

Genesys Quality Management 8.1

GQM Suite User Guide

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Chapter

1

Getting Started with Call Recording

This chapter describes how to open Call Recording, log in, and change the password, the language, and time zone.

This chapter contains the following sections:

Opening Call Recording

Changing the Login Screen Language

Logging in to Call Recording

Changing the Password

Changing the Language That Call Recording Displays

Changing the Time Zone That Call Recording Displays

Opening Call Recording

Type the Call Recording URL in the browser address box.



Figure 1: The Browser Address Box

The Login screen opens.

	Ca	Welcome to II Recording Version: 8.1.510 Genesys		Name : Password : Login
		esys Call Recording red by ZOOM CallREC English (US)		
	Owner	Expiration Date	License State	
Base License		3/27/13	Expired	
Support License	Unknown	License never expires	Unknown	

Figure 2: Opening Call Recording

Changing the Login Screen Language

	Genesys Call Recording	
	English (US) پ مربع Български	
	Česky Dansk Deutsch English	
Owr	Suomi	ense State
Base License ZOOM R	I&D Français Latviešu Nederlands	Expired
Support License Unknow	wn Licer Polski Português (Brasil) Română Pycokulă Slovenčina Slovenšina Svenska Türkçe	Inknown

Figure 3: Login Screen Language

To change the language that the login page displays in, before logging in, select the required language from the drop-down list.

The language used in the login page changes to the selected language.

Changing the language only affects the current user without affecting any other user.

Logging in to Call Recording

Welcome to Call Recording Version: 8.1.510	Name : Anne.Agent
Senesys [®]	Password : ••••••

Figure 4: Logging into Call Recording

To log in to Call Recording:

- 1. Type the user name in the Name: field.
- 2. Type the password in the **Password:** field.

Usernames and passwords are case sensitive.

3. Click Login. Call Recording opens to the Recorded calls tab.

Changing the Password

To change the password:

Log in. Navigate to Users:



Figure 5: From Users Tab

1. Click Edit. The Edit user form opens.

Login: bob Password: Blocked: Image: Password confirmation: Image: Password confirmation: Name: Bob cooper Surname: E-mail: Phone number: Image: Password confirmation:
Name: Bob cooper Surname:
E-mail: Phone number:
LDAP user 🗌
Choose filter END
Group: USEr 🔻 Save Cancel

Figure 6: Edit User Form

2. Type the new password in the **Password:** and **Password confirmation:** fields.

If the browser automatically fills in the **Password:** when the **Edit user** form opens, then disable the **Remember password for sites** option in the browser.

3. Click Save.

Changing the Language That Call Recording Displays

To change the language that the main Call Recording application displays, log in to Call Recording.

Personal Setup Personal Setup Column Setup Plugins Language Choose preferred language English Ŧ عربي Time Zone Български Česky User Time Zone Europe/Prag Deutsch • nalist English (US) Español Française Latviešu Polski Română Русский Slovensky Slovenski Türkçe Save configuration Reload configuration

Navigate to Settings > User Setup > Personal Setup.

Figure 7: Changing the Default Language

- 1. Select the language from the Choose preferred language drop-down list.
- 2. Click Save configuration.

Refresh the web page by clicking on another tab in Call Recording, or by clicking **Refresh** in the web browser.

The labels in Call Recording display in the language selected. Some user interface elements may not change language because of naming restrictions and integration with other systems. Changing the language only affects the current user without affecting any other user.

Changing the Time Zone That Call Recording Displays

The **Time Zone** setting affects all dates and times that Call Recording displays.

To change time zone , navigate to **Settings > User Setup > Personal Setup**.

Personal Setup		
Column Setup	Personal Setu	ар
Plugins		
	Language	
	Language	
	Choose preferre	ed language English 👻
	Time Zone	
	User Time Zone	Europe/Prague
		Europe/Minsk Europe/Monaco
		Europe/Moscow
		Europe/Nicosia
		Europe/Oslo
		Europe/Paris
		Europe/Podgorica
		Europe/Prague
		Europe/Riga
		Europe/Rome Europe/Samara
		Europe/San_Marino
		Europe/Sarajevo
Save configuration		Europe/Simferopol
Reload configuration		Europe/Skopje
		Europe/Sofia

Figure 8: Changing the Default Time Zone

- 1. Select the time zone from the User Time Zone drop-down list.
- 2. Click Save configuration.

Refresh the web page by clicking on another tab in Call Recording, or by clicking **Refresh** in the web browser. Changing the time zone only affects the current user without affecting any other user.

Chapter 1 Getting Started with Call Recording



Chapter

2 Using Call Recording

This chapter describes how to use Call Recording and deals with how to listen to calls, add notes, and search for calls.

This chapter contains the following sections:

Viewing Recorded Calls Playing Recorded Calls Listening to Several Calls in a List using Advanced Player Adding, Deleting, or Modifying Notes in the Call Description Field Adding Notes Using the Call Details Icon Playing Conference and Transferred Calls Playing Screen Capture Video Recordings Protecting Calls from Deletion Changing the Order that Calls Display in, on the Recorded Calls Page Changing Which Columns Display in the Recorded Calls Tab Sending Calls to Email Restoring an Archived and Deleted Call Recording Listening to Restored Calls Canceling Restoration The List of Icons Used in the Recorded Calls Tab

Viewing Recorded Calls

Log in to Call Recording, the **Recorded calls** tab opens by default.

The Recorded calls tab displays calls recorded by Call Recording.

