

**Genesys Quality Management 8.1** 

# Quality Manager User Guide: CC Manager

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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 tasks necessary for a Call Center Manager (CC Manager) to use and administer Quality Manager.

### Audience

This document is intended for Call center managers.

### **Document Version**

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

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



# **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.
- Basic IPT terminology knowledge is recommended.

# 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:

- 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: <a href="http://www.videolan.org/vlc/">http://www.videolan.org/vlc/</a>.
- 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 Quality Manager User Interface Editing Your User Profile Changing Your Password User Settings in the User Profile Viewing System Messages Delegating Evaluations

# **Logging in to Quality Manager**

	Log In
	Log In:
	3 Log In Forgot password? Clear
	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 I	Manager

Figure 1: Log In To Quality Manager

To Log in, navigate to the Quality Manager application URL in your 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 your administrator to unblock your account.

# **Prompt to change your password**

If you have logged in using a default password or your password has passed its expiration date, you will be prompted to change your password. Choose a new password by typing the password in the **New Password** and **Repeat Password** fields. You will never be able to use the default password again.

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 N	

Figure 3: Retrieving a Forgotten Password

- 1. To retrieve a forgotten password click **Forgot Password?**. The **Alert!** dialog displays.
- 2. Type your Quality Manager username in the field provided (if you have you entered the user name in the first box on the previous step then this will be filled for you).
- 3. Click OK.

Quality Manager will send a new password to your registered (for example, company) email account.

### Important:

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

# **Quality Manager User Interface**



Figure 4: Quality Manager User Interface

The figure shows the main user interface.

- 1. Clicking a folder (for example. **Evaluations**) from the left-hand menu displays the contents of that folder in the main window.
- 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 User Profile**

		🖓 Tooltips Off 🍰 CcManager, CcManager (ccmanager) 🖋 Logout 🖂 Messages
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🗉 💋 Questionnaires 🛛 🤇	2 My Language:	English (US)
<ul> <li></li></ul>	Login ID:	ccmanager
(1) About	Name:	CcManager
	Surname:	CcManager
	E-mail:	dina.vachova@zoomint.com
	Change Password	1
	— Delegation —	
	User Settings	
	Records on a page	je: 50
	Dashboard	
	Display On Startu	in:
	Display on Starte	···

Figure 5: Editing Your User Profile

To view and edit your user profile:

- 1. Click the button with your user name to open the User Profile tab.
- 2. Select the language settings of the application from the **My Language** dropdown.
- 3. Click **Save** to save the changes.
- 4. Click to the close icon on the User Profiletab to close the window.

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

#### Important:

Note - Languages

If your browser is not set to use the same language in menus and system messages, you may get occasional mixed-language alert messages when, for example, you refresh the browser page.

# **Changing Your Password**

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×	User Profile	
して 日本 2 年 日本 2 年 1 年 1 年 1 年 1 年 1 年 1 年 1 年 1	⊘ Save 😫 Cancel	
Dashboard	General	
Generations     Generations     Generation	My Language:	English (US)
III 📁 Reports	Login ID:	comanager
Administration About	Name:	CcManager
About	Surname:	CcManager
	E-mail:	jane.doe@company.com
(	1 Change Password	Choose a New Password
	Delegation     User Settings     Records on a page:     Dashboard     Display On Startup:	Change and Continue Cancel
×		🤤 1024x768

Figure 6: Changing Your password

- 1. Click Change Password to open the Choose a New Password dialog.
- 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 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.

### **User Settings in the User Profile**

		🖓 Tooltips Off 🍰 CcManager, CcManager (ccmanager) 🎤 Logout 🖂 Messages
>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>	User Profile 🗷	
۹ (3)	📀 Save 🔀 Cancel	
<ul> <li>Dashboard</li> <li>Dashboard</li> </ul>	General	
🗄 📁 Questionnaires	My Language:	English (US)
Geports	Login ID:	ccmanager
Administration About	Name:	CcManager
Ū	Surname:	CcManager
	E-mail:	dina.vachova@zoomint.com
	Change Password	
	User Settings	
	Records on a page	a: 1 50
	Dashboard Display On Startur	: 2 🔳

Figure 7: User settings in the User Profile

- Type the number of rows to display on list screens, for example, the Evaluation List and User Manager screens. Entering a larger number here (greater than 20) is useful for larger PC displays and will result in fewer pages, but may take longer to scroll or display.
- 2. Check **Display on Startup** if you have defined one or more Dashboard widgets, and would like the Dashboard to be displayed immediately after logging in.
- 3. Click **Save** to update your user profile, or **Cancel** to close the tab without saving.

### **Viewing System Messages**

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<b>**</b>	User Profile 🗶 Messages 🗶			
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Questionnaires	2 CcManager, CcManager	CcManager, CcManager	New evaluation creat	29/08/2012 1(
Image: Below termination Image: Below termination	3 3 akova_BL, Marie	CcManager, CcManager	New evaluation created	29/08/2012 05
Administration (1) About	4 CcManager, CcManager	CcManager, CcManager	New evaluation creat	29/08/2012 09
	5 Malkova, Daniela	CcManager, CcManager	Evaluation feedback	27/08/2012 1
	6 Malkova, Daniela	CcManager, CcManager	Evaluation feedback	27/08/2012 1
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	To User: Cermakova BL, Marie			
	Cc:			
	Subject: New evaluation created			
	Text: Evaluation (491,257) cr	eated		_
	Evaluator: CcManager Co			=
	Agent: Marie Cermakova	a_BL	-	
	Period from: 8/29/12 12	2:00 AM		-
	<u> </u>			

Figure 8: Viewing System Messages

- Click Messages at the top right of the application window to open the messages tab.
- 2. To search for messages in a particular date range, select or type a date range in the **From** and **To** fields then click **Search**.
- 3. Select a Message.
- 4. When certain events, such as scheduling or completing an evaluation take place, the system generates system messages. You can view the messages that are to or from your user profile here. Click an item to view the message details in the text fields at the bottom of the tab.
- 5. To manage your messages in the tab, you can select one or multiple items, then click **Mark as read**, **Mark as unread** or **Delete**.
- 6. To view results by page, add a page number to jump to, or tab through the pages using the arrow buttons.
- 7. To refresh the results, click the **Refresh** button.

### **Delegating Evaluations**

			🖓 Tooltips Off	CcManager, C	cManager (cc	manager)	🎤 Logout	🖂 Messa
User Profile 🗷								
📀 Save 🔀 Cancel								
General								
My Language:	English	*						
Login ID:	ccmanager							
Name:	CcManager							
Surname:	CcManager							
E-mail:	dina.vachova@zoomint.com							
Change Password								

Figure 9: Delegating Evaluations

The **Delegation** checkbox option allows you to delegate your evaluation activities to another user with evaluation permissions –this is typically used if you will be unavailable to perform evaluations for a period of time. Checking this option opens the Delegation section of the User Profile.

To delegate evaluations:

- 1. Select an evaluator from the Evaluator drop down list.
- 2. Select the delegation period From.
- 3. Select the delegation period **To**.
- 4. Click Save.

During this delegation period, the evaluator will then be able to plan and perform evaluations on agents to whom you are assigned as the evaluator.

#### Important:

Evaluator delegation can also be defined for specific users within the Adding another User Type section.



### Chapter



# **Questionnaires**

The following Chapter describes Questionnaires. Questionnaires help Managers and Team Leaders assess the skills of their teams. The questionnaires allow Managers and Team Leaders to grade the performance of staff over the whole of the call making process, from the initial greeting through closing the call.

This chapter contains the following sections:

Setting up a Questionnaire Importing and Exporting Questionnaires



# **Setting up a Questionnaire**

A brief introduction that includes how to create, configure and manage Questionnaires in Genesys Quality Manager 8.1.50x.

### **Creating A New Questionnaire**

	🖓 Tooltips Off 🍰 CcManager, CcManager (ccmanage	er) 🔊 Log	gout 🖂 Messages
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🗑 Dashboard	S Name	Ve So	coring System
Constitutions	ČP hovory S2S	1.0 Pe	rcentage
1 Questionnaires	ČP hovory - test	1.3 Pe	rcentage
Guestionnaire manager     Geports	O ČP hovory - test	1.1 Pe	rcentage
Administration	ČP hovory - test	1.0 Pe	rcentage
(1) About	O GLLe-maily	1.0 Pe	rcentage
	SLI-e-maily_2	1.0 Pe	rcentage

Figure 10: Creating A New Questionnaire

To create a new questionnaire:

- 1. Click the **Questionnaires** link in the left menu, then **Click Questionnaire Manager** to display the current list of questionnaires in Quality Manager.
- 2. Click Add to add a new, blank questionnaire.

### Specifying a Name and Version

Questionnaire Manag	er 🗷 Call Quality 🙁		
🗿 Add Group 🔯	lanage Groups 🔄 Properties 膏 Call Selection Rules 📀 I	Permissions 📄 Save A Copy 🗎 Save & C	lose
Questionnaire Nam	Call Quality 1 Ver. 1.0	2 🛛 🛛 Status: e	mpty - not ready for us
Group Name	Description	F	Percentage
		Add Q	uestion Remove Question
Answer Name	Answer Description	Compliance	Percentage

Figure 11: Specifying a Name And Version

- 1. Type a suitable name for the questionnaire in the Questionnaire Name field.
- 2. Type an initial **Ver.** (version) number (for example. 1.0). The name and version combination must be unique in Quality Manager.

### Setting the Questionnaire Properties

			🖓 Tooltips Off 🍰 CcManager, CcManager (ccmanager) 🚀 Logout 🖂 Messi	ages
<b>&gt;&gt;</b>	Que	stionnaire Manager 🙁 🛛 Call Quality 🗷		
	4 🕑	Add Group 🛛 🔯 Manage 🚺 🔄 Proper	erties 🔁 Call Selection Rules 📀 Permissions 🔒 Save A Copy 🔚 Save & Close	
	Ques	stionnaire Name Call Quality	Ver. 1.0 Status: empty - not ready for u	use!
	Gro	Questionnaire Properties	Bernarian	
		Scoring System	Answers	
	Ap	O Points	Auto-Sort Answers By:	
		2      O Percent	Weight (Ascending)	
		O Grades	O Weight (Descending)	
		Weight (g) for Reports: 1.00		
		Troports: 1.00		
			4 OK Cancel	

Figure 12: Setting the Questionnaire Properties

- Click Properties on the Questionnaire toolbar to view the current settings for this questionnaire.
- 2. From the Questionnaires Properties dialog box, you can select the scoring system used and how answers should be sorted and displayed in reports.

### 3. Scoring Systems

The following scoring systems are available:

- **Points:** Each answer(only) can be assigned a point value or "weight" (for example 10), with the questionnaire score being the sum of all selected answer points. Answers can use a negative point value (for example. -10), and must have a value of between -2,147,483,648 and 2,147,483,647.
- **Percent:** Each question and answer group must be assigned a percentage value or "weight" (minimum: 1, maximum: 100). The final questionnaire percentage score is calculated by finding the weighted average of the selected answers.
- **Grades:** Each answer must be assigned a grade value or "weight" (minimum: 0.001 equals "best", maximum: 5 equals "worst"), whereas each question and question group must be assigned a percentage weight (minimum: 1, maximum: 100). The final questionnaire score grade is calculated using the same algorithm as for percentages; i.e. the weighted average of the selected answers.
- The **Auto-Sort Answers By** options apply to all answer listings when viewing/editing questionnaires, during evaluations and in reports for evaluations using this questionnaire. Answers can be listed by the time

they were added (**Creation Time**), or by **Weight** (by point, percent or grade value depending on the scoring system used in the questionnaire).

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

### Important:

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

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

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

### Adding a Question Group

				🗢 Tooltips Of	ff 🛯 🝰 Valer, Peter (co	omanager) 🍠 Lo	gout 🖂 Messages
«	Questionnaire List 🗷 Call Qua	ality 🗷					
	🕐 Add Group 🔝 Manage Gro	oups 🔄 Properties	Call Selection Rules	Ø Permissions	A Save A	Save & Close	
Contractions	Questionnaire Name Call Qua	ality	Ver. 1.0		🔊 (	Status: empty - r	not ready for use!
🖃 🧔 Questionnaires	Group Name Description	on					Percentage
<ul> <li>Peports</li> <li>Administration</li> <li>About</li> </ul>							
	Add Questio	<u> </u>					
	Group Na						
	Group De		escription			Add Question	Remove Guestion
	Answer Name Group We	eight: 45			C	Compliance	Percentage
			5 Save	Cancel			
						Add Answer	Remove Answer

Figure 13: Adding a Question Group

- 1. Click Add Group to add a new question group.
- 2. Type a suitable Group Name in the Group Name field.
- Type an optional Group Description in the Group Description field for this group of questions.
- 4. Type a Group Weight for this group (if required).

#### Important:

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

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

- 5. Click **Save** to save the Question Group.
- It is advised to save regularly while creating or editing a questionnaire. Click Save&Close (which saves and returns you to the questionnaire list), then double-click on the questionnaire's name (or click Edit) to re-open the questionnaire for further editing.

### Adding a Question

	🖓 Tooltips Off 🍰 CcManager, CcManager (ccm	nanager) 🔊 Logout 🖂 Messages
»	Questionnaire Manager (R) Call Quality (R)	
	📀 Add Group 🔯 Manage Groups 🔄 Properties 🚍 Call Selection Rules 📀 Permissions 🔓 Save A Cop	py 📙 Save & Close
	Questionnaire Name Call Quality Ver. 1.0	: incomplete - not ready for use!
	Group Name Description	Percentage
	☐ Call Opening, 5.0 % (0 items) - start	
	- To add a question to this group, click here, then click the Add Question button, below right	
3	Correct Greeting Did you say Hello welcome to mycompany this is [agent] speaking?	5 10
	Cancel Save 6	
	2	Add Question Remove Question
	Answer Name Answer Description Co	mpliance Percentage

Figure 14: Adding A Question

- 1. Select the question group.
- Click Add Question at the bottom right of the middle list pane to add a new question.
- 3. Type a question name (this is the text that the user will see).
- 4. Type an optional description.
- 5. Type a question weight for this group (if required).
- 6. Click **Save** below the description field to add this question to the current group.

### Important:

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

### Adding Additional Questions and Groups

🗿 Add Group 🚹 lanage Groups 🗉 Proj	perties 🗧 Call Selection Rules 📀 Permissio	ons 🔒 Save A Copy 💾 Save & Close
Questionnaire Name Call Quality	Ver. 1.0	Status: incomplete - not ready for use
Group Name	Description	Percentage
∃ Call Opening, 5% (1 item)		
Correct Greeting / Introduction		(3) 100%
∃ Body of Call, 40% (6 items)		. –
Active Listening		20%
Active Questioning		20%
Provided Information		10%
		4 20%
Identified Issue		
		10%
Call Wrapup		10% 20%
İdentifiled Issue Call Wrapup Troubleshooting Ə Call Skills, 35% (11 items)		

Figure 15: Adding Additional Questions and Groups

Create additional question groups and questions in a similar way.

- 1. Add a new question group by clicking the Add Group button.
- 2. Add a new question by clicking the Add Question button.
- 3. The sum of the weights of all questions in a question group can be viewed on the right side.
- 4. The weight of each individual question is displayed on the right side.

#### Important:

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

### Adding Answers to a Question

				🖓 Tooltips (	Off 👩 Valer, F	eter (con	nanager) 🔊 L	ogout 🖂 Mes:	sages
Questionnaire List 🗵	Call Quality 🗷								
📀 Add Group 🛛 🍃 Ma	nage Groups 🛛 Enq Properties	🔁 Call Se	election Rules	Permissions	s 📄 Save A d	6 🗐	Save & Close		
Questionnaire Name	Call Quality	Ver.	1.0			Status	: incomplete -	not ready for	use!
Group Name		Description	n					Percentage	
🖃 Call Opening, 5% (	(1 item)								^
Correct Greeting / Intro	duction							100%	
■ Body of Call, 40%	(6 items)								
Active Listening								20%	
Active Questioning								20%	
Provided Information								10%	
Identified Issue								20%	
Call Wrapup								10%	
Troubleshooting								20%	
🖻 Call Skills, 35% (1	1 items)								
		(3)					Add Question		estion
Answer Name	Answer Description	$\sim$					mpliance	Percentage	
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-		6	Save	Cancel			iccess all		
		0					icccess group	-	
						n/	one		
							a il all		
						_	il arnun		
						2	Add Answer	Remove Ans	wer

Figure 16: Adding Answers to a Question

- 1. Click to select a question.
- 2. With an existing question selected, click **Add Answer** at the bottom right of the screen.
- 3. **Answer Name** is the text that the user views (and should be unique for this question). Type an optional **Answer Description**.
- Select a Compliance and type the answer's Percentage (influence) for this question's scoring.
- 5. Click Save to save the answer.
- 6. Click Save & Close to save the questionnaire and close it.

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

The Compliance values have the following meanings:

- Success all: If this answer is selected, every question in the current questionnaire gets the value of the answer with the highest weight (having a compliance value of None).
- **Success group**: As above, but every question in the current question group gets the value of the answer with the highest weight (having a compliance value of None).
- None: No overall effect. This is the default compliance setting, and is used for most answers (or all if compliance settings are not required).
- n/a: Not applicable. The influence of which (on the final score) is specified in Quality Manager Application Options (see the section about Administrative Options).
- Fail all: If this answer is selected, every question in the current questionnaire gets the value of the answer with the lowest weight (having a compliance value of None);
- Fail group: As above, but every question in the current question group gets the value of the answer with the lowest weight (having a compliance value of **None**).

### **Adding Additional Answers**

Correct Greeting / Introduction       100%         Body of Call, 40% (6 items)       100%         Active Listening       20%         Active Questioning       20%         Provided Information       10%         Identified Issue       20%         Call Wrapup       10%         Troubleshooting       20%         Call Skills, 35% (11 items)       20%			🖓 Toottips Off 🛛 🧟 Valer, Peter (co	manager) 🔊 Loi	gout 🖂 Mess	ages
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Call Opening, 5% (1 item)       100%         Correct Greeting / Introduction       100%         Body of Call, 40% (6 items)       20%         Active Listening       20%         Active Questioning       20%         Provided Information       10%         Identified Issue       20%         Call Wrapup       10%         Troubleshooting       20%         Call Skills, 35% (11 items)       20%         Answer Name       Answer Description       Compliance       Percentage         Yes       None       10%	uestionnaire Name Call Quality	Ver. 1.0	2	Status: complet	:e - ready for (	use
Correct Greeting / Introduction       100%         B Bdy of Call, 40% (6 items)       20%         Active Listening       20%         Active Questioning       10%         Provided Information       20%         Identified Issue       10%         Call Wrapup       10%         Troubleshooting       20%         Call Wrapup       10%         Troubleshooting       20%         Call Skills, 35% (11 items)       20%         Answer Name       Answer Description       Compliance         Yes       None       10%         No       00%       10%	∋roup Name	Description	~		Percentage	Τ
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Active Listening     20%       Active Questioning     20%       Provided Information     10%       Identified Issue     20%       Call Wrapup     10%       Troubleshooting     20%       Call Skills, 35% (11 items)     20%       Answer Name     Answer Description     Compliance       Yes     None     100%       No     0%	Correct Greeting / Introduction				100%	
Active Questioning       20%         Provided Information       10%         Identified Issue       20%         Call Wrapup       10%         Troubleshooting       20%         Call Skills, 35% (11 items)       20%         Answer Name       Answer Description       Compliance       Percentage         Yes       None       100%         No       100%       100%	Body of Call, 40% (6 items)					
Provided Information       10% d         Identified Issue       20% d         Call Wrapup       10% d         Troubleshooting       20% d         Call Skills, 35% (11 items)       20% d         Answer Name       Answer Description       Compliance       Percentage         Yes       None       100% d	Active Listening				20%	
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Troubleshooting 20% Call Skills, 35% (11 items) Answer Name Answer Description Compliance Percentage Yes None 100% No Mone 0%	dentified Issue				20%	
Call Skills, 35% (11 items)     Add Question     Remove Que       Answer Name     Answer Description     Compliance     Percentage       Yes     None     100%       No     None     0%	Call Wrapup				10%	
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				Add Answer	Remove Answ	ver

Figure 17: Adding Additional Answers

- 1. Add answers to the other questions in each group by selecting them in turn and adding answers.
- 2. When the questionnaire is complete (contains a valid balance of question groups, questions and answers), the message at the top right of the questionnaire tab updates.
- 3. Save your progress regularly using the Save & Close.

