Genesys Quality Management 8.1

Quality Manager User Guide: Agent

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Table of Contents

Chapter

1 Introduction

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

This chapter contains the following sections:

Document Purpose

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

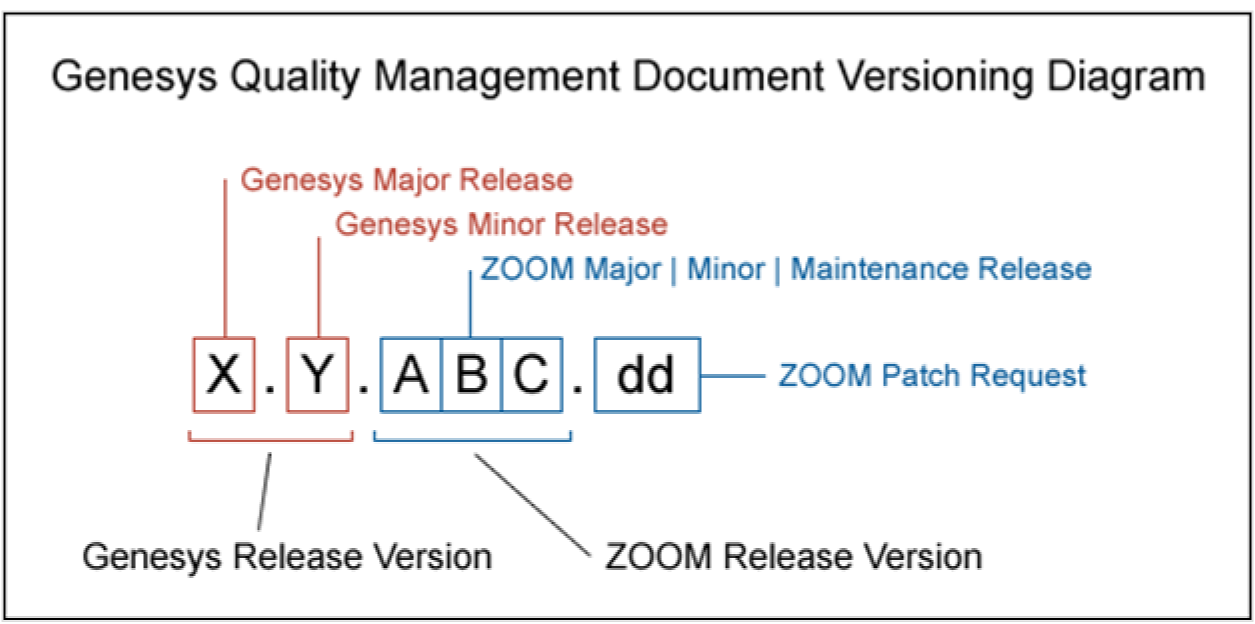
Audience

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
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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-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.

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

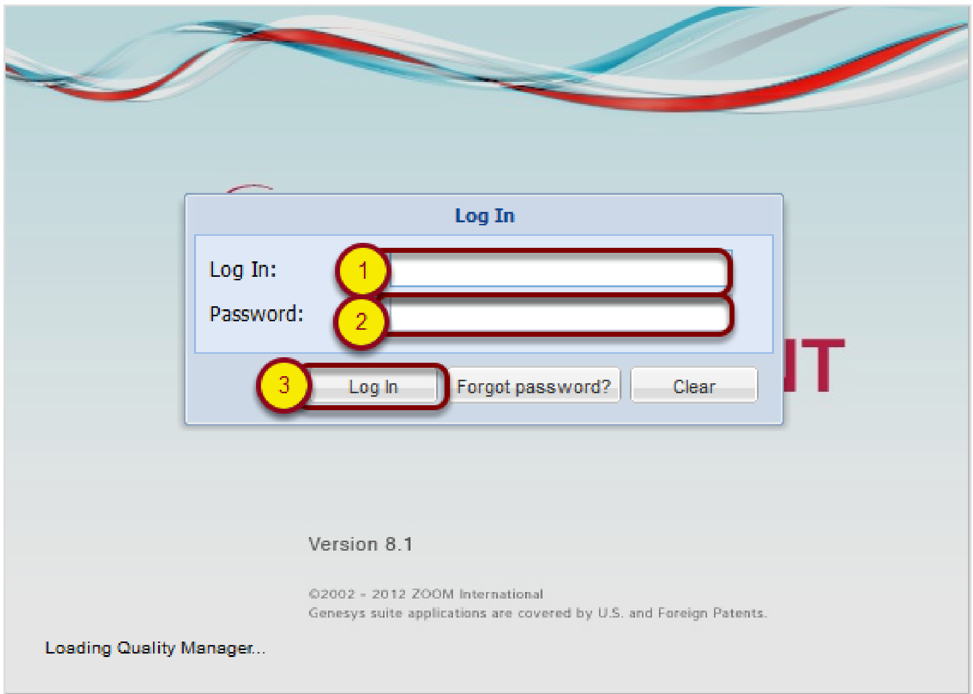


Figure 1: Logging In To Quality Manager

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.