	🔺 🗉 🛛 Date	Beginning	🔺 💌 End	🔺 💌 Length				Description	I
]	21-jul-2011	10:13:06	10:13:26	0:20	5508 (Dev 5508 SLR)	5507 (Dev 5507 SLR)	4167		
	21-jul-2011	10:10:23	10:10:52	0:29	5508 (Dev 5508 SLR)	5507 (Dev 5507 SLR)	4167		
	21-jul-2011	10:06:31	10:09:47	03:16	5508 (Dev 5508 SLR)	5507 (Dev 5507 SLR)	4 i 🖻 🖗		
	21-jul-2011	9:25:58	9:27:53	01:55	5508 (Dev 5508 SLR)	5507 (Dev 5507 SLR)	4 i 🖻 🖗		
	21-jul-2011	9:16:10	9:18:11	02:01	5508 (Dev 5508 SLR)	5507 (Dev 5507 SLR)	4 i d ?		
	21-jul-2011	8:40:07	8:42:48	02:42	5508 (Dev 5508 SLR)	5507 (Dev 5507 SLR)	4 1 6 7		
	20-jul-2011	22:55:14	22:55:33	0:19	5507 (Dev 5507 SLR)	5508 (Dev 5508 SLR)	4167		
	20-jul-2011	22:54:41	22:55:00	0:19	5507 (Dev 5507 SLR)	5508 (Dev 5508 SLR)	4167		
	20-jul-2011	22:54:09	22:54:28	0:19	5507 (Dev 5507 SLR)	5508 (Dev 5508 SLR)	4167		
	20-jul-2011	22:53:37	22:53:56	0:19	5507 (Dev 5507 SLR)	5508 (Dev 5508 SLR)	4167		
	20-jul-2011	22:53:05	22:53:24	0:19	5507 (Dev 5507 SLR)	5508 (Dev 5508 SLR)	4 i B 🖗		
	20-jul-2011	22:52:33	22:52:52	0:19	5507 (Dev 5507 SLR)	5508 (Dev 5508 SLR)	4167		
]	20-jul-2011	22:52:01	22:52:19	0:19	5507 (Dev 5507 SLR)	5508 (Dev 5508 SLR)	4167		

Figure 9: List of Recorded Calls

Each call displays with information about the call in columns.

Change the **Count** to increase or decrease the number of calls displayed on one page.

Click << or >> to move through the pages of recorded calls.

Playing Recorded Calls

Navigate to Recorded calls.

1. Find the call.

То		Description
507 SLR)	4 i 🗗 🖗	
507 SLR)	1 i 6 ?	
507 SLR)	4 i B7	
507 SLR)	4 i B7	

Figure 10: Recorded Call Icons

2. Click the play audio icon s for that call to launch the integrated player and open the call's stereo recording.

The media player uses standard playback controls. Play, pause, stop, fast forward, and adjust the volume.



Figure 11: Integrated Player - Internet Explorer and Media Player



Figure 12: Integrated Player - Other Browsers and Apple QuickTime

Listening to Several Calls in a List using Advanced Player

< 1 2 3	4 5 >>	k 0.07 seconds)	to email 🕩	Advanced PLAYER
🔺 🗉 Date	▲ ■ Beginning	► End	▲ Ength	From
16-Apr-2012	15:06:28	15:06:36	0:07	5507 (Dev 5507 SLR
16-Apr-2012	15:06:16	15:06:21	0:06	5507 (Dev 5507 SLR
16-Apr-2012	10:35:22	10:35:29	0:06	5507 (Dev 5507 SLR
16-Apr-2012	10:35:04	10:35:11	0:07	5507 (Dev 5507 SLR
16-Apr-2012	07:54:16	07:54:23	0:07	5507 (Dev 5507 SLR

Figure 13: Selecting Multiple Recorded Calls

To play more than one call:

1. Select the check boxes of the calls.

The buttons along the blue bar above the recorded calls table activate.

2. Click Advanced PLAYER. The Advanced Player window opens.



Figure 14: The Advanced Player Window

3. Drag and drop the calls to adjust the order and mix of call playback.

Adding, Deleting, or Modifying Notes in the Call Description Field

	[000]	Recorded calls Restored calls	🦓 Users 🎧 LiveMON 🔮	ScoreCARD Fr Setting	s 📝 About 🔎 Audit 🗙 Lo
< 1 2 3	4 5 >> Count 25	 1 - 25 from 114 (query took 0.18 seconds) 	Send to email	Advanced PLAYER	Export 🔃 Restore 🖉 Sea
Da	te 🛋 Beginn	ing 🔺 From	To To		Description
21-jul-201	10:13:06	5508 (Dev 5508 SLR)	5507 (Dev 5507 SLR)	4 i 6 ?	
] 21-jul-201	10:10:23	5508 (Dev 5508 SLR)	5507 (Dev 5507 SLR)	4 i 6 ?	
21-jul-201	10:06:31	5508 (Dev 5508 SLR)	5507 (Dev 5507 SLR)	4 i 6 ?	
21-jul-201	9:25:58	5508 (Dev 5508 SLR)	5507 (Dev 5507 SLR)	4167	
21-jul-201	9:16:10	5508 (Dev 5508 SLR)	5507 (Dev 5507 SLR)	4 i 67	
21-jul-201:	8:40:07	5508 (Dev 5508 SLR)	5507 (Dev 5507 SLR)	4167	
20-jul-201:	22:55:14	5507 (Dev 5507 SLR)	5508 (Dev 5508 SLR)	4 i 6 ?	
20-jul-201:	22:54:41	5507 (Dev 5507 SLR)	5508 (Dev 5508 SLR)	4 i 6 ?	
20-jul-201	22:54:09	5507 (Dev 5507 SLR)	5508 (Dev 5508 SLR)	4 i 6 ?	
20-jul-201:	22:53:37	5507 (Dev 5507 SLR)	5508 (Dev 5508 SLR)	4167	
] 20-jul-201:	22:53:05	5507 (Dev 5507 SLR)	5508 (Dev 5508 SLR)	4167	
20-jul-201	22:52:33	5507 (Dev 5507 SLR)	5508 (Dev 5508 SLR)	4167	
20-jul-201	22:52:01	5507 (Dev 5507 SLR)	5508 (Dev 5508 SLR)	4 i 6 ?	
20-jul-201	22:51:28	5507 (Dev 5507 SLR)	5508 (Dev 5508 SLR)	4 i & ?	
20-jul-201:	22:50:56	5507 (Dev 5507 SLR)	5508 (Dev 5508 SLR)	4 i 6 ?	

