Genesys Quality Management 8.1

Quality Manager User Guide: Supervisor

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Table of Contents

Genesys

Chapter

1 Introduction

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

This chapter contains the following sections:

Document Purpose

This document describes the Genesys Quality Manager 8.1.500+ user interface and contains guides for every task that a Supervisor may perform.

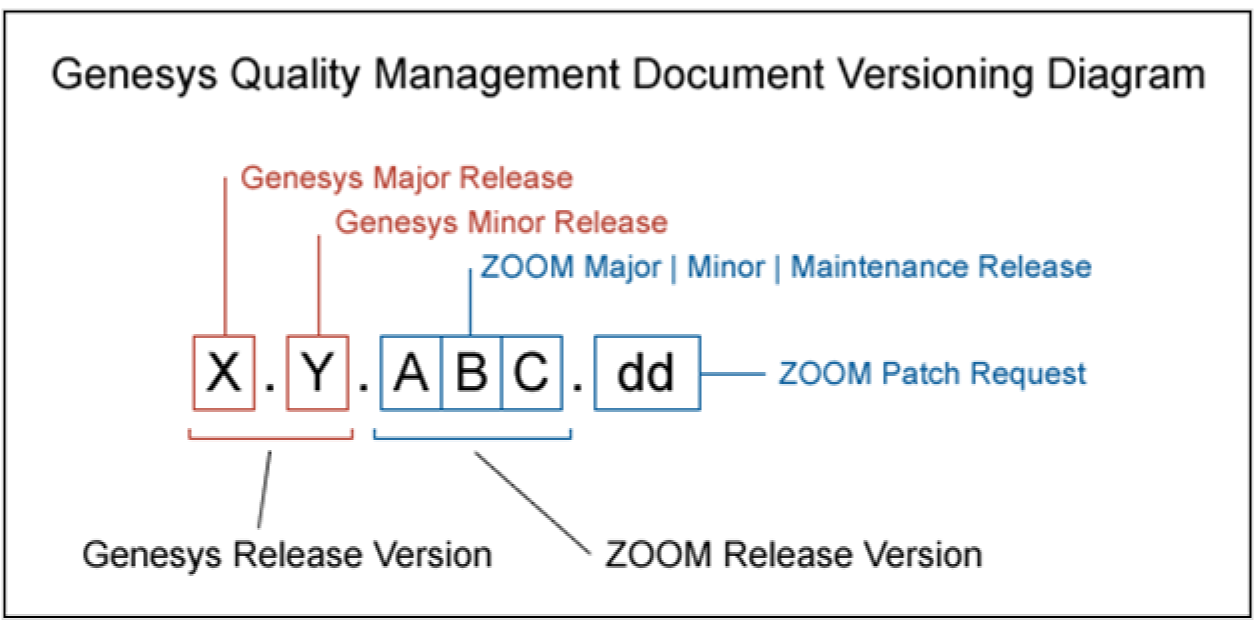
Audience

This document is intended for Call or contact Center Supervisors.

