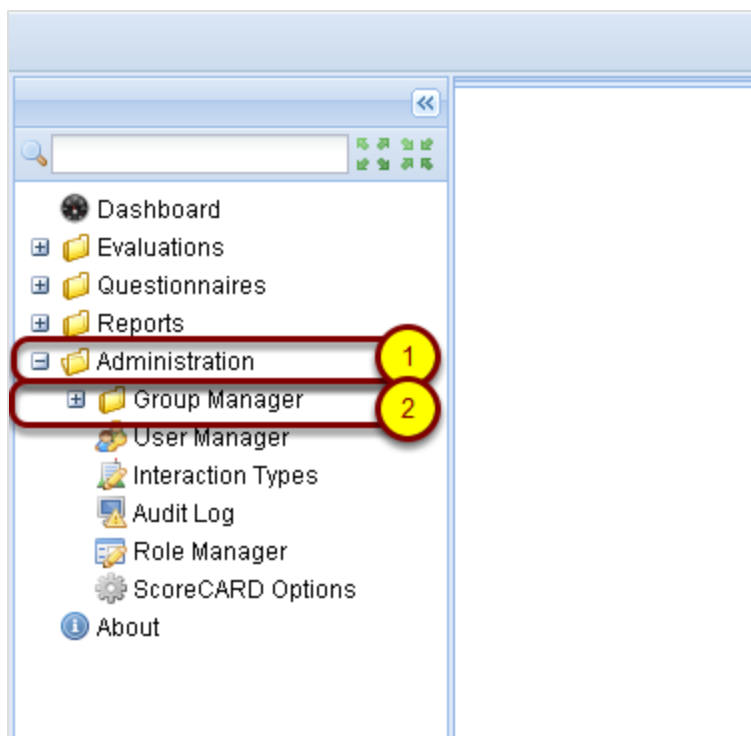


Figure 30: Groups and Users in Quality Manager

To create, modify, or remove users and groups in Quality Manager:

1. Select **Administration** in the left hand menu
  2. Select **Group manager**
- The **Group Manager** tab will open.

## The Group Manager

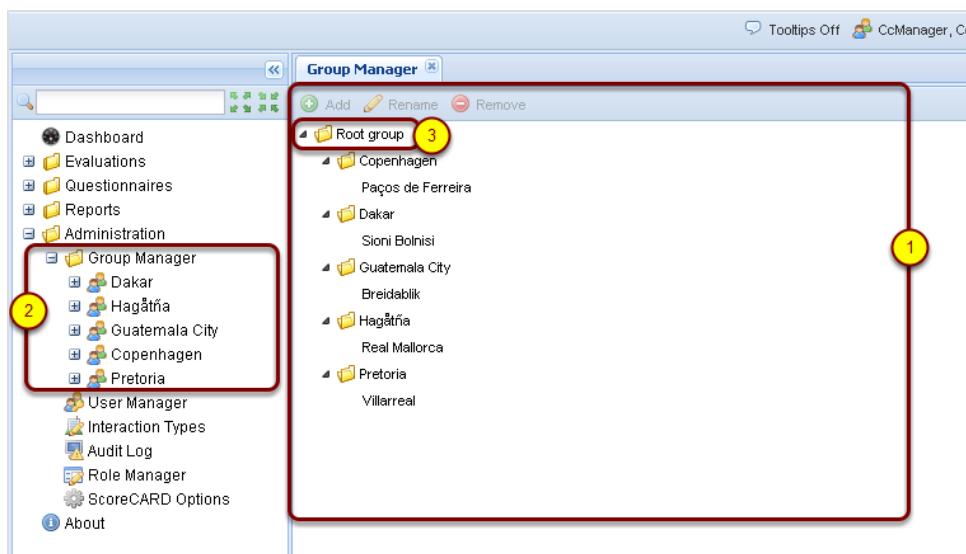


Figure 31: The Group Manager Tab Opens

1. The **Group Manager** tab opens displaying the group tree, which contains the **Root Group** and all of its subordinate groups. It is possible to change the structure of an existing tree by dragging and dropping groups from one position to another. This is useful when reassigning staff for a new campaign. Where group A has a sub group, it is shown as a folder with a name next to it. Groups with no subgroup are shown as just the name. If you move the last subgroup from a group it will change from being a folder to just the group name.
2. The group tree also appears on the left hand side below **Group Manager** in the menu.
3. Agents, team leaders, supervisors, cc managers, and administrators within Quality Manager are always contained within at least one User Group. The default group is called the **Root group**. All others groups are subordinate to the **Root group**. The **Root group** cannot be deleted.



## Creating A User Group

You can only add new groups in the **Group Manager** (tree view) when an existing group is selected.

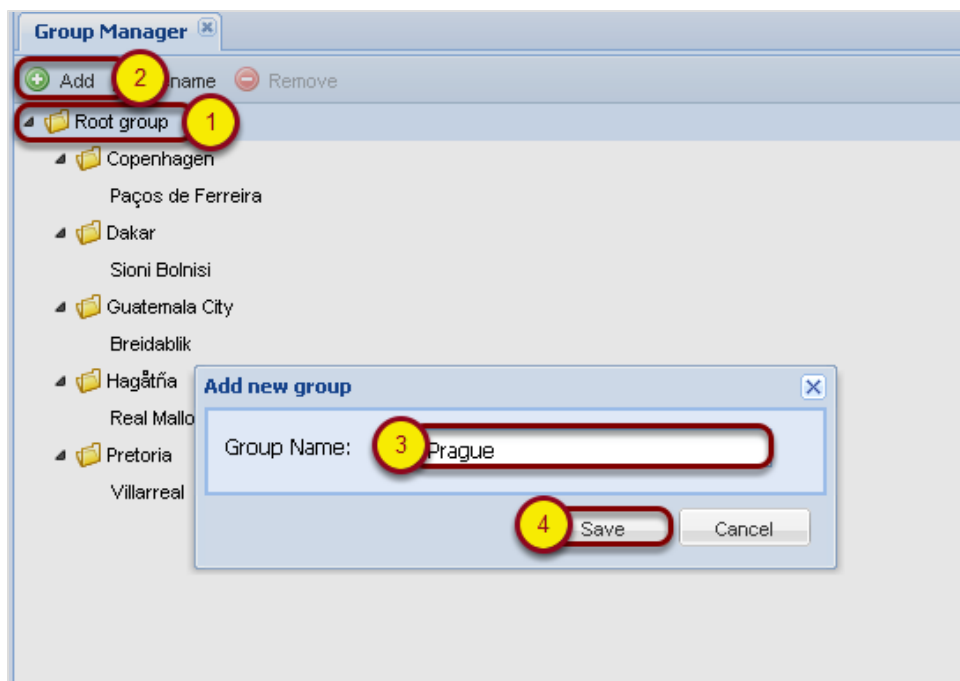


Figure 32: Creating a User Group

1. Select a group to add the new group to
2. Click **Add**
3. Type unique name for this group in **Group Name**
4. Click **Save** to create the group under (inside) the currently selected group