Figure 15: Description of Fields on RHS

To add, delete, or modify text in the description field, click inside the **Description** field.

- 1. Add descriptive text notes to a call recording.
- 2. These notes display to all users who have access to the call recording. Add initials to the notes to identify who made the notes.

Adding Notes Using the Call Details Icon

The user may add, delete, or modify notes to the **Call description** and display call information.

From	То		Description
5508 (Dev 5508 SLR)	5507 (Dev 5507 SLR)	4 i 🖻 🖗	
5508 (Dev 5508 SLR)	5507 (Dev 5507 SLR)	🔰 i 🖻 🖡	
5508 (Dev 5508 SLR)	5507 (Dev 5507 SLR)	1 i d 7	
5508 (Dev 5508 SLR)	5507 (Dev 5507 SLR)	4 i d 7	

Figure 16: The Information Buttons

Click the call details icon \blacksquare . A new window opens that displays call data and enables the user to add text notes.

	Call description	
	A	*
		Ŧ
	Save description	
	Couple Information	
Call ID	386	
Couple ID	386	
Call Status	No problem	
Synchro Tool		
Delete Tool		
Mixer Tool		
Restore Tool		
Archive Tool		
ScoreCARD Usage		
Synchronization ID	16967553192.168.7.51:26592192.168.7.59:16384_1	

Figure 17: Call Description Window

- 1. Click inside the **Call description** box. Type in notes.Use consistent terms, for example: "sale", "complaint", or "training". Add initials to the notes to identify who made the notes during a search.
- 2. Click Save description.

The information is added to the call data record and stored on the database.

To delete or modify a note:

- 1. Click the call details icon \blacksquare .
- 2. Click inside the Call description box. Delete or modify the notes.

3. Click Save description.

The information is updated to the call data record and stored on the database.

Playing Conference and Transferred Calls

Call Recording records data traffic between pairs of connected telephones. A conference call or transferred call is actually a series of these pairs.

- Recording 1 call between the caller and the operator.
- Recording 2 call between the operator and the called party.
- Recording 3 call between the caller and called party.

To listen to the entire call, the user must open all pairs together in Advanced Player. Select the checkboxes of the calls to be reviewed, and click Advanced Player.

Call Recording identifies conference calls with a ConferenceNumber identifier. The ConferenceNumber is the same for the entire collection of call pairs.

May 15, 2008	3:36:26 AM	1001	Conference 16803309	26093	16803309	4 I B
May 15, 2008	3:36:26 AM	1113	Conference 16803309	26093	16803309	412
May 15, 2008	3:36:26 AM	1112	Conference 16803309	26093	16803309	4 I B

Figure 18: Identifying Conference Calls

Transferred calls are kept as independent, but related, recordings, or couples. To sort related calls so that they appear together in the recorded calls list, click the **Order Calls** icon at the top of the **Date** column.



Figure 19: Order by Related Calls Icon

Playing Screen Capture Video Recordings

Genesys Screen Capture enables the user to watch a video recording of an agent's desktop while listening to the call recording. The user can see and hear what the agent saw and heard.

ry took 0.04 seconds)	🕅 Send to email	Advanced PLAYER
From	To	
4232277718	404093	4 i 🕅 🕅 🖗
4232342177	404093	4 1 6 # 7
4232380615	404093	si i i i i i i i i i i i i i i i i i i
4232344836	404093	s i de # ?
4233739262	404089	≤ i ⊳#7

Figure 20: Recorded Calls with Screen Capture

1. Click the video icon 🛄 . to mix the video. When mixed the icon changes to

y took 0.04 seconds)	🗱 Send to email	Advanced PLAYER
🛋 From	To	
84232299638	404002	4 : 6 . 7
84236659844	404002	1 i d # 7
4236623003	404089	ч I в # ?
4232441346	404093	ч I в # ?
9940114874	404009	K I B # 7

Figure 21: Mixed video

2. Click mixed video icon 🚺 to export the mixed video.

Opening 20121115_2051_1111_1000.168.10.85.mp4
You have chosen to open:
20121115_2051_1111_1000.168.10.85.mp4
which is a: MP4 Video
from: http://sascr002
What should Firefox do with this file?
Open with Windows Media Player (default)
Save File
Do this <u>a</u> utomatically for files like this from now on.
OK Cancel

Figure 22: Recorded Calls with Screen Capture

3. Click **Open with** to launch the video, or click **Save File** to store the file on the computer. The messages vary depending on which browser is used. The user must have the H.264 video codec installed to launch videos. For more information, contact the system administrator.

Protecting Calls from Deletion

Feb 25, 2013	8:08:16 AM	8:08:29 AM	0:13	5687 (Peter)	5507 (Dev 5507 SLR)		
Feb 25, 2013	8:08:11 AM	8:08:16 AM	0:04	5687	Conference21219375	4 🖬 🗟 😫	
Feb 25, 2013	8:08:11 AM	8:08:16 AM	0:04	5655	Conference21219375	4167	
Feb 25, 2013	8:08:11 AM	8:08:16 AM	0:04	5507	Conference21219375	4167	
Feb 25, 2013	8:08:09 AM	8:08:11 AM	0:02	5687 (Peter)	5655	4167	

Figure 23: Protecting Calls

To protect a call from deletion:

Click the call unprotected $\mathbf{1}$ to lock a call.

The call protected icon ¹² appears.

Protecting a recorded call means that it cannot be deleted from the database.