Document Version

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

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



Typographical Conventions

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

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

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

```
Code is placed on a gray background and bordered
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Hyperlinks are shown in blue and underlined: http://genesyslab.com/support/contact.

Expected Knowledge

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

- Basic internet browser knowledge.

Browser Recommendations and Technical Requirements

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

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

Important:

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

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

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

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

2. *Internet Explorer 9*
3. *Internet Explorer 8* with *Google Chrome Frame* plugin. The *Google Chrome Frame* plugin can be obtained here:

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

4. *Internet Explorer 7* with *Google Chrome Frame* plugin.This version of IE should be upgraded to IE9 as soon as possible.
5. *Firefox 3.6.16+* Admin rights required for installation. You must install the *Windows Media Player* plugin below:

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

6. *Opera 9+*
7. *Safari 5*
8. *Internet Explorer 8* without the *Google Chrome Frame* plugin.The performance is slow.

The following browsers are not recommended:

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

Internet Explorer 6 is not supported.

Important:

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

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

Internet Explorer Security Settings:

Windows XP

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

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

Windows 7

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

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

Technical Requirements for Playing Audio and Video Media

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

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

1. *Microsoft Windows Media Player*: Plays all audio and video media on the Windows 7 OS. Previous versions of Windows, for example,Vista and XP, need additional codecs to play video media.