---

### Important:

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

---

## Viewing Users In Groups

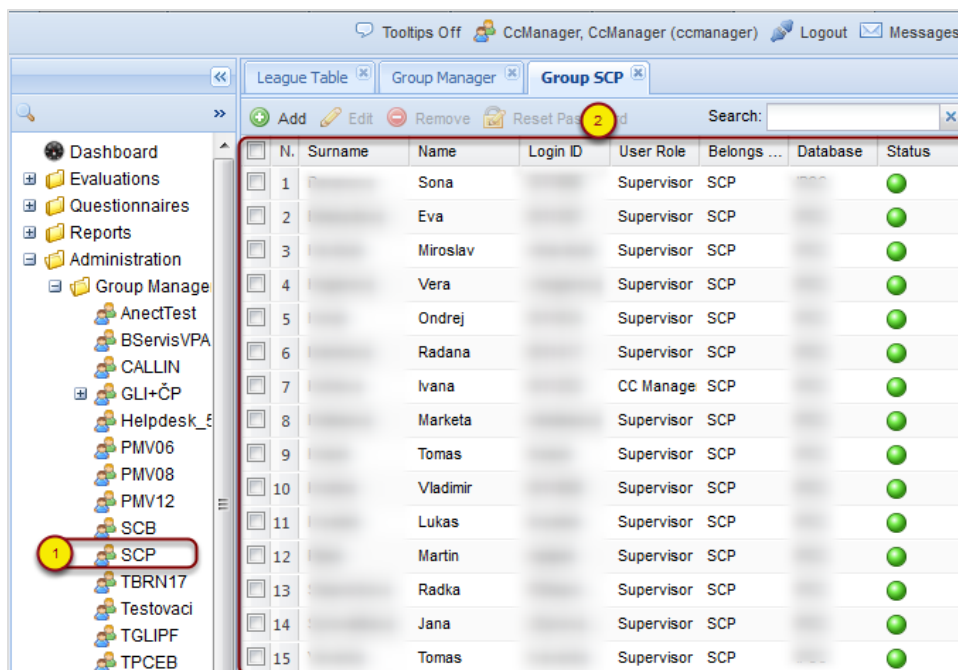
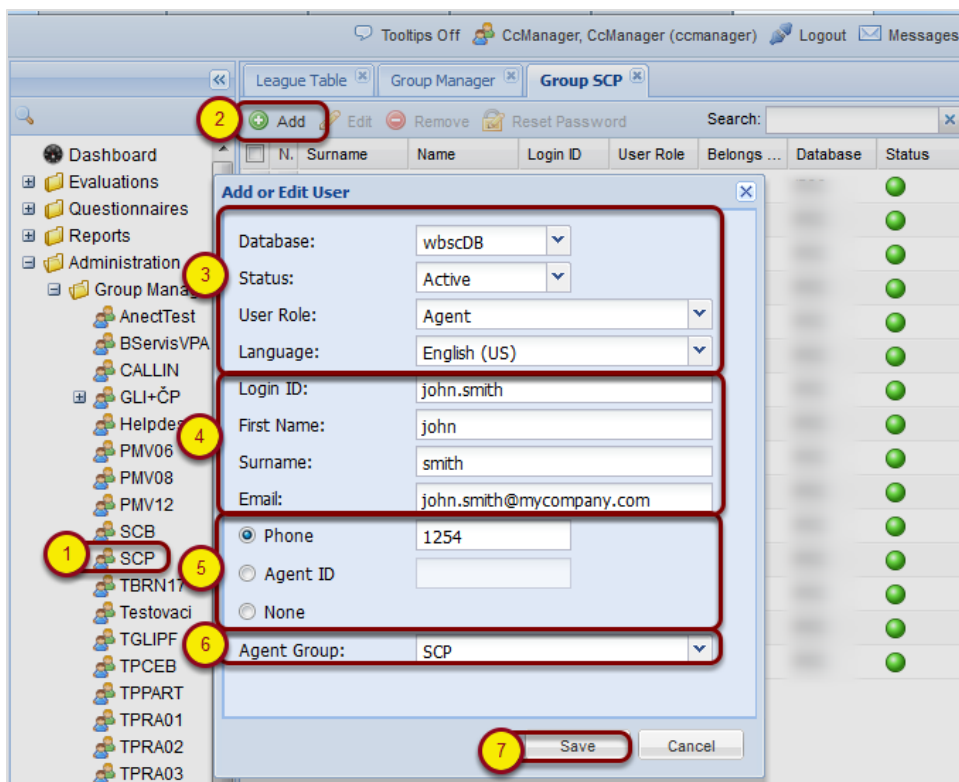


Figure 33: Viewing Users In Groups

1. To view users in a particular group, select the appropriate group name under **Group Manager** in the left hand menu.
2. The group members will appear.

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 an Agent User



Adding a User (Agent)

The **Active** setting indicates whether this user is available in Quality Manager for evaluations and reporting.

Agent profiles that are no longer relevant and/or available should have their **Active** status changed to **De-Activated** or **Blocked**. To unblock a user, change the status to **Active**.

For more information, see [The Role Manager](#).

Select the **Language** that the Quality Manager interface displays in when the user logs in. This can be changed by the user.

---

**Important:**

Most user accounts are imported by the integration with the Genesysplatform database. There are some roles which are only used by Quality Manager.

