

Genesys Quality Management 8.1

Quality Manager User Guide: Agent

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Chapter

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 PurposeAudienceDocument VersionTypographical ConventionsExpected KnowledgeBrowser Recommendations and Technical RequirementsInternet Explorer Security Settings:Technical Requirements for Playing Audio and Video Media

Document Purpose

This document describes the Quality Manager 8.1.500+ user interface and contains guides for tasks that an agent performs.

Audience

This document is intended for Call Center Agents.

Document Version

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

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



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 internet browser knowledge.

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.

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-plugindownload

- 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.

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.

- 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 Getting Started with Quality Manager

A brief introduction to Quality Manager, including how to:

- Access Genesys Quality Manager 8.1.50x
- Update your user profile
- · View system messages sent automatically to or from a user profile

This chapter contains the following sections:

Logging In to Quality Manager Prompt to change your password Retrieving a Forgotten Password Agent Quality Manager User Interface Editing Your Agent Profile Editing Your Agent Profile Language Other User Settings Viewing System Messages

Logging In to Quality Manager

	Log In
	Log In: (1)
	Password:
	3 Log In Forgot password? Clear
	Version 8.1
	©2002 - 2012 ZOOM International Genesys suite applications are covered by U.S. and Foreign Patents.
Loading Quality	

Figure 1: Logging In To Quality Manager

To Log in

Navigate to the Quality Managerapplication URL in a browser:

- 1. Type your username in the Log In: field
- 2. Type your password in the Password: field
- 3. Click Log In

If your password is not accepted click, **Clear** and type the password in the **Password** field again.

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. Please contact you administrator.

Prompt to change your password

If a password has passed its expiration date, you will be prompted to change the password. Choose a new password by typing the password in the **New Password** and **Repeat Password** fields.

Ch	oose a New Password
Your password	has expired. Please provide a new one.
Old Password:	•••••
New Password:	•••••
Repeat Password:	•••••
	Change and Continue Cancel

Figure 2: Choosing a New Password

Retrieving a Forgotten Password

	Log In
	Log In: Anne.Agent
	Password:
	Log 1 Forgot password? Clear
	Alert! Please enter the login of the user. A new password will be generated and sent to the e-mail account registered for this account Anne.Agent
Loading Quality M	Iana OK Cancel

Figure 3: Retrieving a Forgotten Password

- 1. To retrieve a forgotten password, click **Forgot Password?**. The **Alert!** dialog box displays.
- 2. Type the Quality Manager username in the field provided.
- 3. Click OK.

Quality Managersends a new password to the registered (for example, company) email account.

Important:

After requesting a new password, refresh the browser window before attempting to log in again.

Agent Quality Manager User Interface



Figure 4: Quality Manager User Interface

- 1. Click Evaluations) in the left menu. The Evaluation List tab opens.
- 2. **Tooltips** are enabled by default and show information boxes when the cursor hovers over certain Quality Manager features. To disable Tool tips click **Tooltips off** at the top right of the screen.
- 3. To view your user profile, click your user name.
- 4. To exit (log out of) the application click Logout.
- 5. To view all Quality Manager system messages sent to you click Messages.

Editing Your Agent Profile

		🔽 Tooltips Or 🎤 Bloggs, Joe (j.bloggs) 🎤 Logout 🖂 Messages
×	User Profile 🗷	
2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2	📀 Save 😢 Cancel	2
 	General	
	My Language:	English (US)
	Login ID:	j.bloggs
	Name:	Joe
	Surname:	Bloggs
	E-mail:	email@email.com
	Change Password	
	User Settings Records on a pag	e:
	Display On Startu	p:
x	<u> </u>	800::629 🤵

Figure 5: Viewing and Editing the Agent Profile

- 1. Click the button with the user name
- 2. A User Profile tab opens, enabling you to:
 - Select the language settings of the application
 - Change the password

Editing Your Agent Profile Language

		🖓 Tooltips On 🧬 Bl	loggs, Joe (j.bloggs) 🔊 Logout 🖂 Messages
*	User Profile	3	
	Save Sancel		
	General		
-	My Language:	English (US)	\sim $\left(1\right)$
	Login ID:	Česky	<u> </u>
	Name:	Dansk	
	Surname:	Deutsch	
	E-mail:	English English (US)	E
	Change Password	Español	
	User Settings	Française Latviešu	
	Records on a page	: Nederlands	
		- Polski	
	Dashboard	Portugues (Brasil)	
	Display On Startup	Română	
		Slovenski	T
		Clavanshi	-

Figure 6: Editing Your Agent Profile Language

To change languages settings:

- 1. Click on the **My Language** dropdown list and select the language from the list.
- 2. Click Save.
- 3. Click the X to close the User Profile tab.

You must log out of the application and log back in to view the language changes.

Important:

If the browser is not set to use the same language in menus and system messages, an occasional mixed-language alert message may appear (for example, when the browser is refreshed).

Changing Your Agent Password

		🔽 Tooltips On 📌 Bloggs, Joe (j.bloggs) 🚀 Logout 🖂 Messages
«	User Profile	
2 5 5 2 12 2 2 3 5 2 3 5 5 3 5 5 3 5 5 3 5 5 5 3 5 5 5 5 5 5	📀 Save 😢 Cancel	
 Image: Evaluations Image: About 	General	
	My Language:	English (US)
	Login ID:	j.bloggs
	Name:	Joe
	Surname:	Bloggs
	E-mail:	email@email.com
(1 Change Password	
	Choo	se a New Password
		···· 4
	5	Change and Continue Cancel

Figure 7: Changing your Agent Password

To change your password, if permitted or required to so by the password policy,

In the User Profile tab

- 1. Click Change Password. The Choose a New Password dialog opens.
- 2. Type your original password in the Old Password field,
- 3. Type the new password in the New Password field.
- 4. Type the new password again in the Repeat Password field.
- 5. Click Change and Continue to save the changes.
- 6. Click exit on the User Profile tab label to closer the User Profile tab

Important:

Your new password cannot be a password that you have used in the last four password changes.

Strong 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),
- at least one character an upper case letter (A-Z).

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

Please contact your administrator for details of settings.

Other User Settings

The User Settings section also contains the following parameters:

-	^	🔽 Tooltips On 🏕 Williamson, Clifton (clifton.williamson) 💉 Logout 🖂 Messa
er Profile	-3	
Save 2 ancel		
General		
My Language:	English (US)	
ogin ID:	clifton.williamson	
Name:	Clifton	
Surname:	Williamson	
E-mail:	clifton.williamson@zoomint.com	
Change Password	1	
User Settings —	-	
Records on a page	e:	
Dashboard		
Display On Startu	D '	1

Figure 8: Changing the number of Agent Records

Records on a page

- Type the number of rows to display on list screens, for example the Evaluation List . 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.
- 2. Click Save to update your user profile,
- 3. Close to close the tab

Dashboard

To display Widgets on startup (if there are any prepared) select the **Display on Startup** checkbox.