   Download the K-Lite Codec Pack (BASIC or BASIC Mirror versions) from: http://www.free-codecs.com/K_Lite_Codec_Pack_download.htm.

2. *VLC*: Plays combined video and audio recordings, including dual-screen recordings of 1920x1080 or larger. It is not integrated into browsers, for example, *Internet Explorer* and *Firefox*, for audio playback. *VLC* is recommended for Macs and Linux-based systems for combined audio and video reviewing. *VLC* can be downloaded at: http://www.videolan.org/vlc/.
3. *QuickTime*: Plays audio and is integrated into *Internet Explorer*, but does not support playing mp3 audio and H.264 format video together for combined audio and video playback.

Chapter

2

Getting Started with Quality Manager

A brief introduction to Quality Manager, including how to:

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

This chapter contains the following sections:

Logging in to Quality Manager

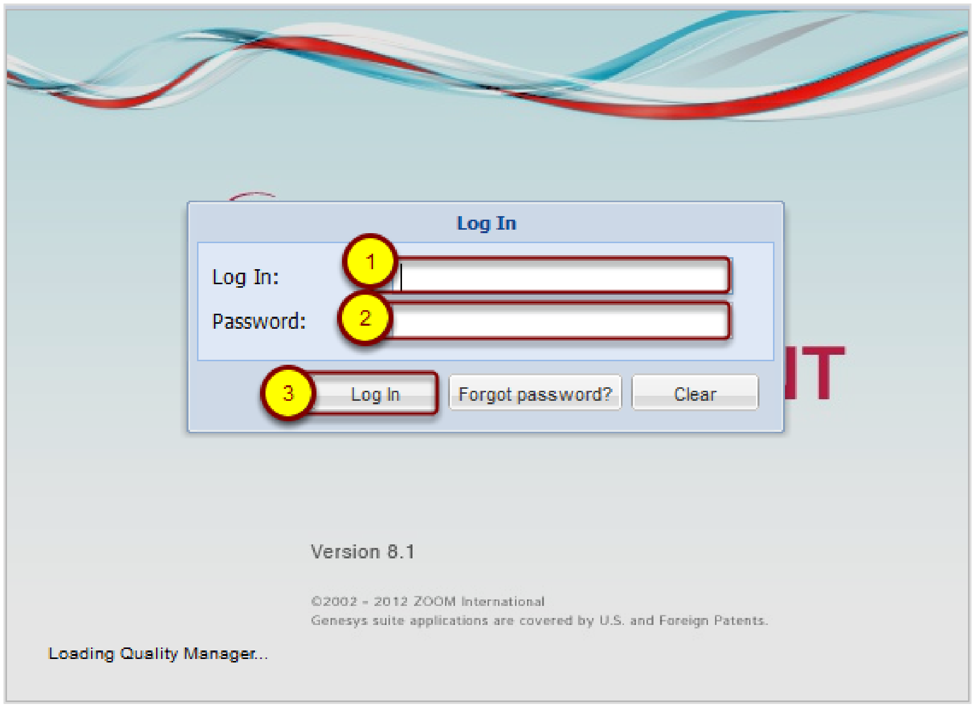


Figure 1: Log In To Quality Manager

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.

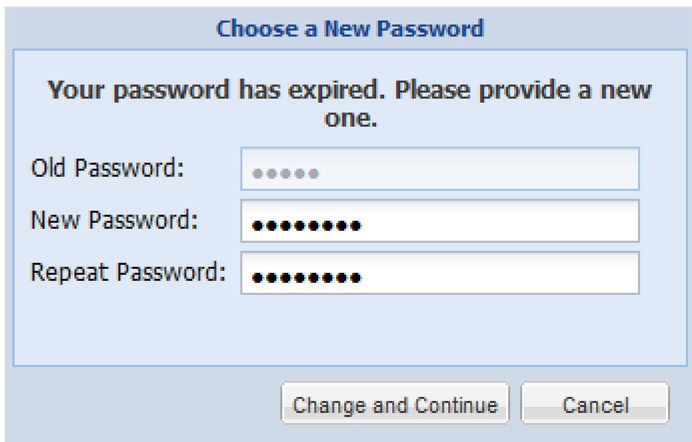


Figure 2: Choosing a New Password

Retrieving a Forgotten Password

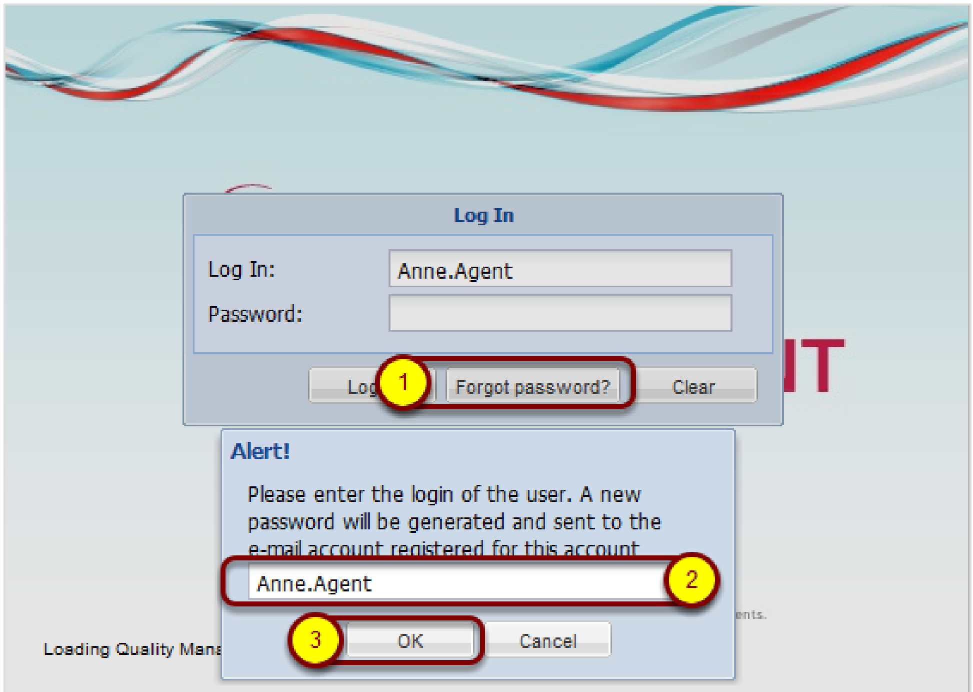


Figure 3: Retrieving a Forgotten Password

1. To retrieve a forgotten password click **Forgot Password?**. The **Alert!** dialog 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

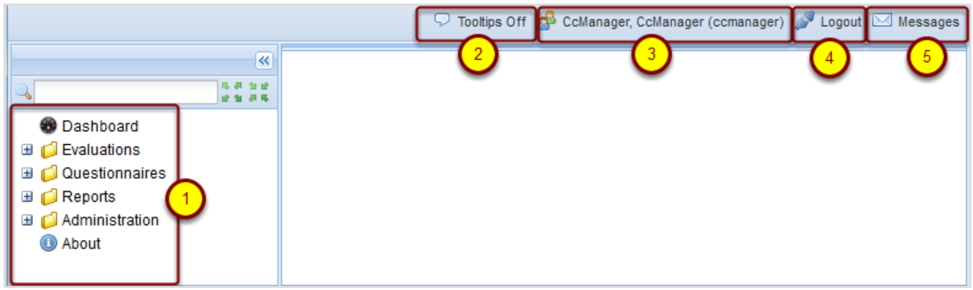


Figure 4: Quality Manager User Interface

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

Editing Your User Profile

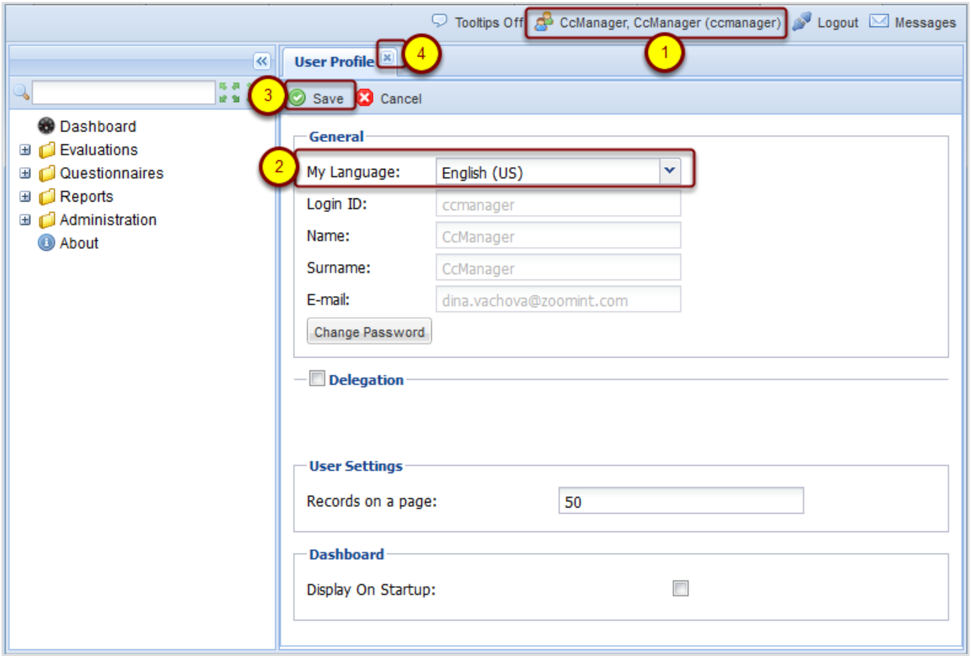


Figure 5: Editing Your User Profile

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 Profile**tab 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

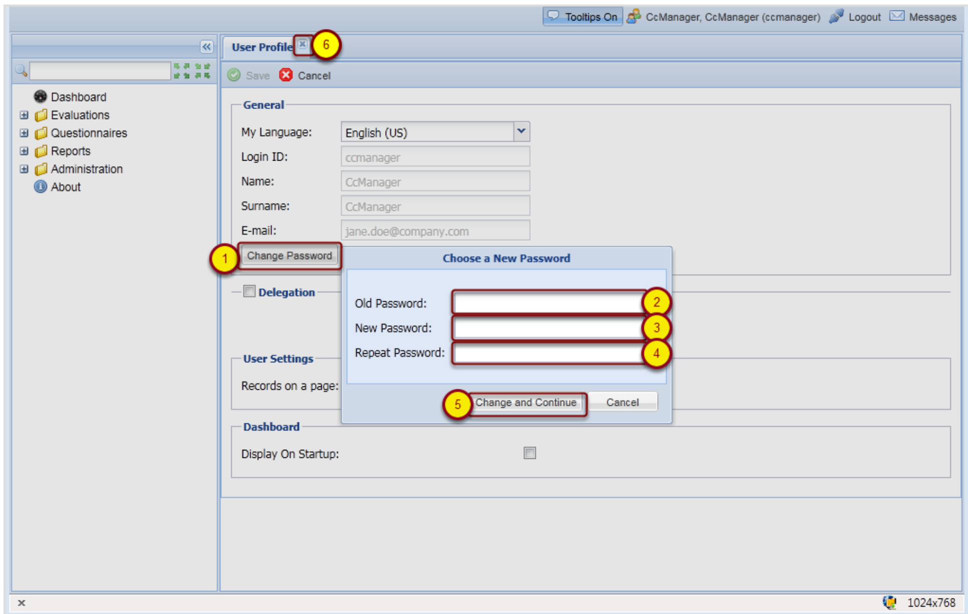


Figure 6: Changing Your password

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.

Viewing System Messages

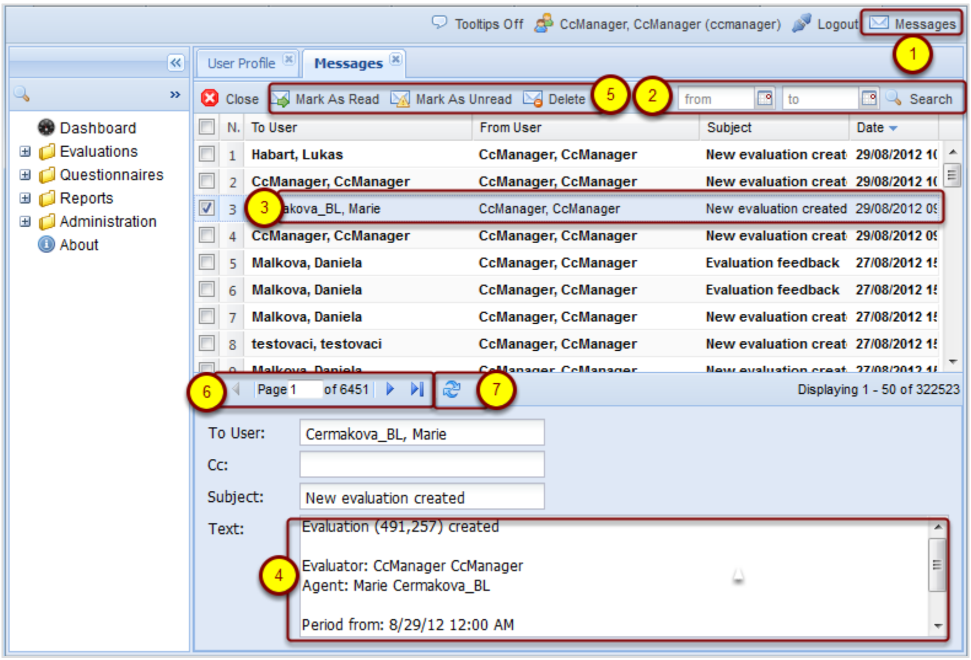


Figure 7: Viewing System Messages

1. 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.

Chapter

3 Evaluations

This chapter describes how to plan and use Evaluations.

This chapter contains the following sections:

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.

Searching for Evaluations

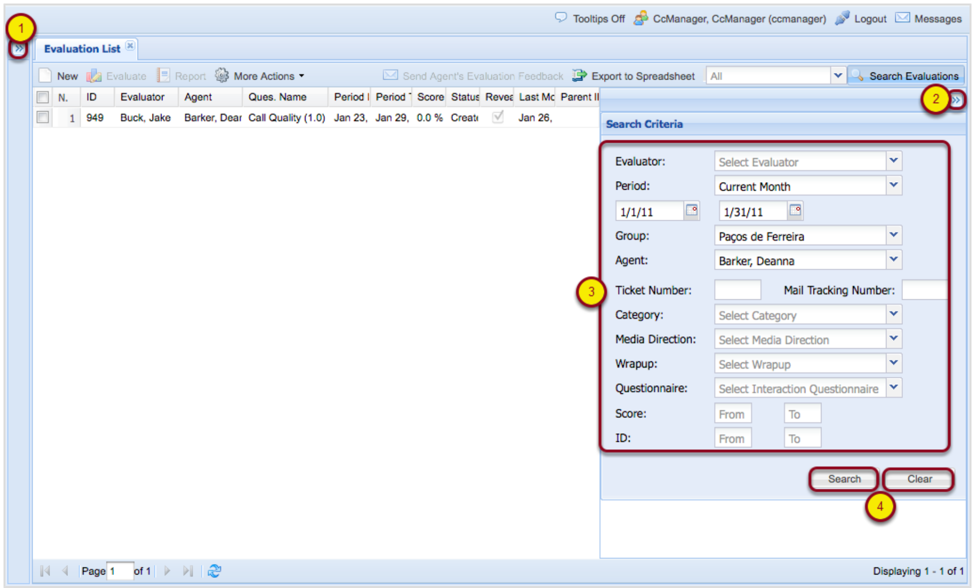


Figure 8: Searching for Evaluations