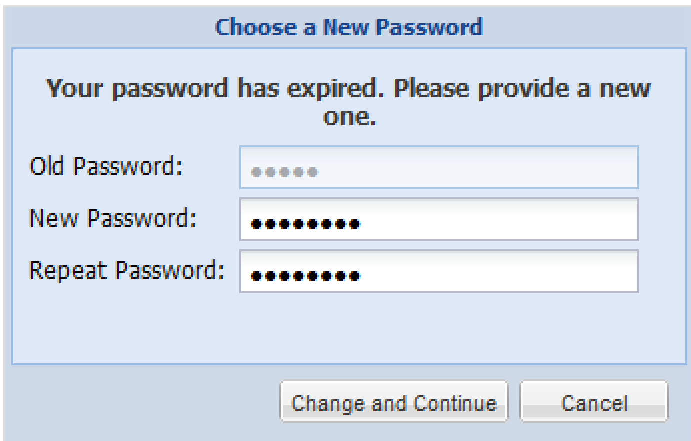


Figure 2: Choosing a New Password

Retrieving a Forgotten Password

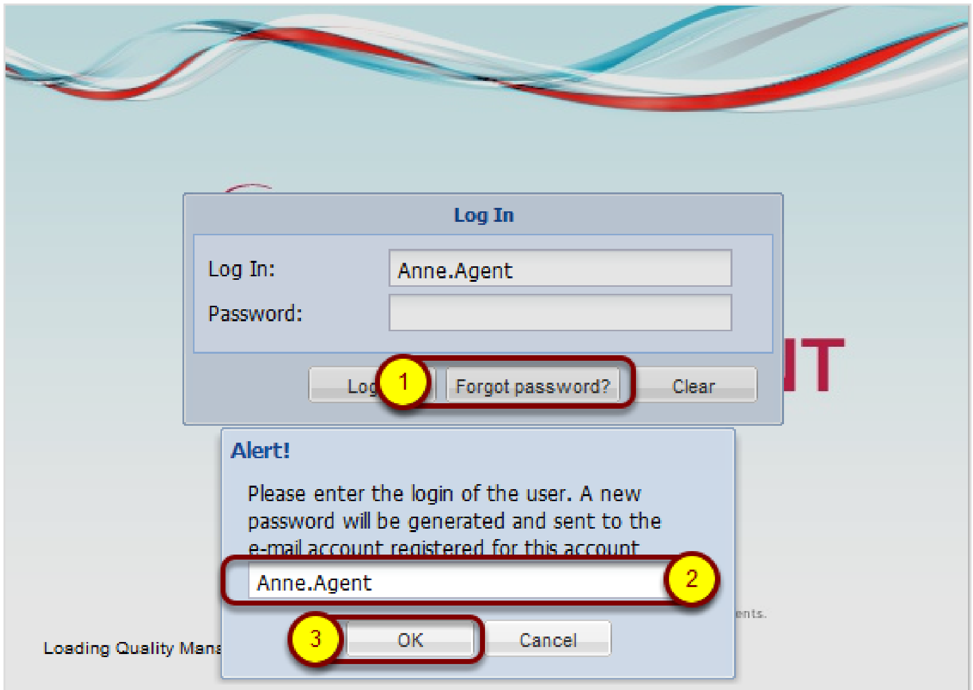


Figure 3: Retrieving a Forgotten Password

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

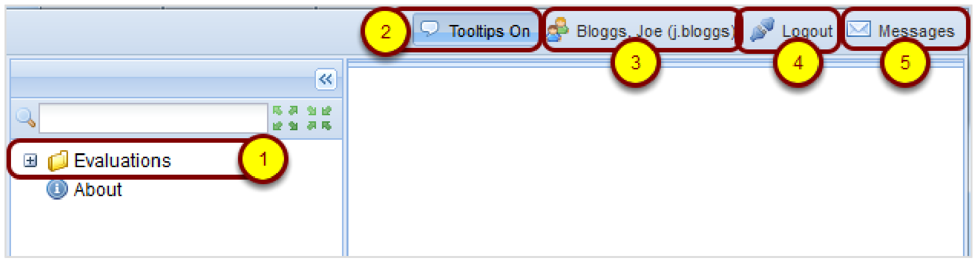


Figure 4: Quality Manager User Interface

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

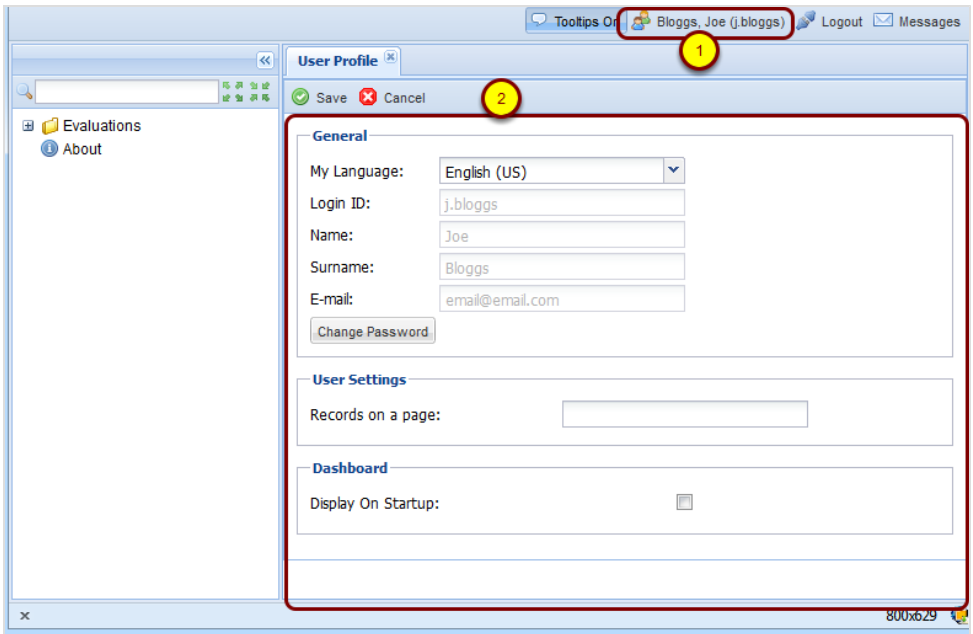


Figure 5: Viewing and Editing the Agent Profile

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

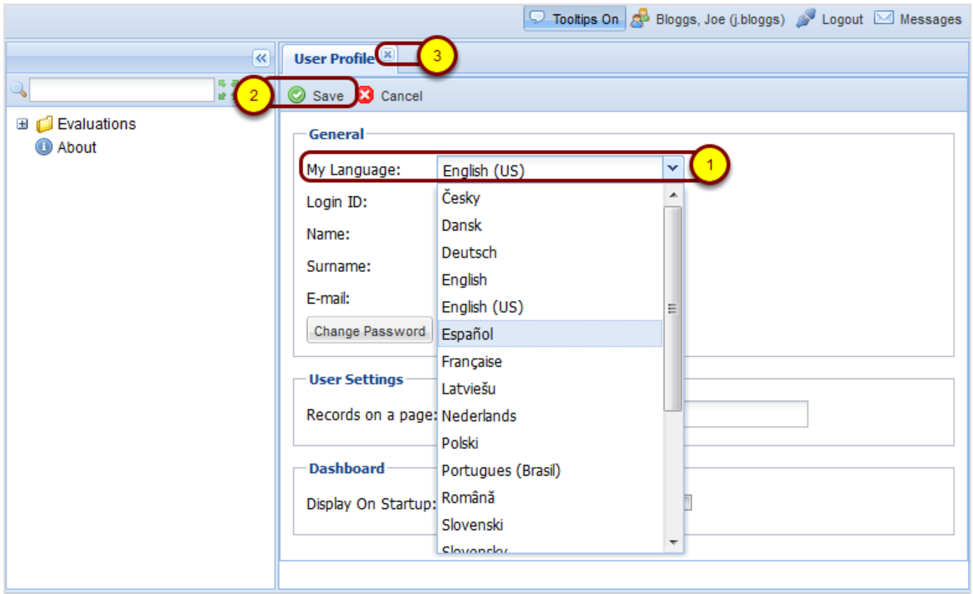


Figure 6: Editing Your Agent Profile Language

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

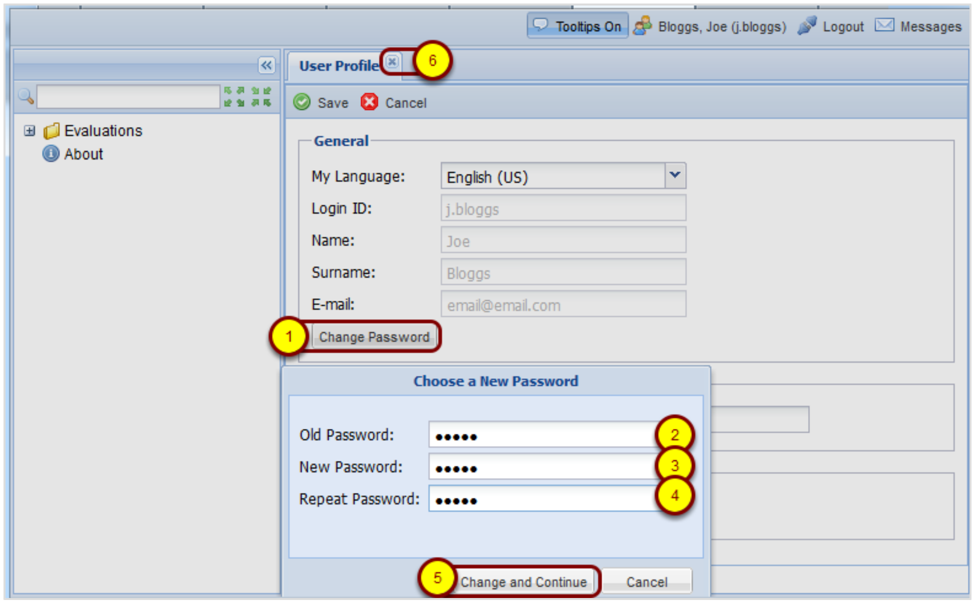


Figure 7: Changing your Agent Password

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:

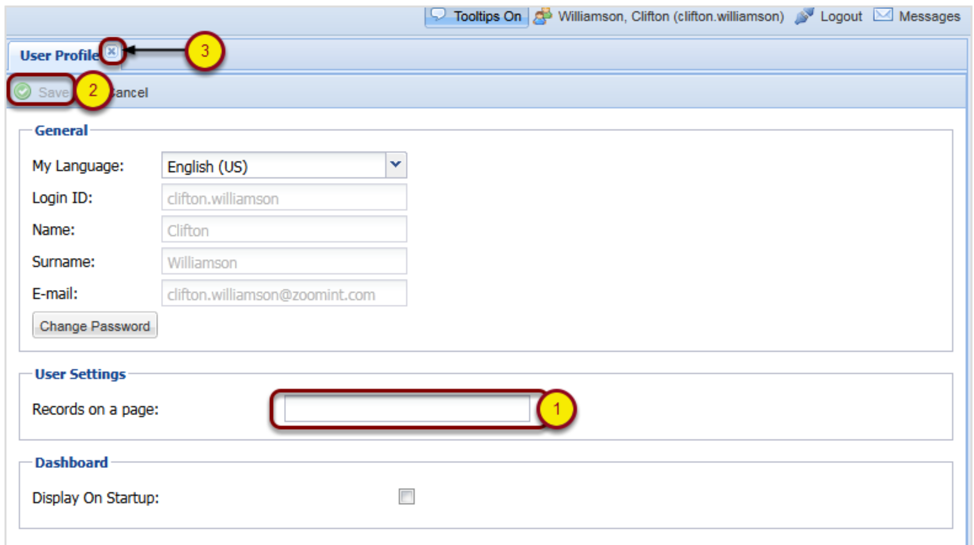


Figure 8: Changing the number of Agent Records

Records on a page

1. 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

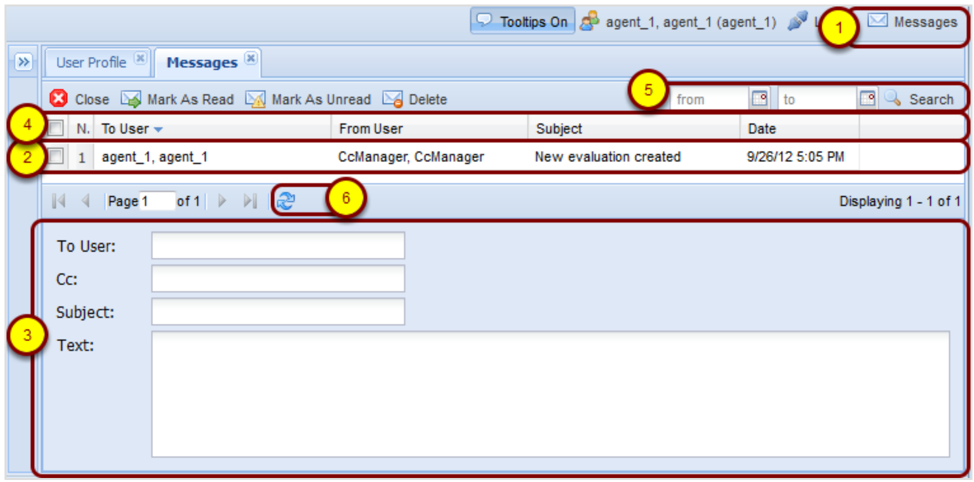


Figure 9: Viewing System Messages

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

3 Evaluations

This chapter describes how to plan and use Evaluations.

This chapter contains the following sections:

Viewing Created Evaluations

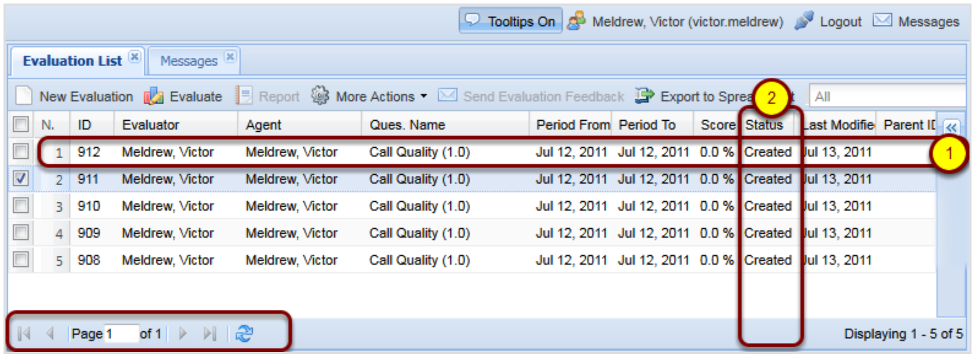


Figure 10: Viewing Created Evaluations

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 Performing an Evaluation for more information.

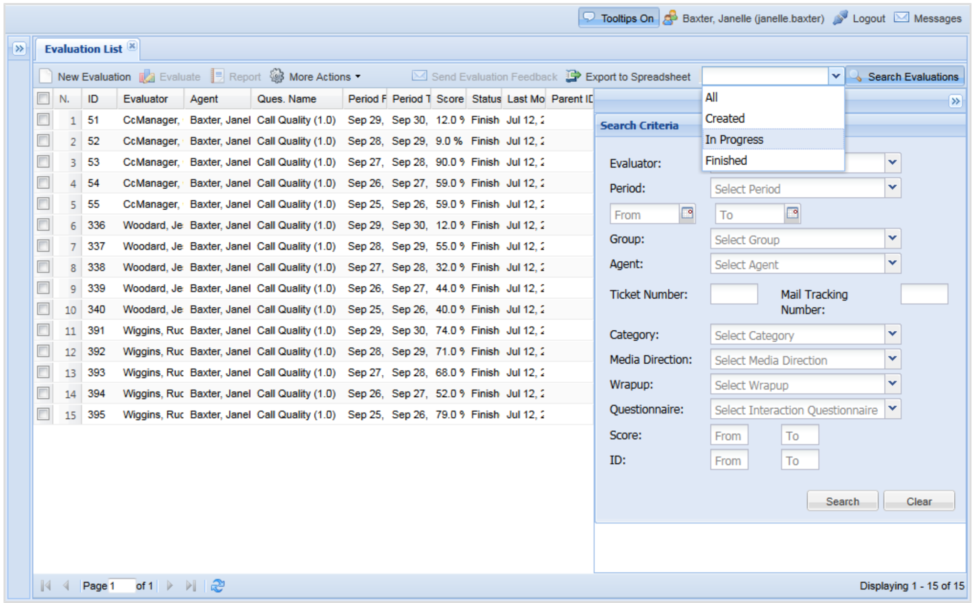


Figure 11: Showing Evaluations Having a Specific Status Drop Down

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.

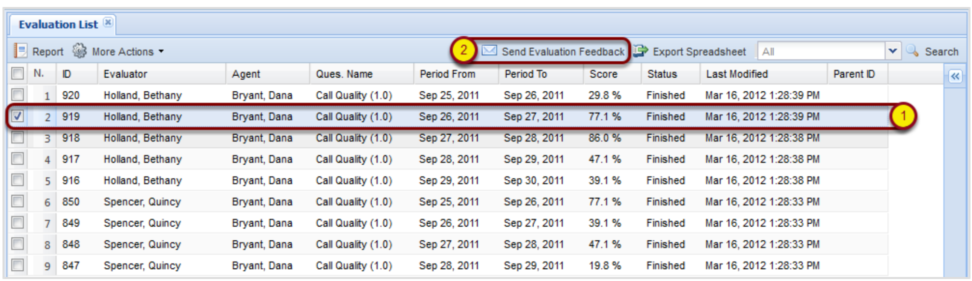


Figure 12: Sending Evaluation Feedback Button

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.