---

## The User Manager

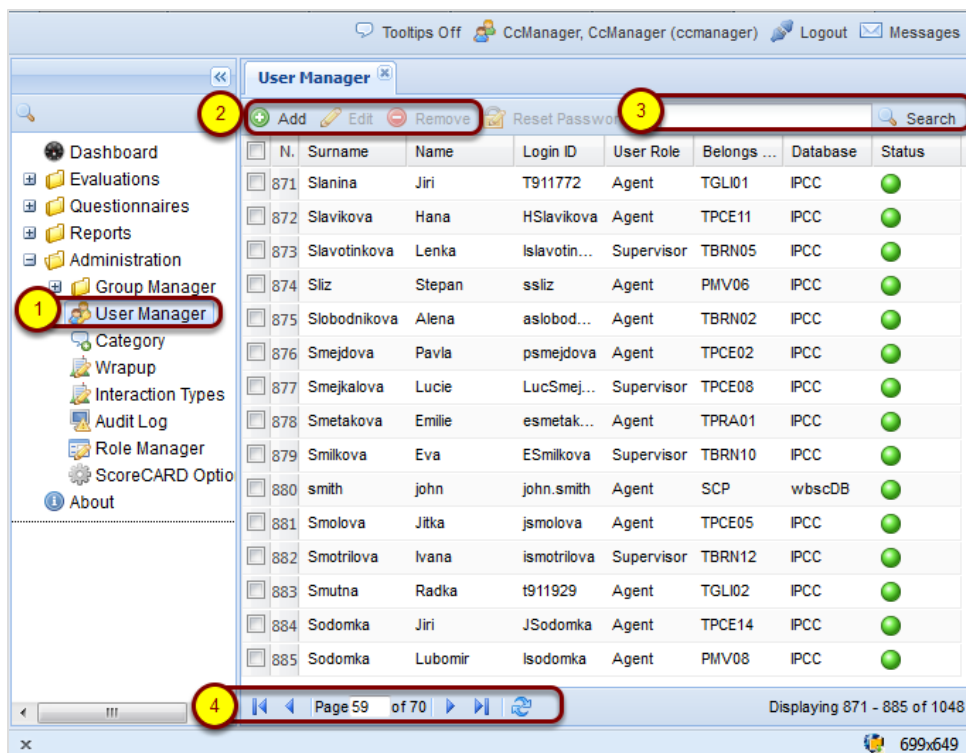


Figure 34: The User Manager

The **User Manager** tab displays a list of all users registered on Quality Manager. This list of all users makes searching and bulk editing of user profiles easier.

1. Select **Administration** then **User Manager** in the left hand menu to open the **User Manager** tab.
2. When viewing a list of users, double-click on the user record or select the checkbox of the user  
 To add a new user click **Add**.  
 To edit click **Edit**.  
 To remove a user select the user and click **Remove**.
3. Enter a first or last name of a user to filter for a search.
4. Select which page of results to view.

## Adding Supervisory Roles

Figure 35: Adding Another User Type

Add users in the **User Manager** by clicking **Add** or edit users by selecting the user and clicking **Edit**.

1. If the user type being created or modified is not 'agent', the **Add or Edit User** dialog box expands to show the group assignment.
2. Group assignment allows the user to be recognized as an evaluator for one or more groups in Quality Manager (those shown in the right panel named **Groups Assigned to Supervisor**).  
To assign a group to the current user, select a group within the **Groups** panel and click **Add**.  
**Add All** allows all available groups to be assigned in one operation.  
**Remove All** removes all group assignments.  
To remove a single group assignment, select an assigned group in the right panel and click **Remove**.
3. **Delegation** enables another evaluator to inherit the same evaluation permissions for a pre-defined period (for example, 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.

4. Click **Save** to update the user profile, or **Cancel** to exit the profile editor dialog without saving changes.

## Removing Users

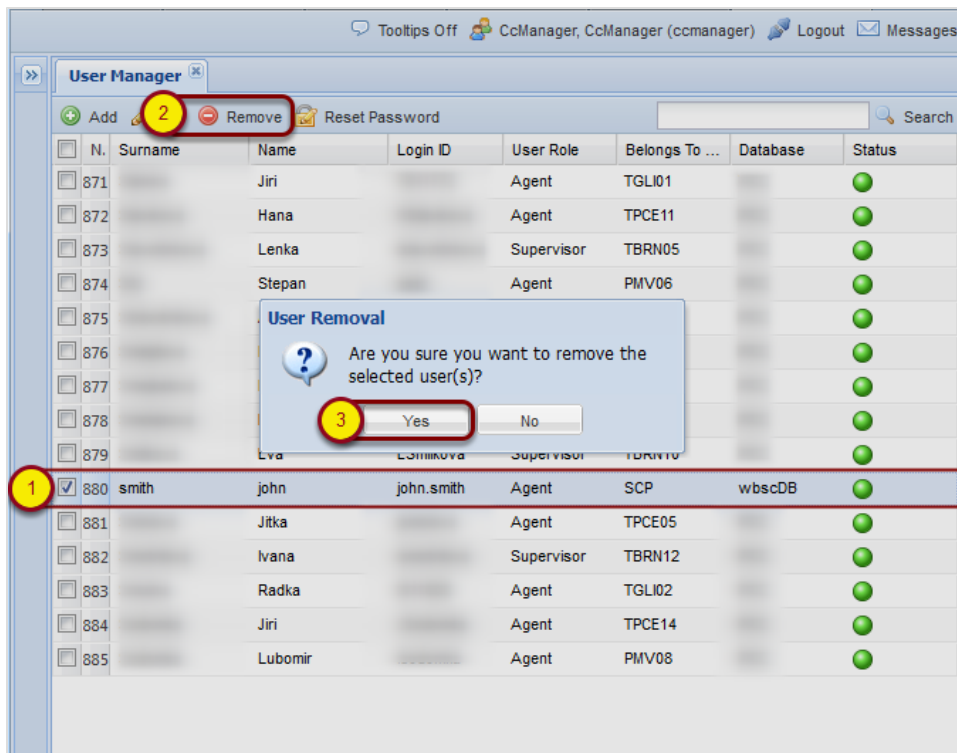


Figure 36: Removing Users

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

In either case,

1. Select the checkbox or click on the user you must remove.
2. Click **Remove** in the toolbar.
3. Click **Yes** in the confirmation dialog box that appears to confirm permanent user deletion.