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.
2. 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.

Opening the Scheduled Evaluation

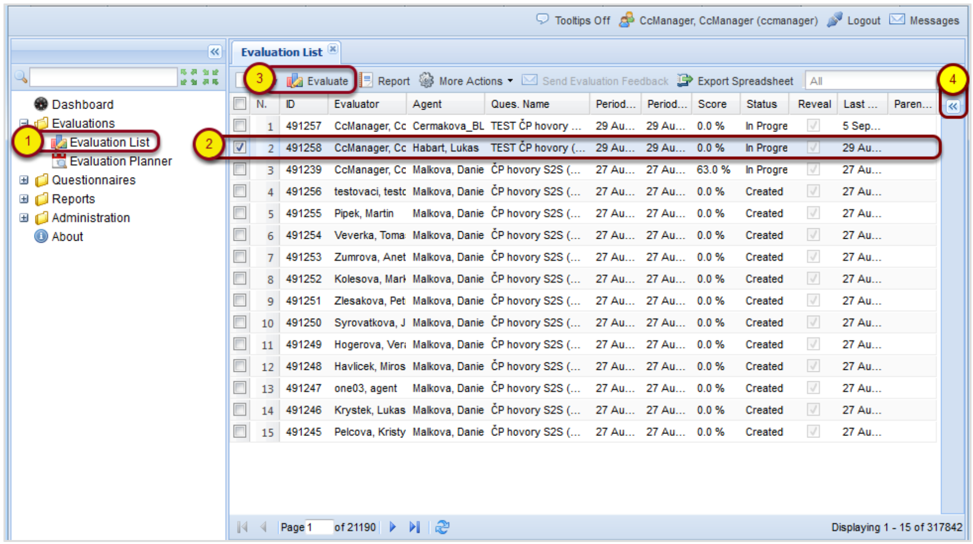


Figure 9: Opening the Scheduled Evaluation

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 Re-Using the Evaluation - 1 (Optional) steps at the end of this tutorial.

The Evaluator Screen

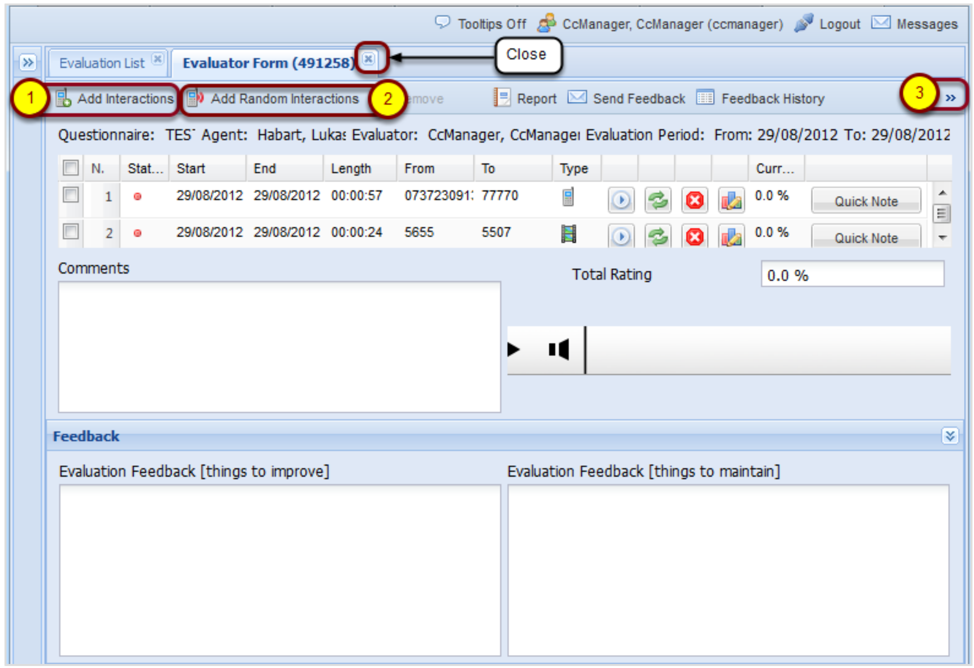


Figure 10: The Evaluator Screen

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

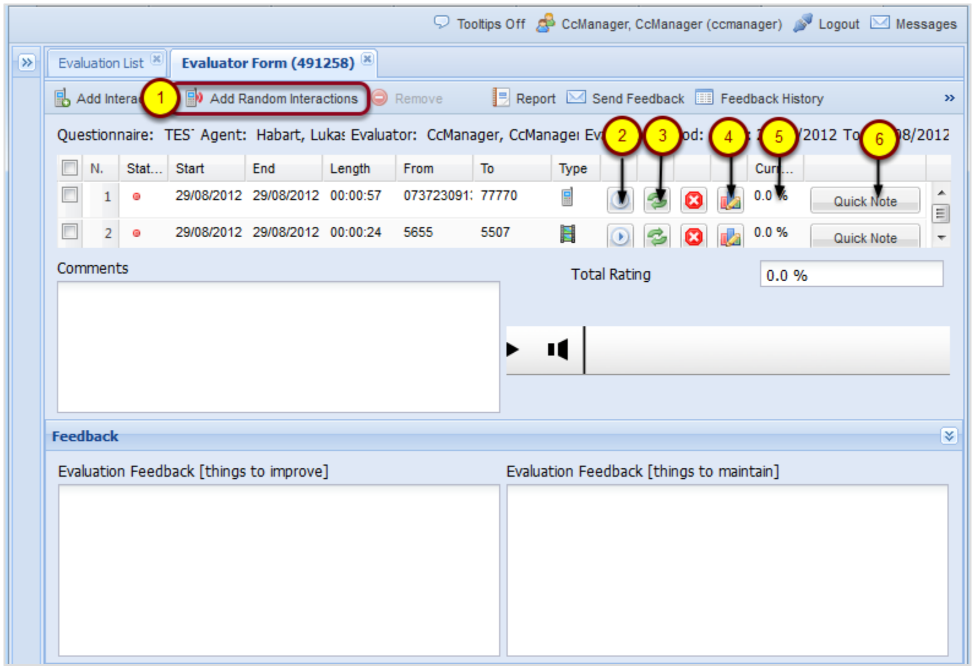


Figure 11: Adding Random Media for Evaluation

To add random media for evaluation

1. Click **Add Random Interactions** to add media records for the evaluation.This will retrieve the minimum number of appropriate agent calls 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.
6. 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

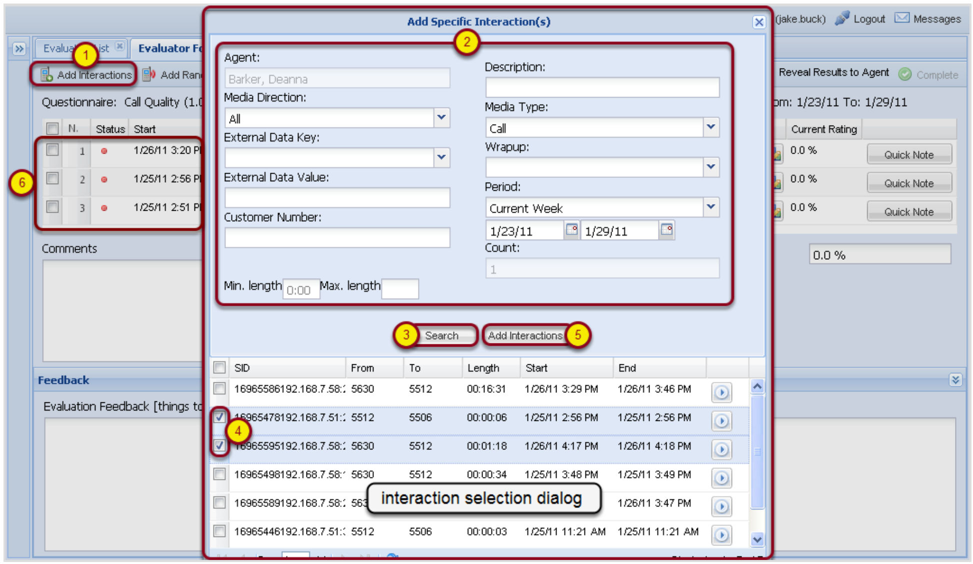


Figure 12: Adding Specific Media for Evaluation

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

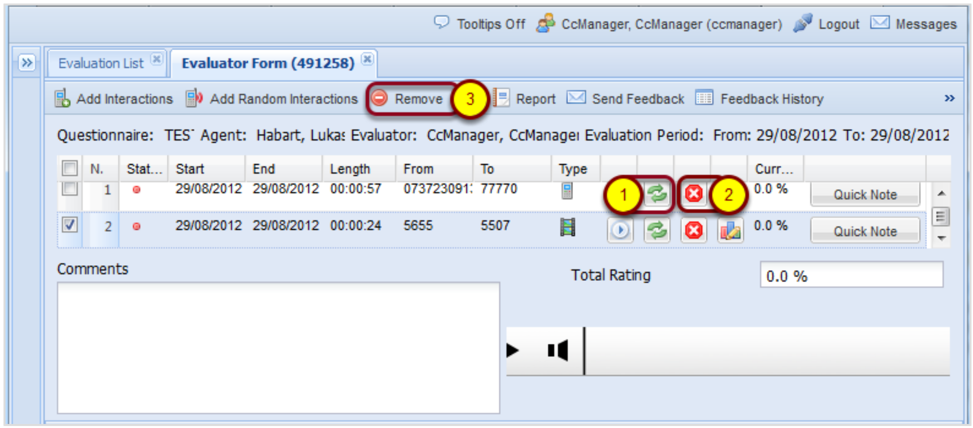


Figure 13: Replacing Media for Evaluation

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

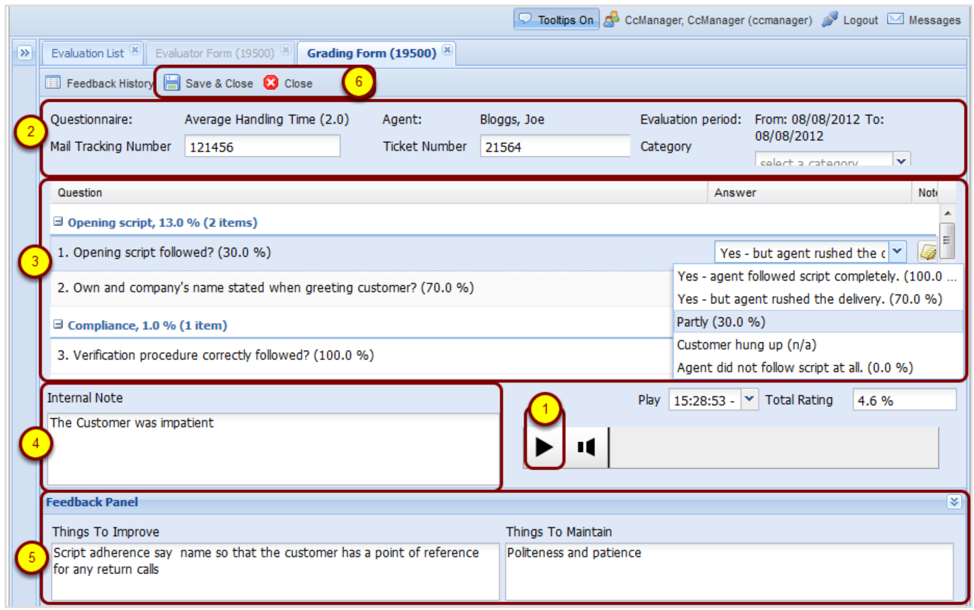


Figure 14: Grading a Media Record

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.

2. 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

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

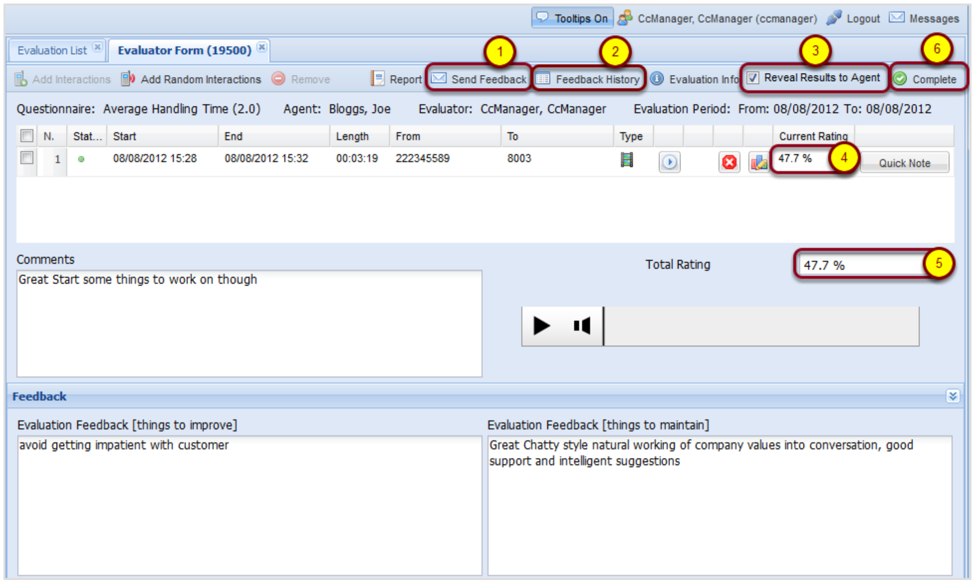


Figure 15: Completing the Evaluation

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

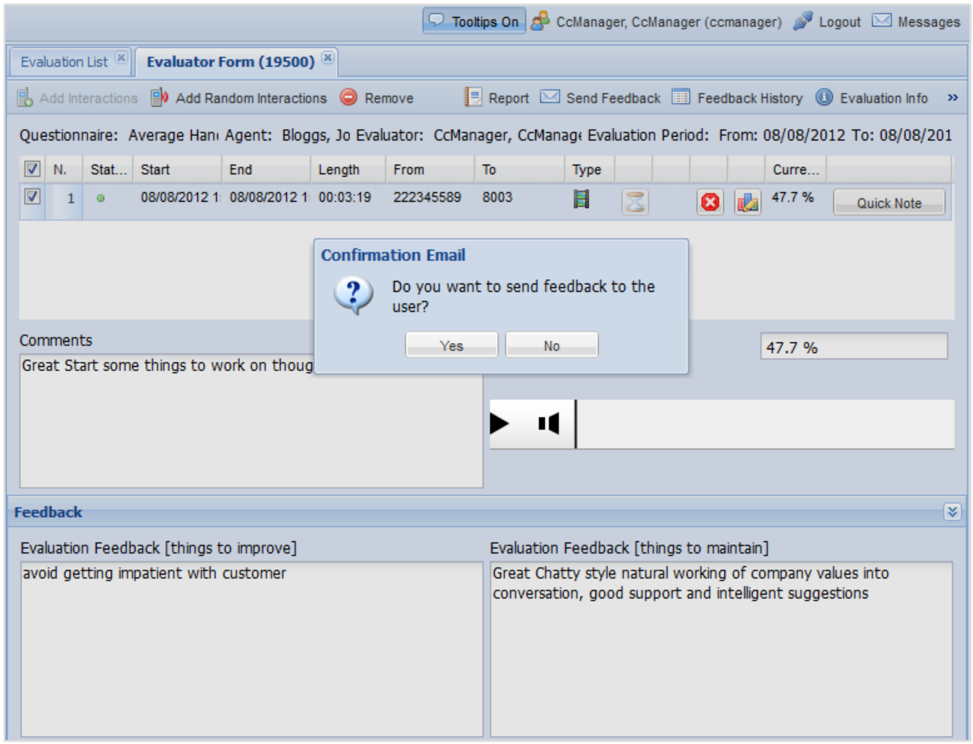


Figure 16: Sending Feedback to an Agent

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 Re-Open An Evaluation. 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

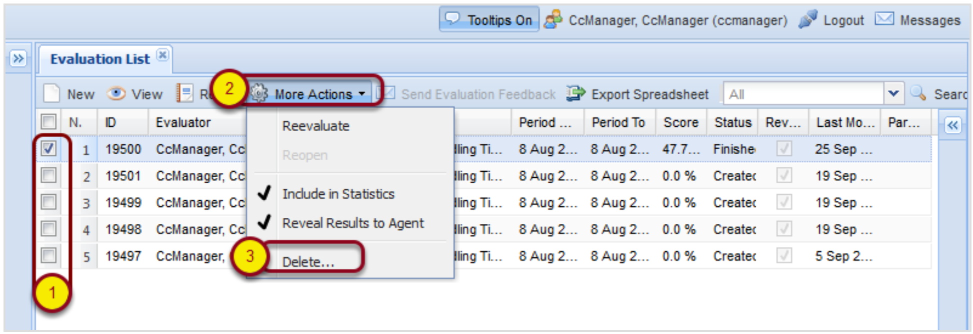


Figure 17: Deleting Evaluations

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**.
3. 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, no-one on the system will be able to delete the agent's self evaluations.

Re-Using the Evaluation - 1

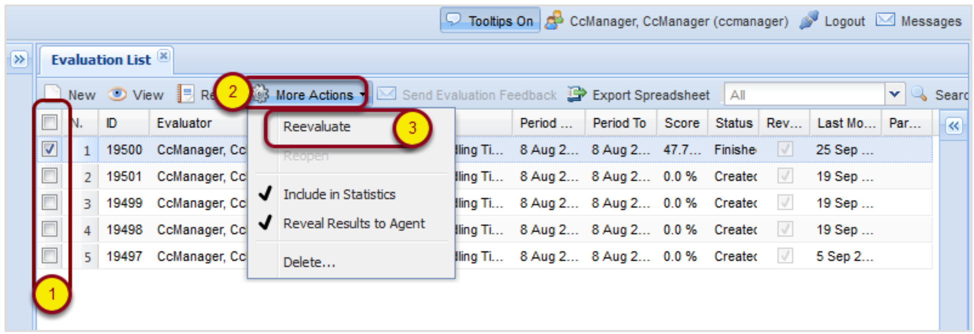


Figure 18: Re-Using the Evaluation - 1 (Optional)

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.

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

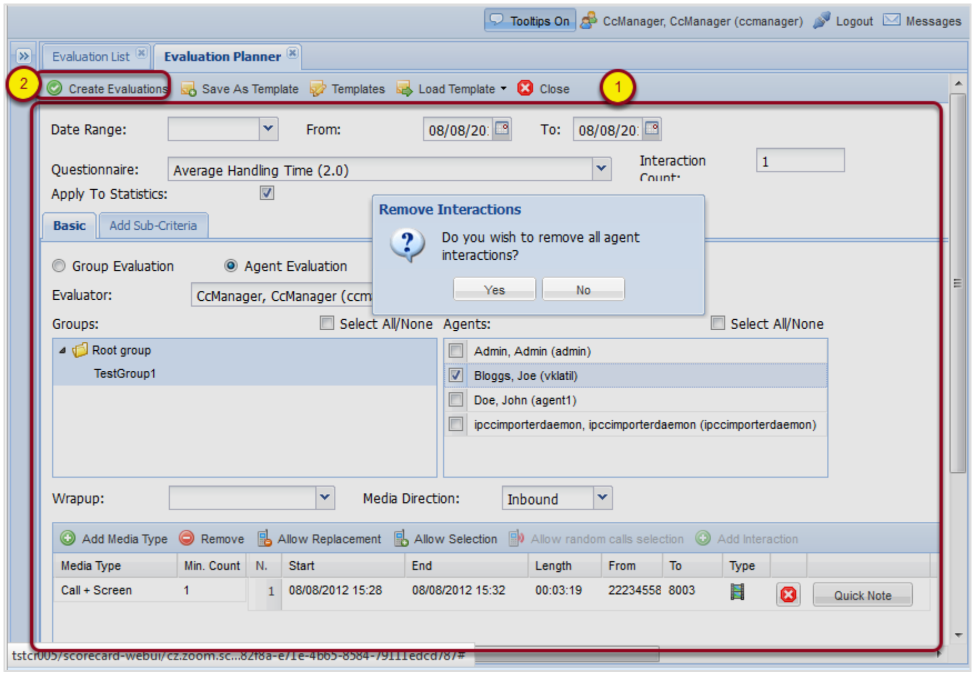


Figure 19: Re-Using the Evaluation - 2 (Optional)

1. 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