### **Specifying Call Selection Rules**

This is an optional feature of the questionnaire, and is only necessary when you wish to filter specific calls to be available for evaluation.



Figure 18: Specifying Call Selection Rules

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

- 1. Click the **Questionnaires** link in the left menu, then click **Questionnaire Manager** to display the current list of questionnaires in Quality Manager.
- To edit the call selection rules click Call Selection Rules on the main questionnaire toolbar to open the Call Selection Rules dialog box.

#### 3. Call Selection Options

The options available are:

- Exact Number: Use this checkbox to select calls to or from phone numbers that exactly match the agent's number (for example, 1234). Otherwise any number that contains the agent's number (in a position specified by Matching Part) is recognized (for example, 1234 is matched in 22331234).
- SIP Number: Use this checkbox to use the SIP number. The agent number must contain the character '@' for recognition of SIP formatted numbers. For example, 1234@example.com.
- Agent Extension Length: Use this field to set the length of the Agent ID. Quality Manageridentifies whether callingnr or originalcallednr is the external call because, the external call number is longer than the extension length.

#### Important:

Note that if SIP is being used (and SIP Number is enabled), this number must be the complete length of the agent's extension. For example, the SIP number 1234@example.com requires an **Agent Extension Length** of 16 (that is one for each character including periods and @signs).

- Allow Internal Call Scoring: Use this checkbox to allow the selection of calls between agents that are defined in the Quality Manager users list.
- Matching Part: If Exact Number is not enabled, this dropdown will show the part of a call's phone number to search for a known agent extension. Options are: Starts With (extension at beginning of phone number), Ends With (at end of phone number) or Contains (extension can be anywhere within the phone number).
- 4. The **Record Criteria Panel** allows the timing of the calls to be specified. Options are:
  - Week Days: Select one or more days of the week that are valid.
  - Time From/To: Select a time period within which the call must have occurred.

Where Call Recording and the client PC are in a different time zones, then the Time intervals will display different values than those originally saved in the Questionnaire.

- Min-Max Recording: Select the minimum or maximum length of the call recording in seconds.
- 5. These settings are optional, and apply only to the current questionnaire. Click **OK** to save any changes, or **Cancel** to exit the dialog.
## **Specifying Access Permissions**

This is an optional feature of the questionnaire. This controls who can select the questionnaire when planning evaluations. Evaluators and agents can be assigned a questionnaire that they do not have permissions to select.

»	Questionnaire Manager 🛞	Call Quality 🛞			cmanager) 🧬 Logout 🖂 Messages
	Cuartiannaire Name Call Q	roups 🔄 Properties 🚍 Call Selec		Permissions	Save & Close
	Access Permissions	O Deny For All	2 • A	llow Selected Only	Deny Selected Only
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(	Balakova	Simona	3)		
	Beranova	Sona	>>>	4	
	Beskydova	Eva		<u> </u>	
	Bocevova	Magdalena			
	Boruvkova	Jitka			
	Bratreoveka	Zdenka 🔻	3		
					5 OK Cancel

Figure 19: Specifying Access Permissions (OPTIONAL)

- 1. To limit or customize access to a questionnaire, click **Permissions** on the questionnaire toolbar. The Access Permissions dialog box will open.
- Access can be granted or blocked for all users, or a subset of users. To create a filtered subset of users, select either the Allow Selected Only or Deny Selected Only permissions option, which activates the user selection window.
- 3. Select the appropriate users in the dialog's left panel (using **CTRL** click on Windows or **CMD** click on the Mac, for multiple selections).
- 4. Click >> (Send To Right) to add users to the subset.

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

5. Click **OK** to save your permissions preferences, or **Cancel** to exit the dialog without saving.

## **Managing Question Groups**

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Questionnaire Manager 🛞 Call Quality 🗵			
3 Add G Manage Groups R Properties All Selection	tion Rules 📀 Permissions 📄 Sa	ave A Copy 📙 Save & Clo	se
Questionnaire Name Call Quality Ver. 1.0	🤌 Status	already used - save a cop	y to make changes
Group Name Description		F	ercentage
∃ Opening call, 40.0 % (5 items)			
Greeting, introducing		2	0.0 %
Dete Question Group Manager	•	2	0.0 %
(3) ③ Add Group	(4)	2	0.0 %
Com Group Name Group Description	Percentage	2	0.0 %
Switz Opening call	40.0 %	2	0.0 %
2 Merchant's skills	20.0 %	Add Question	Remove Questio
Ansy Closing the call	20.0 %	Compliance	Percentage
	20.0 %		
		J	

Figure 20: Managing Question Groups

- 1. Click **Manage Groups** on the questionnaire toolbar to manage question groups
- 2. Select a question group.
- Click Add Group to add a question group or Remove Group to remove a question group (removal of question groups is only possible via this dialog box).
- 4. The sum of the weights must add up to 100%
- 5. Click Close to close the Question Group Manager.

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

#### Important:

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

# **Importing and Exporting Questionnaires**

	🖓 Tooltips Off 🍰 CcManager, CcManag	ger (ccmana	ger) 🔊 Logout 🖂 Messages
» Ques	tionnaire Manager 🛞		
🛈 Ad	d 🖉 Edit 🤤 Remove 📴 Export 🕰 Import	Enter que	ry 🧠 Search
Sta	Name	Version	Scoring System
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	ČP hovory - test	1.3	Percentage
$\bigcirc$	ČP hovory - test	1.1	Percentage
	ČP hovory - test	1.0	Percentage

Figure 21: Importing and Exporting Questionnaires

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

#### Some typical uses can include:

- · Backing up questionnaires and templates
- · Fast set up of questionnaires on a new system
- Automated or advanced creation, editing, and sharing of questionnaires using external text editors and tools

## **Exporting a Questionnaire**

Questionnaire Manager *       1         Add  C Edit  Remove Export in Import       Enter query is Search         Stati Name       Version Scoring Sy         Call Quality       2         In Percentage       1.0         Hard Sell       1.0         Vou have chosen to open       1.0         questionnaire.xml       which is a: XML Document         from: http://docs-callrecl.office.zoomint.com       What should Firefox do with this file?         Open with XML Editor (default)       1         Jo Save File       0         Do this gutomatically for files like this from now on.       4         OK       Cancel		🔽 Tooltips On 🛃 CcManager, CcManager (ccm	anager) 🔊 Logout 🖂	Messages
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Hard Sell 1.0 Percentage          Opening questionnaire.xml         You have chosen to open         @ questionnaire.xml         which is a: XML Document         from: http://docs-callrec1.office.zoomint.com         What should Firefox do with this file?         Open with       XML Editor (default)         3 Save File         Do this gutomatically for files like this from now on.         4       OK	Stati Name		Version	Scoring Sy
Opening questionnaire.xml         You have chosen to open         questionnaire.xml         which is a: XML Document         from: http://docs-callrec1.office.zoomint.com         What should Firefox do with this file?         Open with       XML Editor (default)         Image: Open with       XML Editor (default)         Image: Open with       XML Editor (files like this from now on.         Image: Open with       XML Editor files like this from now on.	Call Quality 2		1.0	Percentage
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What should Firefox do with this file? Qpen with XML Editor (default) Save File Do this automatically for files like this from now on. 4 OK Cancel	which is a: XML Document			
Open with       XML Editor (default)         3       Save File         In Do this automatically for files like this from now on.         4       OK         Cancel	from: http://docs-callrec1.office.z	oomint.com		
3 Save File Do this automatically for files like this from now on. 4 OK Cancel	What should Firefox do with this file?			
Do this automatically for files like this from now on.	Open with XML Editor (defau	it) 🗸		
4 OK Cancel	3 Save File			
4 OK Cancel	Do this automatically for files li	ce this from now on		
		4 OK Cancel		Search ersion Scoring Sy O Percentage
	4 4 Page1 of 1 ▶ ▶  22		Djenlavir	ng 1 - 2 of 2

Figure 22: Exporting a Questionnaire

To export an existing questionnaire

- 1. Select a questionnaire in the Questionnaire Manager.
- 2. Click Export.
- 3. Click Save File.
- 4. Save the resulting XML file to your computer, ideally giving it a more descriptive filename than the default questionnaire.xml.

## Modifying an Exported Questionnaire

1. questionnaire.xml
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xml version="1.0" encoding="UTF-8" standalone="yes"?

Figure 23: Modifying an Exported Questionnaire

You can view and edit exported questionnaire files in any XML-compatible text editor, including the default text editor provided with your computer's operating system.

One of the most useful edits can be to the name and version values (See <u>Modifying an Exported Questionnaire</u>; the original name has been changed in the example). This enables you to import a duplicate of the exported questionnaire, which can be the basis of a simple questionnaire template system.

## Importing a Questionnaire - 1

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Questionnaire Manager 🛞		
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Stati Name	Version	Scoring Sy
O Call Quality	1.0	Percentage
G Hard Sell	1.0	Percentage
Import Questionnaire	×	
Import Questionnaire	Browse (2)	
3 Import		

Figure 24: Importing a Questionnaire

To import a questionnaire

- 1. Click Import on the Questionnaire Manager screen.
- Click Browse in the import dialog to locate the questionnaire file on your computer.
- 3. Click **Import** to start the import.

#### Important:

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

#### Tip:

If your import browser is Chrome, then the file path may display incorrectly. For example: C:\fakepath\questionnaire\_ percent.xml, this does not affect the import and is a known issue with the Chrome browser.

## Importing a Questionnaire - 2

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Questionnaire Manag	ger 🗷 Call Quality 🗷				
) Add Group 🏼 🍃 I	Manage Groups 📴 Prop	erties 🗧 Call Selection Rules	s 📀 Permis 2 📄 Save A Co	py 📙 Save & Close	
uestionnaire Name	Call Quality	Ver. 1.0	1 🖉 Status: already	used - save a copy to ma	ake change
Group Name	Description			Percenta	ge
Opening call, 40	.0 % (5 items)				
Greeting, introducing				20.0 %	
Detection and Verific	:			20.0 %	
Customer?s Conser	1			20.0 %	
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Switching to the mat	1			20.0 %	
				Add Question Rem	ove Questio
Answer Name	Answer Description	1		Compliance Perc	entage

Figure 25: The Imported Questionnaire

When a questionnaire imports successfully, the application will open it for editing.

- 1. Ensure that the name and version are correct.
- 2. Click **Save & Close** to save the questionnaire after completing any modifications.

#### Chapter 3 Questionnaires



## Chapter

# **4** Evaluations

This chapter describes how to plan and use Evaluations.

This chapter contains the following sections:

Planning an Evaluation Practical Examples of Evaluations



# **Planning an Evaluation**

This is a short tutorial to show how to plan a new agent evaluation in Genesys Quality Manager 8.1.50x

## **Opening the Evaluation Planner**

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۹ »	🕲 Create Evaluations 😠 Save As Template 🤯 Templates 🔜 Load Template 🗸 😮 Close
Dashboard Evaluations Construction List Construction Planner Construction Planner	Date Range:   From:  To:  Questionnaire:  Apply To Statistics:
😡 Questionnaire Manager	Basic Add Sub-Criteria
<ul> <li>Peports</li> <li>Administration</li> <li>About</li> </ul>	Group Evaluation     Agent Evaluation     Self-Evaluation Evaluator:     Ø Select All/None Group:     Ø Select All/None
	<ul> <li>Antonovicova, Alena (AAntonovicova)</li> <li>Balakova, Simona (sbalakova)</li> <li>Beranova, Sona (t911996)</li> <li>Beskydova, Eva (t911397)</li> <li>Bocevova, Magdalena (MBocevova)</li> <li>Boruvkova, Jitka (jboruvkova)</li> </ul>
	Wrapup: Media Direction: All
	🔕 Add Media Type 🤤 Remove 🖳 Allow Replacement 🗒 Allow Selection 🖗 Allow random calls selection 🎯 Add Interaction
	Media Type Min. Count N. Start End Length From To Type

Figure 26: Opening the Evaluation Planner

To schedule a new evaluation:

- 1. Click Evaluations in the left hand menu.
- 2. Click Evaluation Planner to open the Evaluation Planner tab.

#### Important:

Click **Close** or click the tab close icon, to close the planner without saving.

#### 🖓 Tooltips Off 🛯 🛃 CcManager, CcManager (ccmanager) 🔊 Logout 🖂 Messages Evaluation Planner 🥝 Create Evaluations 🛛 🔜 Save As Template 🛛 😾 Templates 😼 Load Template 🔻 😫 Close × • Period: Current Week From: 1/23/11 To: 1/29/11 Interaction Count: 2 Ouestionnaire: Call Quality (1.0) × Apply To Statistics: Add Sub-Criteria Basic Group Evaluation Agent Evaluation Evaluator: Select All/None Select All/None Group: 🗹 Buck, Jake (jake.buck) 🗹 CcManager, CcManager (ccmanager) Daniels, Helena (helena.daniels) 🗹 Herrera, Graciela (graciela.herrera) Hopper, Stephan (stephan, hopper) Johns, Christopher (christopher.johns) 🔽 Olson. Rafael (rafael.olson) Wrapup: Media Direction: In/Outbound 🍸 📀 Add Media Type 🤤 Remove 🔢 Allow Replacement 🚯 Allow Selection 🎒 Allow random calls sele tion 📀 Add Inte Media Type Min. Count N. Start End Length From To Туре

## Specifying an Evaluation Period and Questionnaire

Figure 27: Specifying an Evaluation Period and Questionnaire

- Specify the evaluation Period: using the Period: drop down list (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 (Use the format MM/DD/YY).
- The Questionnaire drop down list enables you to pick an available questionnaire to use for the evaluation. If the questionnaire you wish to use is not visible, ensure that it is marked as completed in the Questionnaire Manager (See Questionnaires).
- 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.
- 4. Select the Apply to Statistics checkbox to include the results of this evaluation in reports linked to the selected group or agents. De-selecting this option is useful if the evaluation is for testing or internal purposes only and should not affect the agent results.

Next select a target user, group or self-evaluation.

## Selecting a Target User, Group or Self-Evaluation Option

Evaluation Planner	1										
Create Evaluations	占 Save As Ten	mplate 🤯 Templa	tes 🛃 Loa	ad Template 🔻	🔀 Close						-
Period:	Current Wee	ek 💌	From:		5/8/11		To:		5/14	/11 🖻	
Questionnaire:	Call Quality (	1.0)				~	Interacti Count:	ion			
Apply To Statistics:	$\checkmark$	1									
Basic 1 S	ria	3		4	_						_
Group Evaluation	Ager	nt Evaluation	🔵 🔘 Seli	f-Evaluation							
Evaluator:	CcManager,	CcManager (ccm	anager)		~						
Groups:		Selec	t All/None	Agents:			[	Select	: All/Nor	ne	E
4 🥼 Root group			<u>^</u>	Flare, Fr	ed (fred.flare)						
a 🧔 Copenhagen			=	🔽 Hun, Atti	la (attila.d.hun)	)					
Pacos de Fer	reira			Meldrew	, Victor (Victo	r.Meldrew)	)				
4 🌾 Dakar				Napper,	Wesley (wesl	ey.napper)	I				
Sioi Bolnisi				🔽 Smith, Jo	hn (john.smith	)					
4 🥼 Guatermala C	ity		*								
Wrapup:		*	Media Di	rection:	In/Outbou	nd 🍸					
🗿 Add Media Type 🌘	🔵 Remove 🔃	Allow Replaceme	nt 🔒 Allo	w Selection	Allow rando	m calls sel	lection 🛈	Add Inter	action		
Media Type	Min. Count N.	Start	End		Length	From	То	Туре			
Call 💌	I										
Save	ancel										-

Figure 28: Selecting a Target User or Group

- 1. On the **Basic** tab you can choose to evaluate:
- 2. An agent group by selecting Group Evaluation.
- 3. Individual agents by selecting Agent Evaluation.
- 4. Self Evaluation by selecting Self Evaluation. This is only available if the user currently logged-in has been assigned the self-evaluate role in their user profile (see <u>Enabling Agent Self-Evaluation</u>), If selected, this automatically sets the Evaluator and Evaluated Agent to the currently logged-in user. This enables agents to plan and perform their own performance evaluations. See the Quality Manager Agent User Guide for more details.

## Selecting a Target User

	🖓 Tooltips 0	ff 🔗 CcManager, CcMana	ger (ccmanager)	🎤 Logout 🖂 Messag
Evaluation Planner				
📀 Create Evaluations 🛛 Save As Template 🤯	Templates 🛛 🔒 Load Template	🕶 😫 Close		
Period: Current Week	▼ From:	5/8/11	To:	5/14/11
Questionnaire: Call Quality (1.0)		*	Interaction Count:	
Apply To Statistics:				
Basic Add Sub-Criteria				
Group Evalut Agent Evaluat	ion 🔘 Self-Evaluation			
Evaluator: CcManager, CcManage	er (ccmanager)	<b>▼</b> 2		
Groups:	Select All/None Agents:		📃 Sel	ect All/None
A 🕼 Root group		, Fred (fred.flare)		
Copenhagen Pacos de Ferreira		Attila (attila.d.hun)		
Pacos de Ferreira		rew, Victor (Victor.Meldrew)		
Sioi Bolnisi		er, Wesley (wesley.napper) 1, John (john.smith)		
a 🧊 Guatermala City		, sonn (john.sinkii)		
Wrapup:	✓ Media Direction:	In/Outbound ¥		
📀 Add Media Type 🥥 Remove 🖪 Allow Re	placement 🔢 Allow Selection	Allow random calls sel	ection 📀 Add Ir	nteraction
Media Type Min. Count N. Start	End	Length From	То Туре	• 5
Call 💙 1				-

Figure 29: Selecting Agents for Evaluation

#### Select Agents for Evaluation

The example above shows an Agent Evaluation.

- 1. Select Agent Evaluation.
- 2. Select an **Evaluator**. The Evaluator must be a Quality Manager Team Leader, CC Manager, or Supervisor type of user.
- 3. The groups for which the evaluator is responsible are shown in the Groups list. Click on one or more groups. Clicking on a group displays the group's agents in the Agent list on the right.
- 4. Select the checkboxes of the agents to be evaluated.
- 5. Agent interactions (for example calls) can be filtered by selecting a Wrapup value (if one is available) and a limitation on the Media Direction (inbound and/or outbound). The Media Direction drop down also enables you to specify whether the evaluation should use internal interactions (INTERNAL) only or all interactions to that agent (ALL). The default is BOTH, meaning

both inbound and outbound internal and external interactions will be sampled.

#### Important:

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

## Adding Evaluation Media Types



Figure 30: Adding Evaluation Media Types

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

- 1. Click Add Media Type to add a new Media Type.
- 2. The media types created within GQM are:
  - Call : Selects media only from interactions containing call recordings (this includes screen captures that also include call recordings).
  - Call+Screen : Selects only from interactions that contain both a call recording and a screen capture.
  - Screen : Selects only from interactions containing screen captures (this includes call recordings that also include screen captures).
  - External media may also be specified (Chat logs or Email). In the latter case, the media must be accessed outside 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. 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.