Viewing System Messages

	ד 🖓	ooltips On 🍰 agent_1, agent_1 (a	agent_1) 🎤 🚺	Messages
Ser Profile Messages		<u> </u>		
🔁 🖸 Close 🕞 Mark As Read 🗔 Mark As	s Unread 🛛 🔀 Delete	5 from	📑 to	📑 🔍 Search
4 N. To User -	From User	Subject	Date	
2 1 agent_1, agent_1	CcManager, CcManager	New evaluation created	9/26/12 5:05 PM	
4 4 Page1 of1 ▶ ▶ 🥭	6		D	isplaying 1 - 1 of 1
To User:				
Cc:				
Subject:				
Text:				

Figure 9: Viewing System Messages

1. Click **Messages** at the top right of the application window to open the messages tab.

When certain events, such as scheduling or completing an evaluation take place, the system generates system messages. You can view all of the messages that are to or from your user profile here.

- 2. Click an item to view.
- 3. The message details appear in the text fields at the bottom of the tab.
- 4. You can filter and sort the message list by clicking on column headings or,
- 5. Type a date range to search in, and click Search at the top right.
- 6. Click the refresh button to refresh the list.



Chapter



This chapter describes how to plan and use Evaluations.

This chapter contains the following sections:

Viewing Created Evaluations Sending Evaluation Feedback to the Evaluator Creating a Self-Evaluation Performing a Self-evaluation

Viewing Created Evaluations

					Tooltip	s On 🦽 Mel	drew, Victor (victor.m	eldrew) 省	🖋 Logout 🖂 Messages
Ev	aluat	tion Lis	st 🗷 Messages 🗵)						
	New	Evaluat	tion 澞 Evaluate	📃 Report 🚳 Mor	e Actions 🔹 🖂 Send Evalu	uation Feedba	k 📴 Expoi	rt to Spr		All
	N.	ID	Evaluator	Agent	Ques. Name	Period From	Period To	Score	Status	ast Modifie Parent II 🔬
	1	912	Meldrew, Victor	Meldrew, Victor	Call Quality (1.0)	Jul 12, 2011	Jul 12, 2011	0.0 %	Created	Jul 13, 2011 1
	2	911	Meldrew, Victor	Meldrew, Victor	Call Quality (1.0)	Jul 12, 2011	Jul 12, 2011	0.0 %	Created	Jul 13, 2011
	3	910	Meldrew, Victor	Meldrew, Victor	Call Quality (1.0)	Jul 12, 2011	Jul 12, 2011	0.0 %	Created	lul 13, 2011
	4	909	Meldrew, Victor	Meldrew, Victor	Call Quality (1.0)	Jul 12, 2011	Jul 12, 2011	0.0 %	Created	lul 13, 2011
	5	908	Meldrew, Victor	Meldrew, Victor	Call Quality (1.0)	Jul 12, 2011	Jul 12, 2011	0.0 %	Created	lul 13, 2011
_	_	-						_		
M	4	Page 1	of 1 🕨 🕅	2						Displaying 1 - 5 of 5

Figure 10: Viewing Created Evaluations

Existing evaluations display in the Evaluation List.

- 1. Newly created evaluations should be visible at the top of the list by default.
- 2. Filter the evaluations by status.
- 3. Use the forward and back shuffle controls to navigate through the pages of results.

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 <u>Performing an</u> Evaluation for more information.

New	Evaluat	ion 🚺 Evalu	iate 📃 Repo	ort 🚳 More Actio	ns 🔻		Send E	valuatio	n Feedback 📴 🗗	xport to Spreadsheet		Y	💊 Sea	rch Evalu
N.	ID	Evaluator	Agent	Ques. Name	Period F	Period T	Score	Status	Last Mo Parent IE		All			
1	51	CcManager,	Baxter, Janel	Call Quality (1.0)	Sep 29,	Sep 30,	12.0 %	Finish	Jul 12, 2	Search Criteria	Created			
2	52	CcManager,	Baxter, Janel	Call Quality (1.0)	Sep 28,	Sep 29,	9.0 %	Finish	Jul 12, 2		In Progres	3		
з	53	CcManager,	Baxter, Janel	Call Quality (1.0)	Sep 27,	Sep 28,	90.0 %	Finish	Jul 12, 2	Evaluator:	Finished			~
4	54	CcManager,	Baxter, Janel	Call Quality (1.0)	Sep 26,	Sep 27,	59.0 %	Finish	Jul 12, 2	Period:	Select Pe	riod		*
5	55	CcManager,	Baxter, Janel	Call Quality (1.0)	Sep 25,	Sep 26,	59.0 %	Finish	Jul 12, 2	From	То			
6	336	Woodard, Je	Baxter, Janel	Call Quality (1.0)	Sep 29,	Sep 30,	12.0 %	Finish	Jul 12, 2					*
7	337	Woodard, Je	Baxter, Janel	Call Quality (1.0)	Sep 28,	Sep 29,	55.0 %	Finish	Jul 12, 2	Group:	Select Gr			
8	338	Woodard, Je	Baxter, Janel	Call Quality (1.0)	Sep 27,	Sep 28,	32.0 %	Finish	Jul 12, 1	Agent:	Select Ag	lent		~
9	339	Woodard, Je	Baxter, Janel	Call Quality (1.0)	Sep 26,	Sep 27,	44.0 %	Finish	Jul 12, 1	Ticket Number:		Mail Trackin	g	
10	340	Woodard, Je	Baxter, Janel	Call Quality (1.0)	Sep 25,	Sep 26,	40.0 %	Finish	Jul 12, 2			Number:		
11				Call Quality (1.0)						Category:	Select Ca	tegory		~
12				Call Quality (1.0)						Media Direction:	Select M	edia Direction		*
13				Call Quality (1.0)						Wrapup:	Select W	ranun		~
14				Call Quality (1.0)						Ouestionnaire:		teraction Questio	annaire	~
15	395	Wiggins, Ruc	Baxter, Janel	Call Quality (1.0)	Sep 25,	Sep 26,	79.0 %	Finish	Jul 12, 2				Jinalie	
										Score:	From	То		
										ID:	From	То		
												Sea	irch	Clear

Figure 11: Showing Evaluations Having a Specific Status Drop Down

You can sort the columns by clicking on a column heading, or show evaluations with a specific status via the drop down list, in between **Export to Spreadsheet** and **Search Evaluations**.