Feb 25, 2013	8:08:16 AM	8:08:29 AM	0:13	5687 (Peter)	5507 (Dev 5507 SLR)	4 I 🖗 🖺 I
Feb 25, 2013	8:08:11 AM	8:08:16 AM	0:04	5687	Conference21219375	1 i d S
Feb 25, 2013	8:08:11 AM	8:08:16 AM	0:04	5655	Conference21219375	4 i 6 ?
Feb 25, 2013	8:08:11 AM	8:08:16 AM	0:04	5507	Conference21219375	4 i 6 ?

Figure 24: Protected Call

To remove protection from a call:

Click the call protected icon ¹²⁶ to remove protection from a call. The call unprotected icon 17 appears.

When calls are archived, they can be deleted from the active database unless they are protected.

Changing the Order that Calls Display in, on the Recorded Calls Page



Figure 25: Up and Down Controls for Changing the Recording Order

Calls automatically display in date and time order, with the most recent calls first.

Change the order by using the up and down arrows at the top of each column.

The calls displayed in Call Recording depend on the filters saved on the system. Disable all filters to displays available records.

Changing Which Columns Display in the Recorded Calls Tab

The **Recorded calls** tab contains call information to help the user select calls to play. Add or subtract columns to control how much information displays. These selections only affect the users own view of listed calls.

The number and type of columns available for selection depends on the system configuration, and is set by the system administrator.

Personal Setup					
Column Setup	Columns Glo	obal Se	tup		
Plugins					
	Catup viehte				
	Setup rights				
	Settings below	v will affe	ect column vi	ew if this checkbox is checked	1
	Basic columns				
	Column name	Visible	Description		
	Date	V			
	Call start time	V			
	Call end time				
	Length of call				
	Calling number	V			
	Called number	V			
	Description	V			
	LiveMON colu	mns			
	Column name	Visible	Description		
Save configuration	Duration	V			
Reload configuration	Calling number	V			
	Called number	V			

Navigate to Settings > Configuration > User Setup > Columns setup.

Figure 26: User's Setup - Columns

- 1. Select the columns to display in the Recorded calls tab.
- 2. Click Save configuration.

The columns display in the Recorded calls tab.

Sending Calls to Email

<							
	🔺 🗉 Date	▲ ▼ Beginning	🔺 💌 End	▲ Ength	From		
	16-Apr-2012	15:06:28	15:06:36	0:07	5507 (Dev 5507 SLR		
	16-Apr-2012	15:06:16	15:06:21	0:06	5507 (Dev 5507 SLR)		
	16-Apr-2012	10:35:22	10:35:29	0:06	5507 (Dev 5507 SLR)		
	16-Apr-2012	10:35:04	10:35:11	0:07	5507 (Dev 5507 SLR)		
	16-Apr-2012	07:54:16	07:54:23	0:07	5507 (Dev 5507 SLR)		

Figure 27: Selecting Multiple Recorded Calls

To email Call Recording recorded calls as .mp3 file attachments.

- 1. Select the checkboxes of one or more recorded calls by in the first column.
- 2. Click Send to mail. The Send calls to email window opens.

Send calls to email							
Files listed below will be attached. Please, check file size properly, because email recepient email box may have size restriction							
Start From To Media type (file name) Size(kB) A				Attach			
4/17/09 12:22 PM	6003	6001	AUDIO (1239963751687_6003_6001_6.mp3)	3	•		
4/17/09 12:22 PM	6001	6003	AUDIO (1239963735265_6001_6003_4.mp3)	27	~		
4/16/09 2:07 PM	6003	6001	AUDIO (1239883640903_6003_6001_8.mp3)	26	~		
Attachment size(kB): 56							
Recepients: andrew@aardvark.com, bob@bear.com, catherine@cat.com							
Message body: Here are t promised.			the CallREC phone call mp3s I	*			
Send Discard							

Figure 28: Sending Calls to Email

- 3. Type email addresses in the **Recipients:** field. Use commas to separate emails.
- 4. Type the message in the Message body: field.
- 5. Click Send.

Call Recording sends the attached calls to all the email addresses entered.

Restoring an Archived and Deleted Call Recording

- 1. Select archived and deleted calls in the Recorded calls tab.
- 2. Click Restore.

Advanced PLAYER	Export	t 🗍 Cancel res	toration P Se
Archive	Restored		Description
archive-2013.02.19-mnt-storeman-Calls_Backup-0000.zip	×	😌 🗉 👮 🙆 🎖	
Archive	Restored		Description
 igure 29: Selected Records Being Restored 3. The restoring call icon appears 			
ers 🗅 LiveMON 🔯 ScoreCARD 🛃 Recording	rules 🕂	Settings Abou	nt PAudit X

Figure 30: Selected Records Being Restored

archive-2013.02.19-mnt-storeman-Calls_Backup-0000.zip

When the call is restored, the restored call icon appears $\, {\ensuremath{\mathbb C}}^{2} \,$.

The user can listen to these restored calls normally. Restored calls appear under both the **Restored calls** tab, and the **Recorded calls** tab.

4 1 6 6 ??

Depending on the system configuration and storage policy, the restored call recordings usually appear in the **Restored calls** tab within 24 hours. Call Recording sends an email notifying the user that the call has been restored.

Listening to Restored Calls

To listen to restored calls, click on the call's speaker icon.

ers 🗅 LiveMON 🔮 ScoreCARD 🛃 Recordin		
Archive	Restore	Description
archive-2013.02.19-mnt-storeman-Calls_Backup-0000.zip	2 4 1 2 4 7	
	Restored	Description

Figure 31: Restored Calls and Archived Calls in the Section "Recorded Calls"

Or select multiple files and click Advanced PLAYER.

Canceling Restoration

The user can cancel a call restoration before it is complete.

- 1. Open the Restored calls tab.
- 2. Identify calls to be canceled by selecting their checkboxes.

Advanced PLAYER Export Cancel restoration							
Archive	Restored		Description				
archive-2013.02.16-opt-callrec-data-archive-0000.zip	×	👎 🗉 👮 🚰 🖗					
Archive	Restored		Description				

Figure 32: Canceling Call Restoration

- 3. Click Cancel restoration.
- 4. Click **OK** to confirm the cancellation.