5. To save click Save.

## **Adding Media for Evaluation**

	Add Spec	ific Interact	tion(s)			×	Tooltips Off 🛛 🝰 CcManager, CcM	lanager (ccmanager	) 🎤 Logout 🖂 Mess
Agent: Barker, Deanna		Descri	ption:				emplate - 🔀 Close		
Media Direction:							Cioso		
	~	Media	Type:				1/23/11	To:	1/29/11
All		Call			~				
External Data Key:		Wrapu	p:		_		*	Interaction Cour	t: 2
	*				~				
External Data Value:		Period			_				
		Curre	nt Week		~				
Customer Number:		1/23/	11 🔤 1/29/	/11 🖻	- 1		luation		
		Count		11 11			~		
		- Courres			_				
Min. length 0:00 Max. leng	ath	1			_		ents:	Sele	ect All/None
0:00	, c.						rker, Deanna (deanna.barker)		
	3 Search	Add In	teractions 5				nson, Mattie (mattie.benson)		<b></b>
			$\sim$				rg, Camille (camille.berg)		
SID Fr	om To	Length	Start	End			ck, Jake (jake.buck)		
16965583192.168.7.58: 56	30 5512	00:07:56	1/26/11 3:20 PM	1/26/11 3:28 PM	$\bigcirc$		erry, Zachery (zachery.cherry)		*
965498192.168.7.58: 56	30 5512	00:00:34	1/25/11 3:48 PM	1/25/11 3:49 PM			rtez. Patricia (patricia.cortez)		Ŧ
4							on: In/Outbound Y		
16965475192.168.7.51: 55	12 5506	00:00:06	1/25/11 2:56 PM	1/25/11 2:56 PM					
16965586192.168.7.58; 56	30 5512	00:16:31	1/26/11 3:29 PM	1/26/11 3:46 PM			election 🕒 Allow rand	al 🚺 💿 Add In	teraction
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16965478192.168.7.51: 55									
16965478192.168.7.51: 55 16965472192.168.7.58: 56	30 5512	00:02:05	1/25/11 2:51 PM	1/25/11 2:53 PM	<b>()</b>	$\sim$	09 DM 00:00:07 6612	6606 6	
16965472192.168.7.58: 56						Ă	08 PM 00:00:07 5512	5506	Quick Note
	30 5512	00:02:05 00:01:18	1/25/11 2:51 PM 1/26/11 4:17 PM	1/26/11 4:18 PM	9 1 - 10 of	4	:08 PM 00:00:07 5512	5506	Quick Note

Figure 31: Adding Media for Evaluation

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

To add specific interactions:

- 1. Click **Add Interaction**. A selection dialog box opens that allows the evaluator to filter results by specific parameters.
- 2. Select an Interaction.
- 3. Click Search to display a list of matching interactions.
- 4. Click the checkbox for each record you wish to add to the evaluation.
- 5. Click Add Interactions.
- 6. The chosen interactions appear in the media window and the selection window closes.
- Interactions can also be removed from the evaluation by clicking the appropriate removal button (See <u>Adding Media for Evaluation (Optional</u>)), or a quick note can be added for evaluators to reference.

#### Important:

If the currently selected agent does not have an ID (for example extension number) specified in their ScoreCARD profile, the error message "The agent identifier is set to NONE. Search results will contain results for all agents" appears in the Add Interaction selection dialog window. This results in interactions for all agents being displayed in the dialog box.

### Adding Sub-Criteria



Figure 32: Adding Sub-Criteria

- 1. Click the Add Sub-Criteria tab.
- 2. Click Add Media
- The Media Type dialog box opens. Select a Media Type from the dropdown list. Specify a Min. count click Save. Repeat this step until all required media types have been added. The media types available are:
  - Call
  - Call + Screen
  - Screen
  - Chat

- Email
- Other

#### Tip:

Quality Manager creates rows for **Chat**, **Email**, or **Other** media in the grading, allowing these interactions to be evaluated. **Chat**, **Email**, and **Other** may require different questionnaires, however, because they are written media and may have different standards for evaluation than **Call**, **Call + Screen**, or **Screen** media.

- The Interaction Count must be the sum of all of the Basic and Min. Counts from all Sub-Criteria media types. If the Interaction Count box is highlighted with red edges, the Interaction Count must be changed to equal the sum.
- 5. 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 to that specified on the Basic tab.
- 6. You can specify a minimum call length (Min. Length) to filter out short or aborted calls, and a Maximum length Max. Length to filter out excessively long calls.

#### Tip:

This feature allows the evaluator to compare similar skill levels and bring agents that are almost up to target on track. Then for further evaluations, setting the **Max. length** at higher than accepted norms identifies where more in depth training may be required for those agents whose calls are excessively long.

- 7. External Data shows calls that have been flagged with specific information associated with them. For example, the External Data can be configured to flag high value, new, returning, or other customers, allowing the evaluator to select calls from various customer types.
- The Deadline field allows a date to specified by which the evaluation must be completed. A reminder message can be set to notify the evaluator (Remind Evaluator) a specified number of days before the evaluation deadline (Days to Deadline).

- Click Create Evaluations. The evaluations are created and a message box states how many evaluations were created. Click OK to close the message box.
- 10. Select Evaluation List to view the created evaluations.

#### Important:

If there are no calls that satisfy the sub-criteria available then, calls that satisfy the Basic criteria will be added.

#### 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.

## **Enabling a Selection of Random Calls**

					Tooltips C	iff 🔗 CcMar	ager, Ccl	Manager (ccr	manager)	🄊 Logou	t 🖂 Messa
Evaluation Planner	×										
Create Evaluations	Save As	s Tem	olate 🤯 Templ	ates 🛃 Lo	ad Template	🖌 😢 Close					
Period:	Current \	Neek	~	From:		1/23/11		To:		1/29/11	L 🖪
Questionnaire:	Call Qual	lity (1	0)				~	Interacti	on Count:	3	
Apply To Statistics:		$\checkmark$									
Basic Sub-Criteria	1 🗵 Add S	Sub-Cr	teria								
Group Evaluation	•	Agent	Evaluation	🔘 Self	-Evaluation						
Evaluator:	Buck, Ja	ke (ja	ke.buck)			~					
Groups:			🗌 Sele	ct All/None	Agents:				Select	All/None	
4 🕼 Root group					Barker, Dea	nna (deanna.	barker)				
▲ <sup>(</sup> Copenhage Pacos de l					Benson, Mattie (mattie.benson)						
Paços de l	-erreira				Berg, Camille (camille.berg)						
Sioni Bolni	si				Buck, Jake	(Jake.buck) hery (zachery	chornel			Ļ	
a 🍯 Guatemala	City			* *		icia (patricia.				×	
Wrapup:			×	Media Di		In/Outbour					
Add Media Type	Remove		Allow Replacem	ent 🔒 Alk	ow Selection	Allow rand	om calls	selection	Add Inte	raction	
Media Type	Min. Count	Ν.	Start	End		Length	From	То	Туре		
Call	2	1	1/25/11 11:32 /	M 1/25	'11 11:32 AM	00:00:06	5512	5506		8	Quick Note
		2	1/25/11 1:08 PI	M 1/25/	'11 1:08 PM	00:00:07	5512	5506		8	Quick Note

Figure 33: Selection of Random Calls

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

#### Important:

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

#### Important:

When using the **Get Random Interactions** function while performing an evaluation, Quality Manager only selects interactions that have not yet been used for evaluation.

## **Using Evaluation Templates**

- 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.

## Loading a Saved Template

To load a saved template:

- 1. Click Load Template in the menu bar.
- 2. Select an existing template name from the drop-down list that appears.

Evaluation templates that you have permissions to load can be permanently deleted by clicking the **Templates** button in the menu bar of the Evaluation Planner, and clicking **Remove** on the appropriate template in the Templates dialog box .

#### Important:

Loading an evaluation template will overwrite any existing settings in the Evaluation Planner. Removal of an evaluation template is permanent and cannot be undone!

### Creating the Evaluation

				Tooltips On	🝰 CcManager, CcMa	anager (comanager) 🔊	Logout 🖂 Messages
(*)	Evaluation Planner						
	Create Evaluations	👌 Save As Tem	plate 🤯 Templa	ates 😽 Load Template	• 🔀 Close		^
Dashboard     Dashboard     Solutions     Evaluations     Evaluation List     Evaluation Hanner     Ouestionnaires     Ouestionnaires     Ouestionnaires     Ouestionnaires     Ouestionnaires     Ouestionnaires	Period: Questionnaire: Apply To Statistics: Basic Add Sub-Criter	Current Week Call Quality (1 V		From:	7/10/11	To: Interaction Count:	7/16/11
<ul> <li>Administration</li> <li>About</li> </ul>	<ul> <li>Group Evaluation</li> <li>Evaluator:</li> <li>Groups:</li> </ul>		: Evaluation	Self-Evaluation	×	Select 1	All/None
	<ul> <li>Goot group</li> <li>Goot group</li> <li>Astana</li> <li>Rapid Bucure</li> </ul>			2 Ok	Aida (aida.alvarez) lerbert (herbert.ayala) Cara (cara.conner)		* E
	<ul> <li>▲ <sup>(2)</sup> Brasília</li> <li>Glentoran</li> <li>▲ <sup>(2)</sup> Brussels</li> </ul>			Decke	erri (terri.day) r, Maureen (maureen.de er. Sevmour (sevmour )		
	Wrapup:	Bemove	Allow Replaceme	Media Direction:	All	selection 🔘 Add Intera	
	Media Type 🔺 🛛 N	lin. Count N.	Start	End	Length From		
	Other 1						•

Figure 34: Creating the Evaluation

To Schedule the evaluation after specifying the criteria for determining agent calls for evaluation:

- Click Create Evaluation at the top of the Evaluation Planner page to schedule (create) the evaluation. If any parameters or options are not correct during creation, a validation error dialog box will help you identify the cause of the issue; otherwise a confirmation dialog box will confirm that the evaluation has been scheduled.
- 2. Click **OK** to close the dialog box. A confirmation message is sent to the evaluator.
- 3. Click **Evaluation List** from the menu on the left to view the updated list of evaluations.

## **Viewing Created Evaluations**

	New	🚺 Eva	luate 📑 Report	More Actions	<ul> <li>Send Agent's Ev</li> </ul>		dback 🃴	Export to	(2)shee	t All	
	N.	ID	Evaluator	Agent	Ques. Name	Period Fro	Period To	Score (	Status F	Reveal	Last Modifi Parent ID
]	1	949	Buck, Jake	Barker, Deanna	Call Quality (1.0)	Jan 23, 20	Jan 29, 20	0.0 %	Created	1	Jan 26, 20 (1)
]	2	947	Olson, Rafael	Meadows, Thom:	Call Quality (1.0)	Sep 25, 20	Sep 26, 20	37.0 %	Finished		Jan 25, 20
]	3	946	Olson, Rafael	Meadows, Thoma	Call Quality (1.0)	Sep 26, 20	Sep 27, 20	22.0 %	Finished	$\checkmark$	Jan 25, 20
]	4	945	Olson, Rafael	Meadows, Thoma	Call Quality (1.0)	Sep 27, 20	Sep 28, 20	87.0 %	Finished	$\checkmark$	Jan 25, 20
]	5	944	Olson, Rafael	Meadows, Thoma	Call Quality (1.0)	Sep 28, 20	Sep 29, 20	32.0 %	Finished	$\checkmark$	Jan 25, 20
]	6	943	Olson, Rafael	Meadows, Thoma	Call Quality (1.0)	Sep 29, 20	Sep 30, 20	48.0 %	Finished	$\checkmark$	Jan 25, 20
]	7	942	Olson, Rafael	Silva, Velma	Call Quality (1.0)	Sep 25, 20	Sep 26, 20	25.0 %	Finished	$\checkmark$	Jan 25, 20
]	8	941	Olson, Rafael	Silva, Velma	Call Quality (1.0)	Sep 26, 20	Sep 27, 20	45.0 %	Finished	$\checkmark$	Jan 25, 20
]	9	940	Olson, Rafael	Silva, Velma	Call Quality (1.0)	Sep 27, 20	Sep 28, 20	80.0 %	Finished	$\checkmark$	Jan 25, 20
	10	939	Olson, Rafael	Silva, Velma	Call Quality (1.0)	Sep 28, 20	Sep 29, 20	70.0 %	Finished	$\checkmark$	Jan 25, 20
	11	938	Olson, Rafael	Silva, Velma	Call Quality (1.0)	Sep 29, 20	Sep 30, 20	37.0 %	Finished	$\checkmark$	Jan 25, 20
	12	937	Olson, Rafael	Yates, Bettie	Call Quality (1.0)	Sep 25, 20	Sep 26, 20	30.0 %	Finished	$\checkmark$	Jan 25, 20
	13	936	Olson, Rafael	Yates, Bettie	Call Quality (1.0)	Sep 26, 20	Sep 27, 20	59.0 %	Finished	$\checkmark$	Jan 25, 20
	14	935	Olson, Rafael	Yates, Bettie	Call Quality (1.0)	Sep 27, 20	Sep 28, 20	30.0 %	Finished	$\checkmark$	Jan 25, 20
]	15	934	Olson, Rafael	Yates, Bettie	Call Quality (1.0)	Sep 28, 20	Sep 29, 20	51.0 %	Finished	$\checkmark$	Jan 25, 20
]	16	933	Olson, Rafael	Yates, Bettie	Call Quality (1.0)	Sep 29, 20	Sep 30, 20	49.0 %	Finished	$\checkmark$	Jan 25, 20
]	17	932	Olson, Rafael	Bowers, Ed	Call Quality (1.0)	Sep 25, 20	Sep 26, 20	45.0 %	Finished	$\checkmark$	Jan 25, 20
]	18	931	Olson, Rafael	Bowers, Ed	Call Quality (1.0)	Sep 26, 20	Sep 27, 20	40.0 %	Finished	$\checkmark$	Jan 25, 20
]	19	930	Olson, Rafael	Bowers, Ed	Call Quality (1.0)	Sep 27, 20	Sep 28, 20	80.0 %	Finished	$\checkmark$	Jan 25, 20
]	20	929	Olson, Rafael	Bowers, Ed	Call Quality (1.0)	Sep 28, 20	Sep 29, 20	42.0 %	Finished	$\checkmark$	Jan 25, 20

Figure 35: Viewing Created Evaluations

Existing evaluations display in the **Evaluation List**.

- 1. The newly created evaluation should be visible at the top of the list by default.
- 2. Evaluations can be arranged by status by clicking Status.
- 3. Use the forward, back, and shuffle controls to navigate through the pages of results.

This list screen enables you to also permanently remove (**Delete**) evaluations and create **New evaluations**. Click **New evaluations**.

#### Important:

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

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

1	New	Evalua	tion 🕼 Eva	iluate 📑 Re	eport 🚳 More A	ctions -		🖂 s	end Eva	aluation	Feedback 📴 Ex	port to Spreadshee		× 💊	Search Ev	valu
	Ν.	ID	Evaluator	Agent	Ques. Name	Period	Period	Score	Status	Revea	Last Mc Parent IE		All			
-	1	914	CcManager	Conner, Car	Call Quality (1.0	Jul 10,	Jul 16,	0.0 %	Create		Jul 14,	Search Criteria	Created	_		
	2	913	CcManager	Ayala, Herb	Call Quality (1.0	Jul 10,	Jul 16,	0.0 %	Create		Jul 14,		In Progress			
	3	911	Meldrew, Vi	Meldrew, Vi	Call Quality (1.0	Jul 12,	Jul 12,	0.0 %	In Pro		Jul 13,	Evaluator:	Finished		~	
	4	912	Meldrew, Vi	Meldrew, Vi	Call Quality (1.0	Jul 12,	Jul 12,	0.0 %	Create		Jul 13,	Period:	Select Per	nod	~	
	5	910	Meldrew, Vi	Meldrew, Vi	Call Quality (1.0	Jul 12,	Jul 12,	0.0 %	Create		Jul 13,	From	То			
	6	909	Meldrew, Vi	Meldrew, Vi	Call Quality (1.0	Jul 12,	Jul 12,	0.0 %	Create		Jul 13,	Group:	Select Gr		~	
	7	908	Meldrew, Vi	Meldrew, Vi	Call Quality (1.0	Jul 12,	Jul 12,	0.0 %	Create		Jul 13,				~	
	8	907	CcManager	Meldrew, Vi	Call Quality (1.0	Jan 1, :	Dec 31	0.0 %	Create		Jul 13,	Agent:	Select Ag	ent	*	
	9	906			Call Quality (1.0						Jul 13,	Ticket Number:		Mail Tracking		
	10	905			Call Quality (1.0						Jul 12,			Number:		
	11	904			Call Quality (1.0						Jul 12,	Category:	Select Ca	tegory	~	
	12	903	-		Call Quality (1.0						Jul 12,	Media Direction:	Select Me	edia Direction	~	
	13	902			Call Quality (1.0						Jul 12,	Wrapup:	Select Wr	apup	~	
	14	901			Call Quality (1.0						Jul 12,	Ouestionnaire:	Select Int	teraction Questionnai	· ·	
	15	900			Call Quality (1.0						Jul 12,				e	
	16	899			Call Quality (1.0						Jul 12,	Score:	From	То		
_	17	898			Call Quality (1.0						Jul 12,	ID:	From	То		
	18	897			Call Quality (1.0						Jul 12,					
	19	896			Call Quality (1.0						Jul 12,			Search	C	lear
	20	895	Coney, Hers	Guuerrez, N	Call Quality (1.0	5ep 25	5ep 26	22.0 %	rinish		Jul 12,					

Figure 36: Show evaluations that have a specific status with the drop down list

The columns can be sorted by clicking on a column heading, or show evaluations with a specific status with the drop down list.

- 1. The statuses are:
  - All
  - Created
  - In progress
  - Finished

## **Searching for Evaluations**

New	<b>1</b>	Evaluate	🛛 Report 🛛 🍪 M	Iore Actions -								xport to Spreadsheet	All	✓ ]	Search Eval
N.	ID	Evaluator	-	Ques. Name						Last Mc Pa	rent II				(
1	949	Buck, Jak	e Barker, Dear	Call Quality (1.0)	Jan 23,	Jan 29,	0.0 %	Create	$\checkmark$	Jan 26,		Search Criteria			
												Evaluator:	Select Eval	uator	~
												Period:	Current Mo	onth	~
												1/1/11	1/31/11		
												Group:	Paços de F	erreira	~
												Agent:	Barker, Dea	anna	~
											3	Ticket Number:		Mail Tracking Num	iber:
											Ч	Category:	Select Cate	egory	~
												Media Direction:	Select Med	lia Direction	~
												Wrapup:	Select Wra	pup	~
												Questionnaire:	Select Inte	raction Questionnain	e 💌
												Score:	From	То	
												ID:	From	То	
											- 1				
														Search	Clea
														(	4

Figure 37: Searching for Evaluations

Evaluations can be filtered using the search dialog.

To search for an evaluation:

- 1. Click >> on the left hand side to hide the menu bar in order to get the maximum possible display width for the list.
- Click >> at the top right of the Evaluation List tab (see screenshot) to reveal the search dialog box.
- 3. Set as few or many search fields as required.
- 4. Click Search to apply the filter, or Clear to reset the search fields.

# **Practical Examples of Evaluations**

This section gives practical examples of how to:

- Plan the evaluation of specific calls for specific agents. This could be as the result of a complaint, or a good or bad call discovered by live monitoring.
- Create all of the required evaluations for a period as a batch .
- Improve the quality of the calls by comparing the evaluations of different evaluators.

## Planning the Evaluation of Specific Calls

To evaluate a specific call, access the call:

- 1. Open the Evaluation Planner.
- Select a Period and the Questionnaire to be used to evaluate the call from the dropdown. Type the Interaction Count. See <u>Specifying an Evaluation</u> Period and Questionnaire.
- 3. On the Basic tab Select Agent Evaluation. See Select a Target User.
- 4. Select the **Evaluator** that deals with the group that the agent belongs to. The groups that the evaluator deals with will appear in bold in the **Groups** field. If necessary scroll down in that field to see the full list.
- 5. Select the group that the agent belongs to and the agents in that group will appear in the **Agents** field. If necessary scroll down in that field to see the full list.
- 6. Select the checkbox for the agent. This activates the **Add Interaction** button.
- 7. Click **Add Interaction**, the **Add Specific Interactions** dialog opens. Most fields on the form are optional but the more information that is entered on the dialog the more specific the search will be for the call required.
- 8. Select the **Media Direction**, type, or copy and paste the **Customer number** (if known) and the **Min. length** and **Max. Length** of the call.
- 9. Type, or copy and paste a **Description** (this must match the note made in the description field of the call).
- 10. Select a **Media Type** and a **Wrapup**, select a Period and click **Search**. The calls that correspond to the search will appear. You may then play the call to confirm that you have the correct one.

- Once the correct call is selected, click the checkbox for that call and ensure that all other calls are unchecked. Click Add Interactions. The Add Specific Interactions dialog closes and the call will be added to the evaluation.
- 12. Click **Create Evaluations** to create the evaluation. The evaluation is created and a message box states how many evaluations were created. Click **OK** to close the message box.
- 13. Select Evaluation List to view the created evaluation.