## Removing a User Group

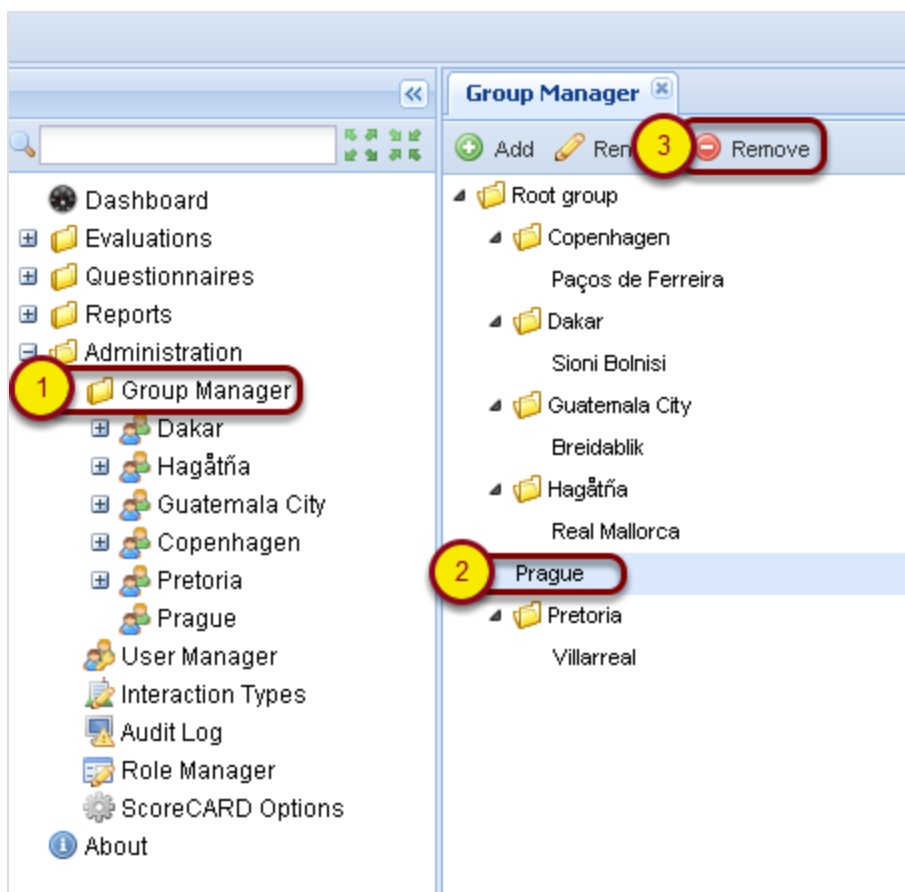


Figure 37: Removing a User Group

To open the **Group Manager** tab item click **Group Manager** in the left hand menu.

1. Removing a user group can only be performed in the **Group Manager** tab. Only an empty group (containing neither users nor sub-groups) can be deleted.
2. Click the group to select it.
3. Click **Remove** in the toolbar.
4. Click **Yes** in the confirmation dialog box that appears to confirm permanent user deletion.



---

**Important:**

User groups are handled by the integration with the Genesysplatform database.

---

## The Role Manager

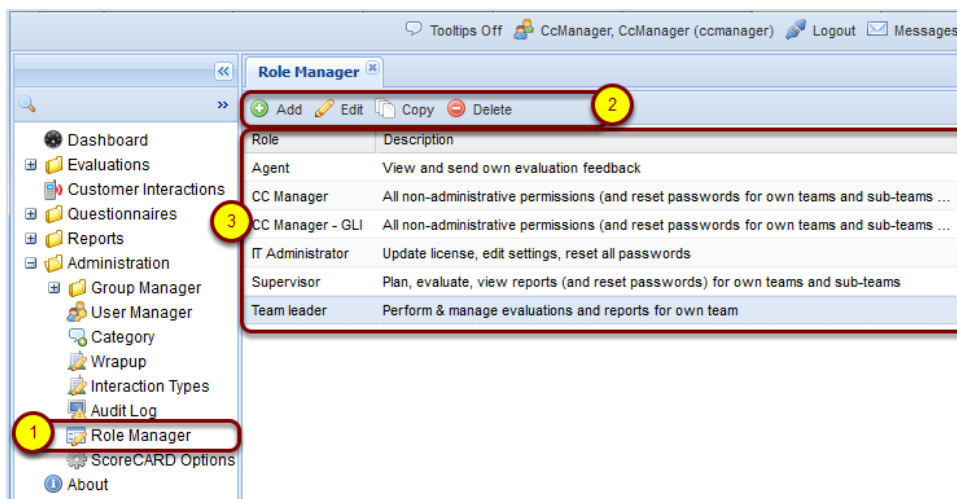


Figure 38: The Role Manager

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

1. Select **Role Manager**.
2. Click **Add** to create new roles or select a role from the list (the **Edit**, **Copy**, and **Delete** actions require a role to be selected for them to operate). The standard roles may be modified but not removed.
3. Click **Edit** to modify existing roles.  
Click **Copy** to create new roles based on an existing role.  
Click **Delete** to remove a role.
4. Click **OK** on the Edit User Role dialog to confirm changes.

---

### Important:

The standard roles cannot be removed, but may be modified.