The call restoration process for these calls is canceled and the calls are not available for playback unless they are restored again. The status icons may require some time to reset, depending on the system configuration.

The List of Icons Used in the Recorded Calls Tab

The recorded call icons show statuses and warnings of calls.

 \blacksquare Play audio: Launches the media player so that the user can listen to the call.

Call details: Opens the information window so the user can add text and see call details.

Export: Enables the user to open or save the call file.

Video: Mixes the video

Video mixed: Exports the call to the user's computer to play the call screen recording.

Only one stream recorded warning icon. Warns that the user can only hear one side of the conversation.

Warning icon: Point to the warning icon for more information. A tool tip appears with the reason for the warning. Reasons include, for example, "No stream recorded."

Archived call: The call is archived.

👿 Deleted call: The call is deleted.

Deleted call available for restore: Restores deleted and archived calls so that the user can open them again.

Restoring call: Shows that the call is in the process of being restored.

Restored call: Shows the call is restored and available for playing.

Call unlocked: The call can be deleted

Call protected: The call protected from deletion.

Synchronized and used, This shows the status of synchronized calls in a multi-server environment.

🗱 Synchronized and not used.

Video not mixed: This shows that a Screen Capture video recording is available for the call, but the audio for the call associated with the video is not available.


Chapter



Searching and Using Filters in Call Recording

This chapter describes how to search and use filters in Call Recording.

This chapter contains the following sections:

Opening the Search Filter DialogUnderstanding Search FiltersDefault Search FilterUsing Advanced SearchesUsing Saved FiltersSaving Search FiltersDisabling FiltersDeleting Saved FiltersUsing Filters in Permanent Rules



Opening the Search Filter Dialog

Genesys Call Recording uses search filters to identify call records.

i	Filtered by: Calls FROM Disable filter
	Logged in as: Victor Meldrew
Settings	About 🔑 Audit 🗙 Logout
IVER 🖻 Ex	port 🔃 Restore
	A
	Description
67	
7 G	
6 P	

Figure 33: The Search Button

To search for calls and video recordings, click **Search**. The **Search filter** dialog box opens.



Figure 34: Search Filter

Understanding Search Filters

Search filters enable users to find calls within the Call Recording database, and the same filters can be used to define user access rights within the **Users** tab.

In most installations, the system administrator provides basic recording and search filters during set-up. Each group and user can be provided with default filters specific to their roles. For example, a supervisor can have a filter that only displays calls handled by a particular group of agents. The supervisor only sees calls from those agents in the Recorded calls Tab.

To search for a specific call or screen recording, the supervisor identifies call attributes, like an agent phone number, and a time range. Call Recording only displays the agent's calls that were recorded during that time range.

If the supervisor uses the same searches repeatedly, they can save the search as a filter to be used at a later time. This search filter can be made available to other users of the Call Recording system. A filter can not be deleted while in use.

Filters identify calls based on call attributes.

Call attributes include:

- Signaling information, for example, IP addresses and telephones that were used in the calls.
- Date or time information, for example, when calls start and stop.
- Duration of call.
- Type of call.
- Call recording status, for example, locked calls only.

Advanced searches enable the user to set filters based on external information, including customer name, skills type, wrap up code, and agent evaluation data fields added to the database by the system administrator.

Default Search Filter

A permanent filter limits the search range of calls to 31 days by default, to improve the performance of searches. This filter prevents a gap of more than 31 days between the **To:** and **From:** search parameters; an error displays if a longer search period is specified.

Without any problem status selected, the search includes calls with all statuses. Choose from:

- No Problem.
- Just one stream recorded.
- No stream recorded.
- Unknown codec.
- Decoding error.
- Error communicating with recorder.
- Cannot capture files.
- Decoder failure (IO error).
- Different codecs for each stream.
- The file exceeds its maximum size.
- License problem.
- Incomplete stream saved.

Using Advanced Searches

Navigate to: **Recorded calls > Search**.

~			ilter													
Filter							-		_							
Choos	e filter	_				-	Filter	' na	ime:					_		
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Calling	numbe	rs:) and	or (С	alled nur	nbers:				1		
Descrip				_	Cas	ie sensi	tive: 📄		ype of ca		All		-			
Couple	s count:	<	-					R	andom s							
Call ler	-	Min.:		Map						d only:						
Calls w	ith the s	same n	umber	from	to	or bot	h) wh	ich	occurre	d more	than 0					
From					No filte	r	-		To:					No filte	r	-
∢ 🗊	lune	•	Þ	₫ 2	011 ,				4 u	uly	•	▶	₫ 2	011 .		
Wk	Su	Мо	Tu	We	Th	Fr	Sa		Wk	Su	Мо	Tu	We	Th	Fr	Sa
22				1	2	3	4		26						1	2
23	5	6	7	8	9	10	11		27	3	4	5	6	7	8	9
24	12	13	14	15	16	17	18		28	10	11	12	13	14	15	16
25	19	20	21	22	23	24	25		29	17	18	19	20	21	22	23
26	26	27	28	29	30				30	24	25	26	27	28	29	30
27									31	31						
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			No pr	oblem												
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Adva	nced s	earch														
	ion betw				l below	() and	d 🔘 or									
	 insen 			itive												
	Stream	Payload														

Figure 35: Advanced Search Fields

Defining custom search criteria in **Advanced search:** extends the search capabilities to include external data available in the call management system. System administrators define **Advanced search:** criteria. Added external data fields for **Advanced search:** appear under the calendar controls in the search window.

Using Saved Filters

Navigate to: **Recorded calls > Search**.