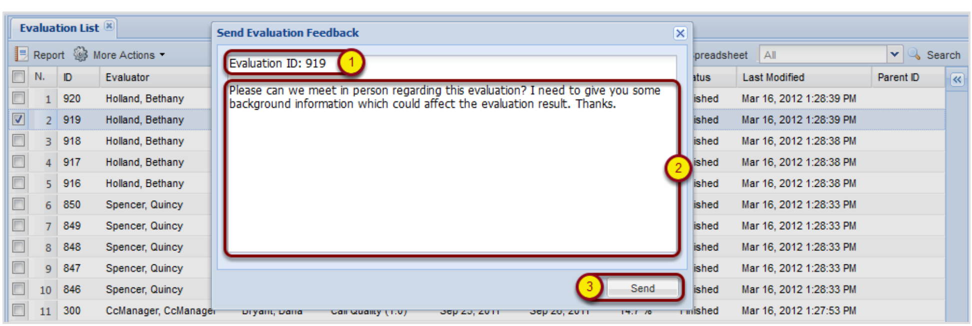


Figure 13: Sending Evaluation Feedback Message

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**.

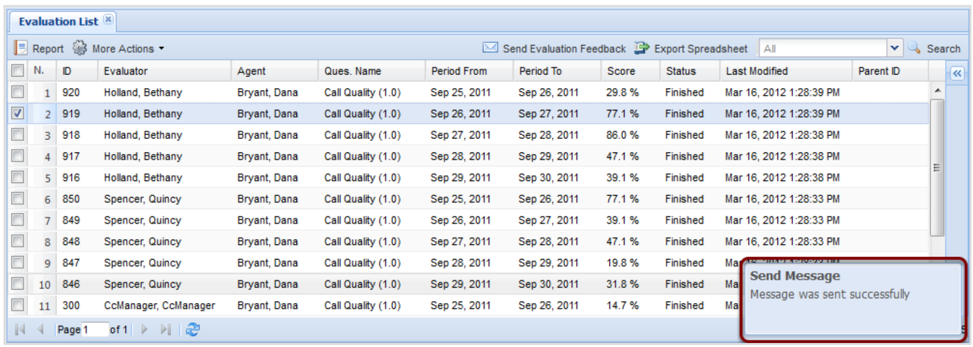


Figure 14: Sending Evaluation Feedback Message Sent

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 Viewing System Messages.

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

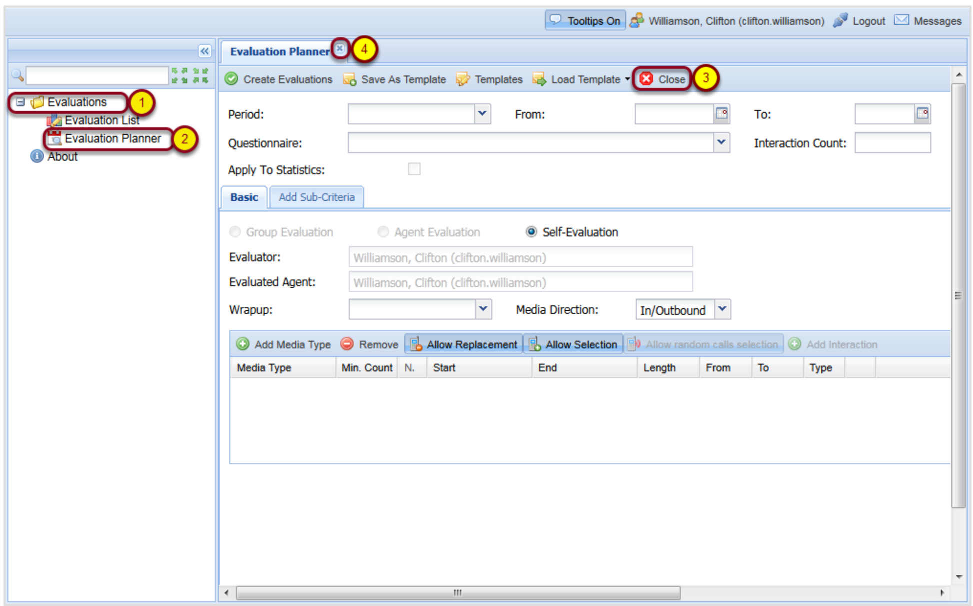


Figure 15: Opening the Evaluation Planner

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

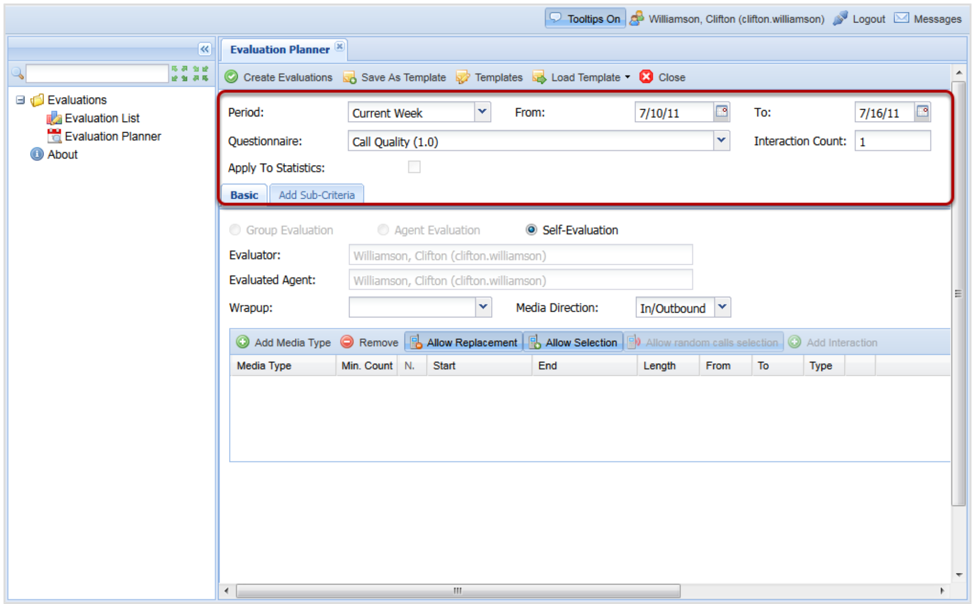


Figure 16: Specifying a Self-evaluation Period and Questionnaire

1. 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 **To**or 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)