---

## Re-Defining User Roles

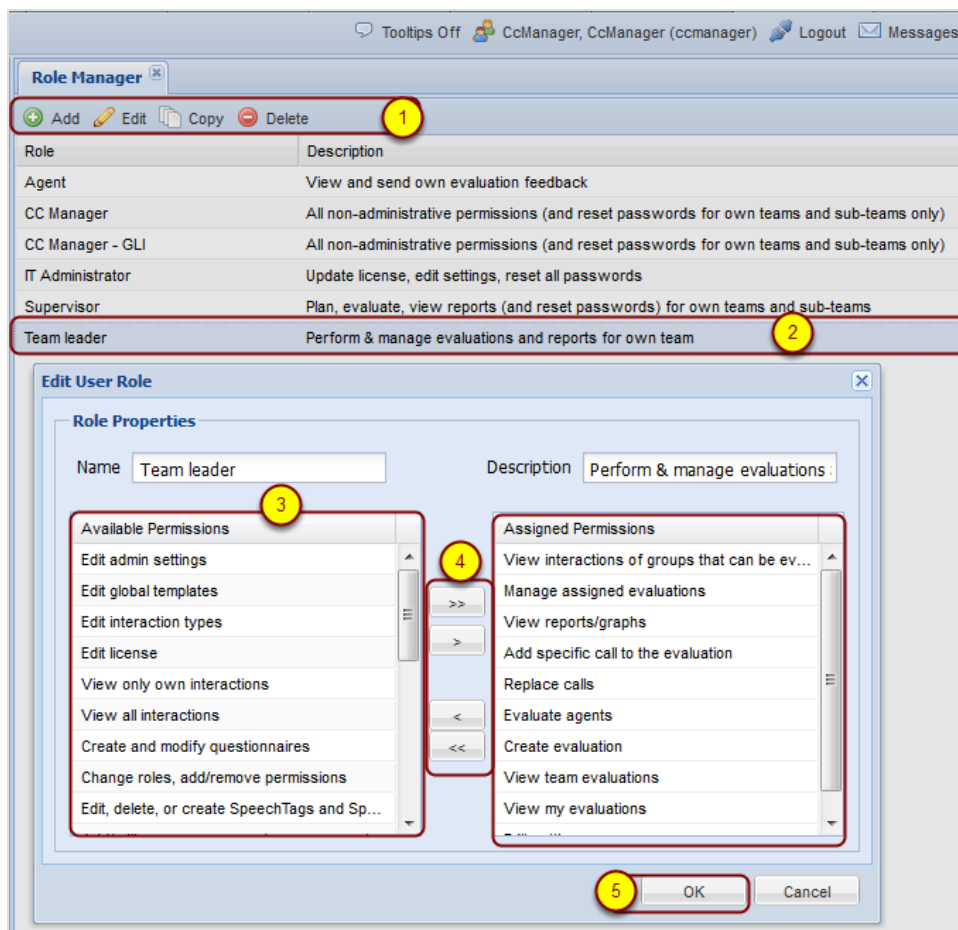


Figure 39: Re-Defining User Roles

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

1. Click on **Team leader** in the list of roles.
2. Click **Edit** to open the Edit User Role dialog box.
3. Modify the current permissions for the **Team leader** role.
4. Click on a permission (in this example: **Create and modify questionnaires**) in the left window and move it over to the right window using the >> button. Conversely, moving a permission from the right window to the left using the << button removes this permission for this role.
5. Click **OK** to save any modifications and immediately apply these permissions to all users who are assigned this role.

**Important:**

After modifying an existing role for the currently logged-in user, that user will need to log out and back in for the new permission properties to be enabled.

Per- mission Property	Allows the User To	By default in Role
Add specific call to the evaluation	Select and add a specific call recording to the evaluation. This feature is only available if the user who planned the evaluation did not disable this property.	Team leader, Supervisor, CC Manager
Add/edit users, groups and manage user hierarchy	Manage users, groups, and hierarchy for user's group and subgroups.	CC Manager
Change roles, add/remove permissions	Edit and add remove user roles and assign privileges to the roles.	CC Manager
Create and modify questionnaires	Create, modify and remove questionnaires.	CC Manager
Create evaluation	Create single evaluation for groups which are on the group list CanEvaluate (assigned groups). This permission is designed to only allow users to create/plan an evaluation for themselves to complete for their assigned groups. This permission will not allow evaluators to plan evaluations for any other evaluators.	Team leader, Supervisor, CC Manager
Edit admin settings	Edit system-wide settings (menu: Administration/Quality Manager options).	CC Manager
Edit settings	Edit technical settings only. No access to business data (Manage Wrapup, Category ).	IT Administrator

Per- mission Property	Allows the User To	By default in Role
Edit closed eval- uations. Re-open	Open an evaluation with the status <b>Finished</b> . This will change the evaluation status from <b>Finished</b> to <b>In progress</b> , and allow users to edit or modify the grading form.	Supervisor, CC Manager
Edit interaction types	Add/Rename/Delete interaction types.	CC Manager
Edit license	Allows admin to upload or reload the Quality Manager license.	IT Administrator
Edit shared templates	Edit shared templates - delete, rename shared templates, change type from Shared to Private.	CC Manager
Evaluate agents	Execute prepared my evaluations, evaluate agents (My evaluations = evaluations where I'm the evaluator).	Team leader, Supervisor, CC Manager
List Audit events	List/Search Audit events	CC Manager
Manage assigned evaluations	This permission allows users that have created evaluations to delete evaluations they have created.	Team Leader
Password reset	The right to reset user's password, but does not allow the user to edit any other user parameters. Users with this right have read-only access to user administration and see the whole user tree. Able to open User Details, where everything except for the fields for resetting the password will be read-only.	IT Administrator
Password reset (team members only)	The right to reset team member's passwords, cannot edit any other user parameters. Users with this right have read-only access to user administration. The Root of the tree is the group that the user belongs to. Open User Details, where everything will be read-only, except for fields for resetting the password.	Supervisor, CC Manager
Plan evaluations for all groups	Plan evaluations for groups which are listed in the CanEvaluate list. This permission is to allow evaluators to also plan/create evaluations for other members (evaluators) of the groups assigned to that evaluator. This limits evaluators from planning evaluations outside of assigned groups. If evaluator is in the Belongs to group they may appear in the list of agents to evaluate. For this evaluator to evaluate themselves from this planning they must have the <b>Self evaluate</b> permission assigned.	CC Manager

Per- mission Property	Allows the User To	By default in Role
Plan evaluations for own group or subgroups	Plan evaluations for groups which are listed in the CanEvaluate list. This permission is to allow evaluators to also plan/create evaluations for other members (evaluators) of the groups assigned to that evaluator. This limits evaluators from planning evaluations outside of assigned groups. If evaluator is in the <b>Belongs to group</b> , they may appear in the list of agents to evaluate. To evaluate themselves from this planning they must have the permission <b>Self evaluate</b> assigned.	Supervisor, CC Manager, Team Leader
Replace calls	Replace a call in evaluations (enable the "replace call" button - will replace a single call with another randomly selected call).	Team leader, Supervisor, CC Manager
Remove all evaluations	Delete evaluations created by ANY user	CC Manager
Self-evaluation	Plan and create evaluations for themselves and their own interactions.	CC Manager, Team Leader, Agent
Send evaluation feedback	Send evaluation feedback to the evaluator. Enables "Send Feedback" in the agent view.	Agent
View all evaluations	View all evaluations.	CC Manager
View evaluations - agent view	View their own evaluations in read-only form. This will also allow agents to view the evaluation detail report and from the evaluation detail report click the <b>Interaction</b> link and be directed to the read access only grading form where the agent can view the grading form, listen to the call and /or view the screen recording.	Agent
View graphs	View reports and graphs of agents in associated teams only (CanEvaluate) "assigned to supervisor"	Team leader, Supervisor, CC Manager
View graphs for all groups	View graphs for other groups and the whole call center. This permission will over-ride group checks, the user will be able to see data of the whole call center.	CC Manager
View my evaluations	View evaluations (where the user is the evaluator). This should include evaluations that the role (supervisor, team leader, ccmanager) has created. They should not be able to see evaluations created by other team leaders, supervisors, or ccmanagers.	Team leader, Supervisor, CC Manager

Per- mission Property	Allows the User To	By default in Role
View team evaluations	View evaluation of agents in associated teams. View evaluations of agents which are in the user's CanEvaluate (assigned groups) group list. This means the user can see all evaluations of the team they are a member of and all evaluations of teams that they can evaluate. This is also true for the group in which they belong. This permission will also restrict the view of the evaluation detail report to the "assigned to supervisor" groupings.	Team leader, Supervisor, CC Manager

Table 7: Role Permissions Properties

## 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, so this **Self-evaluation** permission must be added to the agent roles 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 some but not all agents are allowed to perform self-evaluations, it will be necessary to create a second custom **Agent** role that includes this permission.