#### Important:

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

## **Creating Multiple Evaluations**

>> •	Evaluation List 🗷 Ev	aluation Planner		ates 🚙 Load Template	: 🕶 😥 Close			
<ul> <li>Dashboard</li> <li>I paint of the second /li></ul>	Period:	Current Week	~	From:	4/22/12	To:	4/28/12	2
Evaluation List     Evaluation Planner     Couestionnaires     Caustionnaires     Caustionnaires	Questionnaire: Apply To Statistics: Basic Add Sub-Crit	Call Quality (1.0	)		~	Interaction Count:		3
<ul> <li>Administration</li> <li>About</li> </ul>	Group Evaluation	~	Evaluation	Self-Evaluatio	n			
	Spencer, Quincy	edro.lamb) larcy.marsh) (madeleine.miller n (cathleen.roman e (bruce.singleton)	)		Iraklis Thessaloniki	Select	t All/None	
	Wrapup:	😑 Remove 📑 A	V Replacem	Media Direction:	In/Outbound V	selection 📀 Add In	nteraction	
		Min. Count N.	Start	End 🔺	Length From	То Туре	e	
	Call	2						

Figure 38: Creating Multiple Evaluations

To create all of the required evaluations for a period as a batch:

- 1. Open the Evaluation Planner.
- Select a Period and the Questionnaire to be used to evaluate the calls from the dropdown. Type the Interaction Count. See <u>Specifying an Evaluation</u> Period and Questionnaire.
- 3. On the Basic tab select Group Evaluation
- 4. The **Evaluator** list appears and by default every evaluator is selected. The select Evaluator: **All/None** checkbox will select all or none of the evaluators. Select or de-select checkboxes to choose which evaluators are included.
- 5. To select the groups which are assigned to an evaluator, without actually selecting the evaluator, click on the evaluator's name without selecting the checkbox. The groups that the evaluator is responsible for will appear in the evaluator's box on the right hand side.

	🔽 Tooltips On 🗟 CcManager, CcManager (ccmanager) 🦻 Logout 🖂 Messages
Evaluation Planner ®	
🎯 Create Evaluations 🚺 ve As Template 👳 Templates 👼 Load Template 👻 🕻	Close
Period: Yesterday Y From: 8/	1/11 To: 8/1/11
Questionnaire: Call Quality (1.0)	<ul> <li>Interaction Count: 1</li> </ul>
Apply To Statistics:	
Basic Add Sub-Criteria	
Group Evaluation     Getrefunction     Getrefunction	
Evaluator: Select All/None Groun	Select All/None
Bennett, Sondra (sondra.ber 207 evaluation(s) created	×
CcManager, CcManager (ccm	
Cunningham, Hans (hans.cu 2) Ok	
Garrison, Maritza (maritza.ga	
V Hobbs, Eddie (eddie.hobbs)	
Houston, Anibal (anibal.houston)	
Wrapup: 🛛 🗸 Media Direction: Ir	/Outbound 🔽

Figure 39: Created Evaluations

- 1. Click **Create Evaluations**. The evaluations are created and a message box states how many evaluations were created. Click **OK** to close the message box.
- 2. Select Evaluation List to view the created evaluations.

#### Chapter 4 Evaluations



## Chapter

5

# **Performing an Evaluation**

This chapter is a brief tutorial on how to complete a scheduled agent evaluation in Genesys Quality Manager 8.1.50x. The same basic procedure applies to Self evaluations if appropriate. For further details on Self evaluations see the Quality Manager User Guide Agent document.

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



# **Opening the Scheduled Evaluation**

	«	E	valua	tion List	×									
5.4 12.5	8 9 12 9 8 8		3	🛃 Eva	luate 📃 Repor	t 🎯 More Acti	ons 👻 🖂 Send Eva	luation Fee	dback 📴	Export S	preadsheet	All		
🛞 Dashboard			N.	D	Evaluator	Agent	Ques. Name	Period	Period	Score	Status	Reveal	Last	Paren
Evaluations	$\sim$		1	491257	CcManager, Cc	Cermakova_BL	TEST ČP hovory	29 Au	29 Au	0.0 %	In Progre	1	5 Sep	
Evaluation List	$\bigcirc$	V	2	491258	CcManager, Cc	Habart, Lukas	TEST ČP hovory (	29 Au	29 Au	0.0 %	In Progre	<b>V</b>	29 Au	
Questionnaires	_		3	491239	CcManager, Cc	Malkova, Danie	ČP hovory S2S (	27 Au	27 Au	63.0 %	In Progre	V	27 Au	
Reports			4	491256	testovaci, testo	Malkova, Danie	ČP hovory S2S (	27 Au	27 Au	0.0 %	Created		27 Au	
Administration			5	491255	Pipek, Martin	Malkova, Danie	ČP hovory S2S (	27 Au	27 Au	0.0 %	Created		27 Au	
About			6	491254	Veverka, Toma	Malkova, Danie	ČP hovory S2S (	27 Au	27 Au	0.0 %	Created		27 Au	
			7	491253	Zumrova, Anet	Malkova, Danie	ČP hovory S2S (	27 Au	27 Au	0.0 %	Created		27 Au	
			8	491252	Kolesova, Mark	Malkova, Danie	ČP hovory S2S (	27 Au	27 Au	0.0 %	Created		27 Au	
			9	491251	Zlesakova, Pet	Malkova, Danie	ČP hovory S2S (	27 Au	27 Au	0.0 %	Created		27 Au	
			10	491250	Syrovatkova, J	Malkova, Danie	ČP hovory S2S (	27 Au	27 Au	0.0 %	Created		27 Au	
			11	491249	Hogerova, Vera	Malkova, Danie	ČP hovory S2S (	27 Au	27 Au	0.0 %	Created		27 Au	
			12	491248	Havlicek, Miros	Malkova, Danie	ČP hovory S2S (	27 Au	27 Au	0.0 %	Created		27 Au	
			13	491247	one03, agent	Malkova, Danie	ČP hovory S2S (	27 Au	27 Au	0.0 %	Created		27 Au	
			14	491246	Krystek, Lukas	Malkova, Danie	ČP hovory S2S (	27 Au	27 Au	0.0 %	Created		27 Au	
			15	491245	Pelcova, Kristy	Malkova, Danie	ČP hovory S2S (	27 Au	27 Au	0.0 %	Created		27 Au	

Figure 40: 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. Click to reveal the search dialog if the list is long.

It is only possible to evaluate evaluations that have been **Created** or **In Progress** but not those in the **Finished** status.

To re-use a completed evaluation, see the <u>Re-Using the Evaluation - 1 (Optional)</u> steps at the end of this tutorial.

# **The Evaluator Screen**

Eval	uation	List 🗵	Evaluator	Form (491	258)		Close	J						_
1 🛃 A	dd Inte	eractions	s 📑 Add R	andom Intera	ctions 2	emove	📃 Report	t 🖂 (	Send Feedb	ack 📖	Feedl	back His	tory	(
Que	stion	naire: T	res' Agent:	Habart, Lu	ika: Evaluat	tor: CcMana	ger, CcMana	agei E	valuation P	eriod:	From:	29/08/	2012 To:	29/08/2
	Ν.	Stat	Start	End	Length	From	То	Туре				Curr		
	1	Θ	29/08/2012	29/08/2012	00:00:57	073723091:	77770		💽 🔁			0.0 %	Quick	Note
	2		29/08/2012	29/08/2012	00:00:24	5655	5507		0			0.0 %	Quick	Note
Com	nment	s						Tot	al Rating			0.0 9	6	
								. 1						
							▶ 1							
Feed	lback													
		n Feedb	ack [things	to improve	]		Evaluat	ion Fe	edback [tł	nings to	maint	tain		
		n Feedb	oack [things	to improve	]		Evaluat	ion Fe	edback [tł	nings to	maint	tain]		
		n Feedb	oack [things	to improve	]		Evaluat	ion Fe	edback [tł	nings to	maint	:ain]		
		n Feedb	oack [things	to improve	]		Evaluat	ion Fe	edback [tł	nings to	maint	cain]		
		n Feedb	oack [things	to improve	]		Evaluat	ion Fe	edback [tł	nings to	maint	cain J		

Figure 41: The Evaluator Screen

After starting an evaluation, the evaluator form opens

- 1. You can Add Specific Interactions.
- 2. You can Add Random interactions.
- 3. Some buttons mentioned in this tutorial may not be visible on smaller displays and can only be accessed via the expansion symbol on the right-hand side.

If no existing interactions were specified during the scheduling of the evaluation, the new evaluation will not have any interactions (media records) associated with it.

4. To close the form without saving changes click **Close** on the toolbar or tab.

# **Adding Random Media for Evaluation**

Que	stion	naire: 1	TES' Agent:	Habart, Lu	ıka: Evalua	tor: CcMana	iger, CcMan	agei E		3 od:	4	(5)	/2012 To	8/2
	N.	Stat	Start	End	Length	From	То	Туре	T	Γ	T	Curi	Ť	
	1		29/08/2012	29/08/2012	00:00:57	073723091:	77770			5 🖸		0.0 %	Quick Note	
	2		29/08/2012	29/08/2012	00:00:24	5655	5507			3		0.0 %	Quick Note	
Feed	lback							•						
			oack [things	to improve	]		Evaluat	tion Fe	edback [1	things to	o maint	tain]		

Figure 42: Adding Random Media for Evaluation

To add random media for evaluation

- Click Add Random Interactions to add media records for the evaluation. This will retrieve the minimum number of appropriate agent calls specified when the evaluation was scheduled.
- 2. The Play Media button will play the call or video on the integrated media player.
- 3. The Replace Media button allows the evaluator to replace or remove the media record.
- 4. The Grade button allows the evaluator to evaluate the media record.
- 5. 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.
- Clicking Quick Note enables the evaluator to draw attention to some short text written for each media record without having to open the grading form. This can be used for quickly marking exceptional records for later study. It

can also be used by the person scheduling the evaluation to draw the evaluator's attention to something in the interaction that should be evaluated.

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 when performing an evaluation, Quality Manager only selects interactions that have not yet been used for evaluation.

# **Adding Specific Media for Evaluation**

			Add Speci	ific Interact	ion(s)		×	(jake.buck) 🎤 Logout 🖂 Messages
<b>&gt;&gt;</b>	Evaluator Fo	Agent: Barker, Deanna	(	2 Descrip	otion:			Reveal Results to Agent 📀 Complete
6	Questionnaire: Call Quality (1.0 N. Status Start 1 0 1/26/11 320 P 2 0 1/25/11 256 P 3 0 1/25/11 251 P Comments	Meda Direction: All External Data Key: External Data Value: Customer Number: Min. length D.00 Max. leng	• •	Media Call Wrapu Period: Currer 1/23/ Count: 1	p: : nt Week 11 3 1/29/		▼ ▼ ▼	Dm: 1/23/11 To: 1/29/11 Current Rating 0 0 % Quick Note 0 0 % Quick Note 0.0 % Quick Note
	Feedback Evaluation Feedback (things to	SID         From           16965566192.168.7 56.3 5631         758.5 5631           16965565192.168.7 56.3 5631         1696549192.168.7 56.3 5631           1696549192.168.7 58.2 5631         16965449192.168.7 58.2 5631           16965449192.168.7 58.1 5631         16965449192.168.7 51.1 5512	5512 5506 5512 5512 5512 interaction	Length 00:16:31 00:00:06 00:01:18 00:00:34	eractions 5 Start 1/26/11 3:29 PM 1/25/11 2:56 PM 1/25/11 4:17 PM 1/25/11 3:48 PM on dialog	End 1/26/11 3:46 PM 1/25/11 2:56 PM 1/26/11 4:18 PM 1/25/11 3:49 PM 1/25/11 3:47 PM 1/25/11 11:21 AM		3

Figure 43: Adding Specific Media for Evaluation

- 1. Click **Add Interactions** to select one or more specific interactions to add for evaluation.
- 2. After the interaction selection dialog box opens, specify filters (period, media type etc.) as necessary.
- 3. Click Search.
- 4. Ensure the required interactions are checked for inclusion.
- 5. Click Add Interactions.
- 6. These interactions will appear in the main evaluation window, ready for use.

## **Replacing Media for Evaluation**

<b>B</b> A	dd Int		s 🕑 Add R		ctions 🧿	Remove 3			end Feedbac			-	
Que	N.	naire: T Stat	Start	End	Length	From	То	Type	valuation Per	iod: From	Curr	2012 To: 29/08	/20
	1	0		29/08/2012 29/08/2012		073723091: 5655	5507				0.0 % 0.0 %	Quick Note	ן רב
Com	nment	ts							al Rating		0.0 %		_
							► I	•					

Figure 44: Replacing Media for Evaluation

To change or update the list of media records available for evaluation, the **Allow Call Replacement** option must be enabled when scheduling an evaluation.

If Allow Call Replacement is permitted:

- 1. Click the green arrows to replace the evaluation.
- 2. Click the X to remove evaluations.
- 3. Click Remove to remove evaluations.

This may be useful if the calls are of an inferior quality, and not suitable for use in the evaluation. If replaced, an alternative call will be offered, which fulfills the evaluation's interaction parameters.

#### Important:

In order to complete an evaluation, every media record listed in an evaluation must be graded.

## **Grading a Media Record**

Evaluation List	-	luator Form (19500) 🗷 Grading	Form (19500) 🗵					
Questionnair Mail Tracking	e:	Average Handling Time (2.0) 121456	Agent: Ticket Number	Bloggs, Joe 21564	Evalu: Categ		From: 08/08/20 08/08/2012	
Question						Answ	er	Not
Opening	script, 13.	.0 % (2 items)						
1. Opening	script fol	lowed? (30.0 %)				Yes	- but agent rushe	ed the c 💌 🍃
2. Own and	d company	y's name stated when greeting	customer? (70.0 %)			-	followed script co gent rushed the c	
🗉 Complian	ce, 1.0 %	(1 item)				Partly (30.0	%)	
3. Verificati	on proced	dure correctly followed? (100.0	%)				ung up (n/a) ot follow script at	: all. (0.0 %)
Internal Note	•				Play	15:28:53 -	✓ Total Rating	4.6 %
The Custom	er was imp	patient						
Feedback Par	nel							
Things To In	nprove			Things To Maintain				
Script adher for any retu		name so that the customer has	a point of referenc	e Politeness and pati	ence			

Figure 45: Grading a Media Record

To grade a media record, click the Evaluate icon for that record. A form will open with an integrated media player.

1. Click the **Play** button to begin media playback.

#### Important:

If a user requests a combination of mp3 and recd files, and mixing fails with a message **Loading Media Failed** then only the mp3 (audio) is made available and not the video.

- The questionnaire associated with the evaluation will be displayed in a small window on the form. The Calling Number, Ticket Number, and Category can be updated as required. Scroll down in the window (if necessary) in order to view all the questions.
- 3. The questionnaire associated with the evaluation displays in a small window on the right of the form. Scroll down in the window if necessary in order to view all the questions. Select a suitable answer for each question, stopping and replaying the media as necessary. All questions must be answered for all
Grading a Media Record

media records present in the evaluation before the evaluation can be marked as complete.

- 4. The **Internal Note** text field can be used for keeping notes about a media record that are only visible to evaluators (not to agents).
- 5. The **Feedback Panel** contains two text fields that can be seen by the evaluated agent. **Things To Maintain** can be used to keep a list of points illustrating areas of good performance by the agent, whereas any areas for improvement should be noted in the **Things To Improve** field.
- 6. Click **Save & Close** at the top of the grading form to keep all modifications made to the form fields. The grading session can therefore be saved and returned to at a later time. **Close** closes the grading form.

# **Completing the Evaluation**

	🔽 Toottips On 🍰 CcManager, CcManager (ccmanager) 🎤 Logout 🖂 Mes	sages
Evaluation List (*) Evaluator Form (19500) (*)		6
🚯 Add Interactions 🎒 Add Random Interactions 🤤 Remove	Report 🖂 Send Feedback 🔲 Feedback History 🕕 Evaluation Info 🔽 Reveal Results to Agent 📀 Con	mplete
Questionnaire: Average Handling Time (2.0) Agent: Bloggs, Joe	oe Evaluator: CcManager, CcManager Evaluation Period: From: 08/08/2012 To: 08/08/2012	2
N. Stat Start End Length	From To Type Current Rating	
□ 1 ● 08/08/2012 15:28 08/08/2012 15:32 00:03:19	9 222345589 8003 📔 💽 😢 📢 47.7 % 👍 Quick Note	
Comments	Total Rating 47.7 %	6
Great Start some things to work on though		
Feedback		8
Evaluation Feedback [things to improve]	Evaluation Feedback [things to maintain]	
avoid getting impatient with customer	Great Chatty style natural working of company values into conversation, good support and intelligent suggestions	

Figure 46: Completing the Evaluation

- 1. Before completion, feedback can be sent to the agent (text in the feedback fields on this tab) by clicking **Send Feedback**.
- 2. To view feedback from earlier evaluations for the same agent, click **Feedback History**.
- 3. Click Reveal Results to Agent to allow the agent to view the results.
- 4. View media rating in the Current Rating column.
- 5. View the average of all media in the evaluation in the **Total Rating** field.
- 6. Once the media records have been fully graded, the evaluation can be marked as Complete. To complete the evaluation and exit this tab, click Complete on the toolbar. If all media record questionnaires have been fully answered, Quality Manager marks the evaluation as complete by assigning it the Finished status in the Evaluation List.

# **Sending Feedback to an Agent**

🖵 Toolt	ips On 🧬 CcManager, CcManager (ccmanager) 🚀 Logout 🖂 Messages
Evaluation List 🕱 Evaluator Form (19500) 🛞	
🚯 Add Interactions 🍯 Add Random Interactions 🥥 Remove	Report 🖂 Send Feedback 💷 Feedback History 🕕 Evaluation Info 🛸
Questionnaire: Average Han: Agent: Bloggs, Jo Evaluator: CcMana	ager, CcManage Evaluation Period: From: 08/08/2012 To: 08/08/201
▼ N. Stat Start End Length From	To Type Curre
I         •         08/08/2012 1: 08/08/2012 1: 00:03:19         222345589	8003 📔 🔼 😢 🛃 47.7 % Quick Note
Comments Great Start some things to work on thoug	to send feedback to the
Feedback	۲
Evaluation Feedback [things to improve]	Evaluation Feedback [things to maintain]
avoid getting impatient with customer	Great Chatty style natural working of company values into conversation, good support and intelligent suggestions

Figure 47: Sending Feedback to an Agent

After marking an evaluation as complete, the option to send feedback to the evaluated agent is available (from the information in the feedback text fields).

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

#### Important:

A completed evaluation (an evaluation with the status **Finished**) cannot be re-opened for editing unless the custom Reopen Evaluations role has been assigned to the user – see <u>Re-Open An Evaluation</u>. This would normally be an extraordinary occurrence.

Completed evaluations can be opened in read-only view, where they can be printed or used as a source for a report.

# **Deleting Evaluations**

<ul> <li>Evaluation List </li> <li>New </li> <li>View </li> <li>R<sup>2</sup></li> <li>More Actions </li> <li>Send Evaluation Feedback </li> <li>Export Spreadsheet </li> </ul>													Sear
	N.	ID	Evaluator	Reevaluate		Period	Period To	Score	Status	Rev	Last Mo	Par	<
	1	19500	CcManager, Cc		lling Ti	8 Aug 2	8 Aug 2	47.7	Finishe		25 Sep		
	2	19501	CcManager, Cc	•	lling Ti	8 Aug 2	8 Aug 2	0.0 %	Created		19 Sep		
	3	19499	CcManager, Cc 🂙	Include in Statistics	lling Ti	8 Aug 2	8 Aug 2	0.0 %	Created		19 Sep		
	4	19498	CcManager, Cc	Reveal Results to Agent	lling Ti	8 Aug 2	8 Aug 2	0.0 %	Created		19 Sep		
	5	19497	CcManager, 3	Delete	lling Ti	8 Aug 2	8 Aug 2	0.0 %	Created		5 Sep 2		

Figure 48: Deleting Evaluations

The evaluation list now shows the completed evaluation with a Finished status.

To delete an evaluation that you have created (having **Created**, **In Progress** or **Finished** status):

- 1. Select the evaluation.
- 2. Select More Actions.
- Click Delete in the dropdown list. If this option cannot be clicked, the Evaluate Agents permission needs to be added to your role. This applies to any role that will need to delete (self) evaluations.

#### Important:

Only the original creator (not necessarily the evaluator) of an evaluation has the right to delete it. This limitation is important for self evaluations. The role creating self evaluations (for example Agent) must be assigned the **Evaluate Agents** permission, in addition to the **Self-Evaluate** permission, in order to be allowed to both create and delete evaluations. Without the agent being assigned the Evaluate Agents permission, noone on the system will be able to delete the agent's self evaluations.