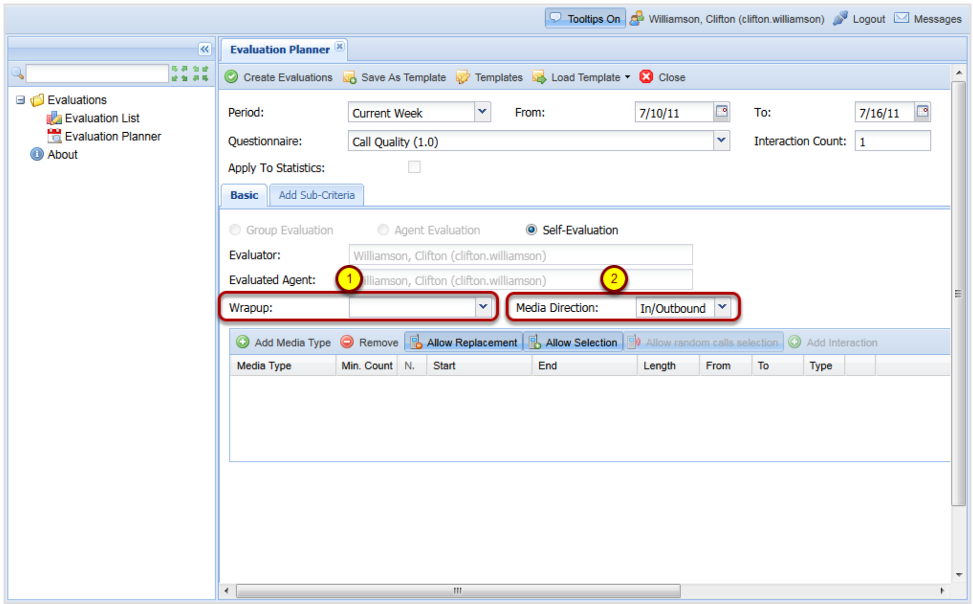


Figure 17: Filter Interactions by Using Wrapup or Media Direction

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

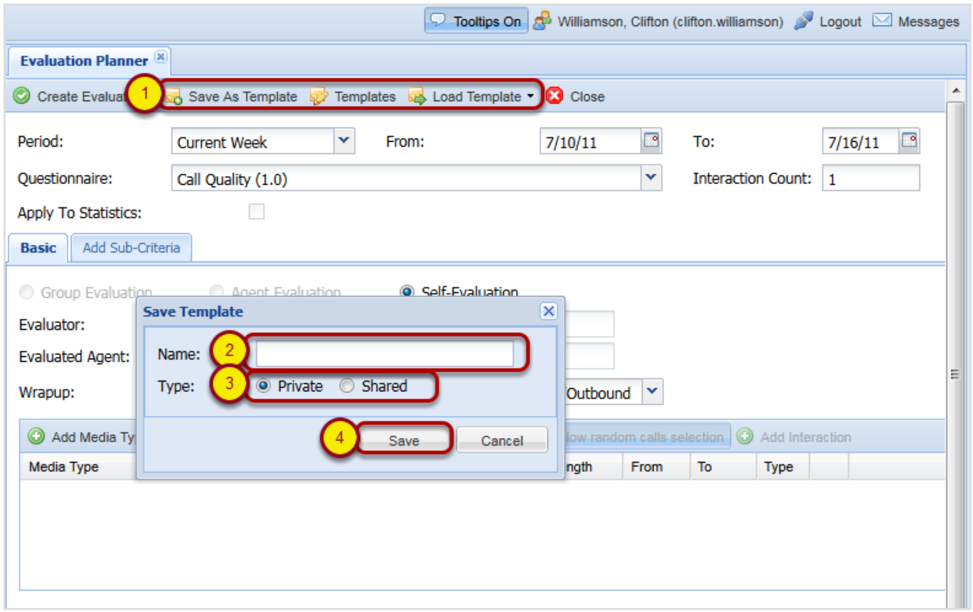


Figure 18: Using Evaluation Templates (Optional)

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

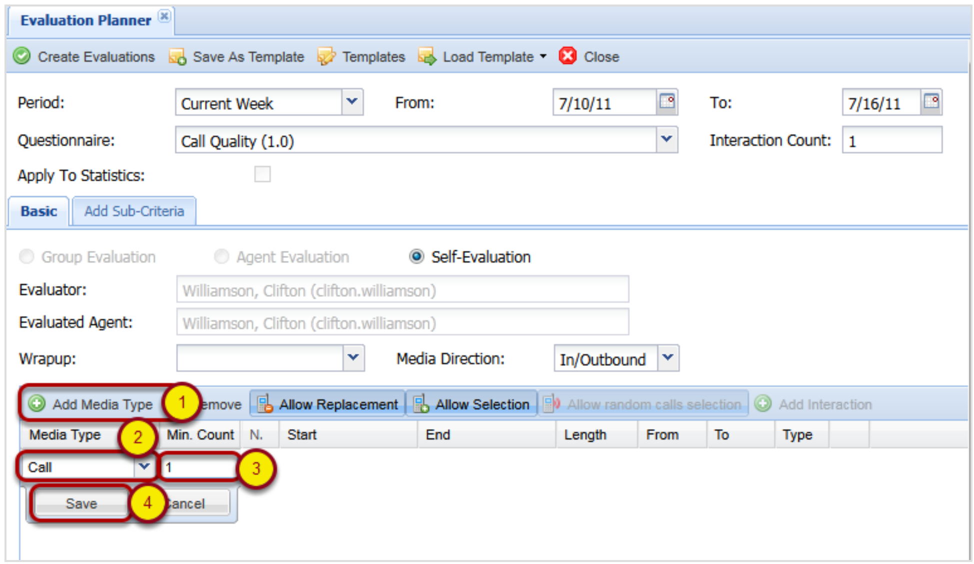


Figure 19: Add Evaluation Media Types

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.
3. **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

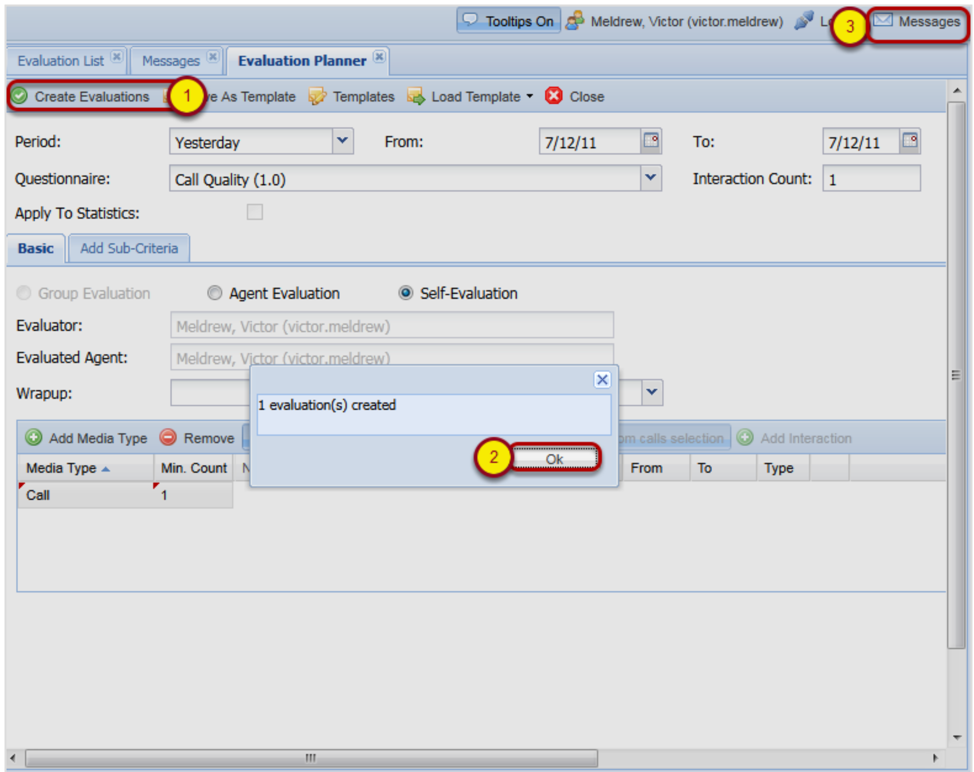


Figure 20: Planning the Evaluation

After specifying the criteria for determining agent calls for evaluation:

1. 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

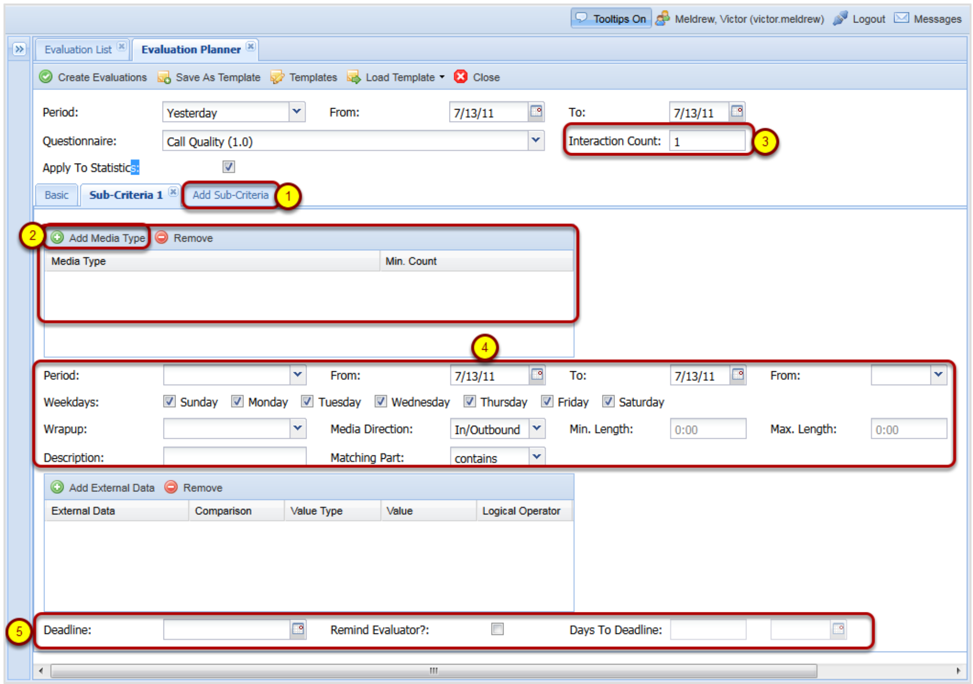


Figure 21: Add Sub-Criteria (Optional)

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.
5. 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