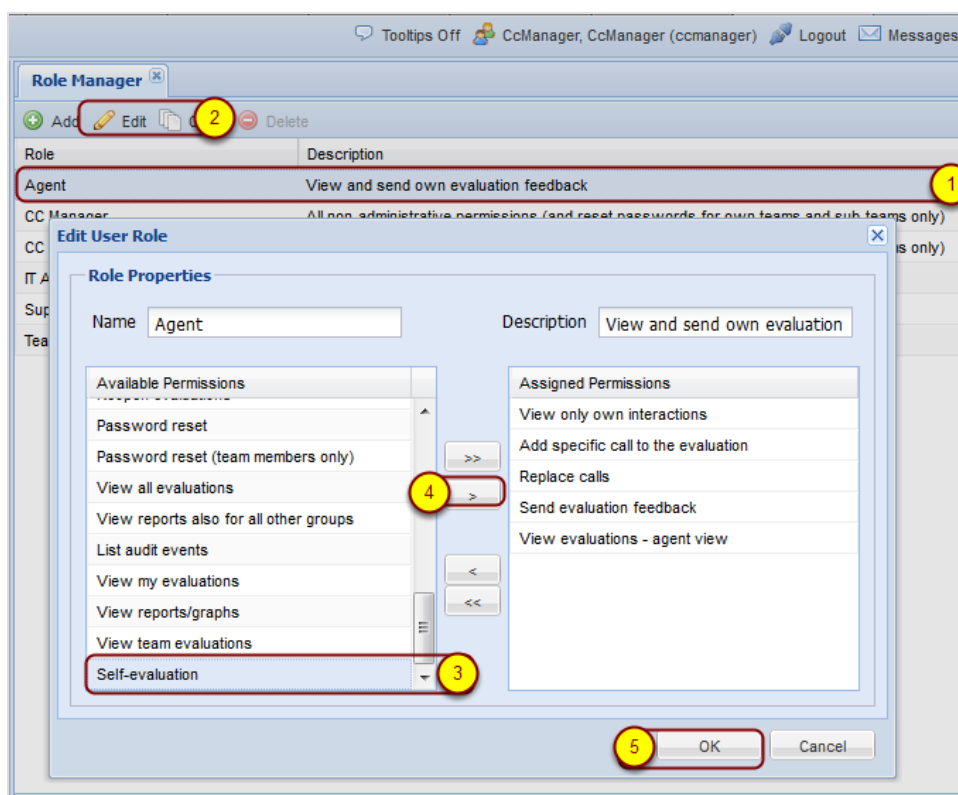


Figure 40: Enabling Agent Self-Evaluation

To Add Self-evaluations to the Agent Roles Navigate to **Administration > Role Manager**

1. Select Agent from the **Roles** available
2. Click **Edit**
3. Select **Self-evaluation**
4. Click **>**



### 5. Click **OK**

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 (for example if 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 8.1.50x for users with CC Managers or Administrator permissions.

### Interaction Types

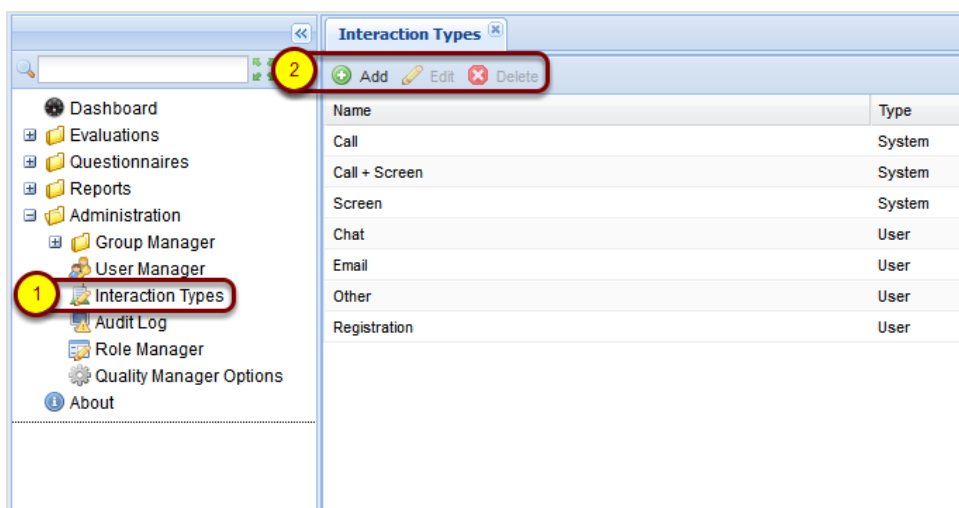


Figure 41: Interaction Types

**Interaction Types** define the types of interaction that Quality Manager can process in evaluations and reports. The interaction types can be modified (renamed) on the **Interaction Types** screen as required.

To add an interaction type:

1. Select **Interaction Types** in the left hand menu.
2. Click **Add**.
3. Type an interaction name in the Name field.
4. Click **Save**.

To Delete an Interaction Type

1. Select **Interaction Types** in the left hand menu. Select an interaction type to delete.
2. Click **Delete**.

**Important:**

The system interaction types, **Call**, **Call+Screen** and **Screen** cannot be deleted cannot be renamed or removed.

To Edit an Interaction Type:

1. Select **Interaction Types** in the left hand menu. Select an Interaction type to edit
2. Edit Click **Add**
3. Type an Interaction Name in the **Name** field.
4. Click **Save**.