The options are:

- All
- Created
- In Progress
- Finished

Sending Evaluation Feedback to the Evaluator

Agents can send feedback on their evaluations using the **Send Evaluation Feedback** button on the toolbar of the Evaluation List. This feature is particularly important when a contact center has a policy that supports agent appeals against their evaluation result. Only the users that have been evaluated have access to this button.

To send evaluation feedback as an agent:

Navigate to the Evaluation List from the left hand navigation tree.

Ev	alua	tion Lis	t 🗷										
	Repo	rt 🎲	More Actions -			⊵	Send Evaluation	Feedback	🗭 Export Sp	areadsheet All		🕶 🔍 Sea	irch
	Ν.	D	Evaluator	Agent	Ques. Name	Period From	Period To	Score	Status	Last Modified	Parent ID		~
	1	920	Holland, Bethany	Bryant, Dana	Call Quality (1.0)	Sep 25, 2011	Sep 26, 2011	29.8 %	Finished	Mar 16, 2012 1:28:39 PM			
	2	919	Holland, Bethany	Bryant, Dana	Call Quality (1.0)	Sep 26, 2011	Sep 27, 2011	77.1 %	Finished	Mar 16, 2012 1:28:39 PM			
	3	918	Holland, Bethany	Bryant, Dana	Call Quality (1.0)	Sep 27, 2011	Sep 28, 2011	86.0 %	Finished	Mar 16, 2012 1:28:38 PM			
	4	917	Holland, Bethany	Bryant, Dana	Call Quality (1.0)	Sep 28, 2011	Sep 29, 2011	47.1 %	Finished	Mar 16, 2012 1:28:38 PM			
	5	916	Holland, Bethany	Bryant, Dana	Call Quality (1.0)	Sep 29, 2011	Sep 30, 2011	39.1 %	Finished	Mar 16, 2012 1:28:38 PM			
	6	850	Spencer, Quincy	Bryant, Dana	Call Quality (1.0)	Sep 25, 2011	Sep 26, 2011	77.1 %	Finished	Mar 16, 2012 1:28:33 PM			
	7	849	Spencer, Quincy	Bryant, Dana	Call Quality (1.0)	Sep 26, 2011	Sep 27, 2011	39.1 %	Finished	Mar 16, 2012 1:28:33 PM			
	8	848	Spencer, Quincy	Bryant, Dana	Call Quality (1.0)	Sep 27, 2011	Sep 28, 2011	47.1 %	Finished	Mar 16, 2012 1:28:33 PM			
	9	847	Spencer, Quincy	Bryant, Dana	Call Quality (1.0)	Sep 28, 2011	Sep 29, 2011	19.8 %	Finished	Mar 16, 2012 1:28:33 PM			

Figure 12: Sending Evaluation Feedback Button

- 1. Click on the evaluation to send feedback about, which must have the **Finished** status.
- 2. Click the **Send Evaluation Feedback** button on the toolbar.

The message entry window opens.

Ev	alua	tion Lis	t×	Send Evaluation Feedback					
	Repo	ort 🎯	More Actions -	Evaluation ID: 919 (1)	prea	dsheet	All	🗸 🔍 Se	ear
	N.	ID	Evaluator		atus	L	ast Modified	Parent ID	
	1	920	Holland, Bethany	Please can we meet in person regarding this evaluation? I need to give you some background information which could affect the evaluation result. Thanks.	ished	d N	lar 16, 2012 1:28:39 PM		
7	2	919	Holland, Bethany		ished	d N	lar 16, 2012 1:28:39 PM		
	3	918	Holland, Bethany		ished	d N	lar 16, 2012 1:28:38 PM		
	4	917	Holland, Bethany		ished	d N	lar 16, 2012 1:28:38 PM		
	5	916	Holland, Bethany	I 9	ished	d N	lar 16, 2012 1:28:38 PM		
	6	850	Spencer, Quincy		ished	d N	lar 16, 2012 1:28:33 PM		
	7	849	Spencer, Quincy		ished	a N	lar 16, 2012 1:28:33 PM		
	8	848	Spencer, Quincy		ished	н м	lar 16, 2012 1:28:33 PM		
	9	847	Spencer, Quincy		ished	d N	lar 16, 2012 1:28:33 PM		
	10	846	Spencer, Quincy	3 Send]	ished	d N	lar 16, 2012 1:28:33 PM		
1	11	300	CcManager, CcManage	i bryani, bana Cail Quality (1.0) 36p 23, 2011 36p 20, 2011 14.7 /6 11	nished	d N	lar 16, 2012 1:27:53 PM		

Figure 13: Sending Evaluation Feedback Message

1. Type the evaluation ID number first to clarify which evaluation the message is related to.

- 2. Type the remainder of the message to the evaluator.
- 3. Click Send.

Ev	alua	tion List	t 🗷								
	Repo	rt 🎯 N	lore Actions -			🖂 S	end Evaluation Fee	dback 達 I	Export Spread	dsheet All	🗙 🔍 Searc
	N.	D	Evaluator	Agent	Ques. Name	Period From	Period To	Score	Status	Last Modified	Parent ID
	1	920	Holland, Bethany	Bryant, Dana	Call Quality (1.0)	Sep 25, 2011	Sep 26, 2011	29.8 %	Finished	Mar 16, 2012 1:28:39 PM	-
	2	919	Holland, Bethany	Bryant, Dana	Call Quality (1.0)	Sep 26, 2011	Sep 27, 2011	77.1 %	Finished	Mar 16, 2012 1:28:39 PM	
	з	918	Holland, Bethany	Bryant, Dana	Call Quality (1.0)	Sep 27, 2011	Sep 28, 2011	86.0 %	Finished	Mar 16, 2012 1:28:38 PM	
	4	917	Holland, Bethany	Bryant, Dana	Call Quality (1.0)	Sep 28, 2011	Sep 29, 2011	47.1 %	Finished	Mar 16, 2012 1:28:38 PM	=
	5	916	Holland, Bethany	Bryant, Dana	Call Quality (1.0)	Sep 29, 2011	Sep 30, 2011	39.1 %	Finished	Mar 16, 2012 1:28:38 PM	-
	6	850	Spencer, Quincy	Bryant, Dana	Call Quality (1.0)	Sep 25, 2011	Sep 26, 2011	77.1 %	Finished	Mar 16, 2012 1:28:33 PM	
	7	849	Spencer, Quincy	Bryant, Dana	Call Quality (1.0)	Sep 26, 2011	Sep 27, 2011	39.1 %	Finished	Mar 16, 2012 1:28:33 PM	
	8	848	Spencer, Quincy	Bryant, Dana	Call Quality (1.0)	Sep 27, 2011	Sep 28, 2011	47.1 %	Finished	Mar 16, 2012 1:28:33 PM	
	9	847	Spencer, Quincy	Bryant, Dana	Call Quality (1.0)	Sep 28, 2011	Sep 29, 2011	19.8 %	Finished	Ma	
	10	846	Spencer, Quincy	Bryant, Dana	Call Quality (1.0)	Sep 29, 2011	Sep 30, 2011	31.8 %	Finished	Ma Send Message Message was sent	successfully
	11	300	CcManager, CcManager	Bryant, Dana	Call Quality (1.0)	Sep 25, 2011	Sep 26, 2011	14.7 %	Finished	Ma	successiony
14	4	Page 1	of 1 🕨 🕅 ಿ								

Figure 14: Sending Evaluation Feedback Message Sent

A notification appears in the bottom right hand corner of the browser window to confirm that the message has been sent to the evaluator.