# **Re-Using the Evaluation - 1**

	tion List	ew 📃 Re 2	More Actions	Evaluation Fe	eedback 📴	Export Spr	eadshee	t All			<b>~</b> 🔍	Sea
N.	ID	Evaluator	Reevaluate 3		Period	Period To	Score	Status	Rev	Last Mo	Par	<b>«</b>
1	19500	CcManager, Cc	Reopen	lling Ti	8 Aug 2	8 Aug 2	47.7	Finishe		25 Sep		
2	19501	CcManager, Cc	Include in Statistics	lling Ti	8 Aug 2	8 Aug 2	0.0 %	Created		19 Sep		
з	19499	CcManager, Cc		lling Ti	8 Aug 2	8 Aug 2	0.0 %	Created		19 Sep		
4	19498	CcManager, Cc 🕚	Reveal Results to Agent	lling Ti	8 Aug 2	8 Aug 2	0.0 %	Created		19 Sep		
5	19497	CcManager, Cc	Delete	lling Ti	8 Aug 2	8 Aug 2	0.0 %	Created		5 Sep 2		

Figure 49: Re-Using the Evaluation - 1 (Optional)

An existing evaluation (with any evaluation status) can be re-used to quickly set up and perform additional evaluations with the same parameters.

Re-using an evaluation enables a user to re-assign a finished evaluation to another evaluator, whilst keeping the same media associated with it. The new evaluator can then evaluate the same call, which allows a first stage in a calibrations procedure that will be conducted entirely through Quality Manager, and which fully documents the calibration process. For more information on this topic please see <u>Calibrating Evaluations</u>.

To re-use an existing evaluation:

- 1. Select the evaluation by clicking it.
- 2. Select More Actions.
- 3. Click the Re-evaluate button from the More Actions dropdown.

# **Re-Using the Evaluation - 2**

🔽 Tootips On 🔊 CcManager, CcManager (ccmanager) 🔊 Logout 🖂 Messi											
Evaluation List 🕱 Evaluation Planner 🕱											
📀 Create Evaluations 🔜 Save As Template 🤯 Templates 🗟 Load Template 👻 Close 🛛 🚺											
Date Range: <ul> <li>From:</li> <li>08/08/20:</li> <li>To:</li> <li>08/08/20:</li> <li>To:</li> <li>08/08/20:</li> <li>Interaction</li> <li>Interaction</li> <li>Count:</li> <li>Add Sub-Criteria</li> <li>Group Evaluation</li> <li>Agent Evaluation</li> <li>Evaluator:</li> <li>CcManager, CcManager (ccm</li> <li>Yes</li> <li>No</li> <li>No</li> <li>Interaction</li> <li>Interactions</li> <li>Interactions?</li> /ul>											
Groups:     Select All/None     Agents:     Select All/None       Image: Constraint of the select All/None     Image: Constraint of the select All/None     Image: Constraint of the select All/None       Image: Constraint of the select All/None     Image: Constraint of the select All/None     Image: Constraint of the select All/None       Image: Constraint of the select All/None     Image: Constraint of the select All/None     Image: Constraint of the select All/None       Image: Constraint of the select All/None     Image: Constraint of the select All/None     Image: Constraint of the select All/None       Image: Constraint of the select All/None     Image: Constraint of the select All/None     Image: Constraint of the select All/None       Image: Constraint of the select All/None     Image: Constraint of the select All/None     Image: Constraint of the select All/None       Image: Constraint of the select All/None     Image: Constraint of the select All/None     Image: Constraint of the select All/None       Image: Constraint of the select All/None     Image: Constraint of the select All/None     Image: Constraint of the select All/None       Image: Constraint of the select All/None     Image: Constraint of the select All/None     Image: Constraint of the select All/None       Image: Constraint of the select All/None     Image: Constraint of the select All/None     Image: Constraint of the select All/None       Image: Constraint of the select All/None     Image: Constraint of the select All/None     Image: Constraint of the select All/											
Wrapup:       Media Direction:       Inbound											
📀 Add Media Type 🤤 Remove 🖺 Allow Replacement 🚯 Allow Selection 🎒 Allow random calls selection 💿 Add Interaction											
Media Type Min. Count N. Start End Length From To Type											
Call + Screen 1 1 08/08/2012 15:28 08/08/2012 15:32 00:03:19 22234558 8003 📔 🔇 Quick Note											
U5/scorecard-webu/c7.200m.sc. 8/d8-e/Te-4bb3-6384-79111edcd/8/7											

Figure 50: Re-Using the Evaluation - 2 (Optional)

- Open the Evaluation Planner. The Remove Interactions dialog appears. Select Yes to remove all the agent interactions used in the initial evaluation or No to keep them. The criteria of the original evaluation will be set in the Evaluation Planner. Modify the evaluation as required.
- 2. Click **Create Evaluations**. A new evaluation is created and appears in the evaluation list.

# **Re-Opening an Evaluation**

7 F	Eva	alua	tion List 🗷						🖓 Tooltip	isOff 🦽 B	luck, Jake (ja	ke.buck) 🔊 Lo	gout 🖂 Messi	ages
	1	New	💼 Grade	Rel 2		More Actions -	Send Agent's Evaluatio	n Feedback 🛛 📴 B	export to Spreads	sheet All		<b>~</b> Q	Search Evaluat	tions
0		N.	ID	Evaluator		Reevaluate	Ques. Name	Period From	Period To	Score	Status	Last Modified	Parent ID	<
	√(	1	949	Buck, J	5	Reopen	Call Quality (1.0)	Jan 23, 2011	Jan 29, 2011	74.0 %	Finished	Jan 27, 2011 13	1	
		2	767	Buck, Jake	-		Call Quality (1.0)	Sep 25, 2010	Sep 26, 2010	57.0 %	Finished	Jan 25, 2011 13		
		3	766	Buck, Jake	1	Include in Statistics	Call Quality (1.0)	Sep 26, 2010	Sep 27, 2010	70.0 %	Finished	Jan 25, 2011 13		
0		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 13		
E		5	764	Buck, Jake		Delete	Call Quality (1.0)	Sep 28, 2010	Sep 29, 2010	7.0 %	Finished	Jan 25, 2011 13	;	
0		6	763	Buck, Jake		Barker, Deanna	Call Quality (1.0)	Sep 29, 2010	Sep 30, 2010	64.0 %	Finished	Jan 25, 2011 1:		

Figure 51: Re-Opening 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 (see <u>Re-</u><u>Defining User Roles</u>).

To reopen an evaluation:

- 1. Select an evaluation with the Finished status.
- 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.

# 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 important when a contact center allows agents to review and appeal their evaluation results. 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	st 🗷									
	Repo	nt 🎯	More Actions -			2	Send Evaluation	Feedback	📴 Export Sp	oreadsheet All		🗸 🔍 Searc
	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 52: Sending Evaluation Feedback Button

- 1. Click on the evaluation that requires feedback (must be in Finished status).
- 2. Click the Send Evaluation Feedback button on the toolbar.

The message entry window opens.

	aluat	tion Lis	t 🗷	Send Evaluation Feedback				
ĺ	Repo	nt 🎯	More Actions -	Evaluation ID: 919 (1)	preads	heet All	🗸 🔍 S	ea
	N.	ID	Evaluator		atus	Last Modified	Parent ID	
1	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	Mar 16, 2012 1:28:39 PM		
	2	919	Holland, Bethany		ished	Mar 16, 2012 1:28:39 PM		
	з	918	Holland, Bethany		ished	Mar 16, 2012 1:28:38 PM		
	4	917	Holland, Bethany		ished	Mar 16, 2012 1:28:38 PM		
	5	916	Holland, Bethany	I Y	ished	Mar 16, 2012 1:28:38 PM		
	6	850	Spencer, Quincy		ished	Mar 16, 2012 1:28:33 PM		
	7	849	Spencer, Quincy		ished	Mar 16, 2012 1:28:33 PM		
	8	848	Spencer, Quincy		ished	Mar 16, 2012 1:28:33 PM		
	9	847	Spencer, Quincy		ished	Mar 16, 2012 1:28:33 PM		
	10	846	Spencer, Quincy	3 Send	ished	Mar 16, 2012 1:28:33 PM		
Í	11	300	CcManager, CcManag	n Dryani, Dana Gair Quality (1.0) 36p 23, 2011 36p 20, 2011 1 <del>4</del> .7.76 11	nished	Mar 16, 2012 1:27:53 PM		

Figure 53: Send Evaluation Feedback Message

- 1. Add the evaluation ID number to clarify which evaluation the message is related to.
- 2. Add a message to the evaluator.
- 3. Click Send.

Β	Repo	ort 🎯	More Actions -			<b></b>	Send Evaluation Fee	edback 達	Export Sprea	dsheet All	<b>v</b> Q	Sear
	Ν.	ID	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		-
1	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		E
	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 Ma		-
	10	846	Spencer, Quincy	Bryant, Dana	Call Quality (1.0)	Sep 29, 2011	Sep 30, 2011	31.8 %	Finished	Ma Send Message		
	11	300	CcManager, CcManager	Bryant, Dana	Call Quality (1.0)	Sep 25, 2011	Sep 26, 2011	14.7 %	Finished	Message was sent	successfully	

Figure 54: Send 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>. System Messages.

# **Using the Evaluation Detail Report**

The Evaluation Detail report is the main report that an evaluator will use when providing feedback to an evaluated agent. At the very minimum it will contain the questions on the grading form and the answers given. Evaluator notes will be shown at the bottom of the grading form.

The form also contains a link to a read-only version of the grading form where the user can listen to the call and view the screen capture if there is one.

When printed, the Evaluation Detail report contains signature lines for the evaluator and the agent to certify that the evaluation has been delivered (generally for HR purposes).

		_					
(	«	Ev	/alua	tion Lis	t 🗵		
۹. ::	»		New	🚺 Ev	3 🖪 Report	More Actions -	🖂 Send Agent's Evaluation F
😨 Dashboard			Ν.	ID	Evaluator	Agent	Ques. Name
Evaluations			1	903	Rutledge, Matthew	Blair, Kendra	Call Quality (1.0)
1 Evaluation List	1		2	900	Gibson, Dominic	Herring, Kendall	Call Quality (1.0)
Evaluation Plan	2	1	3	899	Gibson, Dominic	Herring, Kendall	Call Quality (1.0)
⊞  ☐ Reports     ☐	-		4	898	Gibson, Dominic	Herring, Kendall	Call Quality (1.0)
Administration			5	897	Gibson, Dominic	Herring, Kendall	Call Quality (1.0)
About			6	896	Gibson, Dominic	Herring, Kendall	Call Quality (1.0)
			7	895	Gibson, Dominic	Stout, Coleman	Call Quality (1.0)
			8	894	Gibson, Dominic	Stout, Coleman	Call Quality (1.0)
			9	893	Gibson, Dominic	Stout, Coleman	Call Quality (1.0)

Figure 55: Evaluation List

To open the Evaluation Detail Report:

- 1. Navigate to **Evaluation list**.
- 2. Select a finished evaluation record from the list of evaluations.
- 3. Click **Report** from the tool bar in the **Evaluation List** tab.

>>	Evaluation Detail		
1	📄 Print 🍞 Export to Sprea	idsheet	
	Evaluation #288	0 - Call Quality 1.0	
	Agent: Evaluator:	Alva Riddle (alva.riddle) Chance Blankenship (chance.blankenship)	
	Interaction #2,880	Start:	-
	Call	From:	-
		Direction:	All
		Category:	

Figure 56: 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.

The **Include All Possible Answers** checkbox will display not only the answer that was selected, but all of the other possible answers as well (displayed in gray). This can be useful when providing feedback to an agent (knowing what other options the evaluator had to choose from can provide context for the evaluation).

The **Eco Printing** option will create a slightly compressed version of the evaluation detail report that can be printed on less paper using less ink. It is intended for large contact centers that will print a large number or reports.

#### Important:

The spreadsheet is in the .xls format used in Excel versions 97-2003.

During export, the following dialog box appears.



Figure 57: Open the Spreadsheet

Click **OK** to open the spreadsheet

The Evaluation Detail report is displayed.

# Linking to a Read-only Grading Form



Figure 58: Detail Report Showing Interaction

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

- 1. Mouse 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.

				ç	🔍 Tooltips Off 🛭 🔗 C	cManager, CcM	lanager (	(ccmanager) 🔊 Logout	<b>N</b>	lessage	es
>>	Evaluation List 🙁 Evalu	uator Form (491258) 🙁	irading Form (49	1258) 🗵							
	Feedback History	Save & Close 😢 Close									^
		TEST ČP hovory (1.0)		Habart,	Lukas		on period: From: 29/08/2012 T 29/08/2012		ю:		
	Mail Tracking Number		Ticket Number			Category		select a category	~		
	Question						Answe	ər		N	
	🗏 Ověření, 20.0 % (1	item)								1	
	Ověření dle MP a PP (	100.0 %)							•		
	∃ Struktura hovoru, 1	10.0 % (2 items)									Ξ
	Internal Note					Play 1	9:44:0(	) - 🔨 Total Rating	0.0 %	6	
					▶ 4						
	Feedback Panel										
	Things To Improve				Things To Mainta	'n					
											1
	•									Þ	Ŧ

Figure 59: Grading Form

If there is a media interaction associated with the Grading Form, it appears in the **Play** drop down list, and can be selected to play in the Media player.

When there is more than one media interaction associated with the Grading Form (for instance if a call has been transferred or put on hold), each interaction will appears in the **Play** drop down list and can be selected to play in the Media player.



## Chapter

# 6 Reporting

A short tutorial to show how to create and export evaluation charts and reports in Genesys Quality Manager 8.1.50x.

This chapter contains the following sections:

Types of Reports Setting Up a Report Reports for a Single Evaluation Exporting Report Data

# **Types of Reports**

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

- Agent Skills: select an agent, questionnaire, evaluation period question groups (skills) and questions to view an agent's skill profile
- **Compare Agents:** Select a questionnaire, evaluation period and question group ('skill') and questions to view a comparison between agents' skills
- Compare Evaluators: Select an agent, questionnaire and evaluation period to compare how different evaluators scored this agent
- Results Distribution: Displays a detailed view of agents, evaluations, and interactions volume (categorized using average scores into 'Good', 'Average' and 'Bad' rankings). Choose from displaying the Number of agents, Number of interactions, or Number of evaluations.
- Compare Scores: A report enabling the comparison of evaluators' performance, either for a single call or agent.
- League Table: Based on the 'Averages per Questionnaire for Agent' report, but sorted according to final score and permitting the selection of multiple questionnaires (aggregate average).
- Interactions Volume: Displays all interactions Evaluated, Replaced, and Not Evaluated over a specific time period.
- Evaluations Volume: Displays evaluation volume by status. Choose from Planned, In Progress, and Finished or all three, over a specific time period.

Each report is set up using the parameter fields, after which the Compute Graph button is clicked to generate the report graph. Parameters can still be modified after report creation, but each time the Computer Graph button must be clicked to generate the report and resulting graph.

Report graphs can either be printed using the standard browser print dialog (CTRL + P for Windows, CMD + P for Mac), or the graph itself can be saved as a static graphic image via right-click on the generated graph > Save Image Locally.

Alternatively, report data can be exported in Excel 2007+ (.xlsx) spreadsheet format – see the <u>Exporting Report Data</u> section.

# **Setting Up a Report**





Select **Reports** in the left-hand menu for all reports in Quality Manager. The following example report setup is typical for the **Agent Skills**, **Compare Agents**, and **Compare Evaluators** reports.

1. Click the required report in the left-hand menu (for example, the **Agent Skills** report).



Figure 61: Setting Up a Report

- 2. Select an agent. group from the Group dropdown.
- 3. Select an agent from the Agent dropdown.
- 4. Select a questionnaire from the Questionnaire dropdown.
- 5. Select an evaluation start date in **From** and select an evaluation end date in **To**.
- Select an initial report Scale from the dropdown (in the figure, this is a Week). The Scale affects how wide the time interval is between columns in the final graph. Any of these parameters can be changed again later if necessary.
- Select which skills will be included in the report using the checkboxes or the dropdown. You can choose from All skills or select different sections of the questionnaire (these will vary according to the particular questionnaire).
- When all required parameters have the appropriate values, click Compute graph to create the report, or the Export to spreadsheet button to export the report directly in an Excel 2007 spreadsheet format (.xlsx) (see Exporting Report Data).

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

#### Important:

Where the evaluation is carried out in points rather than as a percentage, the y axis of the graph may exceed 100.

## **Results Distribution Graph - 1**

The **Results Distribution** graph displays the overall progress of large numbers of agents and groups over a period of time.

	🖓 Tooltips Off 🍰 CcManager, CcManager (ccmanager) 🎤 Logout 🖂 Messages
«	Results Distribution 🛞
0 5 br>5 br>5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5	🖄 Compute graph 違 Export Spreadsheet 😫 Close
Dashboard Evaluations Questionnaires Reports Agent Skills	Parameters >>> Show: Number of Agents >>> Questionnaire:
Compare Agents Compare Evaluators Results Distribution Compare Scores League Table	Question Group:
<ul> <li>Interaction Volume</li> <li>Evaluation Volume</li> <li>Administration</li> <li>About</li> </ul>	► Period From Date: 14/08/2012 To Date: 25/09/2012 Scale: Month ▼

Figure 62: Opening the Results Distribution Tab

- 1. Select Reports in the menu.
- 2. Select **Results Distribution**. The **Results Distribution** tab and **Parameters** section open.

Results Distribution		-	
🖄 Comput 🚺 n 📴 Export to spreadsheet 🙁 Close	(2)	3	4
Show: Number of Agents Questionnaire: Call Quality	1.0) Question G	oup: (Entire Questionnaire)	Question: (Entire Question Group) V
Number of Agents	Pa	ameters	A 1
Number of Evaluations	-	Period	
Number of Interactions		-	
	· · · · · · · · · · · · · · · · · · ·	rom Date: 6/1/	11 🗳
	1	o Date: 6/1/	11 🖪
	s	cale: Mon	th 👻

Figure 63: Results Distribution Tab

- The Show drop down list has the alternatives Number of Agents, Number of Evaluations, and Number of Interactions. Click on one of these to select what is displayed in the chart.
- 2. Select a **Questionnaire** from the **Questionnaire** dropdown to base the analysis on.
- 3. Select a **Question Group** from the **Question Group** dropdown (Optional) to base the analysis on.

4. Select a **Question** (Optional) from the **Question** dropdown to base the analysis on.

Results Distribution 🗵			
🖄 Compute graph 🍃 Export Sprea	adsheet 区 Close		
	Parameters		»
	Show:		-
	Number of Agents	~	
	Questionnaire:		
	ČP hovory - test (1.3)	•	
	Question Group:		
	Komunikační standardy	~	I
	Question:		
	Oslovení	*	
	Period		
	From Date:	14/08/2012	(1)
	To Date:	25/09/2012	2
	Scale:	Month	~
		– Day –	1
	Agents	Week	3
	Groups:	Month	J
	a 🥼 Root group	Quarter	
	AnectTest	Year	

Figure 64: The Results Distribution Tab Parameters

- 1. Select or type a From Date for the graph to begin.
- 2. Select or type a **To Date** for the graph to end.
- 3. Select the **Scale** for the Graph from the drop down (this affects how wide the bars in the graph display).

Groups:			Select All	None		
A 10 Root group				*		
Alan Wande	rer			=		
mobile						
a 🍯 Apia						
FC Sion						
🛛 📹 Asunción				-		
Agents:			Select All/	None		
Barron, Glenn (gle	enn.barron)			<u></u>		
Buckner, Randy (	andy.buckne	нг)				
Gomez, Harley (h	mez, Harley (harley.gomez)					
Hendricks, Kristop	oher (kristoph	ner.hendricks)				
Macdonald, Earne	est (earnest.r	nacdonald)				
Malone, Trenton (	trenton.malo	ne)		-		
Scoring						
_						
Scoring Type:	Percent	age				
Good Threshold:	75	Maximum:	100			
Bad Threshold:	25	Minimum:	0	_		

Figure 65: The Results Distribution Tab Parameters / Select Agents

- Select one or more agent Groups. You can select all or none by checking or unchecking Select All/None. The agents in the groups will display in the Agents section. You can select more than one group by pressing and holding the CTRL key while clicking additional groups.
- 2. Select one or more **Agents** using their checkboxes. You can select all or none by checking or unchecking **Select All/None**.