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												Filter n	ame :			
				Choo	se filte	er: Ch	noose fil	ter			- 1					
						ΰÞ	elete][ßı	Load	Ŋ,	All user	5		8	Save
Calling	numbe	rs :) and	0	r (Called nu	umbers	1					
Descrip	tion				Ca	se sens	itive:	1	Type of o	call	All		-			
Couple	s count	<	-					F	Random	selectio	n 📄					
Call len	gth	Min. :		Ma	x. :				Locked	d only :						
Calls w	ith the	same n	umber f	from) to 💿	or bot	th 🗿 v	vhicł	h occure	d more	than 0					
c-II-1	FROM				No filte	er	_		Calls	TO .				No filte	er	_
Lalis	FROM								Calls	10 :						
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24	12	13	14	15	16	17	18		28	10	11	12	13	14	15	16
25	19	20	21	22	23	24	25		29	17	18	19	20	21	22	23
26	26	27	28	29	30				30	24	25	26	27	28	29	30
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												4	Cancel		P:	Search

Figure 36: Search

To use a saved filter:

Saved filters appear in the **Choose filter:** drop-down list. Selecting a pre-existing filter enables the user to use recurring search criteria. Filters can be created by users, and shared, or they can be set-up by system administrators.

- 1. Select a filter from the Choose filter: drop down list.
- 2. Click Load. The filter settings appear in the Search window.
- 3. Click Search.

Only calls matching the filters display in the **Recorded calls** list in Call Recording. To see all calls, disable the filters.

Saving Search Filters

To create a filter that displays only certain calls, the user must choose search criteria in the search window. Saving this search criteria creates a re-usable filter.

- 1. Select the search attributes. If the **From:** date is chosen, then the **To:** date with a separation of no more than 31 days must also be chosen, otherwise the dates are not saved.
- 2. Type a Filter name:.
- 3. Select **All users** to make saved filters available to all users of the system. Otherwise, saved filters are available only to the user who created the filters.
- 4. Click Save.

The filter is now added to the filter drop-down list.

Disabling Filters

Navigate to: Recorded calls.

Call Recording displays the search criteria that are currently active at the top right of the screen next to the **Filtered by:** indicator.



Figure 37: Clearing Filters

To return to displaying all records, click **Disable filter**. A permanent **Calls FROM** filter improves search performance by limiting the search range to a default of 31 days. This filter is visible and cannot be disabled, but the range value can be changed by an administrator.

Deleting Saved Filters

- 1. Select a filter from the Choose filter: drop down list.
- 2. Click Delete.

The filter is no longer available in the filter drop down list.

Important:

If the filter is being used by other users of the system, Call Recording does not enable the current user to delete the user who created the filter.

Using Filters in Permanent Rules

Filters can also be used as rules for restricting access to recorded calls. Supervisors and administrators can assign saved filters to **Groups** and **Users**. When filters are assigned to a group, then only those filtered recorded calls are available to the users within that group.

Permanent rule filters can be assigned to a group through the Users tab.

Open a group, and click Edit Filters.

Multiple permanent rule filters can be assigned to a group by editing the group, and choosing saved filters from the **Choose filter:** drop down list. Use Boolean operators, **and**, or **or**, to combine filters. When saving the group, the permanent filters apply to all members of that group.



Chapter

Δ

Searching for Call Records in Call Recording

This chapter describes how to search for calls in Call Recording.

This chapter contains the following sections:

Searching for calls by Calling and Called Numbers Alphanumeric Characters Using Wild Cards to Search Searching for Calls by Type Searching for Calls by Date-Time Range Searching for Calls by Date-Time Ranges Searching for Calls During a Standard Time Range Searching for Calls During a Standard Time Range Searching for Calls by Description Searching for Calls by Couples Count Searching for Calls by Call Length Searching for Calls from the Same Numbers Displaying Call Search Results Randomly Searching for Calls by External Data

Searching for calls by Calling and Called Numbers

If the either the calling or called numbers is known, it is possible to search for all the calls from, and to those numbers. Navigate to **Recorded calls > Search**.

•	P	Sea	rch f	ilter												(lose 🗙	
	Filter Choos		er: Ch	oose fi	lter		•	Filt	ter	name:								
		Ĩ] Del	ete		5 Loa	ad	All	use	rs 📄				8	Save			
	-		ars: 12	24?) and	O or	_	Called n	umbers	5: 4*)		
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	4 💌	pril	Ŧ		4 🖪	2012	•			4 🖪	Лау	-		4 🖪	2012	₽₽		
	Wk	Su	Мо	Tu	We	Th	Fr	Sa		Wk	Su	Мо	Tu	We	Th	Fr	Sa	
	13	1	2	3	4	5	6	7		18			1	2	3	4	5	
	14	8	9	10	11	12	13	14		19	6	7	8	9	10	11	12	
	15	15	16	17	18	19	20	21		20	13	14	15	16	17	18	19	
	16 17	22 29	23 30	24	25	26	27	28		21 22	20 27	21 28	22 29	23 30	24 31	25	26	
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													5 c	Cancel	(_∕ ₽ s	iearch	D

Figure 38: Searching by Calling and Called Numbers

To find Calling and Called numbers:

- 1. Type the calling number in the **Calling numbers:** field. Use the wildcards "?" and "*" for ranges of numbers. The example above gives calling numbers from 1240-9 and any called number beginning in 4, that is from 4000 to 4999.
- 2. Select the operator value and or or. Using and returns records from the calling number range and called number range, using or returns records that contain either. This is often used when setting filters to listen to calls made or received by a specific user. The calling number and the called number would be the same number separated by or operator, this would return all calls that a certain agent had either made or received.
- 3. Type the called number in the **Called numbers:** field. Use wildcards "*" and "?" for ranges of numbers.

4. Click Search.

Only recorded calls found using the numbers, or range of numbers, that were typed in the **Calling numbers:** and **Called numbers:** boxes display in the **Recorded calls** list. This can be used for setting filters to listen to calls that were made or received by a specific user. The calling number and the called number would be the same value, separated by **or**. This would then return all calls that the user has either made or received.

To return to displaying all recorded calls, click **Disable Filter** at the top right of the screen.