## Audit Log

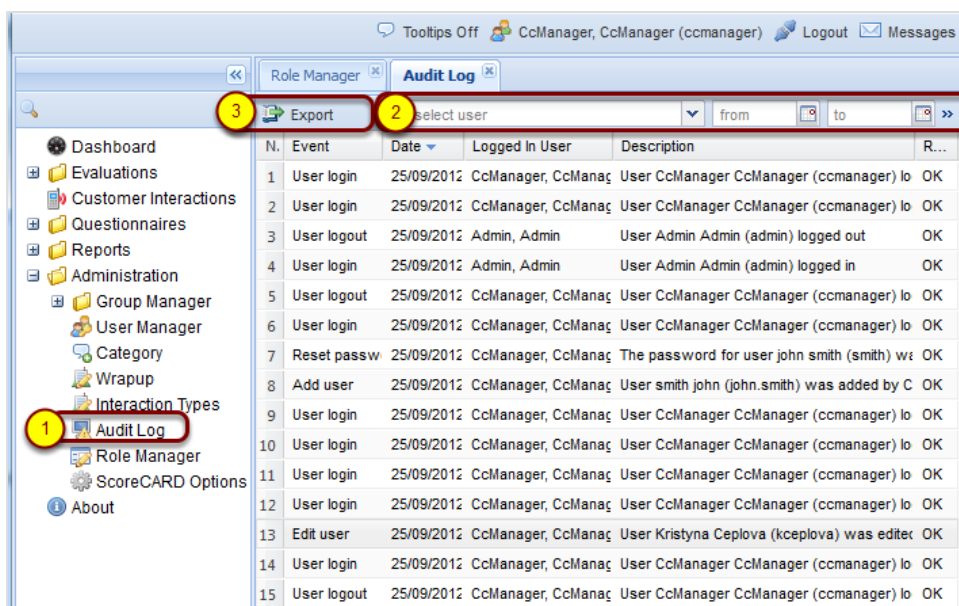


Figure 42: Audit Log

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

1. Click **Audit Log** and a list of the most recent events in Quality Manager displays in the **Audit Log** tab.
2. Use the filtering options (user name, from and to date range, event type) to reduce the list to relevant events.

- Alternatively, export all entries to an Excel (2007 and later) spreadsheet file (.xlsx) for additional analysis.

## Quality Manager Options

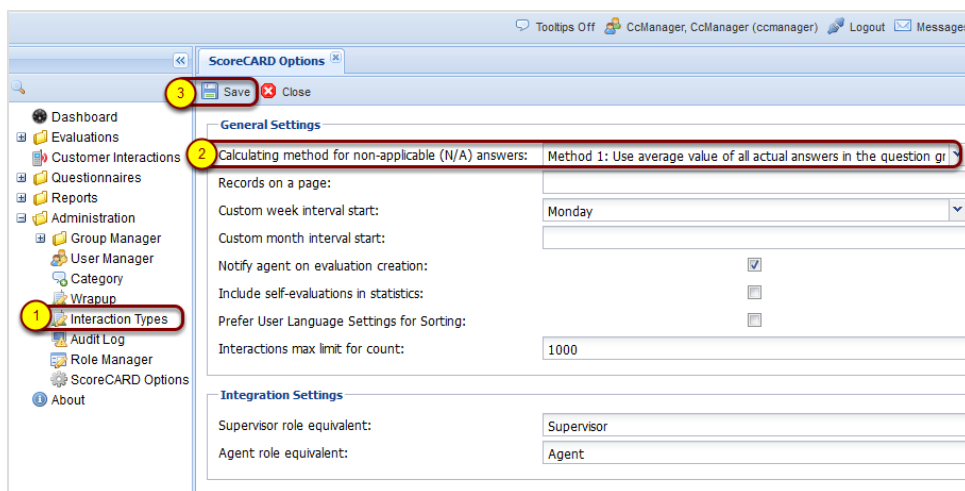


Figure 43: Quality Manager Application Options

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 **Quality Manager Options** section of the Administration menu.

- Click **Quality Manager Options** to open the **Quality Manager Options** tab.
- The **Calculating method for non-applicable (N/A) answers** setting, controls how the N/A compliance setting for questionnaire answers is calculated. These options are global for all questionnaires. Their purpose is to assign a score to N/A answers that will be statistically non-significant, neither unduly penalizing nor rewarding the agent for being given such an answer. They 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 (that is the score depends on which answers have already been selected). This means that the score given to the N/A answers reflects the agent's performance in the question group as a whole.
  - 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 (that is the score does not depend on which answers have already been

selected). This means that the score given to the N/A answers reflects the average mark of all available answers in the questionnaire.

- **Method 3:** Skip the N/A answer (that is exclude this question from the final group score, so N/A answers are ignored). In this case the agent will be awarded a score of zero points for this question.

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

The following two settings (**Custom week interval start**, **Custom month interval start**) enable cultural time settings to be designated, for example 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.

The **Supervisor role equivalent** and **Agent role equivalent** options enable the user to map these two roles in Quality Manager (agent and supervisor) to their two equivalent roles in Genesys Configuration Manager when integrating the agent databases.

3. Ensure that all details are correct before saving changes.

## Quality Manager Administrative Options

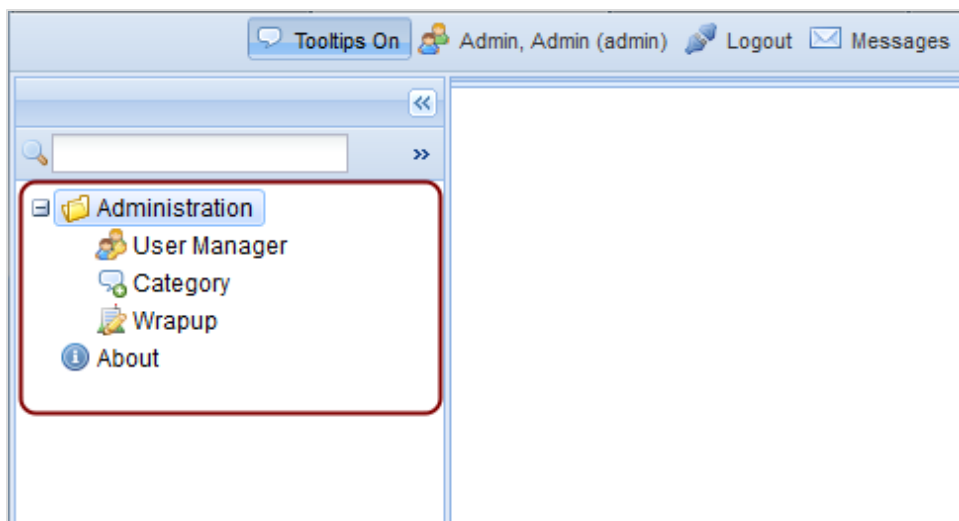


Figure 44: Quality Manager Administrative Options

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

Categories and Wrapups are described below. The 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 Quality Manager administrator to reset passwords for users, but not change or view any other settings.