The **Scoring** parameters enable you to determine the threshold (boundary) values for the report groupings.

- 3. Set the **Good Threshold** (this value must be lower than the **Maximum** value). The **Good Threshold** is the minimum value for an agent score to be included in the top rated group (the default is 75%).
- 4. Set the **Bad Threshold** (this value must be higher than the **Minimum** value). The **Bad Threshold** is the maximum value for an agent score to be included in the worst rated group (the default is 25%). All agent scores that fall between these two thresholds are included in the average group.



Figure 66: Compute Graph

- Click Compute Graph to begin the chart creation process. A graph will display if there is data available. If you receive a message warning about no data being available for the specified parameters, you will need to modify your parameter values - for example, change the From Date, To Date, or questionnaire specified, then click Compute Graph again.
- 2. Click **Export to Spreadsheet** to create a tabular version in downloadable spreadsheet format (.xlsx).

Opening Agents+Score+History+15+Jul+2011+-+15+Jul+2011.xlsx
You have chosen to open
Agents+Score+History+15+Jul+2011+-+15+Jul+2011.xlsx
which is a: Microsoft Excel Worksheet
from: http://docs-callrec1.office.zoomint.com
What should Firefox do with this file?
Save File
Do this <u>a</u> utomatically for files like this from now on.
OK Cancel

Figure 67: Export to Spreadsheet Dialog

Click **OK** to open the spreadsheet.

The exported Spreadsheet will open in MS Excel 2007-10 or compatible alternative.

X	🚽 inj - (t	≝ - [ <del>-</del>	Ag	ents+	Score	His.		. 0	Σ	3
ŀ	File Hor	Inse Pa	ag f	For D	at R	ev \	•	<b>?</b> -	ē	23
	<mark>``</mark>	A			%		A		Σ	
Pa	ste 🛷	Font	Aligr	ment *	Numb	ber	Styles	Cells	2	ľ
Clip	board 🕞								Ed	
	G16		-	0		f <sub>x</sub>				۷
	Α	В		(	2		D	E		
1	Agents	s Sco	ore	His	tor	<b>y</b> -	Mon	thly		
2	ory From:	15.7.2	011		H	listo	ory To:	15.7.2	011	
3	tionnaire:	Juality	1.0			Sc	oring:	RCENTA	AGE	
4	on Group:	roup: All Good		Good:	75,0	00%				
5	Question:		All Bad: 25,00%							
6	Groups:		Brussels							
7	Agents:						Her	bert Ay	/ala	
0										

Figure 68: Example of Exported Spreadsheet

The cells can be resized as required.



## **Results Distribution Graph - 2**

Figure 69: Results Distribution Graph 2

The graph bars display Good (green), Average(orange) and Bad(red) scores.

With the graph open, hover over a bar section to see information about the data calculated.

Clicking on a part of a bar opens the Evaluation Detail screen with all interactions included in that part of the chart.

## **Compare Scores Report - 1**



Figure 70: Compare Scores Report - 1

The **Compare Scores** report enables the comparison of the performance of evaluators and their questionnaires across agents or groups. The following two modes are available:

- evaluation-based comparison ("head to head"); compare the scoring by two evaluators for one specific evaluation
- agent-based comparison ("general comparison"); compare the scoring by two evaluators for a specified agent

Click **Reports > Compare Scores** to display the parameters page. The first row of boxes define the parameters for the base evaluation, from which all comparisons are made.

- 1. Select a base questionnaire to use.
- 2. Select a base evaluator group.
- 3. Select a base evaluator.
- Select one evaluation (only one can be selected here).
   The second row of boxes define the parameters for all other evaluations that

will be compared to the base evaluation. The questionnaire is now automatically selected.

- 5. Select one or more target evaluator groups.
- 6. Select one or more target evaluator.
- 7. Select one or more target evaluations for comparison.
- Click OK to start the process of creating the report or export as a spreadsheet (.xlsx) file.

## **Compare Scores Report - 2**

Compare	Scores							
Questionna	ire:	Call	Quality	v (1.0)				
				, , ,				
	Group/Question name							
		Base	1					
		Evaluati						
		on.						
		Deanna	Deanna		Deanna		Deanna	
		Barker,	Barker,		Barker,		Barker,	
		20/10/10	20/10/10		20/10/10		20/10/10	
		, Eval	, Eval	Deanna`	, Eval	Deanna`	, Eval	Deanna`
		ld: 1741	ld: 1742	s Diff	ld: 1743	s Diff	ld: 1744	s Diff
Opening call		4.00%	0.00%	-4.00%	24.00%	20.00%	28.00%	24.00%
	Greeting, introducing the agent and the company	10.00%	0.00%	-10.00%	20.00%	10.00%	0.00%	-10.00%
	Detection and Verification of a competent person	0.00%	0.00%	0.00%	20.00%	20.00%	10.00%	
	Customer?s Consent to interview him/her (time, topic)	0.00%		0.00%	20.00%	20.00%	20.00%	
	Company Presentation	0.00%	-	0.00%	0.00%	0.00%	20.00%	
	Switching to the matter of the call	0.00%		0.00%		0.00%	20.00%	
Merchant's skills		4.00%	12.00%		6.00%	2.00%	18.00%	
	Questioning techniques - investigative/business orien		30.00%	30.00%		0.00%	30.00%	
	Understanding customer needs	0.00%	20.00%		0.00%	0.00%	40.00%	
	Solution proposal	10.00%	10.00%	0.00%	20.00%	10.00%	20.00%	
	Customer care	10.00%			10.00%	0.00%	0.00%	
Call control		18.00%			20.00%	2.00%	0.00%	
	Following the script	10.00%	0.00%	-10.00%	10.00%	0.00%	0.00%	-10.00%

Figure 71: Compare Scores Report – 2

The Figure: *Compare Scores Report* shows a sample spreadsheet report. All evaluation values are shown in columns. The first evaluation displayed is the base evaluation, while the remaining evaluations shown are those selected for comparison to the base evaluation.

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

#### Important:

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

## League Table - 1

<b>*</b>	League Table 🛎	
C 53 22 2 2 3 5	Export to Spreadsheet 6	lose
Dashboard     Evaluations	Period:	
	Date From:	Yesterday Yesterday Yesterday Yesterday
🖄 Compare Evaluators	Questionnaire	
Compare Scores	Scoring System:	Percentage 👻
League Table	Questionnaire:	Select All/None:
Evaluation Volume C Administration About		Call Quality (1.0)
	Mainstream Threshold	5
4	Bad Threshold:	25
-	Good Threshold:	75
	Agents	
	Grouping:	Agent     Group
	Groups:	Select All/None Agents: Select All/None
	<ul> <li>A Contemp</li> <li>Astana</li> </ul>	Admin, Admin (admin)
<u> </u>	Brasília	CcManager, CcManager (ccmanager)
	Brussels	ipccimporterdaemon, ipccimporterdaemon (ij
	▷ i Papeete ▷ i Vaduz	

Figure 72: League Table – 1

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

1. Click **Reports > League Table** to display the parameters for this report.

- 2. Specify from / to dates to limit the number of finished evaluations analyzed, then a scoring system (for example, Percentage).
- 3. Specify one or more questionnaires as the source of the evaluations.
- 4. Additional criteria can be specified: Mainstream limits the range of scores to upper / lower limits, and Agent / Agent Group allows the League Table to be confined to a subset of agents.
- 5. Finally the **Grouping** option displays the ranked results at Agent level (default) or at Group level (useful when agent groups need to be directly compared).
- 6. Click **Export to Spreadsheet** to generate the report as a downloadable spreadsheet file (.xlsx).

## League Table - 2

Leagu	ie Ta	ble			
Questio From: To:	nnaire	Call C 9/26/2 9/29/2		))	
#	Name	Surname	Login	Group	Average Score
1.	Patricia	Cortez	patricia.cortez	Paços de Ferreira	52.56%
2.	Eva	Sanders	eva.sanders	Paços de Ferreira	51.52%
3.	Charlie	Lester	charlie.lester	Paços de Ferreira	51.19%
4.	Marco	Ochoa	marco.ochoa	Paços de Ferreira	50.13%
5.	Ward	Guy	ward.guy	Paços de Ferreira	49.97%
6.	Fannie	Watson	fannie.watson	Paços de Ferreira	47.90%
7.	Camille	Berg	camille.berg	Paços de Ferreira	47.89%
8.	Natalie	Mccall	natalie.mccall	Paços de Ferreira	46.95%
9.	Mattie	Benson	mattie.benson	Paços de Ferreira	46.03%
10.	Zachery	Cherry	zachery.cherry	Paços de Ferreira	45.78%
11.	Alisha	Workman	alisha.workman	Paços de Ferreira	44.94%
12.	Stefanie	Winters	stefanie.winters	Paços de Ferreira	43.58%
13.	Deanna	Barker	deanna.barker	Paços de Ferreira	42.96%
14.	lvy	Young	ivy.young	Paços de Ferreira	36.12%
Average Sco	re				46.97%

Figure 73: League Table – 2

The Figure League Table shows an example **League Table** report grouped by agent. This spreadsheet report can be printed or further processed manually or with other tools.

## **Interaction Volume**

The **Interaction Volume** report displays all interactions **Evaluated**, **Replaced**, and **Not Evaluated** over a specific time period.



Figure 74: Interaction Volume Tab

To open the Interaction Volume tab, click Reports > Interaction Volume.

In the Chart Data section:

- 1. Select the type of volume in the **Volume** dropdown box. The **Volume** dropdown box has 4 options.
  - Volume: Shows the total number of interactions.
  - Volume Ratio: Shows the percentage ratio between interactions in the given state.
  - **Call Length:** Shows the total length of calls and screens that were evaluated / not evaluated / replaced.
  - Call Length Ratio: Shows the call lengths in percent of total volume.

Volume is selected by default.

Interactions between two agents may be calculated twice (once for each agent ), but the effect on the statistics will be negligible.

- 2. Check the boxes **Evaluated**, **Replaced**, and **Not Evaluated**, and select which states are shown in the chart. **Evaluated** and **Replaced** are selected by default. **Not Evaluated** is unselected by default.
- 3. Select filters from the dropdown in the **Filter** section:
  - The evaluators default is All Evaluators.
  - The groups default is All Groups.
  - The questionnaires default is All Questionnaires.
- 4. In the Date Range: section:
  - Select a From date.
  - Select a **To** date.

Choose the scale for the graph, there are 5 options:

- Day (default)
- Week
- Month
- Quarter
- Year
- 5. Check the checkboxes in **Interaction Types** to select the interaction types available in the system to be included in the graph. These are:
  - Call + Screen
  - Chat (such as instant messages)
  - Email
  - Other
  - Registration

All are selected by default unless **Call Length** or **Call Length Ratio** are selected where only **Call + Screen** is enabled.

6. Click Compute Graph.



Figure 75: Interaction Volume Chart

The graph displays the following colors:

- Green for Evaluated.
- Orange for Replaced.
- Gray for those that were Not Evaluated.

#### Important:

The **Interaction Volume** chart will only function correctly if Quality Manager configuration parameters in the Call Recording Web GUI are correctly configured, such as the **Agent Key ID**. Please refer to the Quality Manager Configuration Settings section in the Quality Manager Administration Guide for more information.

## **Evaluations Volume**

**Evaluations Volume:** displays evaluation volume by status. Choose from **Planned**, **In Progress**, and **Finished** or all three, over a specific time period.



Figure 76: Evaluations Volume Tab

To open the Evaluations Volume tab click Reports > Evaluations Volume.

In the Chart Data section:

- 1. Select the type of volume in the **Volume** dropdown box. The **Volume** dropdown box has 2 options:
  - Volume: Shows total number of interactions.
  - Volume Ratio: Shows percentage ratio between interactions in the a given state.

Volume is selected by default.

- 2. Check the boxes **Planned**, **In Progress**, and **Completed**, and select which states are shown in the chart.
- 3. Select filters from the dropdown lists in the Filter Section.
  - The evaluators default is All Evaluators.
  - The groups default is All Groups.
  - The questionnaires default is All Questionnaires.
- 4. In the Date Range: section:

- Select a From date.
- Select a **To** date.

## 5. Click Compute Graph

The graph will display.

## 6. To export to a spreadsheet, click Export to Spreadsheet.



Figure 77: Evaluations Vol Chart

The graph displays the following bar colors:

- Red for Planned
- Orange for In Progress
- Green for **Completed**

Mouse over a stacked bar item on separate lines to show:

- The total number of evaluations in the stack in format <number of evaluations in stack> of <number of evaluations in bar>.
- The percentage of all evaluations in the bar in format <percentage>% (no decimals).

## **Reports for a Single Evaluation**

			🖓 Tool	tips Off 🛛 🦽 CcManager,	CcManager (ccmanager) 🍠 Logo	out 🖂 Message:
~	Evaluation List 🛞 Evaluation	Detail 🗷				
	📄 Print 👘 🎲 Export to Sprea	adsheet		2	Include All Possible Answers	Eco Printing
Dashboard     Evaluations	Evaluation #949	9 - Call Q	uality 1.0			
Evaluation List     Evaluation Planner	Agent:	Deanna Ba	arker (deanna.barker)	Evaluation date:	27/01/11	
I Cuestionnaires	Evaluator:	Jake Buck	(jake.buck)	Eval. period from:	23/01/11 12:00	
🗉 💋 Reports				Eval. period to:	29/01/11 11:59	
🗉 📁 Administration						
About	Interaction #954	Start:	26/01/11 03:30:00	End:	26/01/11 03:46:30	
	Call	From: Direction: Category:	5630 In/Outbound	To: Wrap up:	5512	
	Question			Answer		Rating
	Opening call					-
	Greeting, introducing the	e agent and th	ne company	Average		50.0%
	Detection and Verificatio	n of a compe	tent person	Good		100.0%
	Customer?s Consent to	interview him/	'her (time, topic)	Good		100.0%
	Company Presentation			Bad		0.0%
	Switching to the matter o	f the call		Average		50.0%
	Merchant's skills	1	Maria Maria and Andrea Andrea	0		100.00
	Questioning techniques	-	vousiness oriented	Good		100.0%
	Understanding customer	neeus		Good		100.0% 50.0%
	Solution proposal Customer care			Average Good		50.0% 100.0%
	Call control			Good		100.0%
	Carcontor					

Figure 78: Reports for a Single Evaluation

selected grayed out).

- 1. Click **Evaluation list** in the left hand menu. The **Evaluation List** tab opens and displays available evaluations. Select the check box of an evaluation in the **Evaluation List**.
- Click Report at the top of the Evaluation List tab. This creates a simple text-based report with the following options: Include All Possible Answers: Shows all possible answers (with those not

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

 To print, click Print. To save as an Excel file (.xlsx) file click Export to Spreadsheet.

#### Tip:

To produce a report for multiple evaluations, select more checkboxes in step 1
### **Exporting Report Data**



Figure 79: Exporting Graph Data to a Spreadsheet - 1

To export all graph data to a Microsoft Excel 2007 or above (.xlsx) spreadsheet file:

- 1. Configure the graph parameters.
- 2. Click Export to Spreadsheet at the top of each graph.

#### Important:

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

- 🔺 Base Evaluation						
Select a Questionnaire:	Groups:	Select All/No	one	Select Evaluators Select .	All/None	Select Base Evaluation:
Call Quality (1.0)	🔺 🣁 Root gr	oup	^	Buck, Jake (jake.buck)		Benson Mattie 9/29/10 -
	🔺 🂋 Cop	enhagen		Ryan, Melinda (melinda.rya	n)	Benson Mattie 9/28/10 -
	Paç	os de Ferreira				Benson Mattie 9/27/10 -
	🔺 ៅ Dak	ar				Benson Mattie 9/26/10 -
Open	ing export.xl	sx		X		Benson Mattie 9/25/10 -
You	have chosen to o	nen				Watson Fannie 9/29/10 -
	export.xlsx					Watson Fannie 9/28/10 -
		rosoft Office Excel W	orket	aat		Watson Fannie 9/27/10 -
		ocs-callrec1.office.zo(				Watson Fannie 9/26/10 ·
	at should Firefox	do with this file?				Watson Fannie 9/25/10 -
					<u> </u>	
Evaluations for Comparise	Open with	Microsoft Office Exe	cel (d	efault) 💌		
Selected Questionnaire:	🔘 <u>S</u> ave File				l/None	Select Evaluations to Com
Call Quality (1.0)	📃 Do this <u>a</u> uto	matically for files like t	this fi	rom now on.		Benson Mattie 9/29/10 -
					þ	Benson Mattie 9/28/10 -
			_			Benson Mattie 9/27/10 -
		(	2	OK Cancel		Benson Mattie 9/26/10 -
						Benson Mattie 9/25/10 -
	a 💋 Gua	itemala City				Watson Fannie 9/29/10 -
	Bre	idablik				Watson Fannie 9/28/10 -
						Matson Fannia 0/27/10 .

Figure 80: Exporting Graph Data to a Spreadsheet - 2

Export to Spreadsheet creates a downloadable .xlsx file within a short space of time (how this appears depends on the web browser used).

- 1. Select **Open with** and select a spreadsheet application to open the file or click **Save File** to save the spreadsheet to the operating system.
- 2. Click OK.

	A	В	С	D	E	F	G	Н	1
1	Compare	Scores							
1									
2	Questionnai	re:	Call (	Quality	y (1.0)				
3									
4		Group/Question name							
4		Group/Question name	Base	1		1			
			Dase Evaluati						
			on.						
			Deanna	Deanna		Deanna		Deanna	
			Barker.	Barker.		Barker.		Barker.	
		(2)	20/10/10	20/10/10		20/10/10		20/10/10	
		õ	, Eval	, Eval	Deanna`	,	Deanna`	, Eval	Deanna`
5				ld: 1742			s Diff	ld: 1744	
6	Opening call		4.00%		-4.00%	24.00%	20.00%	28.00%	24.00%
7		Greeting, introducing the agent and the company	10.00%			20.00%	10.00%	0.00%	
8		Detection and Verification of a competent person	0.00%		0.00%	20.00%	20.00%	10.00%	10.00%
9		Customer?s Consent to interview him/her (time, topic)	0.00%		0.00%	20.00%	20.00%	20.00%	20.00%
10 11		Company Presentation Switching to the matter of the call	0.00%	0.00%	0.00%	0.00%	0.00%	20.00%	20.00%
	Merchant's skills	Switching to the matter of the can	4.00%		8.00%	6.00%	2.00%	20.00%	14.00%
12	WEICHAIL S SKIIS	Questioning techniques - investigative/business orient	0.00%		30.00%	0.00%	0.00%	30.00%	30.00%
14		Understanding customer needs	0.00%			0.00%	0.00%	40.00%	40.00%
15		Solution proposal	10.00%		0.00%	20.00%	10.00%	20.00%	10.00%
16		Customer care	10.00%	0.00%	-10.00%	10.00%	0.00%	0.00%	-10.00%
17	Call control		18.00%	0.00%	-18.00%	20.00%	2.00%	0.00%	-18.00%
18		Following the script	10.00%	0.00%	-10.00%	10.00%	0.00%	0.00%	-10.00%
18							0.000/		

Figure 81: Exported Graph (Compare Evaluations) in Spreadsheet Format

View the downloaded file in Microsoft Excel versions 2007 and above, and other programs that can read the Excel .xlsx format. The file can also be processed or analyzed by other tools.

The following types of data are visible:

- 1. Evaluation ID (click on the column or row to expand the cell to read the full ID).
- 2. Evaluation Date (when the evaluation was completed).
- 3. Weighted totals.

The color coding of the cells is:

- Green better than base level.
- Yellow same as base.
- Red worse than base.

#### Tip:

Evaluations are identified by their evaluation ID. The evaluation ID is included in a header row of exported graph data, but is normally hidden from view. Increase the height of this row (normally row 5) to see the IDs (see figure).

Using an ID number, you can search for the specific evaluation in the ScoreCARD evaluation list using the search (enter the same ID into **From** and **To** ID fields).



#### Chapter

7

# **Calibrating Evaluations**

To ensure that all evaluations are carried out to the same standard using the same scoring, it is necessary to compare how each evaluator scores agents. The best way to do this is get all of the evaluators to score the same agent, call (or media), and questionnaire to compare the scores for each section. When the evaluations have been carried out and compared, the group of evaluators should discuss the different evaluations and agree on a standard set of criteria that they will all use.