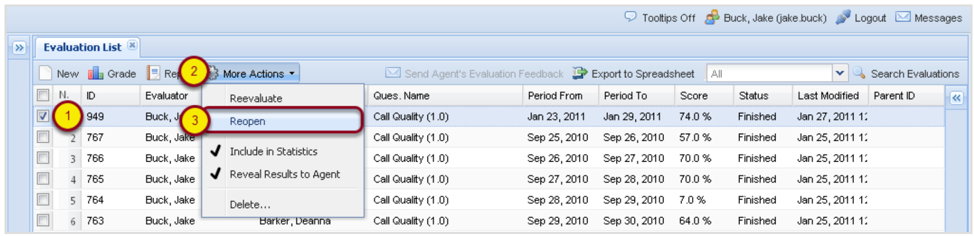


Figure 20: Re-Opening an Evaluation

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.

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.

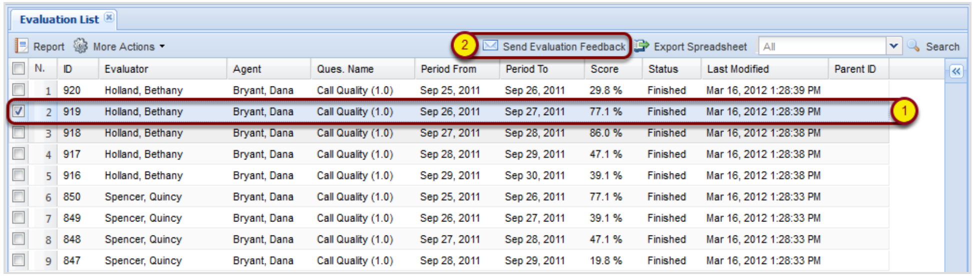


Figure 21: Sending Evaluation Feedback Button

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.

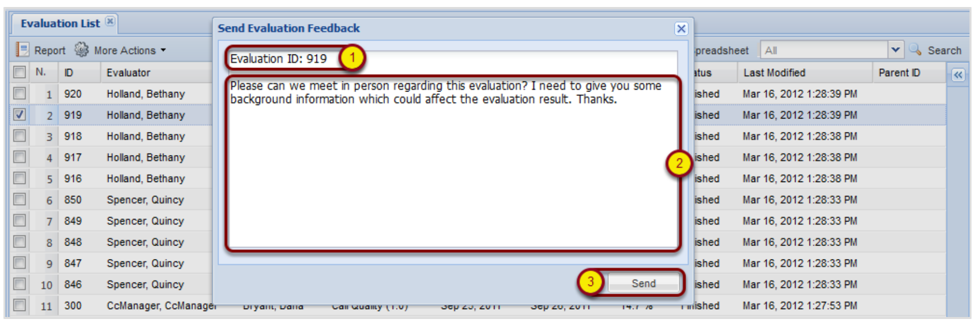


Figure 22: Send Evaluation Feedback Message

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**.

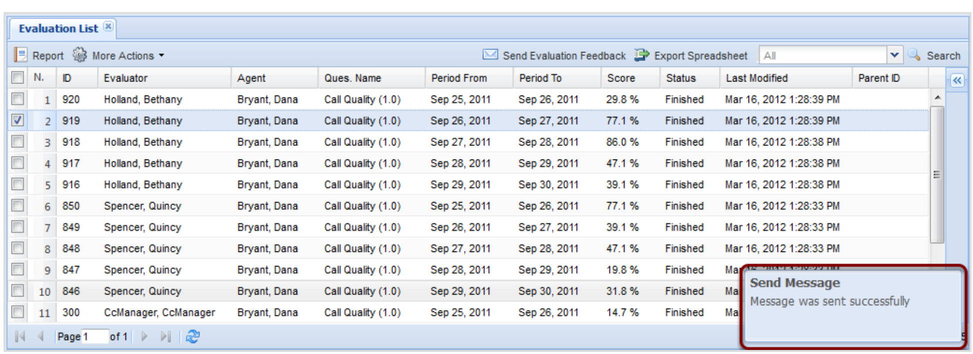


Figure 23: Send Evaluation Feedback Message Sent

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 Viewing 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).

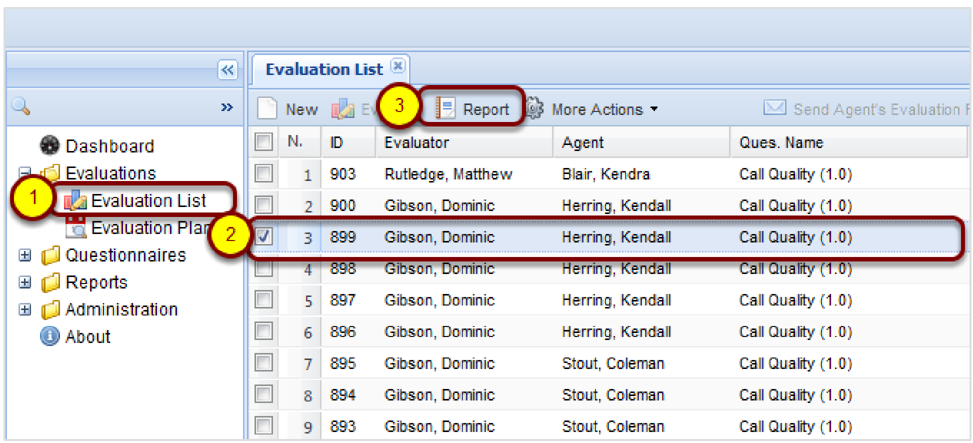


Figure 24: Evaluation List

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.

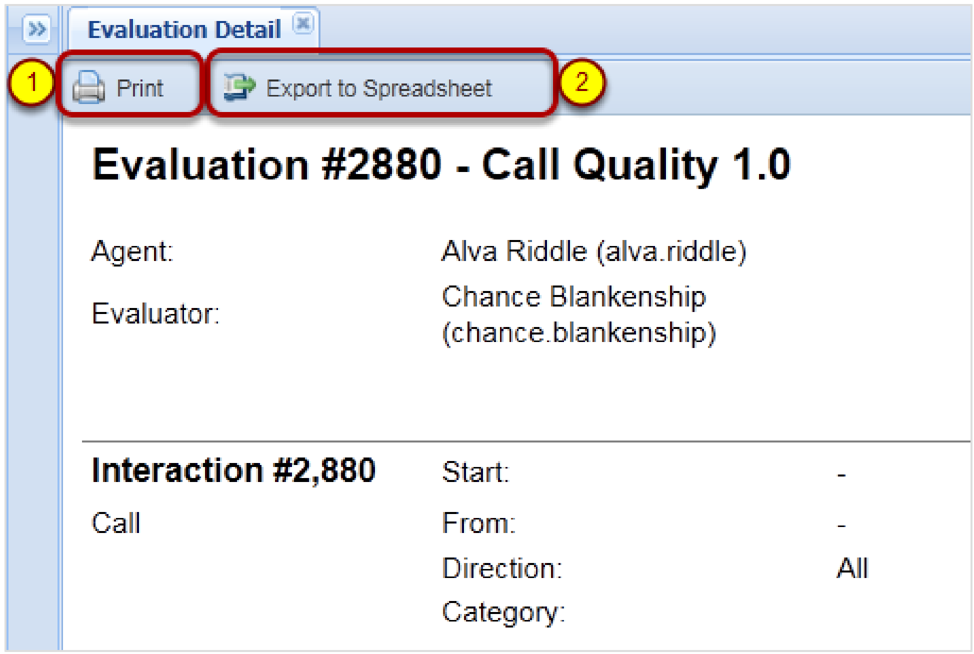


Figure 25: Evaluation Detail Report

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.

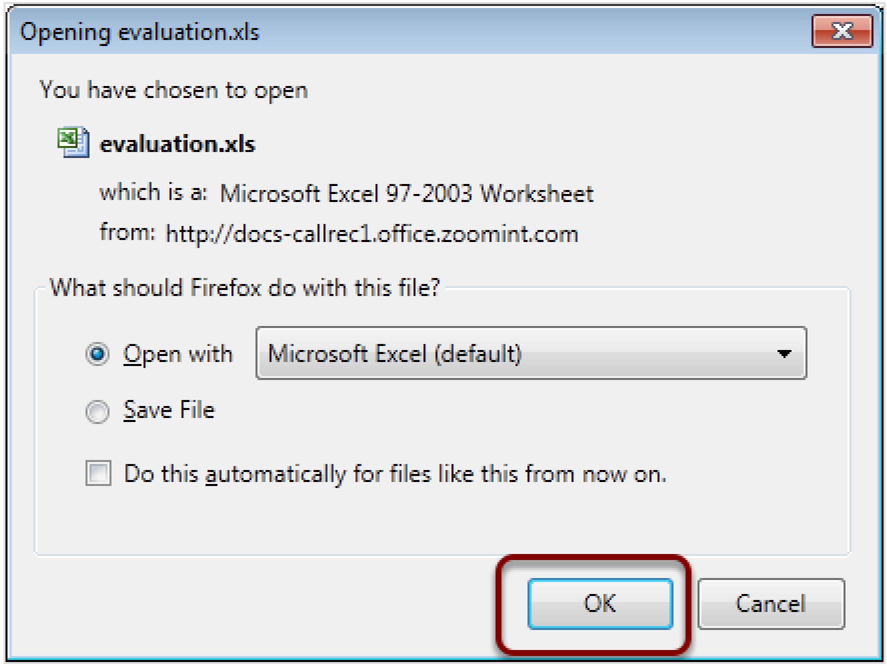


Figure 26: Open the Spreadsheet

Click **OK** to open the spreadsheet

The Evaluation Detail report is displayed.

Linking to a Read-only Grading Form

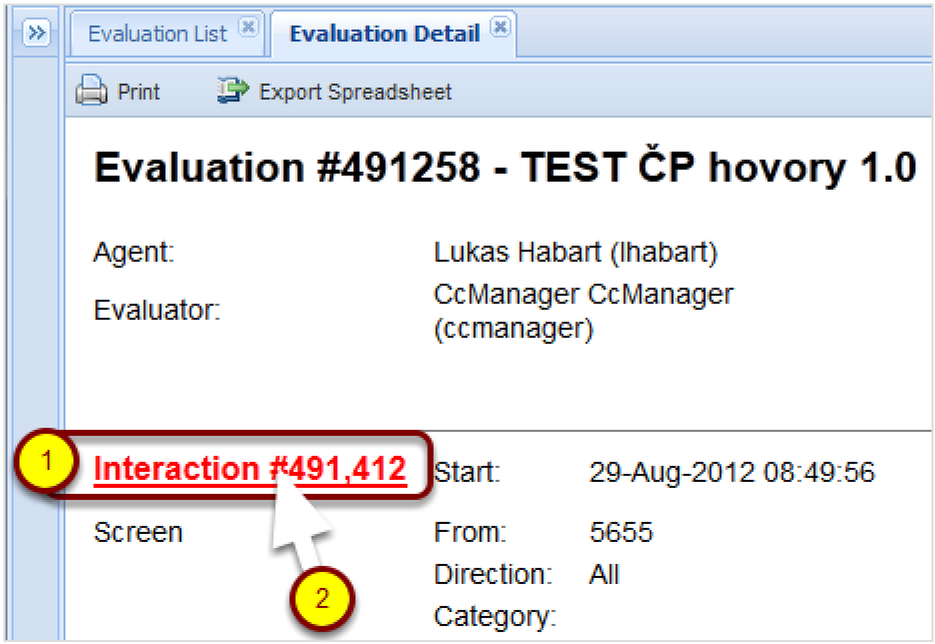


Figure 27: Detail Report Showing Interaction

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.

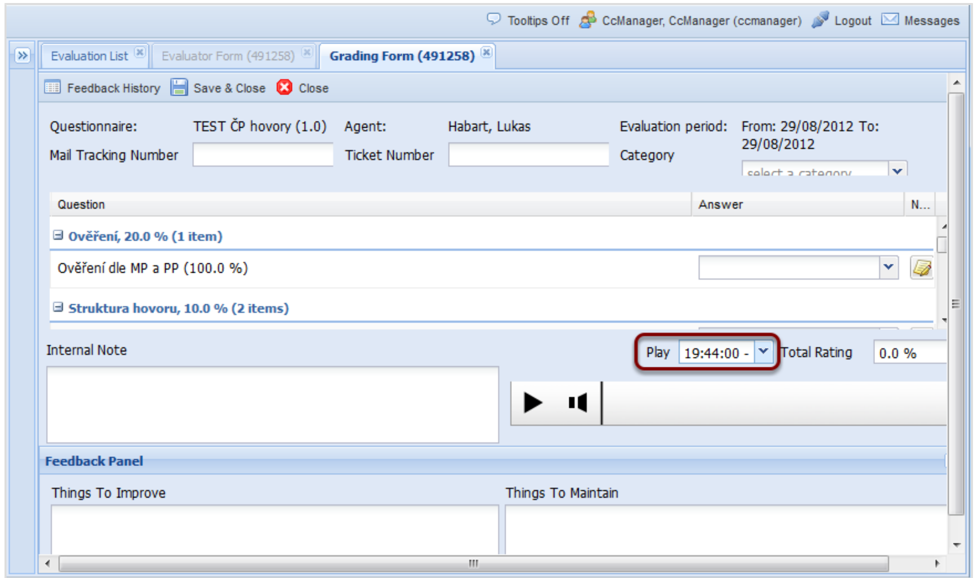


Figure 28: Grading Form

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

4 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

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 *Exporting Report Data* *section.*

Setting Up a Report

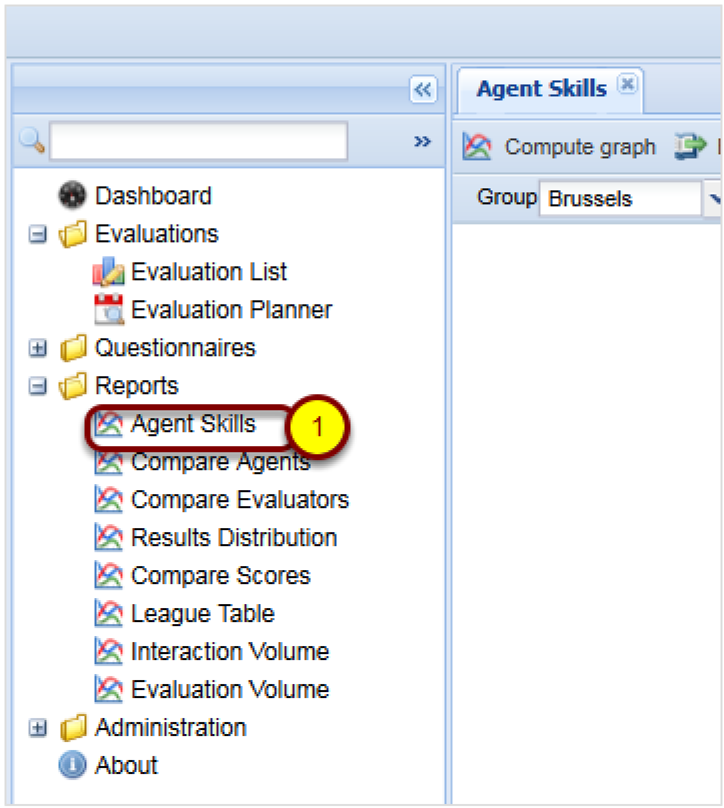


Figure 29: Selecting Agent Skills

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).

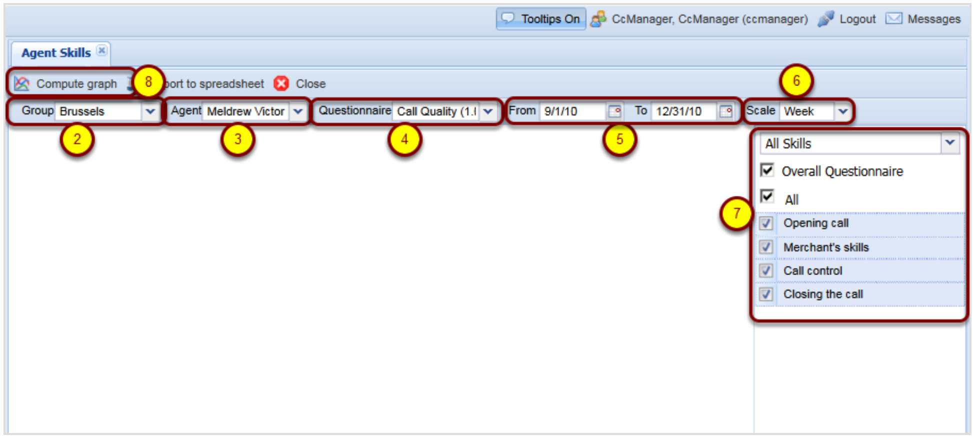


Figure 30: Setting Up a Report

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**.
6. 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.
7. 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).
8. 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.

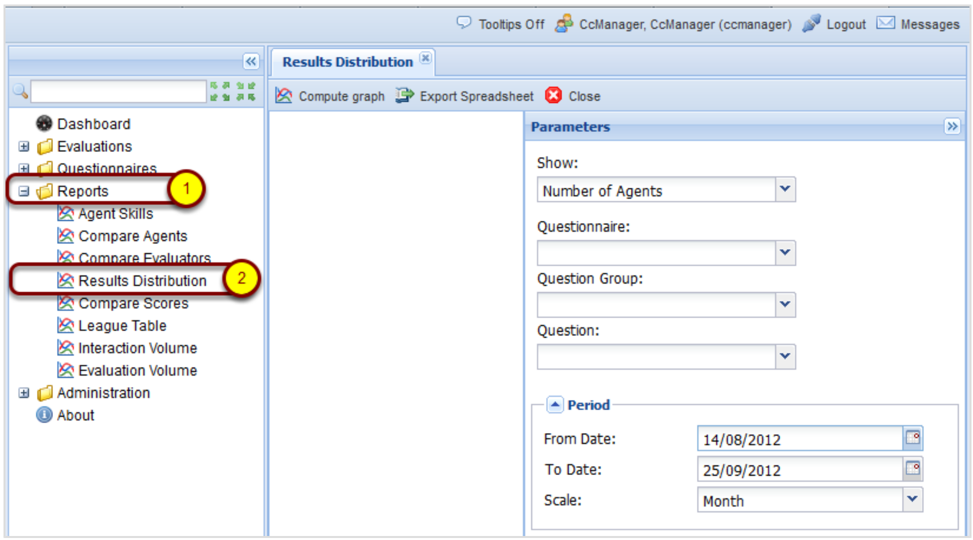


Figure 31: Opening the Results Distribution Tab

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

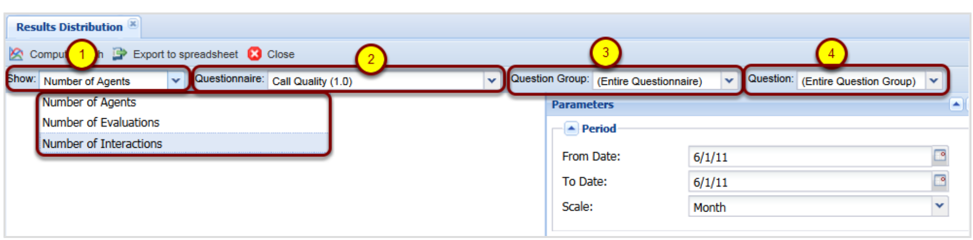


Figure 32: Results Distribution Tab

1. 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.

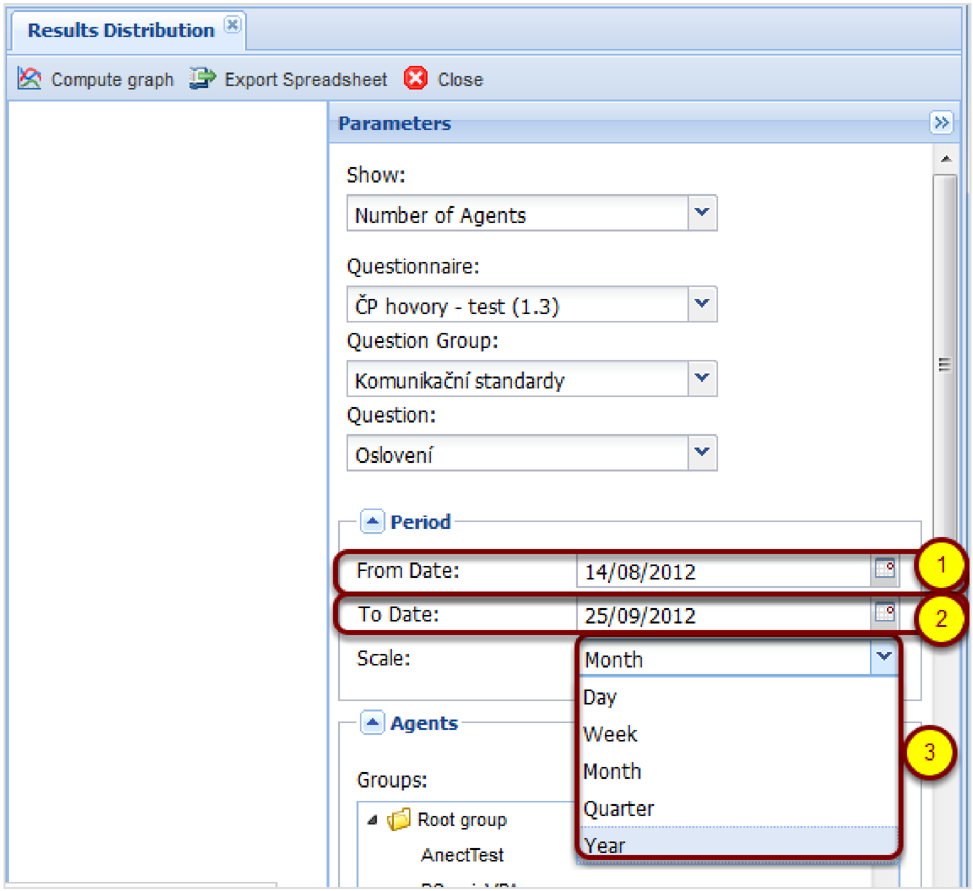


Figure 33: The Results Distribution Tab Parameters

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).