The message will now appear in the evaluator's system message inbox. For more information about how the evaluator retrieves the message, please see <u>Viewing</u> <u>System Messages</u>.

Creating a Self-Evaluation

This section gives a short tutorial to show how to create a new self-evaluation in Genesys Quality Manager. Self evaluations are only available if the system administrator has enabled the feature.

Opening the Evaluation Planner

					🔽 Tooltips On	🝰 Williamso	n, Clifton (c	lifton.wil	liamson) 🔊	Logout 🖂	Messag	jes
«	Evaluation Planner	24										
Q	Oreate Evaluations	Nave As	Template	🌛 Templates	Load Template	- Close	3					^
Evaluations	Period:			▼ Fr	rom:		•	To:				
Evaluation Planner About	Questionnaire:						~	Intera	ction Count:			
- Abbui	Apply To Statistics:											
	Basic Add Sub-Crit	eria										
	Group Evaluation	O A	Agent Evalua	ition	Self-Evaluation							
	Evaluator:	Williamso	on, Clifton (o	lifton.william	son)							
	Evaluated Agent:	Williamso	on, Clifton (o	lifton.william	son)							-
	Wrapup:			✓ M	ledia Direction:	In/Outbou	nd 🎽					-
	Add Media Type	Remove	🔒 Allow F	Replacement	Allow Selection	Allow rand	lom calls se	lection	O Add Inte	raction		
	Media Type	Min. Count	N. Start		End	Length	From	То	Туре			
												-
												-
	•		1	1							•	

Figure 15: Opening the Evaluation Planner

To schedule a new evaluation:

- 1. Click **Evaluations** in the left hand menu.
- 2. Select the Evaluation Planner.
- 3. If you wish to close the new evaluation without planning evaluations, click **Close**,
- 4. or click the tab close icon to exit the Evaluation Planner.

Specifying a Self-evaluation Period and Questionnaire

		🔽 Toottips On 🛃 Williamson, Clifton (clifton.williamson) 🍠 Logout 🖂 Messages
~	Evaluation Planner	
2 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5	O Create Evaluations	🔜 Save As Template 🤿 Templates 👼 Load Template 🕶 🔇 Close
Constraints Constrain	Period: Questionnaire: Apply To Statistics: Basic Add Sub-Onte Group Evaluation Evaluator: Evaluated Agent: Wrapup: Add Media Type	Current Week V From: 7/10/11 To: 7/16/11 C Call Quality (1.0) V Interaction Count: 1
	· · · · · · · · · · · · · · · · · · ·	

Figure 16: Specifying a Self-evaluation Period and Questionnaire

- Specify the evaluation Period: using the drop down list for Period: (for instance select Current Week) and the From and To dates will appear. Alternatively, select specific dates using the Calendars for From and Toor by typing dates into the From and To fields (date must be in the format MM/DD/YY).
- 2. The **Questionnaire** drop down list enables you to pick an available questionnaire to use for the evaluation.
- 3. Set the Interaction Count . This 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. You can leave this empty for now, and fill in a value after completing the Media Type section.

Filter Interactions by Wrapup or Media Direction (Optional)

	🔽 Toottips On 🧬 Williamson, Clifton (clifton.williamson) 🧬 Logout 🖂 Mess	ages
~	Evaluation Planner 🛞	
3 5 8 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2	🛇 Create Evaluations 😡 Save As Template 🤯 Templates 👼 Load Template 🔹 😢 Close	
 Evaluations Evaluation List Evaluation Planner About 	Create Evaluations Current Week From: 7/10/11 To: 7/16/11 Questionnaire: Call Quality (1.0) Apply To Statistics: Bassic Add Sub-Oftena Corup Evaluation Agent Evaluation Evaluation Evaluation Cifton (clifton williamson) Evaluated Agent: Corup Evaluation Writemer, Clifton (clifton williamson) Corup Evaluation Evaluated Agent: Corup Evaluation Co	
		-

Figure 17: Filter Interactions by Using Wrapup or Media Direction

You can filter interactions (for example, calls) by selecting:

- 1. A Wrapup value (if one is available).
- 2. A filter on the Media Direction (incoming calls or outgoing calls only, internal only, or all calls).

Using Evaluation Templates

	🔽 Tooltips On 🇬 Williamson, Clifton (clifton.williamson) 🚀 Logout 🖂 Messages
Evaluation Planne	r 🛞
Create Evalua	1 🛃 Save As Template 🤯 Templates 🤿 Load Template 🛛 🕄 Close
Period:	Current Week 💙 From: 7/10/11 🖻 To: 7/16/11 🖻
Questionnaire:	Call Quality (1.0) Interaction Count: 1
Apply To Statistics:	
Basic Add Sub-C	Viteria
Group Evaluation	
Evaluator:	Save Template
Evaluated Agent:	Name: 2
Wrapup:	Type: <u>3 Private Shared</u> Outbound Y
Add Media Ty	4 Save Cancel ow random calls selection O Add Interaction
Media Type	ngth From To Type

Figure 18: Using Evaluation Templates (Optional)

- 1. Click Save As Template to save the evaluation settings for re-use.
- 2. Enter a unique name for this template.
- 3. Specify if the template will be for your use only by selecting **Private**, or shared with other evaluation creators by selecting **Shared**.
- 4. Click **Save** to save the changes.

Agent Adding Evaluation Media Types

Evaluation Planner	
Oreate Evaluations	🔜 Save As Template 👳 Templates 👼 Load Template 🝷 😫 Close
Period:	Current Week From: 7/10/11 To: 7/16/11
Questionnaire:	Call Quality (1.0) v Interaction Count: 1
Apply To Statistics:	
Basic Add Sub-Crite	ria
Group Evaluation	Agent Evaluation Self-Evaluation
Evaluator:	Williamson, Clifton (clifton.williamson)
Evaluated Agent:	Williamson, Clifton (difton.williamson)
Wrapup:	Media Direction: In/Outbound
Add Media Type	1 emove 🖪 Allow Replacement 🗟 Allow Selection 🖗 Allow random calls selection 😳 Add Interaction
Media Type 2	Min. Count N. Start End Length From To Type
Call	1 3
Save 4	lancel

Figure 19: Add Evaluation Media Types

On the **Basic** tab, specify the types of media to be evaluated.