# Selecting a Suitable Evaluation for Calibration

Find a suitable evaluation for calibration by navigating to the **Evaluation List**. The **Evaluation List** tab opens and displays the most recent evaluations. Use the page controls at the bottom of the window to find **Finished** evaluations.

« »			tion List			lore Actions - 🖂 Ser		aadbaak II	> Evna	d to Spraade	heet A			~
Dashboard		N.	ID	Evaluator	Agent	Ques, Name		Period To		Status	_	Last Modifi	Parent ID	-
Evaluations		701	904	Scott, Flora	-	Call Quality (1.0)	Jul 1, 2011			Created	V	Aug 2, 201		
waluation List		702	903	Scott, Flora		Call Quality (1.0)	Jul 1, 2011					Aug 2, 201		
Evaluation Planner		702	902	Scott, Flora	Wheeler, Luisa	Call Quality (1.0)	Jul 1, 2011			Created		Aug 2, 201		
📁 Questionnaires		704	901	Scott, Flora	Hobbs, Eddie	Call Quality (1.0)	Jul 1, 2011					Aug 2, 201		
Reports			900									Jul 18, 201		
Administration		705		Spears, Jannie	Vargas, Dora	Call Quality (1.0)	Mar 26, 20				V			
Group Manager User Manager		706	899	Spears, Jannie	Vargas, Dora	Call Quality (1.0)	Mar 27, 20					Jul 18, 201		
lnteraction Types		707	898	Spears, Jannie	Vargas, Dora	Call Quality (1.0)	Mar 28, 20					Jul 18, 201		
Audit Log		708	897	Spears, Jannie	Vargas, Dora	Call Quality (1.0)		Mar 30, 20				Jul 18, 201		
🔯 Role Manager 🦯		709		Spears, Jannie	Vargas, Dora	Call Quality (1.0)		Mar 31, 20			1	Jul 18, 201		_
ScoreCARD Op	-	710		Spears, Jannie	Gross, Carolina	Call Quality (1.0)	Mar 26, 20		-			Jul 18, 201		J
About		711	854	Spears, Jannie	McFarland, Lynda	Call Quality (1.0)	Mar 27, 20	Mar 28, 20	26.0 %	Finished		Jul 18, 201		
		712	853	Spears, Jannie	McFarland, Lynda	Call Quality (1.0)	Mar 28, 20	Mar 29, 20	84.0 %	Finished		Jul 18, 201		
		713	852	Spears, Jannie	McFarland, Lynda	Call Quality (1.0)	Mar 29, 20	Mar 30, 20	75.0 %	Finished		Jul 18, 201		
		714	851	Spears, Jannie	McFarland, Lynda	Call Quality (1.0)	Mar 30, 20	Mar 31, 20	75.0 %	Finished		Jul 18, 201		
		715	850	Spears, Jannie	Gordon, Murray	Call Quality (1.0)	Mar 26, 20	Mar 27, 20	2.0 %	Finished		Jul 18, 201		
		716	849	Spears, Jannie	Gordon, Murray	Call Quality (1.0)	Mar 27, 20	Mar 28, 20	54.0 %	Finished		Jul 18, 201		
		717	848	Spears, Jannie	Gordon, Murray	Call Quality (1.0)	Mar 28, 20	Mar 29, 20	10.0 %	Finished		Jul 18, 201		
		718	847	Spears, Jannie	Gordon, Murray	Call Quality (1.0)	Mar 29, 20	Mar 30, 20	77.0 %	Finished		Jul 18, 201		
		719	846	Spears, Jannie	Gordon, Murray	Call Quality (1.0)	Mar 30, 20	Mar 31, 20	62.0 %	Finished		Jul 18, 201		
		720	845	Stephens, Winsto	Vargas, Dora	Call Quality (1.0)	Mar 26, 20	Mar 27, 20	7.0 %	Finished		Jul 18, 201		
	4						11							Þ

Figure 82: Select a Suitable Evaluation

- 1. Select the check box of an evaluation with the status Finished.
- 2. Click **Report** to see how the individual sections and questions have been scored in detail. The **Evaluation Detail** opens in a separate tab. If the evaluation is suitable, then the evaluation can then be used for calibration across the evaluation team.

🔓 Print 👘 🦃 Expect to Sp	Installation			C Include All Possible Answer	< E to P
Evaluation #89	5 - Call Quali	ty 1.0			
Agent: Evaluator:	Carolina Gross () Jannie Spears ()		Evaluation Date: Exal. Period From: Exal. Period To:	18/07/15 26/03/11 12:00 27/08/11 12:00	
Interaction #895	Start		End:		
Call	Prom: Direction: Callegory:	Al	To: Wirap Up:		
Question			Answer		Rating
Opening call					
Greeting, introducing th	e agent and the com	plany'	Good		100.0%
Detection and Verification	on of a competent pe	rson	Good		100.0%
Customer?s Consent to	interview him/her (b	me, topic)	Good		100.0%
<b>Company Presentation</b>			Good		100.0%
Switching to the matter	of the call		Good		100.0%
Identhant's skills					
Questioning techniques	- investigative/busin	ess oriented	Ded		0.0%
Understanding custome	r needs		Good		100.0%
Solution proposal			Average		50.0%
Customer care			Good		100.0%
Call control					
Following the script			Excellent		100.0%
The Language, length o	f seniences, speed o	f speech	Excellent		100.0%
Listening			Good		100.0%
Responding			Good		100.0%
Overcoming objections			Good		100.0%
Tone / pitch of the call /	Positive speech		Excellent		100.0%

Figure 83: Evaluation Detail

# **Assigning Evaluators to the Agents Group**

Before calibrating evaluators, you must ensure that they are assigned the right to evaluate the group that the target agent is in.

Find each evaluator in the User Manager section, open their profile and check if the groups have been assigned to them.

	Evaluation Optail      Evaluation Planner      User Manager	
S. 8. # %	Add C Edit S Remove	
Dashboard	N. Surname Name Login ID User Role Belongs To Group	Database Status
Generations	61 Santos Leah Ieah.santos Agent CE Principat	ScoreCardE
Evaluation List Evaluation Planner	2 2 Scott Flora flora.scott Supervisor CE Principat	ScoreCardE
Questionnaires	63 Spears Jannie jannie.spea Supervisor Renova Dzepciste	ScoreCardI
🗉 🣁 Reports	Add or Edit User	-  X
Administration		-
Group Manager	Database: ScoreCardDB Groups:	Groups Assigned to Supervisor:
User Manager	Status: Active 🝸 🖉 Root group	CE Principat
Audit Log	User Role: Supervisor 🗸 🖌 Harare	Renova Dzepciste
🔯 Role Manager	Language: English (US)	
ScoreCARD Options	Login ID: flora.scott	
(1) About	First Name: Flora Renova Dzep	
	Surname: Scott	
	Sumane. Scott	
	Email: flora.scott@zoomint.com	
	Phone 5013	
	Agent ID	
	O None	
	Agent Group: CE Principat	
	Reset Password	
	Add Add /	All Remove All
		5 Save Cancel

Figure 84: Assign Evaluators to Group

- 1. Select User Manager from the menu tree. The User Manager tab opens
- 2. Select an evaluator. In the figure above, this is a supervisor. Other roles may perform the evaluation if they have the appropriate permissions.
- 3. Click edit Add or Edit User. The dialog box opens for this evaluator.
- 4. Drag the group (in the example **Renova Dzepciste**) into the **Groups** Assigned to Supervisor field.
- 5. Click Save.

Repeat steps 2 to 5 for each evaluator.

# **Creating Evaluations for each Evaluator**

) E	valua	tion List 🗵	Evaluation Detail	×		_							
	New	Evaluation	🛃 Evaluate 📃 🛛	k <mark>(2</mark> ) 🍪	More Action	s 🔹 🖂 Se	end Evaluation Feedbacl	k 📴 Export t	to Spreads	heet All		🗸 🔍 Search Eva	luat
	N.	ID	Evaluator	A(3)	Re-Evaluat	•	Period From	Period To	Score	Status	Reveal	Last Modified Parent ID	
	701	904	Scott, Flora	Vela	Re-Open		Jul 1, 2011	Jul 31, 2011	0.0 %	Created		Aug 2, 2011	
	702	903	Scott, Flora	Hart			Jul 1, 2011	Jul 31, 2011	0.0 %	Created		Aug 2, 2011 1	
	703	902	Scott, Flora	Whe 🗸		Statistics	Jul 1, 2011	Jul 31, 2011	0.0 %	Created		Aug 2, 2011	
	704	901	Scott, Flora	Hob 🗸		ults to Agent	Jul 1, 2011	Jul 31, 2011	0.0 %	Created		Aug 2, 2011	
	705	900	Spears, Jannie	Varç	Delete Eva	luation(s)	Mar 26, 2011	Mar 27, 2011	57.0 %	Finished		Jul 18, 2011	
	706	899	Spears, Jannie	Vargas,	Dora	Call Quality (1.0)	Mar 27, 2011	Mar 28, 2011	25.0 %	Finished		Jul 18, 2011	
	707	898	Spears, Jannie	Vargas,	Dora	Call Quality (1.0)	Mar 28, 2011	Mar 29, 2011	19.0 %	Finished		Jul 18, 2011 -	
	708	897	Spears, Jannie	Vargas,	Dora	Call Quality (1.0)	Mar 29, 2011	Mar 30, 2011	0.0 %	Finished		Jul 18, 2011 -	
	709	896	Spears, Jannie	Vargas,	Dora	Call Quality (1.0)	Mar 30, 2011	Mar 31, 2011	68.0 %	Finished		Jul 18, 2011 -	
V	710	895	Spears, Jannie	Gross, C	Carolina	Call Quality (1.0)	Mar 26, 2011	Mar 27, 2011	84.0 %	Finished		Jul 18, 2011 -	
	711	854	Spears, Jannie	McFarla	nd, Lynda	Call Quality (1.0)	Mar 27, 2011	Mar 28, 2011	26.0 %	Finished		Jul 18, 2011 /	

Figure 85: More Actions on Evaluation List

- 1. Select the Evaluation List tab again, ensure the evaluation is still selected.
- 2. Click More Actions.
- 3. Select Re-evaluate.

The **Evaluation Planner** tab opens populated with the same interactions and parameters as the original evaluation. The Remove Interactions dialog box opens.



Figure 86: Remove Interactions

4. Click No (this ensures that the same interaction is used for each evaluation).



Figure 87: Choose an Evaluator

- 5. Select an evaluator to participate in the calibration session.
- 6. Click Create Evaluations. The evaluations created dialog displays.

			×
1 evaluation(s) created			
	7	Ok	



7. Click OK. The evaluation is created.

Repeat steps 1 to 7 for each evaluator.

The newly created evaluations should now display in the **Evaluation List** with the most recent displaying at the top of the first page.

							🖵 т	oltips On	🔗 CcManager, (	CcManager	(comana	iger) 🄊	Logout 🖂 Mess	ages
	~	Ev	alua	tion List	×									
Q 8.8 8 9	21 12 21 55		New	Evaluatio	n 🕼 Evaluate	🖪 Report 🚳	More Actions 👻 🖂	Send Eval	uation Feedback	🕒 Export	to Sprea	dsheet 📝	All	
Dashboard			N.	ID	Evaluator	Agent	Ques. Name	Period Fr	Period To Score	Status 4	Reveal	Last Mo	Parent ID	~
Evaluations		C	1	1731	Spears, Jannie	Gross, Carolina	Call Quality (1.0)	Mar 26, 2	Mar 27, 2 0.0 %	Created	1	Aug 4, 20	895	
Levaluation List			2	1332	CcManager, Cc	Hartman, Nane	Call Quality (1.0)	Aug 1, 20	Aug 1, 20 0.0 %	Created		Aug 2, 20		1
Evaluation Planner			3	1331	CcManager, Cc	Wheeler, Luisa	Call Quality (1.0)	Aug 1, 20	Aug 1, 20 0.0 %	Created		Aug 2, 20		
Questionnaires     Annumber of the second seco			4	1330	CcManager, Cc	Hobbs, Eddie	Call Quality (1.0)	Aug 1, 20	Aug 1, 20 0.0 %	Created		Aug 2, 20		

Figure 89: Showing Created Evaluation with Parent ID

The **Parent ID** denotes the original evaluation that the new evaluation is based on. This is useful for comparison purposes with the original.

The evaluators must all evaluate the same agent and interactions. Once all of the evaluations are completed, Quality Manager can generate reports to compare results.

The easiest way to compare evaluators in detail, is to find the **Finished** evaluations in the **Evaluation List**, select each evaluation, and click **Report**. The evaluators can then compare scores .

e company ent person her (time, t	on	Evaluation Date: Eval. Period From: Eval. Period To: Eval. Period To: End: To: Wrap Up: Answer Good Good Average Good	04/08/11 26/03/11 12:00 27/03/11 11:59 - -	Rating	Agent: Evaluator: Interaction #903 Call Question Opening call	Carolina Gross (carol Winston Stephens (w Start: From: Direction: Category:		Evaluation Date: Eval. Period From: Eval. Period To: End: To: Wrap Up: Answer	04/08/11 26/03/11 12:00 27/03/11 11:59 -	
ent person her (time, f	All	To: Wrap Up: Answer Good Good Average		100.0%	Call Question	From: Direction:	- - All	To: Wrap Up:	-	
ent person her (time, f	All	Wrap Up: Answer Good Good Average	•	100.0%	Question	Direction:	- All	Wrap Up:		
ent person her (time, f	on	Good Good Average		100.0%				Answer		
ent person her (time, f	on	Good Average			Opening call					Rating
ent person her (time, f	on	Good Average								
	e, topic)			100.076	Greeting, introducing the Detection and Verificatio			Good Average		100.0% 50.0%
		Good		50.0%	Customer?s Consent to	interview him/her (time,	lopic)	Good		100.0%
				100.0%	Company Presentation			Average		50.0%
		Average		50.0%	Switching to the matter of	of the call		Average		50.0%
					Merchant's skills					
business (	s oriented	Good		100.0%	Questioning techniques	- investigative/business	priented	Good		100.0%
		Average		50.0%	Understanding customer	needs		Good		100.0%
		Good		100.0%	Solution proposal			Average		50.0%
		Good		100.0%	Customer care			Good		100.0%
		Excellent		400.00	Call control					
				100.0% 78.0%	Following the script			Good		80.0%
eed of sp	speecn	Good Average		45.0%	The Language, length of	sentences, speed of sp	eech	Excellent		100.0%
		Good		100.0%	Listening			Average		45.0%
		Bad		0.0%	Responding			Good		100.0%
h		Good		89.0%	Overcoming objections			Bad		0.0%
		0000		0.3.076	Tone / pitch of the call / F	Positive speech		Good		89.0%
		Good		100.0%	Closing the call					
		Good		100.0%	Thanks and farewell to t	he customer		Average		11.0%
e infoline	e	Good		100.0%	Summary after call - rec	ар		Good		100.0%
					Inviting the customer to	all anytime the infoline		Good		100.0%
			Total Rating:	81.0%					Total Rating:	71.0%
	e infolin	e infoline	Good	Good e infoline Good	Good 100.0% e infoline Good 100.0%	Good 100.0% Thanks and farewell to the infolme Good 100.0% Summary after call - rect Inviting the customer to the infolme Good 100.0% Inviting the customer to the infolmer Good Intervention of the infolmer Good Interventing Intervention of the infolmer Good Interventing Interve	Good 100.0% ie infoline Good 100.0% E infoline Good 100.0% Good 100.0% Summary after call - recap Inviting the customer to call anytime the infoline	Good 100.0% Good 100.0% e infoline Good 100.0% Inviting the customer to call anytime the infoline	Good 100.0% ie infoline Good 100.0% ie infoline Good 100.0% infoline Good 100.0% Summary after call - recap Good Inviling the customer to call anytime the infoline Good	Good         100.0%         Thanks and farewell to the customer         Average           Good         100.0%         Summary after call - recap         Good           Inviting the customer to call anytime the infoline         Good         Good

Figure 90: Detail Report Comparison

You may also wish to use compare scores. See Compare Scores Report - 1.

Compare Score	es			
	Questionnaire:			Call Quality (1.
	Group/Question name	E	valuations	
		Base Evaluation,	Carolina	
		Carolina Gross,	Gross,	
		04/08/11, Eval	04/08/11,	Carolina's
		ld: 1,731	Eval Id:	Diff
Opening call		80.00%	70.00%	-10.00%
	Greeting, introducing the agent and the company	100.00%	100.00%	0.00%
	Detection and Verification of a competent person	100.00%	50.00%	-50.00%
	Customer?s Consent to interview him/her (time, topic)	50.00%	100.00%	50.00%
	Company Presentation	100.00%	50.00%	-50.00%
	Switching to the matter of the call	50.00%	50.00%	0.00%
Merchant's skills		80.00%	90.00%	10.00%
	Questioning techniques - investigative/business oriente	100.00%	100.00%	0.00%
	Understanding customer needs	50.00%	100.00%	50.00%
	Solution proposal	100.00%	50.00%	-50.00%
	Customer care	100.00%	100.00%	0.00%
Call control		66.90%	69.30%	2.40%
	Following the script	100.00%	80.00%	-20.00%
	The Language, length of sentences, speed of speech	78.00%	100.00%	22.00%
	Listening	45.00%	45.00%	0.00%
	Responding	100.00%	100.00%	0.00%
	Overcoming objections	0.00%	0.00%	0.00%
	Tone / pitch of the call / Positive speech	89.00%	89.00%	0.00%
Closing the call		100.00%	55.50%	-44.50%
	Thanks and farewell to the customer	100.00%	11.00%	-89.00%
	Summary after call - recap	100.00%	100.00%	0.00%
	Inviting the customer to call anytime the infoline	100.00%	100.00%	0.00%
Total Weighted Sco	re:	81.00%	71.00%	-10.00%

Figure 91: Compare Scores

# **Comparing Evaluators**

The Compare Evaluators chart provides an overview of evaluators in relation to each other.



Figure 92: Select Compare Evaluators

To compare scores (logged on as ccmanager):

- 1. Select **Reports** in the left hand menu.
- 2. Select Compare Evaluators.
- 3. Select the **Group**, **Agent**, **Questionnaire**, **From** and **To** that correspond with an evaluation carried out in the previous section.
- 4. Click Compute graph.

# **Compare Evaluators Chart**



Figure 93: Compare Evaluators Chart

In this example, the Compare Evaluators chart is divided into three sections showing the scores given by three evaluators. The columns correspond to sections in the questionnaire in this example:

- The light blue columns represent the scores for Opening Call.
- The gray columns represent the scores for Merchants skills.
- The Blue column is represent the scores for Call Control.
- The purple columns represent the scores for Closing the call.

Hover over a particular column and the name of the column and the precise percentage display.



#### Chapter



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

This chapter contains the following sections:

The Quality Manager Dashboard Setting Up a Dashboard - 1 Setting Up a Dashboard - 2 Setting Up a Dashboard - 3

# **The Quality Manager Dashboard**



Figure 94: The Quality Manager Dashboard

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

You can configure a varying number of information boxes ('widgets') on the Dashboard. The widgets display a quick summary of evaluation data such as high/low performing agents and groups, in a simple visual format.

The widgets take data directly from the Quality Manager database, so Dashboard reflects an up-to-the-minute overview of your call center's performance.

Two dashboards are available:

**Default** is the basic setup for all Dashboard users. The default widgets can be set up to give users a generic top-level performance overview. **User Dashboard** can be customized by each individual Dashboard user for his/her own requirements.

1. Select Dashboard to open the Dashboard tab.

The types of Widget in the figure are:

- 1. Pie
- 2. Trend

- 3. High Scoring Agent
- 4. Low Scoring Agent

# **Setting Up a Dashboard - 1**

		🖓 Tooltips Off 🖉 CcManager, CcManager (ccmanager) 🍠 Logout 🖂 Messages
	Dashboard ®	
C	3 Widgets per Row 3 3 Add Widget 4 Save	
1 Dashboard	High Scoring Agents	
<ul> <li>Evaluations</li> <li>Questionnaires</li> </ul>	High Scoring Groups	
■ <sup>[]</sup> Questionnaires ■ <sup>[]</sup> Reports	Low Scoring Agents	
Administration	Low Scoring Group	
🕕 About	Trend	
	Pie	
	2 User Dashboard Default Dashboard	

Figure 95: Setting Up a Dashboard - 1

A dashboard can only be properly set up when agents, groups and questionnaires have been defined.