Alphanumeric Characters

GQM supports extensions, DNs, and terminals that include alphanumeric characters. The following characters are supported:

Character Type	Valid Characters
Letters	A-Z, a-z
Numbers	0-9
Symbols	@ & + \$ % ' . , : ; ! ~ () [] #

Table 1: Valid Alphanumeric Characters for Extensions, DNs and Terminals

Ranges can only use numeric characters, for example: 1234–5678, or a regular expression. Multiple ranges must be separated by commas (,) with no additional spaces, for example: 1000–1900, 2000–2700, 3200–3500.

Using Wild Cards to Search

Wild card characters can be used in find fields as follows:

? character represents an arbitrary character

* character represents an arbitrary string

Examples of the use of wild cards are as follows:

Specifying a range: 200? selects the numbers from 2000 to 2009;

20?? selects the numbers from 2000 to 2099

Specifying all numbers: 2* selects all phone numbers which start with the number 2;

*2 selects all phone numbers which end with the number 2

Searching for Calls by Type

Navigate to: Recorded calls > Search.

Call Recording is able to distinguish call patterns and determine which recordings belong to a type of call, such as a conference call between three different callers. The types of calls that the user can search for include the following:

- All
- Normal
- Conference

To search for calls by their type:

- 1. Select the Type of call from the drop down list.
- 2. Click Search.

Only recorded calls of the type selected display in the Recorded calls list.

Searching for Calls by Date-Time Range

Navigate to: Recorded calls > Search.

All calls are identified by their date, time, and duration. Call Recording uses standard calendar controls to enable the user to identify their own time ranges. The user can also use pre-configured time ranges, or search during hourly ranges.

Close 🗙 💭 Search filter Choose filter: Choose filter Filter name: **V** 🕓 Load 👸 Save Delete All users Calling numbers: and or Called numbers: Case sensitive: Description Type of call All **V** < 🖵 Random selection Couples count: Min.: Call length Max.: Locked only: Calls with the same number fi ch occurred more than 0 No filte No filter -From * To: 10 minutes ago < 2012 - ▷ March **• •** April 💌 🕨 30 minutes ago One hour ago Wk Mo Tu We Th Fr Sa Wk Mo Tu We Three hours ago 9 13 Six hours ago 10 5 6 7 Last 24 hours 14 4 Last 48 hours 11 12 13 14 15 11 12 13 9 10 14 15 12 25 16 16 17 18 19 20 **17** 23 24 25 26 27 28 29 13 28 30 29 31 18 30 14 17/03/12 00:00:00 Daily hours from Daily hours to No problem × Just one stream recorded = Problem Status: No stream recorded. ÷ Unknown codec. 🖨 Cancel Search

To search for pre-configured time ranges:

Figure 39: Search Pre-configured Time Range

- 1. Select a pre-configured range from the **From:** drop down list or the **To:** drop down list.
- 2. Click Search.

Only recorded calls from the time range selected display in the **Recorded calls** list.

Searching for Custom Time Ranges

Navigate to: **Recorded calls > Search**.

To search for Custom Time Ranges:

P	Sear	rch f	ilter												(lose 🗙
Filter Choos	e filte	er: Ci	1005e fi lete		y Loa	■			name:					Save		
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Descrip	otion				C	ase ser	sitive:		Type of	call	A			-		
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Call le	ngth	Mir	n.:	N	lax.:				Lo	cked or	nly: 📄]				
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												🗳 o	Cancel		_∕ ⊳ s	iearch

Figure 40: Search Date Range

- 1. Select a starting date-time in the From: calendar control.
- 2. An ending date-time in the To: calendar control must also be selected.
- 3. Click Search.

Only recorded calls in the date-time range selected display in the **Recorded calls** list.

Searching for Calls During a Standard Time Range

Navigate to: Recorded calls > Search.

To search for Daily hours:

To display calls that were recorded during a standard daily time range, such as calls between 8 am and 10 am, use **Daily hours** to find the recorded calls.

Note: Use the time format HH:MM:SS AM/PM.

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11 12	12	13 20	14 21	15 22	16 23	17 24	18 25		15	9	10 17	11	12	13	14	15
12	19 26	20	21	22	30	31	25		16 17	16 23	24	18 25	19 26	20 27	21 28	22 29
14	20	27	20	23	30	31			18	30	24	23	20	27	20	23
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Daily	hours f	from							Daily	hours	to					
Probler	m Statu	51	No str	ne stre	am rec corded lec.				0	▲ ■ ▼						
												🛱 0	Cancel		₽ s	iearch

Figure 41: Search Time Range

- 1. Type the **Daily hours from** starting time.
- 2. Type the Daily hours to ending time.
- 3. Click Search.

Only recorded calls that are within the **Daily hours** range selected display in the **Recorded calls** list.

Check the fields below the calendars to ensure that the selection criteria have been registered correctly. Call Recording reads the fields below the calendars for the selected date and time ranges, and not the calendars themselves.

Searching for Calls by Description

Navigate to: Recorded calls > Search.

The **Recorded calls** tab in Call Recording displays comments typed in the **Description** column in call records by users. Users can search for calls using these comments.