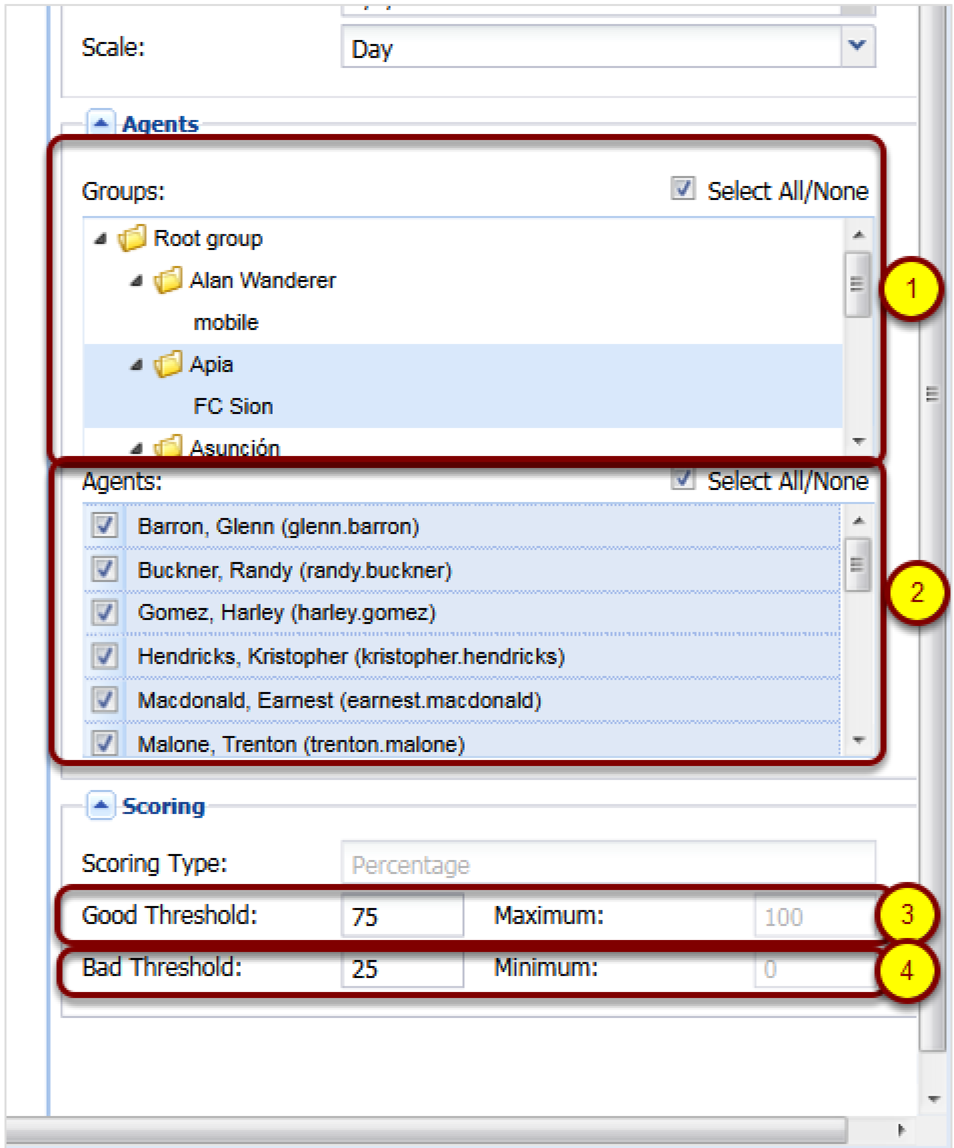


Figure 34: The Results Distribution Tab Parameters / Select Agents

1. 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.

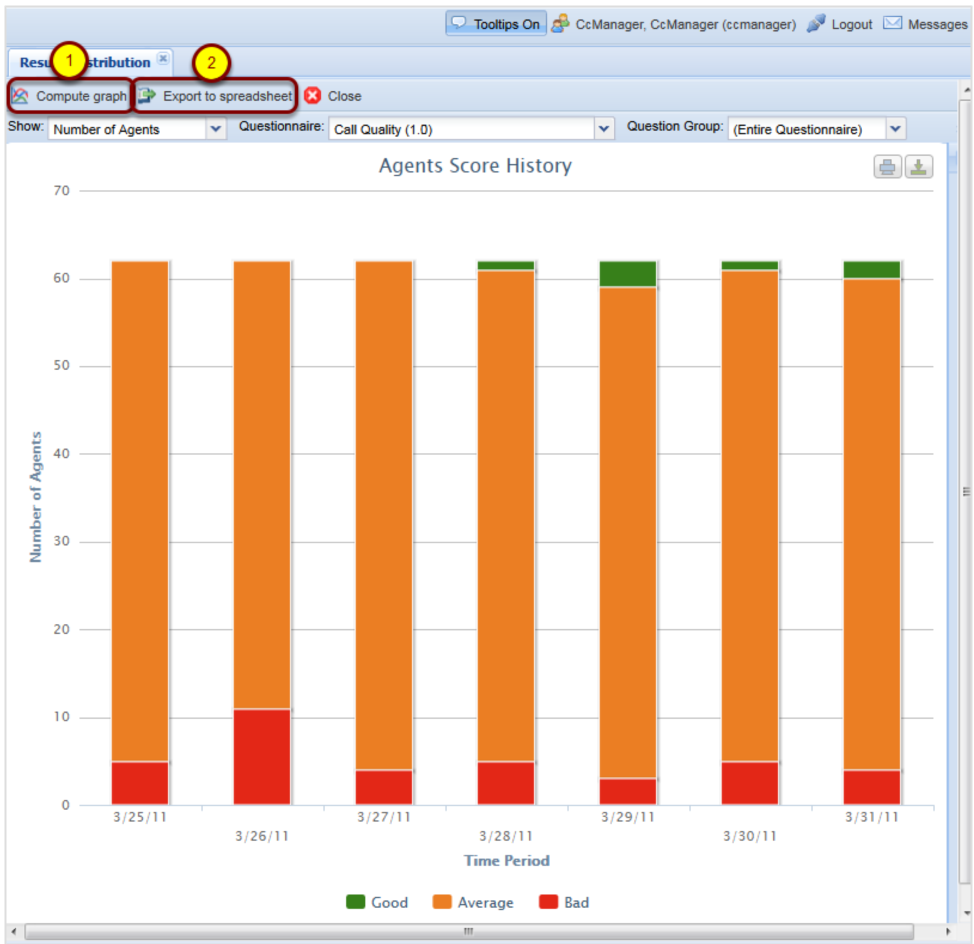


Figure 35: Compute Graph

1. 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).

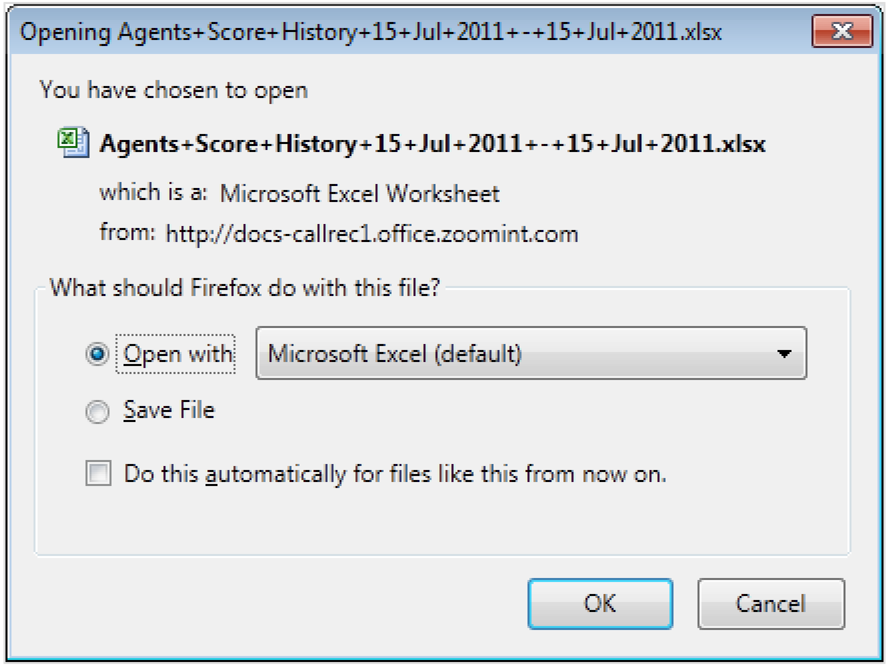


Figure 36: Export to Spreadsheet Dialog

Click **OK** to open the spreadsheet.

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

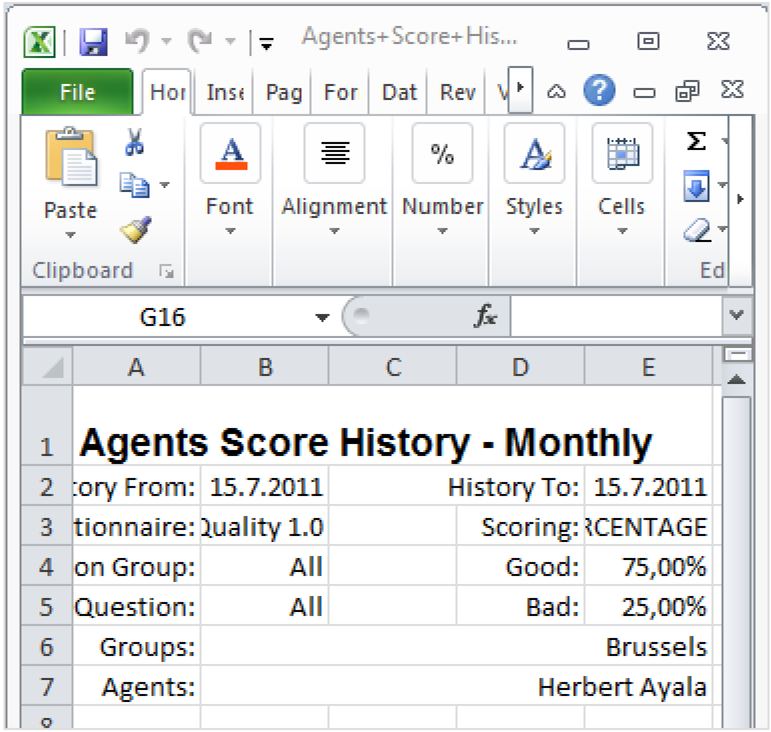


Figure 37: Example of Exported Spreadsheet

The cells can be resized as required.

Results Distribution Graph - 2

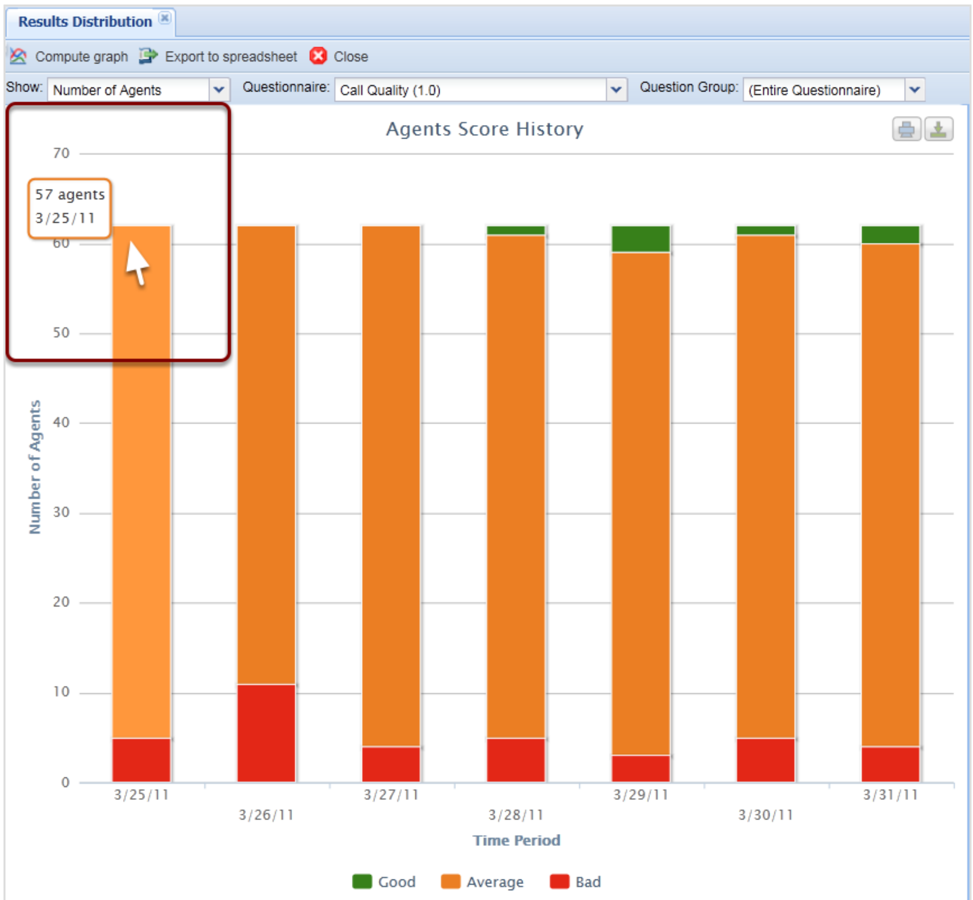


Figure 38: Results Distribution Graph 2

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

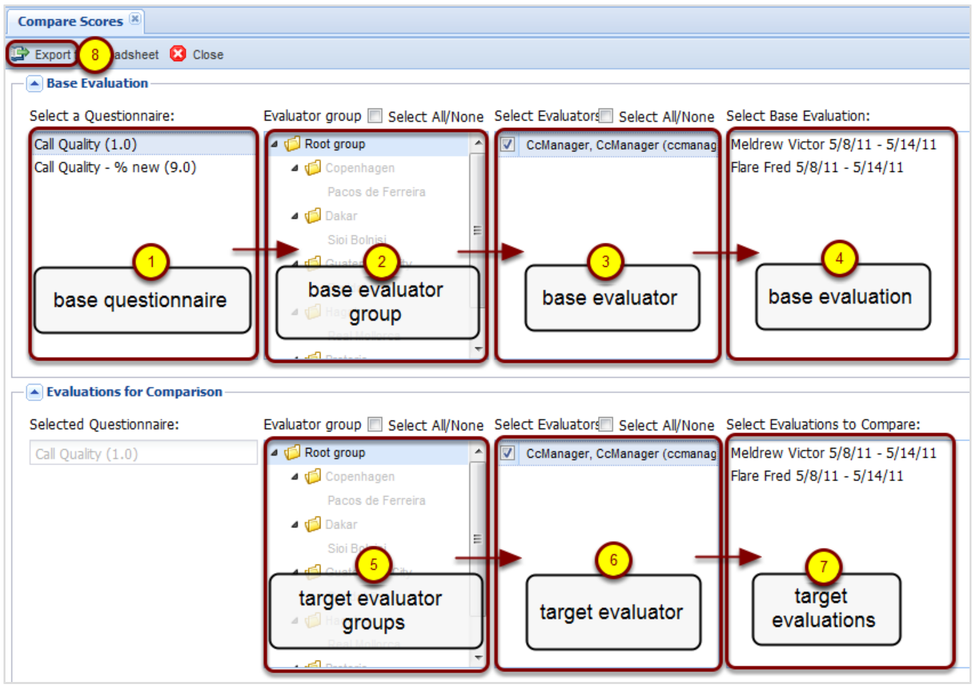


Figure 39: Compare Scores Report – 1

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.
4. 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.
8. Click **OK** to start the process of creating the report or export as a spreadsheet (.xlsx) file.

Compare Scores Report - 2

Compare Scores

Questionnaire: **Call Quality (1.0)**

Group/Question name		Base Evaluation, Deanna Barker, 20/10/10, Eval Id: 1741	Deanna Barker, 20/10/10, Eval Id: 1742	Deanna`s Diff	Deanna Barker, 20/10/10, Eval Id: 1743	Deanna`s Diff	Deanna Barker, 20/10/10, Eval Id: 1744	Deanna`s Diff
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%	10.00%
	Customer?s Consent to interview him/her (time, topic)	0.00%	0.00%	0.00%	20.00%	20.00%	20.00%	20.00%
	Company Presentation	0.00%	0.00%	0.00%	0.00%	0.00%	20.00%	20.00%
	Switching to the matter of the call	0.00%	0.00%	0.00%	0.00%	0.00%	20.00%	20.00%
Merchant's skills		4.00%	12.00%	8.00%	6.00%	2.00%	18.00%	14.00%
	Questioning techniques - investigative/business orient	0.00%	30.00%	30.00%	0.00%	0.00%	30.00%	30.00%
	Understanding customer needs	0.00%	20.00%	20.00%	0.00%	0.00%	40.00%	40.00%
	Solution proposal	10.00%	10.00%	0.00%	20.00%	10.00%	20.00%	10.00%
	Customer care	10.00%	0.00%	-10.00%	10.00%	0.00%	0.00%	-10.00%
Call control		18.00%	0.00%	-18.00%	20.00%	2.00%	0.00%	-18.00%
	Following the script	10.00%	0.00%	-10.00%	10.00%	0.00%	0.00%	-10.00%
	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]

Figure 40: 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

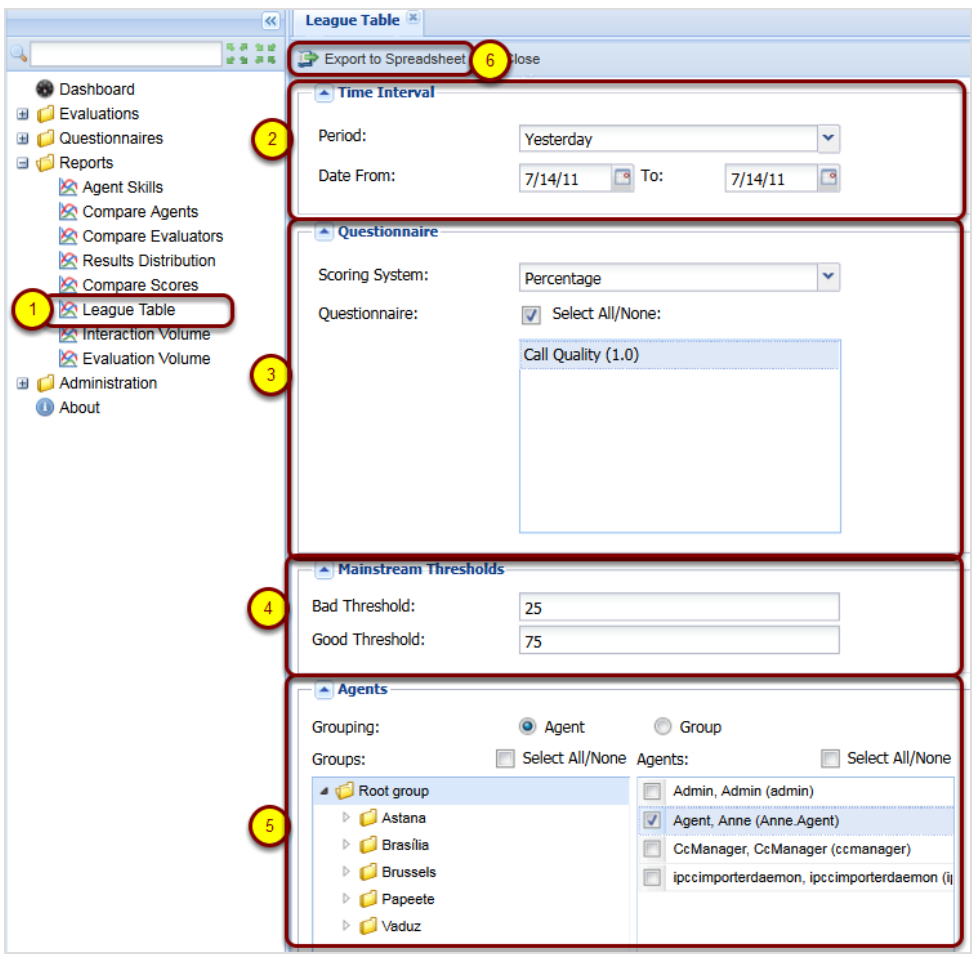


Figure 41: League Table – 1