The **Allow Selection** and **Allow Replacement** buttons enable sampled calls to be selected or replaced by the evaluator during an evaluation. By default these features are enabled, but clicking either button will disable (restrict) the functionality available during an evaluation.

- 1. Click Add Media Type to add a new media type.
- 2. The media types created within GQM are:
 - 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). This media must be accessed outside of Quality Manager.
- The Min. Count field is the minimum number of media records that should be sampled for this type. Unless Sub-Criteria are 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.
- 4. To save click Save.

Planning the Evaluation

	🔽 Toottips On 🖉 Meldrew, Victor (victor.meldrew) 🦻 L 😗 🖾 Message	s
Evaluation List 🗵 Me	ssages 🕷 Evaluation Planner 🛞	
Create Evaluations	🚺 e As Template 👳 Templates 😞 Load Template 🔹 😫 Close	•
Period:	Yesterday From: 7/12/11 To: 7/12/11	
Questionnaire:	Call Quality (1.0) Interaction Count: 1	
Apply To Statistics:		
Basic Add Sub-Crite	eria	
Group Evaluation	Agent Evaluation Self-Evaluation	
Evaluator:	Meldrew, Victor (victor.meldrew)	
Evaluated Agent:	Meldrew, Victor (victor.meldrew)	E
Wrapup:	1 evaluation(s) created	-
Add Media Type	Remove	
Media Type 🔺	Min. Count N Count N To Type	
Call	1	
		+
•	III. De la constante de la con	

Figure 20: Planning the Evaluation

After specifying the criteria for determining agent calls for evaluation:

- Click Create Evaluation at the top of the Evaluation Planner page to create the evaluation. If any parameters or options are not correct during creation, a validation error will help identify the cause of the issue; otherwise a small message will confirm that the evaluation has been scheduled.
- 2. Click OK.
- 3. The Planner screen closes and a confirmation message is sent (visible in the Messages list).

Important:

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

Add Sub-Criteria

						🖓 Tooltips On 🖉	Meldrew, Victor (victor.meldrew) 🍠 L	.ogout 🖂 Messages
»	Evaluation List 🗵 Eva	luation Planner 🛞							
	Create Evaluations	ᡖ Save As Template 🧧	👌 Templates 🛛 😽 Lo	oad Template 🔻	🔀 Close				
	Period:	Yesterday	Y From:		7/13/11	To:	7/13/11	_	
	Questionnaire:	Call Quality (1.0)			*	Interaction Count:	1	3	
	Apply To Statistics:							-	
	Basic Sub-Criteria 1	Add Sub-Criteria	1						
6	🔾 🛈 Add Media Type 🄇	Remove	-						
	Media Type	rumove		Min. Count					
					4				
	Period:		Y From:		7/13/11	To:	7/13/11	From:	· · · ·
	Weekdays:	Sunday V Monda	ay 📝 Tuesday	Wednesda	y 🔽 Thursday 🛽	🛚 Friday 🛛 🗹 Saturday	r		I
	Wrapup:		✓ Media Di	rection:	In/Outbound	Min. Length:	0:00	Max. Length:	0:00
	Description:		Matching) Part:	contains 💌				
	Add External Data	Remove							
	External Data	Comparison	Value Type	Value	Logical Opera	tor			
5	Deadline:		Remind	Evaluator?:		Days To Deadline:)
	•								•

Figure 21: Add Sub-Criteria (Optional)

- 1. Optionally, more advanced filtering criteria can be specified by clicking the **Add Sub-Criteria** tab.
- 2. Click Add Media Type
- 3. Specify an **Interaction count**. Ensure that the interaction count equals the sum of the Basic and Subcriteria media types defined.
- 4. 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**). Specify how many days before the deadline the message should be sent (**Days to Deadline**).

Important:

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.

Searching for Evaluations

	New	Evalua	tion 🛃 Evalu	ate 💼 Re-Op	en 💼 Re-Evalua	e 🛛 🙀 Change parameters	Search Evaluations	📃 Report 🛛 📴 Export to	o Spreadshe	et 🖂 Send Age	nt's Evaluation Fe
1	N.		Evaluator	Agent	Ques. Name	Period Fi Period Ti Score					2
	1	1864	Barker, Dean	i Barker, Deani	Call Quality (1.0)	Oct 17, 1 Oct 23, 1 0.0 %	Create Oct 20,1	Search Criteria			
								Evaluator:	Select Ev	aluator	*
								Period:	Current V	Veek	~
								10/17/10 📑	10/23/1	0 🖸	
								Group:	Select Gr	oup	*
								Agent:	Barker, D	eanna (deanna.t	oarker) 🎽
							G	Ticket Number:		Mail Tracking	Number:
							· · · ·	Category:	Select Ca	itegory	*
								Media Direction:	Select Me	edia Direction	~
								Wrapup:	Select W	rapup	*
								Questionnaire:	Select In	teraction Questi	onnaire 🍸
								Score:	From	То	
								ID:	From	То	
										Sear	ch Clea

Figure 22: Searching for Evaluations

Evaluations can be also be filtered using the search dialog.

To search for an evaluation:

- 1. Click >> on the left hand side to hide the left hand menu bar.
- 2. Click >> at the top right of the Evaluation List tab (see screenshot) to reveal the search dialog.
- 3. Set as few or many search fields as necessary.
- 4. 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.

Performing a Self-evaluation

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

Opening the Scheduled Evaluation

Ev	alua	tion Li	st 🕱 Messages 🖲							
	New	Evalu	2 🛃 Evaluate	📃 Report 🎯 Mo	re Actions 👻 🖂 Send I	Evaluation Feedba	ck 📴 Expo	t to Spr	eadsheet	
]	N.	ID	Evaluator	Agent	Ques. Name	Period From	Period To	Score	Status	Last Modifie Pa
	1	912	Meldrew, Victor	Meldrew, Victor	Call Quality (1.0)	Jul 12, 2011	Jul 12, 2011	0.0 %	Created	Jul 13, 2011
1	2	911	Meldrew, Victor	Meldrew, Victor	Call Quality (1.0)	Jul 12, 2011	Jul 12, 2011	0.0 %	Created	Jul 13, 2011
1	3	910	Meldrew, Victor	Meldrew, Victor	Call Quality (1.0)	Jul 12, 2011	Jul 12, 2011	0.0 %	Created	Jul 13, 2011
]	4	909	Meldrew, Victor	Meldrew, Victor	Call Quality (1.0)	Jul 12, 2011	Jul 12, 2011	0.0 %	Created	Jul 13, 2011
	5	908	Meldrew, Victor	Meldrew, Victor	Call Quality (1.0)	Jul 12, 2011	Jul 12, 2011	0.0 %	Created	Jul 13, 2011

Figure 23: Opening the Scheduled Evaluation

To perform an evaluation:

- 1. Click Evaluation List.
- 2. Select the check box for the appropriate evaluation or click on the evaluation.
- 3. Click Evaluate.
- 4. If necessary click to open the Search Evaluations menu.