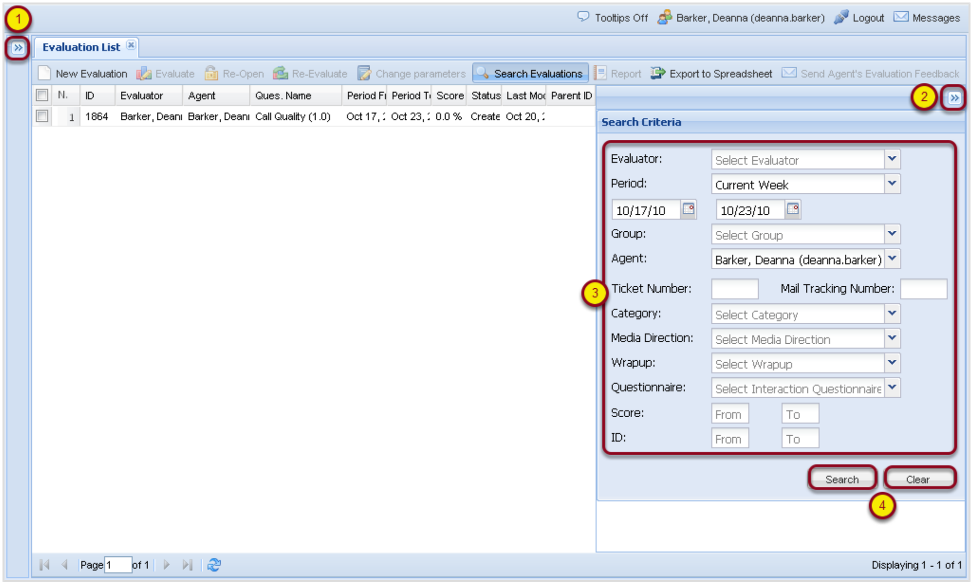


Figure 22: Searching for Evaluations

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

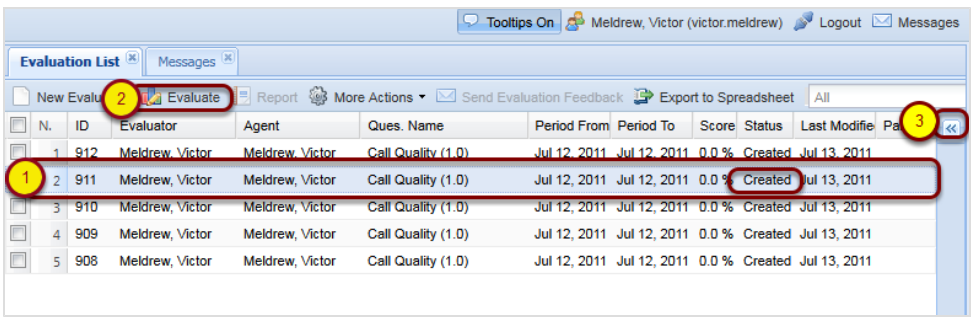


Figure 23: Opening the Scheduled Evaluation

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

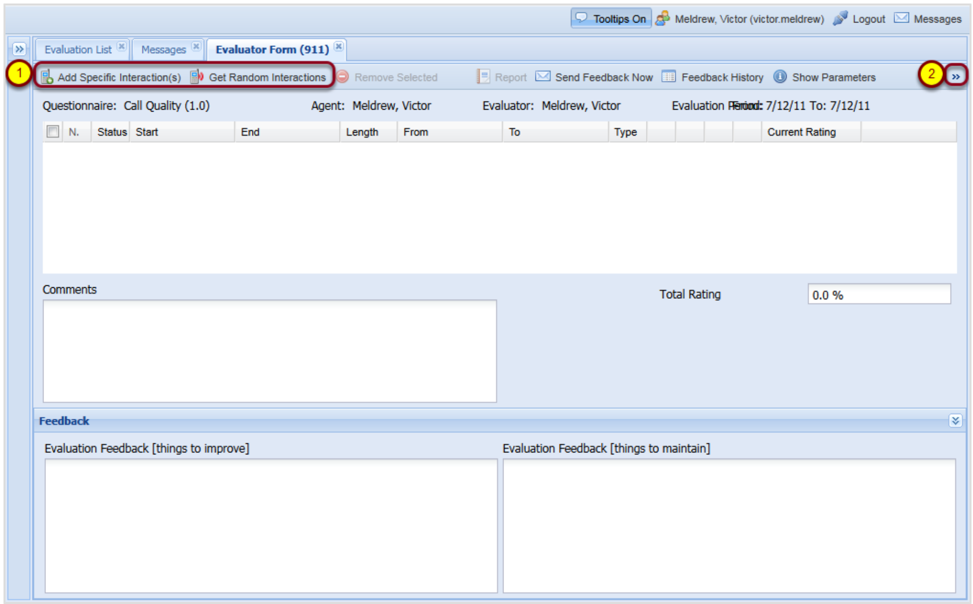


Figure 24: The Evaluator Screen

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

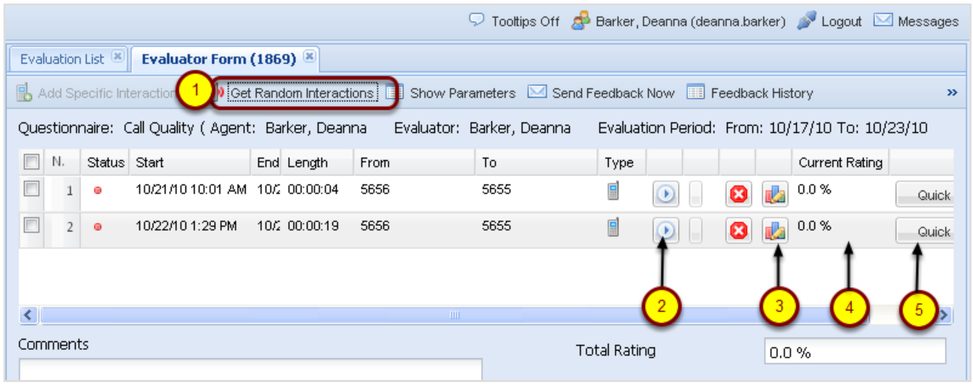


Figure 25: Adding Random Media for Evaluation

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

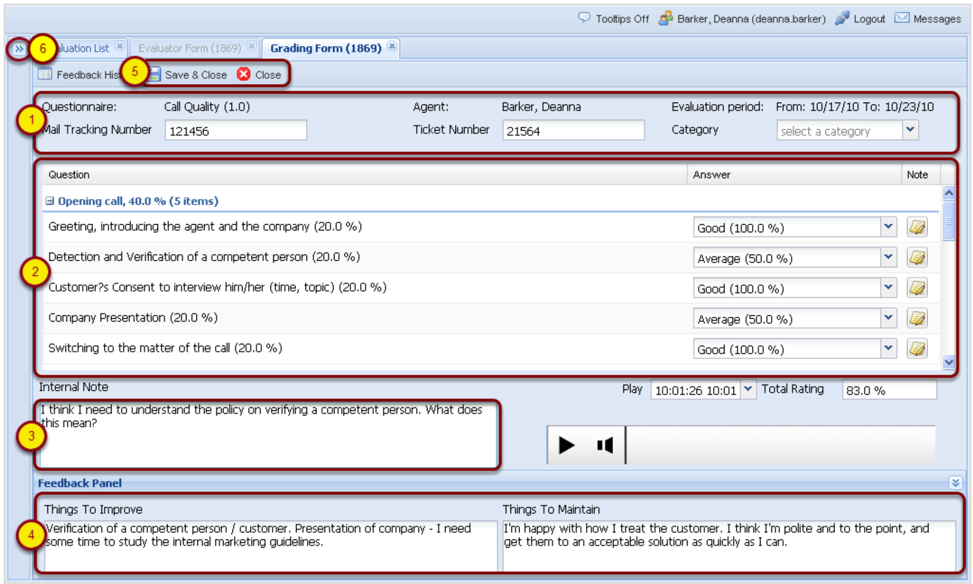


Figure 26: Grading a Media Record

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.

1. 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.
3. 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

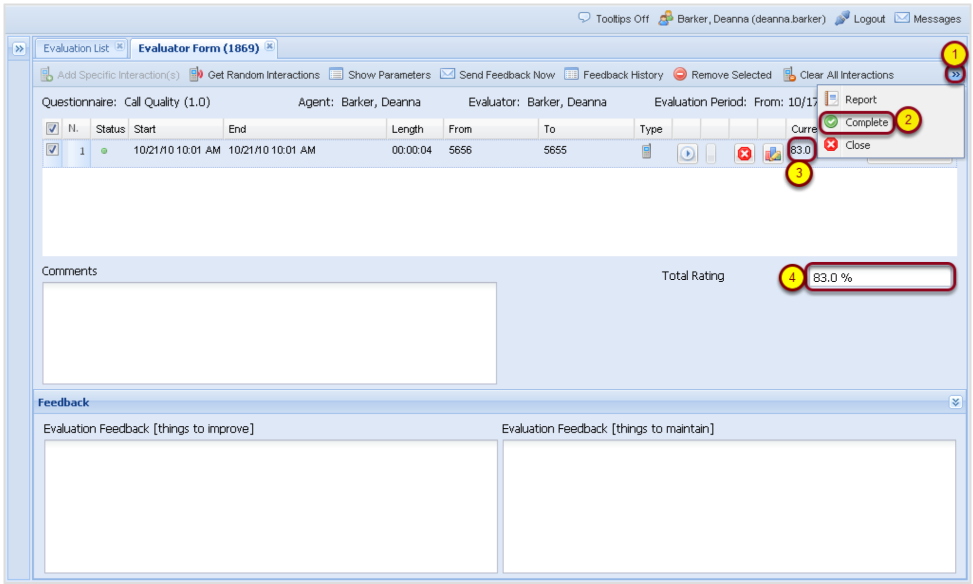


Figure 27: Completing the Evaluation

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.
2. 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

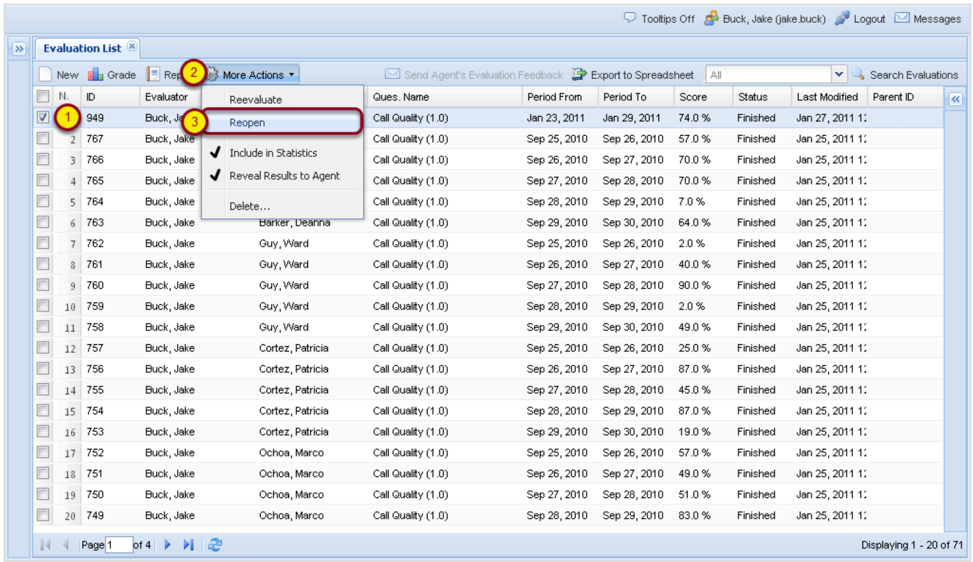


Figure 28: Re-Open an Evaluation

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**.
3. 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**:

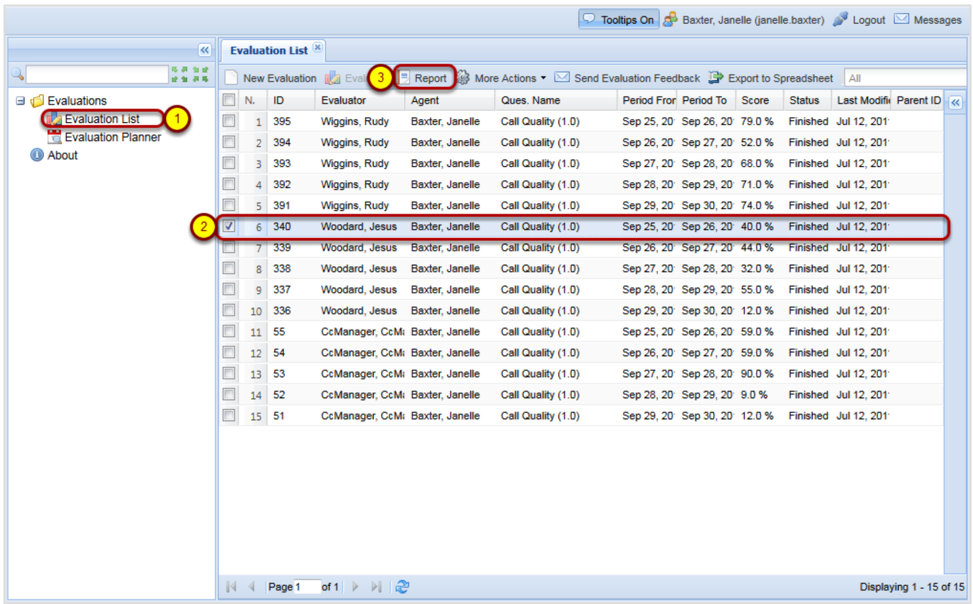
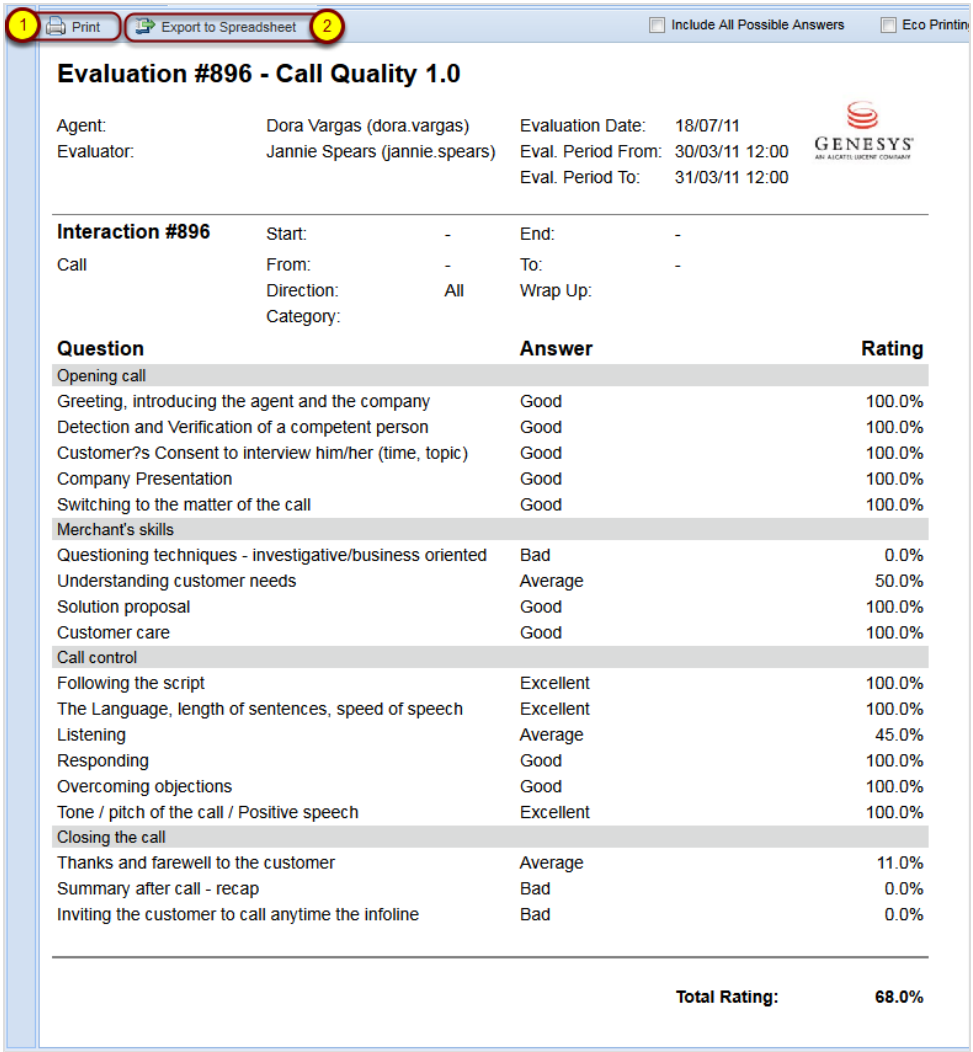


Figure 29: Evaluation List

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.



Print | Export to Spreadsheet | Include All Possible Answers | Eco Printin

Evaluation #896 - Call Quality 1.0

Agent:	Dora Vargas (dora.vargas)	Evaluation Date:	18/07/11
Evaluator:	Jannie Spears (jannie.spears)	Eval. Period From:	30/03/11 12:00
		Eval. Period To:	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 agent and the company	Good	100.0%
Detection and Verification of a competent person	Good	100.0%
Customer?s Consent to interview him/her (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/business oriented	Bad	0.0%
Understanding customer 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 of 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 the customer	Average	11.0%
Summary after call - recap	Bad	0.0%
Inviting the customer to call anytime the infoline	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:

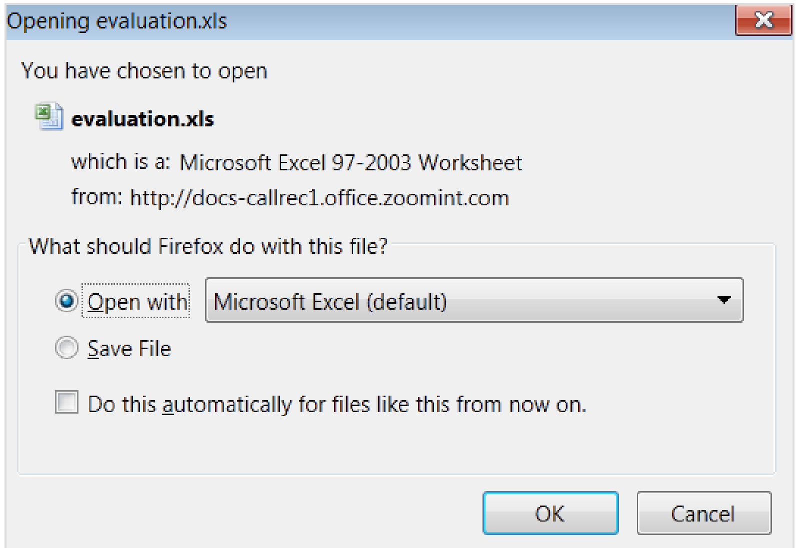


Figure 31: Opening the Spreadsheet

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.

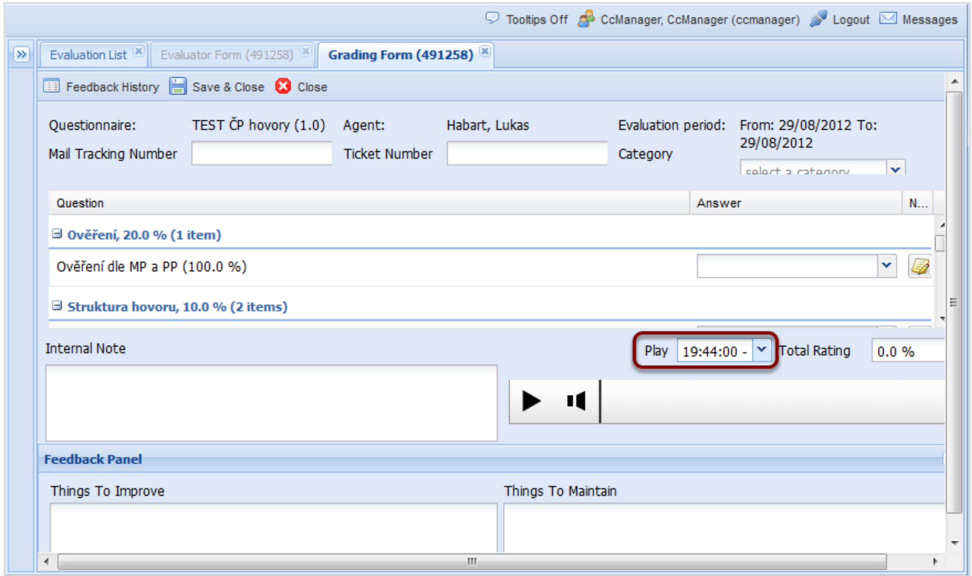


Figure 33: Grading Form

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

4 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.