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

League Table					
Questionnaire	Call Quality (1.0)				
From:	9/26/2010				
To:	9/29/2010				
#	Name	Surname	Login	Group	Average Score
1.	Patricia	Cortez	patricia.cortez	Paços de Ferreira	52.56%
2.	Eva	Sanders	eva.sanders	Paços de Ferreira	51.52%
3.	Charlie	Lester	charlie.lester	Paços de Ferreira	51.19%
4.	Marco	Ochoa	marco.ochoa	Paços de Ferreira	50.13%
5.	Ward	Guy	ward.guy	Paços de Ferreira	49.97%
6.	Fannie	Watson	fannie.watson	Paços de Ferreira	47.90%
7.	Camille	Berg	camille.berg	Paços de Ferreira	47.89%
8.	Natalie	Mccall	natalie.mccall	Paços de Ferreira	46.95%
9.	Mattie	Benson	mattie.benson	Paços de Ferreira	46.03%
10.	Zachery	Cherry	zachery.cherry	Paços de Ferreira	45.78%
11.	Alisha	Workman	alisha.workman	Paços de Ferreira	44.94%
12.	Stefanie	Winters	stefanie.winters	Paços de Ferreira	43.58%
13.	Deanna	Barker	deanna.barker	Paços de Ferreira	42.96%
14.	Ivy	Young	ivy.young	Paços de Ferreira	36.12%
Average Score					46.97%

Figure 42: 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.

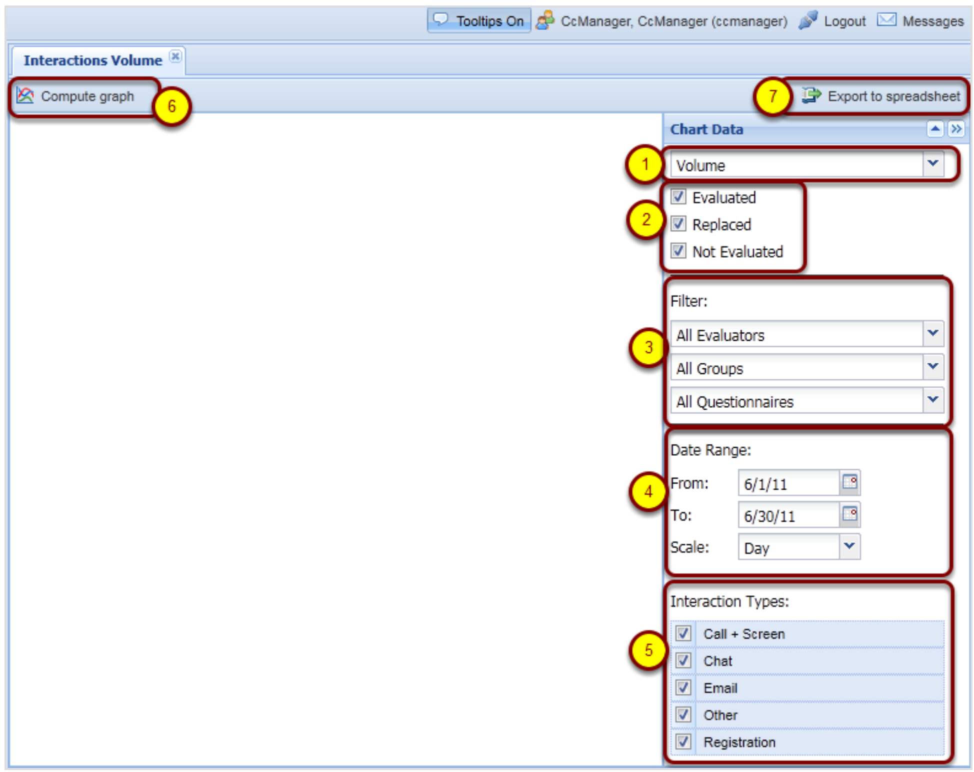


Figure 43: Interaction Volume Tab

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**.

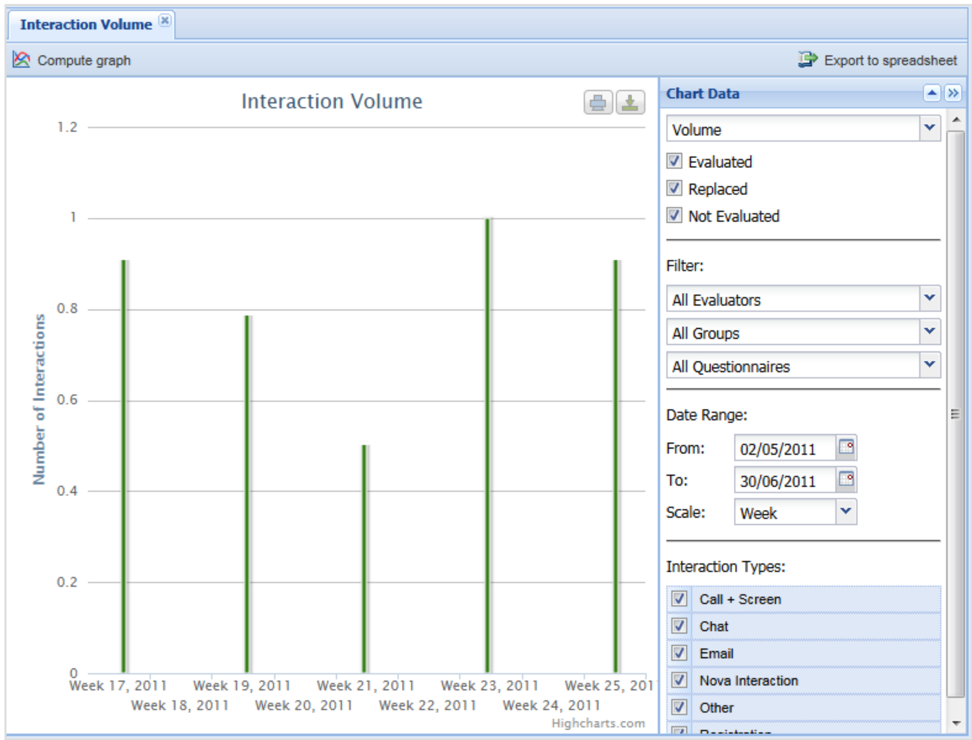


Figure 44: Interaction Volume Chart

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.

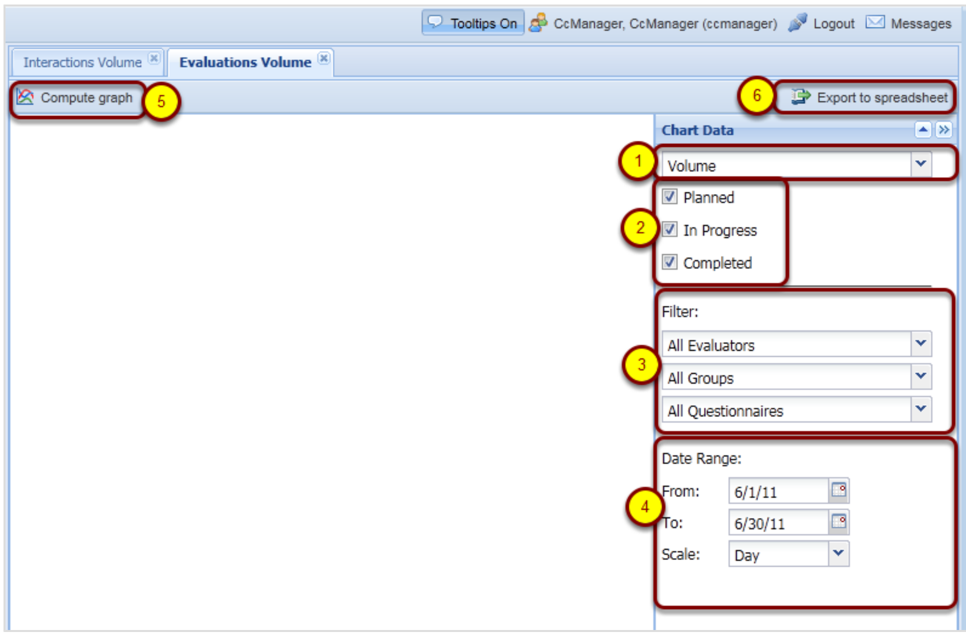


Figure 45: Evaluations Volume Tab

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**.

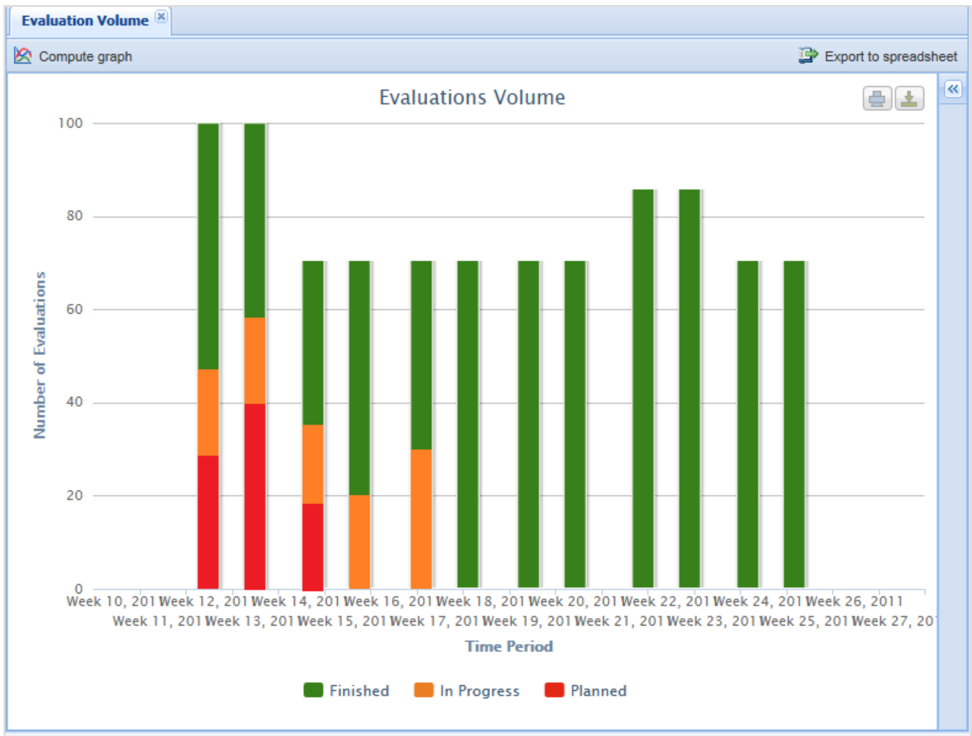


Figure 46: Evaluations Vol Chart

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

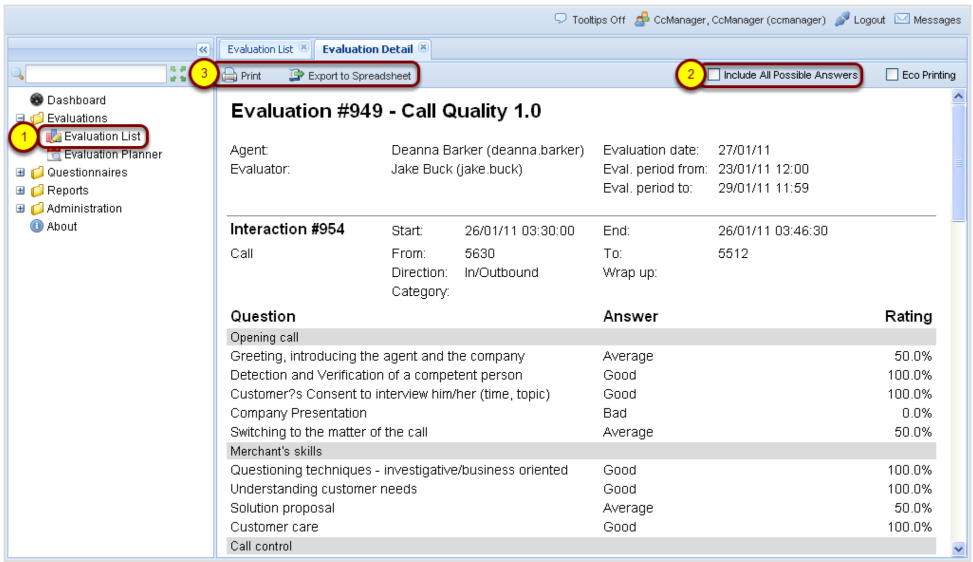


Figure 47: Reports for a Single Evaluation

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**.
2. 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 selected grayed out).
   Eco Printing: Creates a simpler text-based version of the report, with graphical borders removed for more economic printing.
3. 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

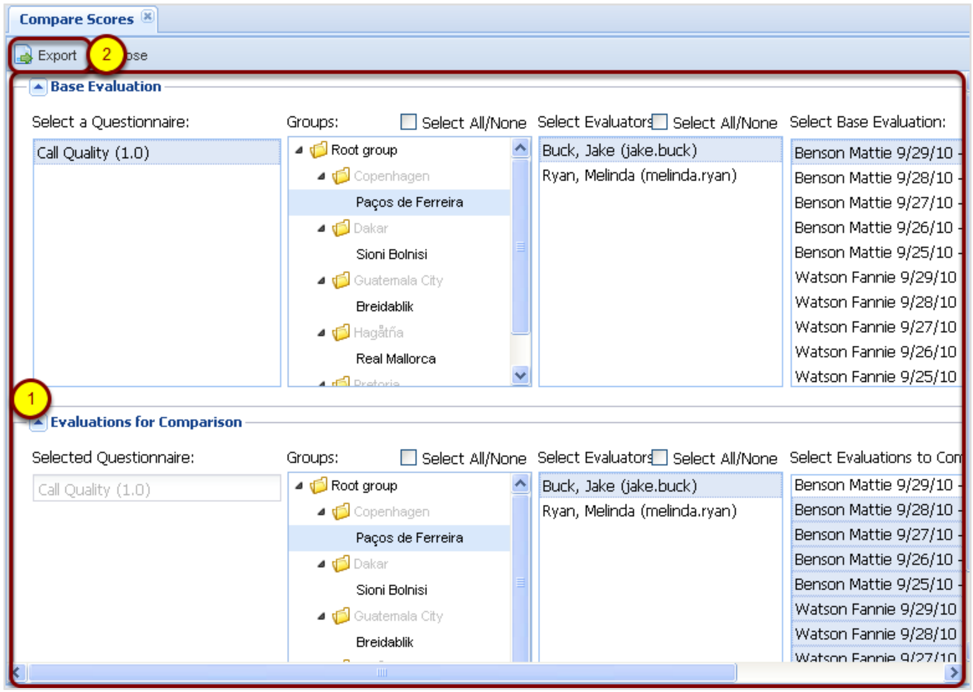


Figure 48: Exporting Graph Data to a Spreadsheet - 1

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.

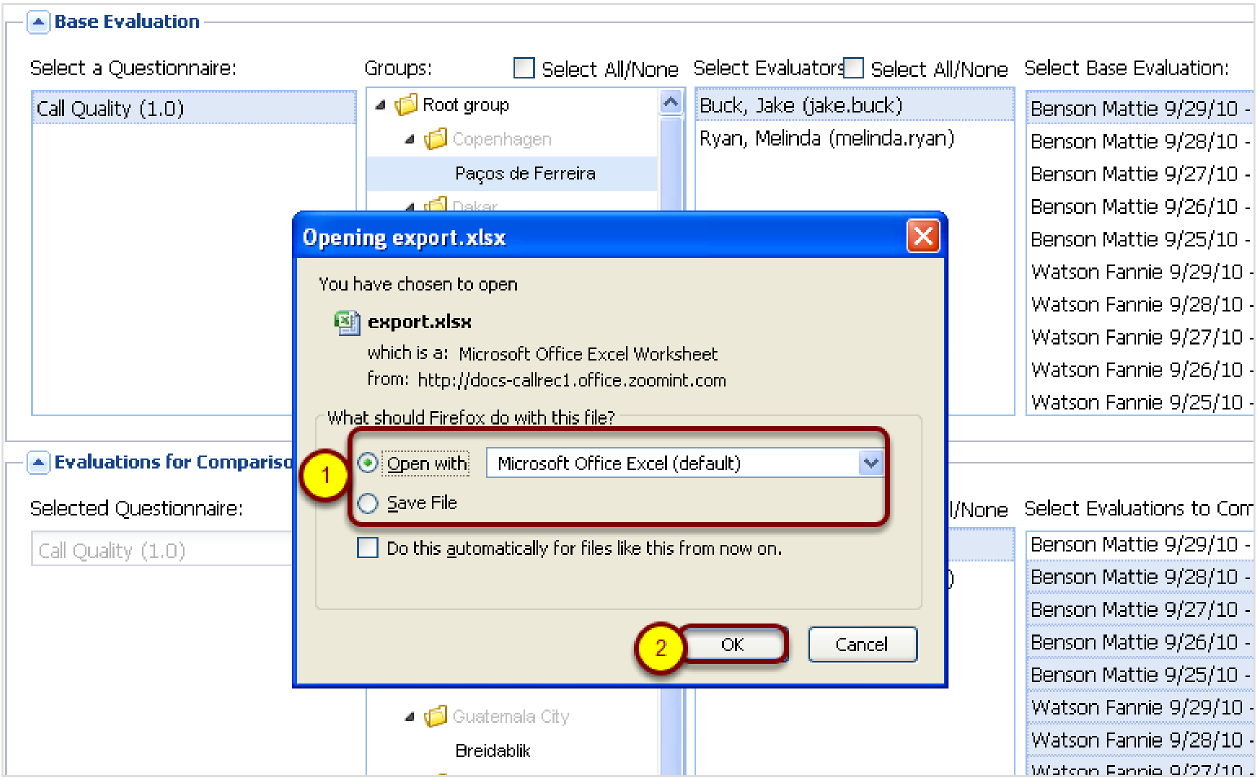
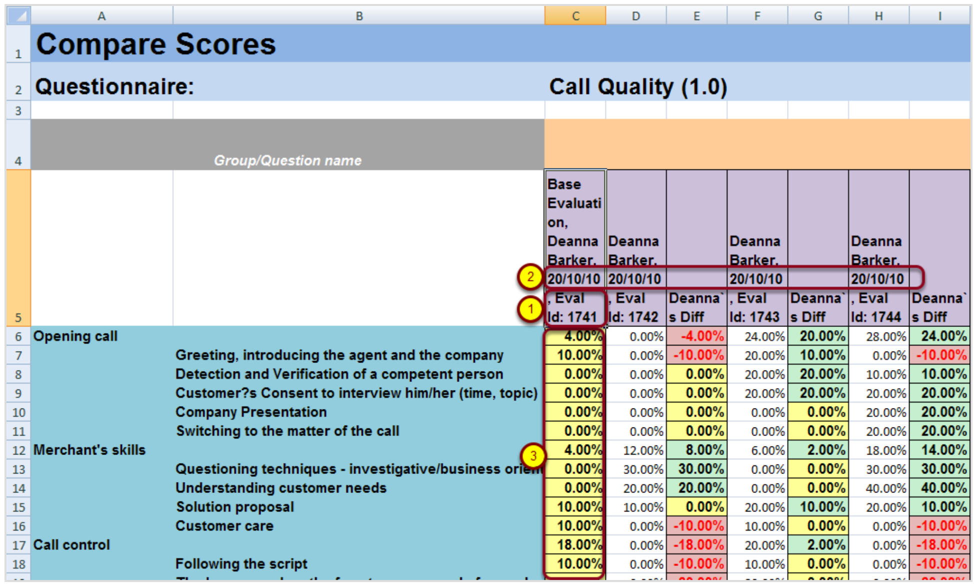


Figure 49: Exporting Graph Data to a Spreadsheet - 2

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	B	C	D	E	F	G	H	I
1	Compare Scores								
2	Questionnaire:		Call Quality (1.0)						
3									