It is only possible to evaluate evaluations that have a status of **Created** or **In Progress**. Evaluations that have a **Finished** status can be re-evaluated from the **More Actions** dropdown on the toolbar.

The Evaluator Screen

		S Toottips On	Aeldrew, Victor (victor.meldrew)	Logout 🖂 Messages
Evaluation List Messages Evaluator Form (91	1) 🗷			
1 R Add Specific Interaction(s) 🕑 Get Random Interaction	ns Remove Selected	Report 🖂 Send Feedback Nov	v 🔲 Feedback History 🕕 Show Para	meters 2 >>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>
Questionnaire: Call Quality (1.0)	gent: Meldrew, Victor	Evaluator: Meldrew, Victor	Evaluation Fleminod: 7/12/11 To: 7/1	2/11
N. Status Start End	Length From	То Туре	Current Rating	
Comments				
			Total Rating 0.0 %	
Feedback				*
Evaluation Feedback [things to improve]		Evaluation Feedback [things	to maintain]	

Figure 24: The Evaluator Screen

After starting an evaluation, the evaluator form displays. To close the form without saving changes, click **Close** on the toolbar or tab.

- 1. You can Add Specific Interactions.
- 2. Or Get Random interactions.
- 3. Some buttons mentioned in this tutorial may not be visible on smaller screens and can be accessed by clicking >> on the right hand side.

If interactions were not specified during the scheduling of the evaluation, the new evaluation will not have interactions (media records) associated with it.

Adding Random Media for Evaluation

🖓 Toottips Off 🍰 Barker, Deanna (deanna.barker) 🚀 Logout 🖂 Messages											
Evaluation	Evaluation List 🖲 Evaluator Form (1869) 🖲										
🚯 Add Specific Interaction 1 🕅 Get Random Interactions 🔲 Show Parameters 🖂 Send Feedback Now 💷 Feedback History 💦 👋											
Questionnaire: Call Quality (Agent: Barker, Deanna Evaluator: Barker, Deanna Evaluation Period: From: 10/17/10 To: 10/23/10											
🕅 N.	Status	Start	End Length	From	То	Туре	Current Rating				
1	۰	10/21/10 10:01 AM	10/2 00:00:04	5656	5655		0.0 %	Quick			
2	۰	10/22/10 1:29 PM	10/2 00:00:19	5656	5655		😫 🛃 ^{0.0} 🚺	Quick			
						1	t	1			
								<u></u>			
<						0					
Commen	ts					Total Rating	0.0 %				

Figure 25: Adding Random Media for Evaluation

To add random media for evaluation:

- 1. Click **Add Random Interactions** to add media records for the evaluation. This will retrieve the minimum number of appropriate agent calls, as specified when scheduling the evaluation.
- 2. Click the Play button to play the selected media with the integrated media player.
- 3. Click the Grade button to open the evaluation questionnaire for the media record.
- 4. 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.
- 5. Clicking **Quick Note** enables the evaluator to leave a brief snippet of text for each media record, without having to open the grading form. This could be used for quickly marking records for later review.

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 Add Random Interactions function while performing an evaluation, Quality Manager only selects interactions that have not yet been used for evaluation.

Grading a Media Record

Questionnaire: Mail Tracking Numbe	Call Quality (1.0) 121456	Agent: Ticket Numbe	Barker, Deanna Br 21564	Evaluation period: Category	From: 10/17/10 To: 10/ select a category	23/1
Question				Answer		Note
■ Opening call, 40.	0 % (5 items)					
Greeting, introduci	ing the agent and the company (20.0 %)		Good (100.0 9	%) 👻	Ø
Detection and Veri	ification of a competent person (2	20.0 %)		Average (50.0	%) 🗸	
Customer?s Conser	nt to interview him/her (time, top	pic) (20.0 %)		Good (100.0 9	%) 🗸	Ø
Company Presenta	tion (20.0 %)			Average (50.0	v)	Ø
Switching to the n	natter of the call (20.0 %)			Good (100.0 %	%) 💌	Ø
internal Note			_	Play 10:01:26 10:01 💙 To	otal Rating 83.0 %	
I think I need to un this mean?	derstand the policy on verifying a	competent person. What does				

Figure 26: Grading a Media Record

To grade a media record, click the Evaluate icon for that record. A form will open, and (if the media type is a call) the media will begin to play.

- Update the Mail Tracking Number, Ticket Number, and Category as required.
- 2. The questionnaire associated with the evaluation displays in a small window on the form. Scroll down in the window (if necessary) to view all of the questions. Select a suitable answer for each question, stopping and replaying the media as necessary. All questions must be answered for all media records present in the evaluation before the evaluation can be marked as complete.
- The Internal Note text field can be used for keeping notes about a media record that are only visible to you.
- 4. The Feedback Panel contains two text fields that can be seen by anyone who reviews the evaluation report. Things To Maintain can be used to keep a list of points illustrating areas of good performance, whereas any areas for improvement should be noted in the Things To Improve field.
- 5. Click **Save** at the top of the grading form to keep all modifications made to the form fields. The grading session can be saved and returned to at a later time. The Close button closes the grading form.
- 6. Click >> to expand the screen view if necessary.

Completing the Evaluation

									Ӯ Toottig	os Off 🛛 🛃 Barker	Deanna (dear	ina.barker) 🔊 Log	out 🖂 Messages
»	Eva	luation	List 🗵	Evaluator Form	(1869) 🗷								(1)
	1	vdd Sp	ecific In	teraction(s) 📑 Get	Random Interac	tions 🔲 Show P	arameters	Send F	eedback Now 🔲 Feedbac	k History 🥥 Rem	nove Selected	📙 Clear All Interac	tions 🐱
	Que	estion	naire: (Call Quality (1.0)		Agent: Barker, I	Deanna	Evalu	iator: Barker, Deanna	Evaluation	Period: Fron	n: 10/17 📃 Repor	t
	V	N.	Status	Start	End		Length	From	То	Туре		Curre Comp	
	V	1	0	10/21/10 10:01 AM	10/21/10 10:01	АМ	00:00:04	5656	5655		8	83.0 😫 Close	
												(3)	
	Corr	nment	ts							Total Rat	ina		
										Total Nat	ing	4 83.0 %	
	Feed	lback											*
	Eva	luatio	n Feed	pack (things to imp	rove]				Evaluation Feedback [th	nings to maintain]		

Figure 27: Completing the Evaluation

Once the media records have been fully graded, the evaluation may be marked as completed.