- 1. Click **Dashboard** in the left hand menu. The **Dashboard** tab opens.
- 2. Click either User Dashboard or Default Dashboard
- 3. Choose the number of **Widgets per Row** from the dropdown list. For example, two **Widgets per Row** are used and two rows are in the figure, enabling four widgets in the display.
- 4. Create the first widget by clicking Add Widget and selecting one of the following types from the dropdown list:
   High Scoring Agents
   High Scoring Groups
   Low Scoring Agents
   Low Scoring Group

Specify the maximum number to display using the **Count** parameter. **Trend** displays the average score trend from a specified questionnaire for an agent group (or groups), with numbers comparing this week/month to last week/month.

Pie uses the pass and fail criteria (Good / Bad Threshold) from a specified

questionnaire to display a pie chart of agent categories (good/average/bad) for a group or all groups. For an example of this please see <u>Setting Up a Dashboard -</u> <u>2</u>.

Repeat step 4 until all of the widgets have been selected.

# **Setting Up a Dashboard - 2**

	🔽 Tooltips On 🧬 CcManager, CcManager (ccmanager) 🚀 Logout 🖂 Mes	sages
×	Dashboard 🖲	
5 8 5 12 12 12 13 12 12 12 13 12	🔟 Widgets per Row 👻 🔕 Add Widget 🕶 🔚 Save	
Dashboard		
Evaluations	Pie - Configuration	
📩 Evaluation List	Refresh (minutes): 30	
Questionnaires	Period: Yesterday	
I 💭 Reports	Description: Summary	
Generation     Generation     Generation	Questionnaire: Call Quality (1.0)	
	Groups: Select All/None	
	A 💋 Root group	
	Dungate	
	Good Threshold: 75	
	Bad Threshold: 25	
	Min-Max Value: 0 - 100	
	Save	
	User Dashboard Default Dashboard	
×	1024x74	58 🌻

Figure 96: Setting Up a Dashboard – 2

In the example in the figure, a pie widget is selected from the list in Add Widget.

- 1. Click the settings button to configure the widget (see figure).
- 2. The **Pie Configuration** dialog box appears. In the **Pie Configuration** dialog box:

	🔽 Tooltips On 🥵 CcManager, CcManager (ccmanager) 💕 Logout 🖂 Mess	ages
×	Dashboard 🗵	
Q	🔟 Widgets per Row 🔹 🔕 Add Widget 👻 🔚 Save	
Dashboard     Cashboard     Cashboard	Widgets per Row • Add Widget • Save	
	User Dashboard Default Dashboard	
x	1024x76	3 🤅

Figure 97: Pie Widget Configuration

- 1. Type a **Refresh:** rate in minutes. This dictates how often the data is refreshed for the widget. It is recommended that this value shouldn't be less than 5 minutes to avoid browser performance issues with multiple widgets refreshing together.
- Select a Period: from which the data will be collected, from the Period: dropdown. Choose from: Yesterday, Current Week, Last Week, Current Month, Last Month, Current Quarter, First Quarter, Second Quarter, Third Quarter, Fourth Quarter, Current Year, Last Year
- 3. Type a **Description** for the widget.
- Select a Questionnaire from the dropdown list. If a Description: is not provided for a widget during configuration, Quality Manager will display settings information in the title bar of the widget instead.
- The threshold values can be modified if required. Select a target agent Group. Use the checkbox to Select All/None of the groups and use CTRL (Win) or CMD (Mac) while selecting to add or remove groups from your selection.
- 6. The questionnaire provides the default **Good Threshold**, **Bad Threshold**, and **Min-Max Value** (range).
- 7. Click Save to apply the settings and display the widget.

# **Setting Up a Dashboard - 3**

		🖓 Tooltips Off 🛛 🝰 CcManager, CcManager (ccmanager) 🎾 Logout	🖂 Messages
(4)	Dashboard 🖲		
0. 5 # 2 # # 2 # 5 #	💷 Widgets per Ro 1 💿 Add Widget 🔚 Save	2	
<ul> <li>Dashboard</li> <li>U Evaluations</li> <li>Q ouestionnaires</li> <li>Q Reports</li> <li>Q About</li> </ul>	Pacos de Ferreira Summary - Bad - 257 - Average - 523 - Good - 16		3
	Pacos Top Scorers	e× ▲ 3	
		0	
		9	
		6	
	User Dashboard Default Dashboard		~

Figure 98: Setting Up a Dashboard - 3

After saving the widget configuration, the widget displays the data as appropriate.

- 1. Additional widgets can be added or removed, dragged to different positions by their title bars (the mouse cursor changes to a cross when dragging is possible), or minimized as required.
- 2. After completing the widget configuration, click **Save** to save the changes (the **Save** button is disabled if no changes need to be saved).
- 3. Use the appropriate buttons in the upper right hand corner of the widget to remove, minimize, or hide the widget.

#### Important:

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



#### Chapter



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 ccmanager login. If you are currently logged in to Quality Manager, log out, refresh your web browser, and log in with a ccmanager login and password.

The default log in is comanager 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 99: 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 100: The Group Manager Tab Opens

- 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.

Group Manager	8
	ne 🤤 Remove
🖉 🕼 Root group	1)
a 🂋 Copenhage	en
Paços de l	Ferreira
🔺 🃁 Dakar	
Sioni Bolni	si
a 🧔 Guatemala	City
Breidablik	
🔺 🃁 Hagåtña	Add new group
Real Mallo	
🔺 🃁 Pretoria	Group Name: (3) Prague
Villarreal	
	4 Save Cancel

Figure 101: 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**

	Ş	Tooltips Off 🧟 CcMa	nager, CcManager (ccn	nanager) 🔊	Logout 🖂	Messages
<b>«</b>	League Table 🙁	Group Manager 🙁	Group SCP 🗷			
Q ≫	💿 Add 🥜 Edit	🥥 Remove 📓 Res	et Pas <mark>2</mark> d	Search:		×
🐨 Dashboard 🔶	N. Surname	Name Lo	ogin ID User Role	Belongs	Database	Status
🗄 📁 Evaluations	1	Sona	Supervisor	SCP	1000	•
⊕ Questionnaires	2	Eva	Supervisor	SCP		•
⊞	3	Miroslav	Supervisor	SCP		•
🖃 🂋 Group Manage	<b>4</b>	Vera	Supervisor	SCP		•
AnectTest	5	Ondrej	Supervisor	SCP		•
a BServisVPA A CALLIN	6	Radana	Supervisor	SCP		•
∃ 📌 GLI+ČP	7	Ivana	CC Manage	SCP		•
🛃 Helpdesk_£	8	Marketa	Supervisor	SCP		•
PMV06	9	Tomas	Supervisor	SCP		•
🛃 PMV08 📌 PMV12 🛛 ≣	10	Vladimir	Supervisor	SCP		•
A SCB	11	Lukas	Supervisor	SCP		•
1 🛃 SCP	12	Martin	Supervisor	SCP		•
de TBRN17	13	Radka	Supervisor	SCP		•
률 Testovaci 📣 TGLIPF	14	Jana	Supervisor	SCP		•
₫ TPCEB	15	Tomas	Supervisor	SCP		•

Figure 102: 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

	toot 🤉	tips Off 🔗 Co	Manager, Cc	Manager (cci	manager) 🔬	🖗 Logout 🗵	Messages
(	« League Table 🛎 Gro	oup Manager 🙁	Group S	CP 🗷			
<u> </u>	2 💿 Add 🕜 Edit 🥥	Remove 🔐 R	leset Passw	ord	Search:		×
🗑 Dashboard	N. Surname	Name	Login ID	User Role	Belongs	Database	Status
Constitutions	Add or Edit User				×		9
<ul> <li>Understanding</li> <li>Questionnaires</li> <li>Reports</li> </ul>	Database:	wbscDB	~				•
□ ⊕ Administration 3 □ ⊕ Group Mana	Status:	Active	~				ă
AnectTest	User Role:	Agent			~		ŏ
🝰 BServisVPA ♣ CALLIN	Language:	English (US)			~		0
⊞ 📥 GLI+ČP	Login ID:	john.smith					0
🛃 Helpder 👍	First Name:	john					0
A PMV06	Surname:	smith					0
₽МV08 ₽МV12	Email:	john.smith@	mycompan	y.com			0
SCB	Phone	1254			ע ד		0
TBRN17	🔘 Agent ID						0
📥 Testovaci	None						•
💣 TGLIPF 🚺	Agent Group:	SCP		-	J  -		
A TPCEB					-		•
A TPRA01		-					
FPRA02		7	Save	Can	cel		
📥 TPRA03			_	_			



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

«	U	serl	Manager 🛎			$\sim$			
۵ (2)	0	Add	<b>1</b> 🖉 Edit 🤤	Remove 🔐	Reset Passw	a <mark>(3)</mark>			🔍 Sear
🗑 Dashboard		Ν.	Surname	Name	Login ID	User Role	Belongs	Database	Status
🗉 📁 Evaluations		871	Slanina	Jiri	T911772	Agent	TGLI01	IPCC	0
Questionnaires		872	Slavikova	Hana	HSlavikova	Agent	TPCE11	IPCC	0
∃ 📁 Reports ∃ 📹 Administration		873	Slavotinkova	Lenka	Islavotin	Supervisor	TBRN05	IPCC	0
🚤 📁 Group Manager		874	Sliz	Stepan	ssliz	Agent	PMV06	IPCC	0
1 🔊 User Manager		875	Slobodnikova	Alena	aslobod	Agent	TBRN02	IPCC	0
Category		876	Smejdova	Pavla	psmejdova	Agent	TPCE02	IPCC	0
interaction Types		877	Smejkalova	Lucie	LucSmej	Supervisor	TPCE08	IPCC	0
audit Log		878	Smetakova	Emilie	esmetak	Agent	TPRA01	IPCC	0
🤯 Role Manager		879	Smilkova	Eva	ESmilkova	Supervisor	TBRN10	IPCC	0
ScoreCARD Option (1) About		880	smith	john	john.smith	Agent	SCP	wbscDB	0
		881	Smolova	Jitka	jsmolova	Agent	TPCE05	IPCC	0
		882	Smotrilova	Ivana	ismotrilova	Supervisor	TBRN12	IPCC	0
		883	Smutna	Radka	t911929	Agent	TGLI02	IPCC	0
		884	Sodomka	Jiri	JSodomka	Agent	TPCE14	IPCC	0
		885	Sodomka	Lubomir	Isodomka	Agent	PMV08	IPCC	0

Figure 103: 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.
- 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

Add or Edit User						×
Database:	ScoreCardDB	G	iroups:		Groups Assigned to Supervisor:	
Status:	Active		a 📁 Root group		Breidablik	
User Role: (1)	Team leader	V)	a 📁 Copenhagen		Guatemala City	- 1
Language:	English (US)	~	Paços de Fer 4 🧊 Dakar	reira	Sioni Bolnisi	- 1
Login ID:	ronald.mcdonald		Sioni Bolnisi			- 1
First Name:	Ronnie		a 🎁 Guatemala Ci			- 1
Surname:	MacDonald		Breidablik			
Email:	bigmac@mycompany.com	n	A Ø Hagåtña Real Mallorca			- 1
<ul> <li>Phone</li> </ul>	1254		Prague			- 1
🔿 Agent ID			a 🧔 Pretoria			- 1
🔿 None			Villarreal			- 1
Agent Group:	Real Mallorca	~				- 1
Reset Password						-
			Add Add	All Remo	ve Remove All	
						_
✓ Delegation	3					
	lson, Rafael (rafael.olsc 🍸	From	2/1/11	То	2/28/11	
	ison, Nalael (ralaelluist	11011	2/1/11		2/20/11	
					4 Save Can	cel

Figure 104: 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**

() Add (2) (	Remove 🔐 Res	et Password				
N. Surname	Name	Login ID	User Role	Belongs To	Database	Status
871	Jiri	Loginio	Agent	TGLI01	Dutubuse	
872	Hana		Agent	TPCE11		ă
873	Lenka		Supervisor	TBRN05		
874	Stepan		Agent	PMV06		0
875	User Rem	oval				0
876	2	Are you sure you	want to remov	e the		0
877		selected user(s)?				0
878	3	Yes	No			0
879	Lva	LJIIIKUYA	Supervisor	TURNUT		0
880 smith	john	john.smith	Agent	SCP	wbscDB	0
881	Jitka		Agent	TPCE05	-	0
882	Ivana		Supervisor	TBRN12		0
883	Radka		Agent	TGLI02		٢
884	Jiri		Agent	TPCE14		٢
885	Lubomir		Agent	PMV08		

Figure 105: 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 106: 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

		🖓 Tooltips Off 🏾 🛃 CcManager, CcManager (ccmanager) 🚀 Logout 🖂 Messages
(*)	Role Manager 🖲	
la seconda sec	💿 Add 🥜 Edit	🗅 Copy 🤤 Delete 🔹 💙
🔀 Dashboard	Role	Description
🗉 📁 Evaluations	Agent	View and send own evaluation feedback
Customer Interactions	CC Manager	All non-administrative permissions (and reset passwords for own teams and sub-teams
🗄 💋 Questionnaires 🛛 🔁	CC Manager - GLI	All non-administrative permissions (and reset passwords for own teams and sub-teams
Geports     Geports     Geports	IT Administrator	Update license, edit settings, reset all passwords
Administration I Group Manager	Supervisor	Plan, evaluate, view reports (and reset passwords) for own teams and sub-teams
🔊 📁 Oroup Manager	Team leader	Perform & manage evaluations and reports for own team
👳 Wrapup		
🗽 Interaction Types		
Audit Log		
1 💀 Role Manager		
ScoreCARD Options		
About		

Figure 107: 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.
- 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.
- 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**

Role Manager 🗵			
-			
🔾 Add 🥜 Edit 肮 Copy 🤤 Delet	$\sim$		
Role	Description		
Agent		evaluation feedback	
CC Manager		e permissions (and reset passwords for own teams	
CC Manager - GLI	All non-administrative	e permissions (and reset passwords for own teams	and sub-teams only)
IT Administrator	Update license, edit	settings, reset all passwords	
Supervisor	Plan, evaluate, view	reports (and reset passwords) for own teams and s	sub-teams
Team leader	Perform & manage e	valuations and reports for own team	)
Name Team leader  Available Permissions  Edit admin settings Edit global templates Edit interaction types	Ê	Assigned Permissions View interactions of groups that can be ev Manage assigned evaluations View reports/graphs	
Edit license		> Add specific call to the evaluation	
View only own interactions		Replace calls	E
View all interactions		< Evaluate agents	
Create and modify questionnaire	:s	<< Create evaluation	
Change roles, add/remove perm	issions	View team evaluations	
Edit, delete, or create SpeechTa	gs and Sp	View my evaluations	

Figure 108: 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.</p>
- 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 per- missions	Edit and add remove user roles and assign privileges to the roles.	CC Manager
Create and modify ques- tionnaires	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 1: 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.

Add	Ed	t 🗈 🕗 🗇 Dek	ete					
lole		-	Description					
gent			View and sen	d own eval	uation feedback			(
C Man C Ed	it User R	ole	All non adminis	etrative ner	mieeinne (and ree	eat naceworde for own taame and ei	ih tear	ns only
•	- Role P	roperties						
ur ea	Name	Agent			Description	View and send own evaluation		
		ble Permissions			Assigned P	ermissions		
	Passw	vord reset		*	View only o	own interactions		
	Passw	ord reset (team memb	ers only)		Add specifi	ic call to the evaluation		
	View	all evaluations			Replace ca	lls		
	View	eports also for all othe	er groups	Q.	Send evalu	ation feedback		
	List au	dit events			View evalu	ations - agent view		
	View	my evaluations		_<				
	View	reports/graphs						
	View t	eam evaluations		E				
	Self-e	valuation		-3				

Figure 109: 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**

×	Interaction Types 🛞	
Q 5 2	💿 Add 🥜 Edit 😢 Delete	
<ul> <li>Dashboard</li> <li>Evaluations</li> </ul>	Name	Туре
<ul> <li>         Evaluations      </li> <li>         Questionnaires     </li> </ul>	Call Call + Screen	System
⊞	Screen	System
🗄 📁 Group Manager	Chat Email	User
User Manager	Other	User
Audit Log	Registration	User
🔅 Quality Manager Options		
(1) About		

Figure 110: 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

- 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:

- 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

🖓 Tooltips Off 🍰 CcManager, CcManager (ccmanager) 🦻 Logout 🖂 Messag							
K Role Manager K Audit Log K							
۹ 😗	P	Export	2 select u	ser	▼ from P to	• »	
😨 Dashboard	N.	Event	Date 🔻	Logged In User	Description	R	
Evaluations	1	User login	25/09/2012	CcManager, CcManag	User CcManager CcManager (ccmanager) lo	ок	
Customer Interactions	2	User login	25/09/2012	CcManager, CcManag	User CcManager CcManager (ccmanager) lo	ок	
Questionnaires	з	User logout	25/09/2012	Admin, Admin	User Admin Admin (admin) logged out	ок	
	4	User login	25/09/2012	Admin, Admin	User Admin Admin (admin) logged in	ок	
🗄 💋 Group Manager	5	User logout	25/09/2012	CcManager, CcManag	User CcManager CcManager (ccmanager) lo	ок	
🔊 User Manager	6	User login	25/09/2012	CcManager, CcManag	User CcManager CcManager (ccmanager) lo	ок	
Sategory	7	Reset passw	25/09/2012	CcManager, CcManag	The password for user john smith (smith) wa	ок	
눭 Wrapup	8	Add user	25/09/2012	CcManager, CcManag	User smith john (john.smith) was added by C	ок	
Interaction Types	9	User login	25/09/2012	CcManager, CcManag	User CcManager CcManager (ccmanager) lo	ок	
Audit Log	10	User login	25/09/2012	CcManager, CcManag	User CcManager CcManager (ccmanager) lo	ок	
Role Manager	11	User login	25/09/2012	CcManager, CcManag	User CcManager CcManager (ccmanager) lo	ок	
About	12	User login	25/09/2012	CcManager, CcManag	User CcManager CcManager (ccmanager) lo	ок	
÷	13	Edit user	25/09/2012	CcManager, CcManag	User Kristyna Ceplova (kceplova) was edited	ок	
	14	User login	25/09/2012	CcManager, CcManag	User CcManager CcManager (ccmanager) lo	ок	
	15	User logout	25/09/2012	CcManager, CcManag	User CcManager CcManager (ccmanager) lo	ок	

Figure 111: 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.

- 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.

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

# **Quality Manager Options**

	<b>♀</b> 1	ïooltips Off 🍰 CcManager, CcManager (ccmanager) 🍻 Logout 🖂 Messages
×	ScoreCARD Options	
۹ (3)	Save 😢 Close	
Dashboard     Deshboard     Deshboard	General Settings	
Customer Interactions	2 Calculating method for non-applicable (N/A) answers:	Method 1: Use average value of all actual answers in the question gr
<ul> <li>Ucestionnaires</li> <li>Reports</li> </ul>	Records on a page:	
Reports Administration	Custom week interval start:	Monday 👻
🗉 📁 Group Manager	Custom month interval start:	
🧬 User Manager 🤜 Category	Notify agent on evaluation creation:	
Wrapup	Include self-evaluations in statistics:	
1 Interaction Types	Prefer User Language Settings for Sorting:	
Audit Log	Interactions max limit for count:	1000
ScoreCARD Options	Integration Settings	
	Supervisor role equivalent:	Supervisor
	Agent role equivalent:	Agent

Figure 112: 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.

- 1. Click **Quality Manager Options** to open the **Quality Manager Options** tab.
- 2. 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 selfevaluations 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.

# About Tab

				🖓 Tooltips On 🤞	CcManager, CcMa	anager (ccmanager)	🔊 Logout 🖂 Messag
	~	About 🗷					
•	5 8 9 9 2 9 8 5	Product Info					
🔀 Dashboard		Version:	4.9.3				
Evaluations Questionnaires		Build:	111129_1232				
<ul> <li>i € Aeports</li> <li>i € Administration</li> <li>i About</li> </ul>							

Figure 113: About Tab

The About tab shows the currently installed version and build number for Quality Manager.

#### Chapter 9 Administration



Chapter

# **10** 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.