4	Group/Question name								
5			Base Evaluation, Deanna Barker, 20/10/10, Eval Id: 1741	Deanna Barker, 20/10/10, Eval Id: 1742	Deanna`s Diff	Deanna Barker, 20/10/10, Eval Id: 1743	Deanna`s Diff	Deanna Barker, 20/10/10, Eval Id: 1744	Deanna`s Diff
6	Opening call		4.00%	0.00%	-4.00%	24.00%	20.00%	28.00%	24.00%
7		Greeting, introducing the agent and the company	10.00%	0.00%	-10.00%	20.00%	10.00%	0.00%	-10.00%
8		Detection and Verification of a competent person	0.00%	0.00%	0.00%	20.00%	20.00%	10.00%	10.00%
9		Customer?s Consent to interview him/her (time, topic)	0.00%	0.00%	0.00%	20.00%	20.00%	20.00%	20.00%
10		Company Presentation	0.00%	0.00%	0.00%	0.00%	0.00%	20.00%	20.00%
11		Switching to the matter of the call	0.00%	0.00%	0.00%	0.00%	0.00%	20.00%	20.00%
12	Merchant's skills		4.00%	12.00%	8.00%	6.00%	2.00%	18.00%	14.00%
13		Questioning techniques - investigative/business orien	0.00%	30.00%	30.00%	0.00%	0.00%	30.00%	30.00%
14		Understanding customer needs	0.00%	20.00%	20.00%	0.00%	0.00%	40.00%	40.00%
15		Solution proposal	10.00%	10.00%	0.00%	20.00%	10.00%	20.00%	10.00%
16		Customer care	10.00%	0.00%	-10.00%	10.00%	0.00%	0.00%	-10.00%
17	Call control		18.00%	0.00%	-18.00%	20.00%	2.00%	0.00%	-18.00%
18		Following the script	10.00%	0.00%	-10.00%	10.00%	0.00%	0.00%	-10.00%

Figure 50: 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

5 Dashboards

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

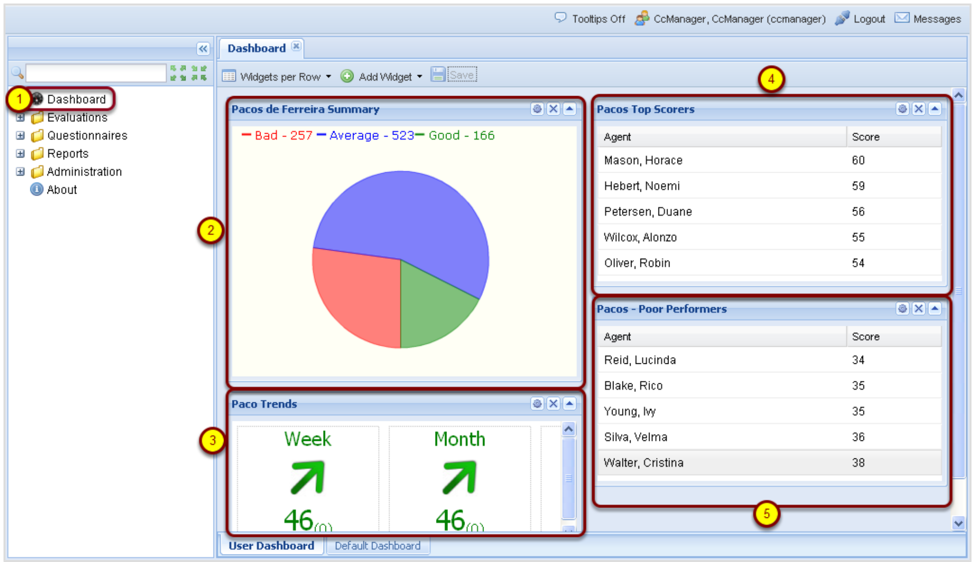


Figure 51: The Quality Manager Dashboard

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

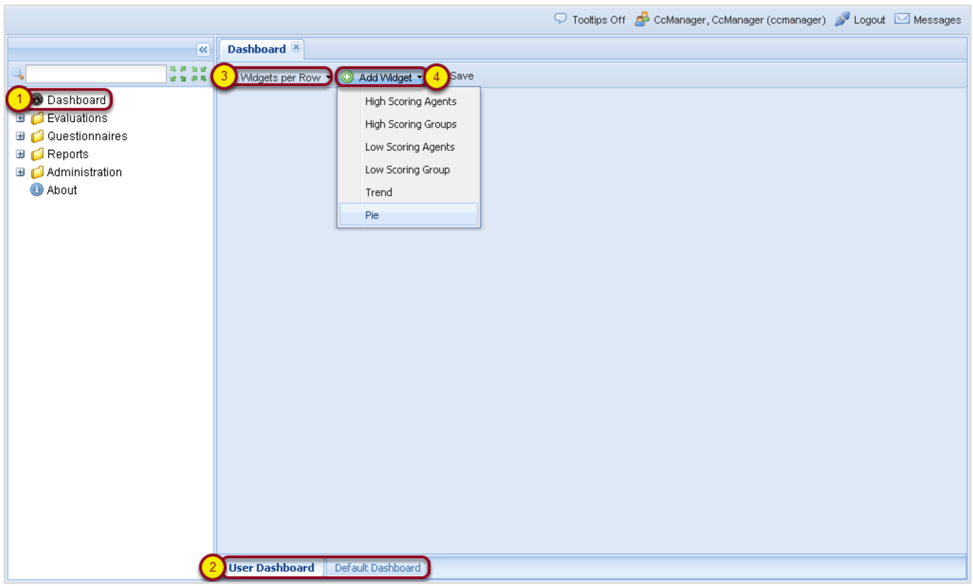


Figure 52: Setting Up a Dashboard – 1

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 Setting Up a Dashboard - 2.

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

Setting Up a Dashboard - 2

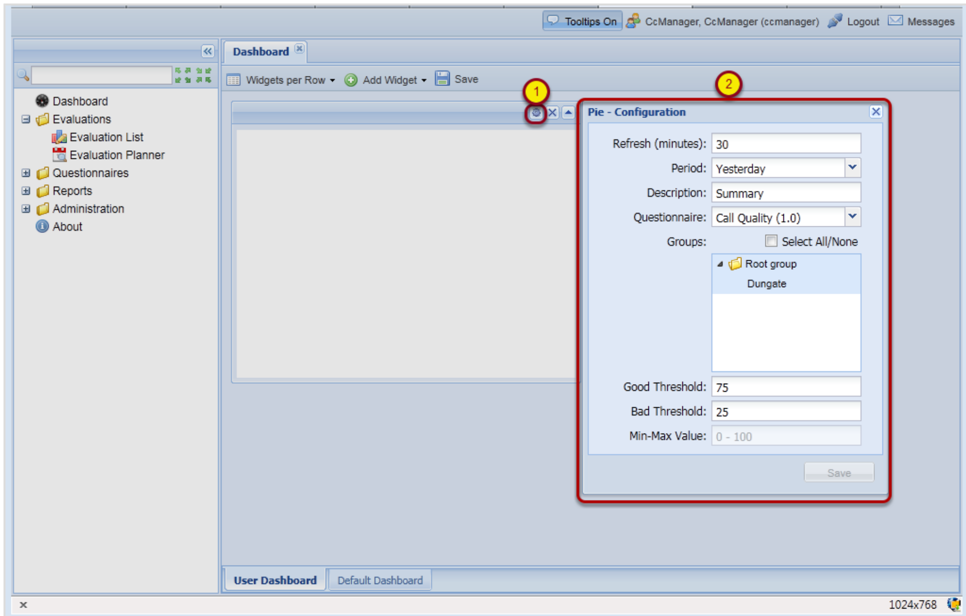


Figure 53: Setting Up a Dashboard – 2

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:

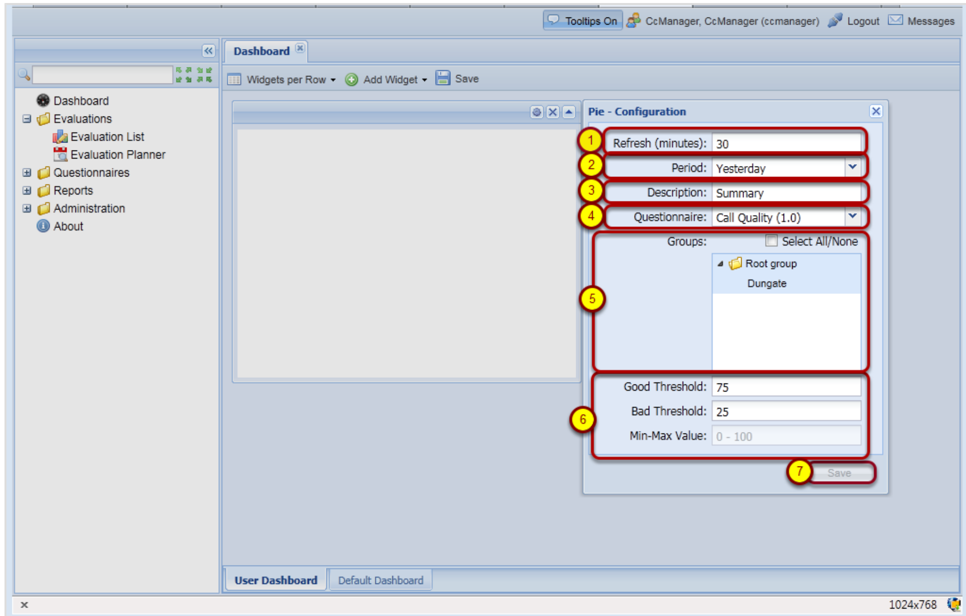


Figure 54: Pie Widget Configuration

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.
2. 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.
4. 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.
5. 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

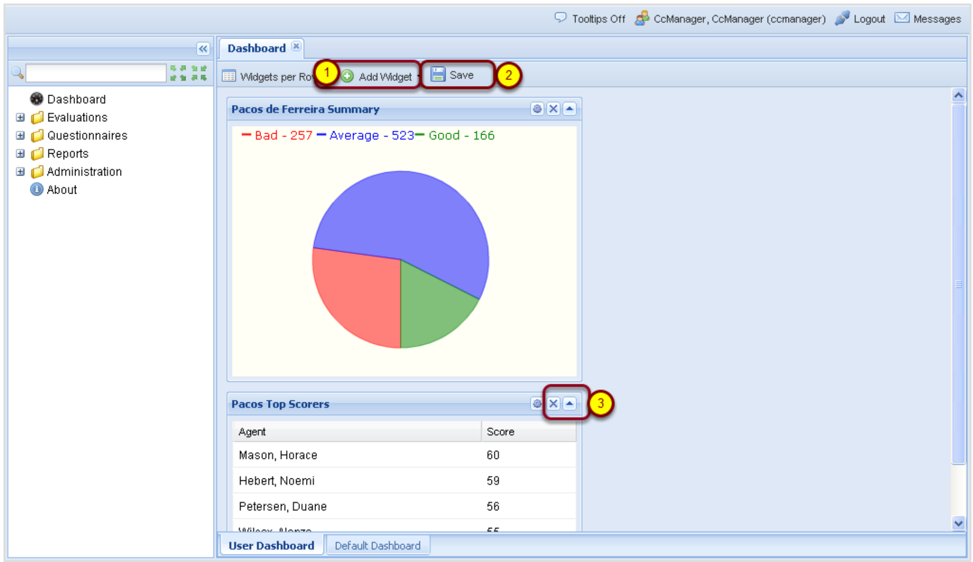


Figure 55: Setting Up a Dashboard – 3

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

6 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.