## Category Management

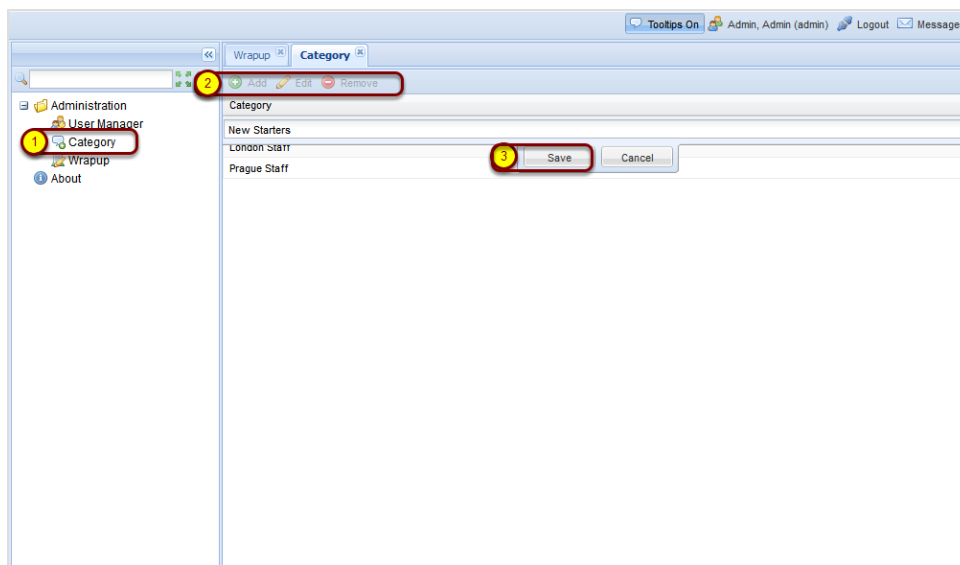


Figure 45: Category Management

Quality Manager Categories are used for classifying agent calls during evaluation. This allows you to search for particular groups such as new starters that need greater supervision.

1. Click **Category** to view, add and remove category records.
2. Use the **Add** and **Remove** buttons (if available, or double-clicking on an existing category to edit it).
3. Click save to save the new category.

Category names must be unique within the application.

## Wrapup Data

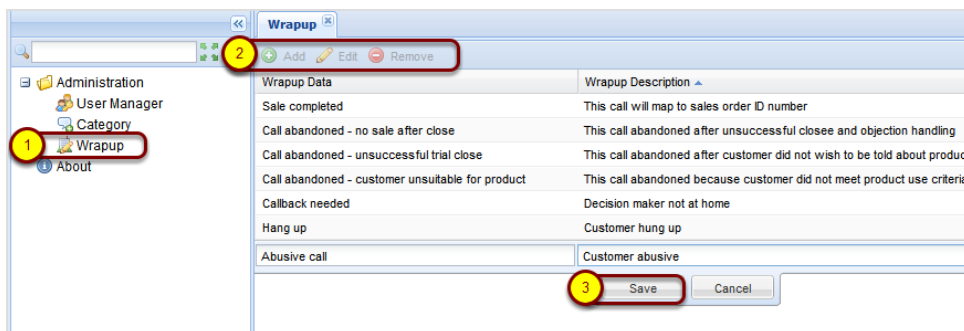


Figure 46: Wrapup Data

If Quality Manager has access to call wrapup data (text entered by an agent at the end of a call) then this data is available for further categorizing and filtering calls. This allows a manager to isolate all the successful calls or unsuccessful calls and treat them differently. For instance if an agent has a lot of calls with "no sale after close" then it can highlight how the agent needs to be trained. The **Wrapup** manager allows an administrator to manually enter wrapup data along with a description, enabling Quality Manager to recognize and filter this data when searching for agent calls.

1. Select **Wrapup**.
2. 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 Quality Manager.
3. Click **Save** or double click the wrapup Data to save.



## About Tab

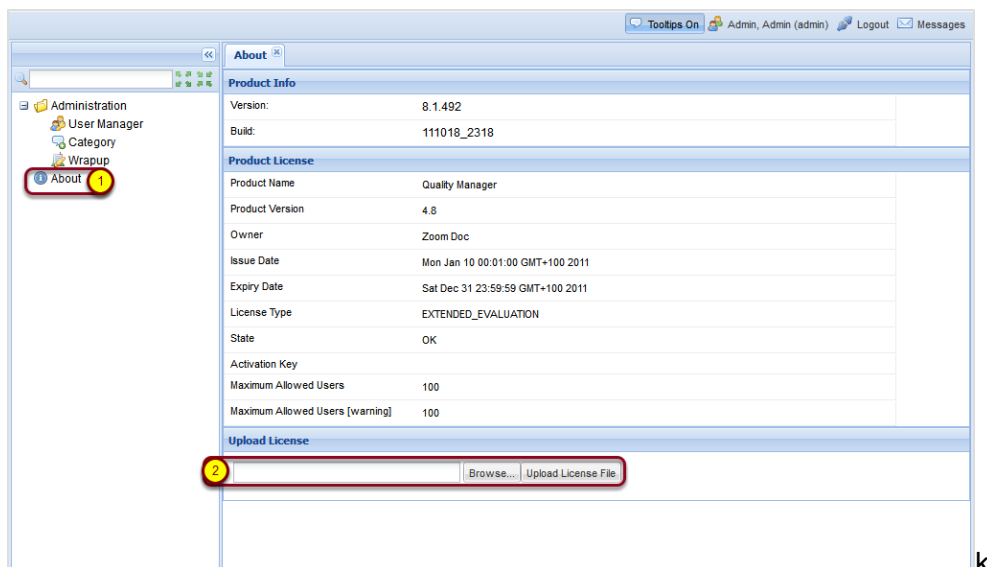


Figure 47: About Tab

1. The About tab displays information about the currently installed Quality Manager application, including version information, product license details and an upload interface to install/activate a new license.
2. A valid Quality Manager license is required immediately after Quality Manager installation in order to unlock the product (only a ScoreCARD administrator can log in to an unlicensed instance of Quality Manager). See the Quality Manager Administrator Guide for more details.

## Chapter

# 7

# Request Technical Support

### Technical Support from VARs

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

### Technical Support from Genesys

If you have purchased support directly from Genesys, please contact <http://genesyslab.com/support/contact> Genesys Technical Support.