Important:

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

- 1. Click >> to expand right.
- To complete the evaluation and exit this tab, click Complete on the toolbar (the button may be hidden when displayed in a small browser window - see hint in the second step of this tutorial). If all media record questionnaires have been fully answered, Quality Manager marks the evaluation as Finished.
- 3. Shows the rating for the media questionnaire.
- 4. Shows the total rating for all media.

The completed evaluation can be opened from the evaluation list in read-only mode for review, printing, or to create a report.

Re-Open an Evaluation

	Nev	/ 💼 Grade	Rep 2	Č3	More Actions *	🖂 Send Agent's Evalu	ation Feedback 🛛 📴 E	Export to Spread	sheet All		v Q	Search Evaluat
] N.	ID	Evaluator		Reevaluate	Ques. Name	Period From	Period To	Score	Status	Last Modified	Parent ID
V	(1	949	Buck, Ja	٢	Reopen	Call Quality (1.0)	Jan 23, 2011	Jan 29, 2011	74.0 %	Finished	Jan 27, 2011 1:	
		767	Buck, Jake	_		Call Quality (1.0)	Sep 25, 2010	Sep 26, 2010	57.0 %	Finished	Jan 25, 2011 1:	
	3	766	Buck, Jake	1	Include in Statistics	Call Quality (1.0)	Sep 26, 2010	Sep 27, 2010	70.0 %	Finished	Jan 25, 2011 1:	
	4	765	Buck, Jake	1	Reveal Results to Agent	Call Quality (1.0)	Sep 27, 2010	Sep 28, 2010	70.0 %	Finished	Jan 25, 2011 1:	
	5	764	Buck, Jake		Delete	Call Quality (1.0)	Sep 28, 2010	Sep 29, 2010	7.0 %	Finished	Jan 25, 2011 1:	
	6	763	Buck, Jake		Barker, Deanna	Call Quality (1.0)	Sep 29, 2010	Sep 30, 2010	64.0 %	Finished	Jan 25, 2011 1:	
] 7	762	Buck, Jake		Guy, Ward	Call Quality (1.0)	Sep 25, 2010	Sep 26, 2010	2.0 %	Finished	Jan 25, 2011 1:	
	8	761	Buck, Jake		Guy, Ward	Call Quality (1.0)	Sep 26, 2010	Sep 27, 2010	40.0 %	Finished	Jan 25, 2011 1:	
	9	760	Buck, Jake		Guy, Ward	Call Quality (1.0)	Sep 27, 2010	Sep 28, 2010	90.0 %	Finished	Jan 25, 2011 1:	
	10	759	Buck, Jake		Guy, Ward	Call Quality (1.0)	Sep 28, 2010	Sep 29, 2010	2.0 %	Finished	Jan 25, 2011 1:	
	11	758	Buck, Jake		Guy, Ward	Call Quality (1.0)	Sep 29, 2010	Sep 30, 2010	49.0 %	Finished	Jan 25, 2011 1:	
	12	757	Buck, Jake		Cortez, Patricia	Call Quality (1.0)	Sep 25, 2010	Sep 26, 2010	25.0 %	Finished	Jan 25, 2011 1:	
	13	756	Buck, Jake		Cortez, Patricia	Call Quality (1.0)	Sep 26, 2010	Sep 27, 2010	87.0 %	Finished	Jan 25, 2011 1:	
	14	755	Buck, Jake		Cortez, Patricia	Call Quality (1.0)	Sep 27, 2010	Sep 28, 2010	45.0 %	Finished	Jan 25, 2011 1:	
	15	754	Buck, Jake		Cortez, Patricia	Call Quality (1.0)	Sep 28, 2010	Sep 29, 2010	87.0 %	Finished	Jan 25, 2011 1:	
	16	753	Buck, Jake		Cortez, Patricia	Call Quality (1.0)	Sep 29, 2010	Sep 30, 2010	19.0 %	Finished	Jan 25, 2011 1:	
	17	752	Buck, Jake		Ochoa, Marco	Call Quality (1.0)	Sep 25, 2010	Sep 26, 2010	57.0 %	Finished	Jan 25, 2011 1:	
	18	751	Buck, Jake		Ochoa, Marco	Call Quality (1.0)	Sep 26, 2010	Sep 27, 2010	49.0 %	Finished	Jan 25, 2011 1:	
	19	750	Buck, Jake		Ochoa, Marco	Call Quality (1.0)	Sep 27, 2010	Sep 28, 2010	51.0 %	Finished	Jan 25, 2011 1:	
E	20	749	Buck, Jake		Ochoa, Marco	Call Quality (1.0)	Sep 28, 2010	Sep 29, 2010	83.0 %	Finished	Jan 25, 2011 1:	

Figure 28: Re-Open an Evaluation

After an evaluation is marked as complete, it is assigned the **Finished** status. **Finished** evaluations cannot be opened again to edit scores unless the custom **Reopen evaluations** permission has been assigned to the user's role.

To reopen an evaluation:

- 1. Select an evaluation with the status **Finished**.
- 2. Click More actions.
- Click Reopen from the dropdown. The status of the Evaluation becomes In Progress.

Important:

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.

Using the Evaluation Detail Report

The Evaluation Detail report allows users to access information about reviews, and view or listen to the interactions that are evaluated.

To open the Evaluation Detail Report:

	«	E	valua	tion List	×							
•	5 8 9 9 P		New	Evaluatio	n 🕼 Eval 3	Report 谢 Mo	re Actions 🔹 🖂 Send Ev	aluation Feedback 🍺 E	xport to S	preadsheet	All	
Evaluations			N.	ID	Evaluator	Agent	Ques. Name	Period Fror Period To	Score	Status	Last Modifie Pa	arent ID
Evaluation List Constraints Evaluation Planner About			1	395	Wiggins, Rudy	Baxter, Janelle	Call Quality (1.0)	Sep 25, 20 Sep 26, 20	79.0 %	Finished	Jul 12, 201 [.]	
	er		2	394	Wiggins, Rudy	Baxter, Janelle	Call Quality (1.0)	Sep 26, 20 Sep 27, 20	52.0 %	Finished	Jul 12, 201 [.]	
			3	393	Wiggins, Rudy	Baxter, Janelle	Call Quality (1.0)	Sep 27, 20 Sep 28, 20	68.0 %	Finished	Jul 12, 201 [.]	
			4	392	Wiggins, Rudy	Baxter, Janelle	Call Quality (1.0)	Sep 28, 20 Sep 29, 20	71.0 %	Finished	Jul 12, 201 [.]	
	_		5	391	Wiggins, Rudy	Baxter, Janelle	Call Quality (1.0)	Sep 29, 20 Sep 30, 20	74.0 %	Finished	Jul 12, 201 [.]	
	2		6	340	Woodard, Jesus	Baxter, Janelle	Call Quality (1.0)	Sep 25, 20 Sep 26, 20	40.0 %	Finished	Jul 12, 201 [.]	
	-		7	339	Woodard, Jesus	Baxter, Janelle	Call Quality (1.0)	Sep 26, 20 Sep 27, 20	44.0 %	Finished	Jul 12, 201 [.]	
			8	338	Woodard, Jesus	Baxter, Janelle	Call Quality (1.0)	Sep 27, 20 Sep 28, 20	32.0 %	Finished	Jul 12, 201 [.]	
			9	337	Woodard, Jesus	Baxter, Janelle	Call Quality (1.0)	Sep 28, 20 Sep 29, 20	55.0 %	Finished	Jul 12, 201 [.]	
			10	336	Woodard, Jesus	Baxter, Janelle	Call Quality (1.0)	Sep 29, 20 Sep 30, 20	12.0 %	Finished	Jul 12, 201 [.]	
			11	55	CcManager, CcMa	Baxter, Janelle	Call Quality (1.0)	Sep 25, 20 Sep 26, 20	59.0 %	Finished	Jul 12, 201 [.]	
			12	54	CcManager, CcMa	Baxter, Janelle	Call Quality (1.0)	Sep 26, 20 Sep 27, 20	59.0 %	Finished	Jul 12, 201 [.]	
			13	53	CcManager, CcMa	Baxter, Janelle	Call Quality (1.0)	Sep 27, 20 Sep 28, 20	90.0 %	Finished	Jul 12, 201 [.]	
			14	52	CcManager, CcMa	Baxter, Janelle	Call Quality (1.0)	Sep 28, 20 Sep 29, 20	9.0 %	Finished	Jul 12, 201	
			15	51	CcManager, CcMa	Baxter, Janelle	Call Quality (1.0)	Sep 29, 20 Sep 30, 20	12.0 %	Finished	Jul 12, 201	

Figure 29: Evaluation List

- 1. Navigate to Evaluation list.
- 2. Select an evaluation record from the list of evaluations with the **Finished** status.
- 3. Click **Report** from the tool bar in the **Evaluation List** to open the **Evaluation Detail** report.

	~				
Evaluation #89	6 - Call Qual	ity 1.0			
Agent:	Dora Vargas (do	via vargae)	Evaluation Date:	18/07/11	9
Evaluator:	Jannie Spears (Evaluation Date.	0	ENESYS'
Evaluator.	Jannie Spears (jannie.spears)	Eval. Period To:	31/03/11 12:00	ALCATEL LUCENE COMPANY
			Eval. Periou 10.	31/03/11 12:00	
Interaction #896	Start:	-	End:	-	
Call	From:	-	To:	-	
	Direction:	All	Wrap Up:		
	Category:				
Question			Answer		Rating
Opening call					
Greeting, introducing the	e agent and the con	npany	Good		100.0%
Detection and Verification	on of a competent p	erson	Good		100.0%
Customer?s Consent to	interview him/her (t	time, topic)	Good		100.0%
Company Presentation			Good		100.0%
Switching to the matter	of the call		Good		100.0%
Merchant's skills					
Questioning techniques	- investigative/busing	ness oriented	Bad		0.0%
Understanding custome	r needs		Average		50.0%
Solution proposal			Good		100.0%
Customer care			Good		100.0%
Call control					
Following the script			Excellent		100.0%
The Language, length o	f sentences, speed	of speech	Excellent		100.0%
Listening			Average		45.0%
Responding			Good		100.0%
Overcoming objections			Good		100.0%
Tone / pitch of the call /	Positive speech		Excellent		100.0%
Closing the call					
Thanks and farewell to f	the customer		Average		11.0%
Summary after call - rec	ар		Bad		0.0%
Inviting the customer to	call anytime the info	oline	Bad		0.0%
				Total Rating:	68.0%

Figure 30: Evaluation Detail Report

- 1. Click **Print** to print the **Evaluation Detail**.
- 2. Click **Export to Spreadsheet** to export the Evaluation Detail to an Excel spreadsheet.

Important:

The spreadsheet is in xls format (Excel 97-2003).

When exported, the following commentary box appears:

Opening evaluation.	xls	×							
You have chosen to	o open								
🕙 evaluation.xl	s								
which is a: Microsoft Excel 97-2003 Worksheet									
from: http://docs-callrec1.office.zoomint.com									
What should Firefox do with this file?									
Open with Microsoft Excel (default)									
Save File									
Do this <u>a</u> utomatically for files like this from now on.									
	OK Car	icel							

Figure 31: Opening the Spreadsheet

Click **OK** to open the spreadsheet.

Linking to a Read-only Grading Form

Figure 32: Detail Report Showing Interaction

The Evaluation Detail also allows you to link to the grading form

- 1. Hover over the word and number **Interaction #xxx** (where xxx is the interaction number). The word and number will turn red to reveal that it is a link.
- 2. Click the link **Interaction #xxx**, the read-only access Grading Form will open.



				🖓 Tooltips Off	🝰 CcManager, CcMa	inager (d	ccmanager) 🔊 Logout		Messag	jes
»	Evaluation List 🙁 Evalu	uator Form (491258) 🙁	Grading Form (49	1258) 🗵						
	🔲 Feedback History 📙	Save & Close 😫 Close								^
	Questionnaire: Mail Tracking Number	TEST ČP hovory (1.0)	Agent: Ticket Number	Habart, Lukas	Evaluation pe Category		From: 29/08/2012 To: 29/08/2012	~		
	Question					Answe	r		N	
	🖻 Ověření, 20.0 % (1	item)								
	Ověření dle MP a PP ((100.0 %)						•		
	🗉 Struktura hovoru, 1	10.0 % (2 items)								=
	Internal Note				Play 19	9:44:00	- V Total Rating	0.0	%	
	Feedback Panel									
	Things To Improve			Things To M	Maintain					
	•								+	

Figure 33: Grading Form

If there is a media interaction associated with the Grading Form then it appears in the **Play** drop down list and you can select it from the list and play it using the player.

Where there is more than one media interaction associated with the Grading Form (for instance if a call has been transferred or put on hold) then each interaction will appears in the **Play** drop down list and you can select them from the list and play them using the Media player.



Chapter

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.