P	Sea	rch f	ilter												(lose 🗙
Filter	5:															
Choos	e filter	Cho	ose filte	r		-	Filter	na	ame:							
	đ] Del	ete	ß	Load		All use	ers				6	Sav	/e		
Calling	numbe	rs:			0) and) or	С	alled nur	nbers:		_		_		
Descrip	tion				Cas	e sensi	tive: 📄	Ţ	ype of ca	all	All		-			
Couple	s count	<	-					R	andom s	election						
Call ler	igth	Min.:		Max	G:				Locked	d only:						
Calls w	ith the :	same n	umber	from	to 🔘	or both	n) wh	ich	occurre	d more	than 0					
From					No filte	r	Ŧ		To:					No filte	r	-
۹ J	une	•		₫ 2	011 .				4 J	uly	Ŧ	▶	₫ 2	011 .		
Wk	Su	Мо	Tu	We	Th	Fr	Sa		Wk	Su	Мо	Tu	We	Th	Fr	Sa
22				1	2	з	4		26						1	2
23	5	6	7	8	9	10	11		27	3	4	5	6	7	8	9
24	12	13	14	15	16	17	18		28	10	11	12	13	14	15	16
25	19	20	21	22	23	24	25		29	17	18	19	20	21	22	23
26	26	27	28	29	30				30	24	25	26	27	28	29	30
27									31	31						
Dail	y hours	from	6/21/	11 12:0	0:00 AN				Dail	y hours	to					
Probler	n Statu	51	No str	oblem ne strea eam rec wn cod	orded.	rded.			-							
											[B	Cance		P	Search

Figure 42: Search by Description

- 1. Type the search terms in the **Description** field.
- 2. Select Case sensitive:, if the search must match upper and lower case.
- 3. Click Search.

Only recorded calls containing comments matching the user terms display in the **Recorded calls** list.

To return to displaying all recorded calls, click **Disable Filter**.

Important:

Comments in the **Description** field must use standard terminology to make searching for calls more accurate.

Searching for Calls by Couples Count

Navigate to: Recorded calls > Search.

Each call has at least one couple. A couple is a pair of RTP streams that correspond to the two directions of media in a telephone conversation. A couple is created at the start of a call ,or call section, and ends when an event in the call signaling closes the RTP stream. When a user transfers a call, or has a conference call, each new connection is a new call couple. These related call couples can be found by the number of couples they have. Transferred calls are > greater than 1. Conference calls are > greater than 2.

- 1. Select <less than, = equal to, or >greater than from the drop down list.
- 2. Type the number of call couples.
- 3. Click Search.

Only recorded calls with the number of call couples selected display in the **Recorded calls** list.

Searching for Calls by Call Length

Navigate to: Recorded calls > Search.

Call Recording enables the user to find calls based on their total length.

- 1. Type the minimum call length in the Min.: field (hh:mm:ss).
- 2. Type the maximum call length in the Max.: field (hh:mm:ss).

Note: There can be a combination of Min.: and Max.: or only using one value.

3. Click Search.

Only recorded calls within the length selected display in the Recorded calls list.

Searching for Calls from the Same Numbers

Navigate to: **Recorded calls > Search**.

Call Recording enables the user to find phone numbers that are repeatedly connected to each other. If there is a customer who calls repeatedly, or an agent who makes many calls to the same number, it is possible to find these patterns.

- 1. Select Calls from the same number.
- from: The same number calls the call center repeatedly.
- to: The same agent calls outside repeatedly.
- both: The same number calls the same agent repeatedly.
- 2. Type a number into the which occurred more than field.
- 3. Click Search.

Only recorded calls that meet the criteria display in the Recorded calls list.

Displaying Call Search Results Randomly

Navigate to: **Recorded calls > Search**.

The call search results randomizer helps a call quality controller to have a more objective perspective on call search results. To display the search results in random order, instead of by date-time order, select the **Random selection** checkbox.

Searching for Calls by External Data

When Call Recording is integrated with other applications, such as a Cisco Unified Communications Manager or CIM, additional data can be passed from the external application to Call Recording. Call Recording can then use this data to find call records.

Important:

The system administrator must enable **Advanced search:**, and add external data fields to Call Recording before a search can be made for external data.

Searching for Calls by Agent Names

Navigate to: **Recorded calls > Search**.

In many call centers, agents can sit at any terminal. Each agent has a unique identifier in the Call Manager, name or ID number, that attributes call activity to the agent not the terminal.

- 1. In Advanced search:, select or type an Agent Name.
- 2. Click Search.

Only recorded calls involving the agent selected display in the **Recorded calls** list.

Searching with Other External Data

The system administrator can add additional fields, depending on the external data stored in systems that are integrated with Call Recording.

item key	Text		Туре	Match	Sort	
CCX_Variable_ZIPCod	CCX Zip Cod	е	AutoSelect -	EQUALS	-	
Up Down Remo	ve	Use	d in #filters/#viev	v restrictions:Not	used.	
Item key	Text		Туре	Match	Sort	
CCX CEG EullName	CCX Full Nar	1e	AutoSelect -	EQUALS	-	
CALLED_STREAM_PA CALLED_URL CALLING STREAM PA		Use	d in #filters/#viev	v restrictions: No	t used.	
CALLING_URL CCX_ANI CCX_ApplicationID			Туре	Match	Sort	
CCX_CallID CCX CallType		ID	Input -	EQUALS	•	
CCX_CFG_Extension CCX_CFG_FirstName		Use	d in #filters/#viev	v restrictions:Not	used.	
CCX_CFG_FullName						
CCX_CFG_LastName CCX_CFG_LoginID			Туре	Match	Sort	
CCX_CSQID	Number	ason	Input -	EQUALS	-	
CCX_Variable_Account CCX_Variable_Activatio CCX_Variable_Amount		Use	d in #filters/#viev	v restrictions:Not	used.	
CCX_Variable_BillingInd CCX Variable Contract						
CCX_Variable_Contract		Text		Туре	Match	Sort
CALLED STREAM PA	YLOAD	value			EQUALS	-

Figure 43: Selecting Data for Search Dropdown

The figure shows an example of the types of external data available in the **Item key** drop-down list.

Navigate to: Recorded calls > Search.

ilter hoo	s: se filte	IT Ch	oose fi	ter		_	Filt	er	name:	_						
		Del			Loa	- T			's 🥅			[H :	Sava		
		_	ete		_						_			Jave		
Calling Descri	g numbe ntion	ars:			-	-	itive:		Called n		s: Al					
	es count	<	-					-	Random							
Call le	ngth	Min		M	ax.:				Lock	ed only	y: 📄					
Calls v	with the	same	numbe	r from) to () or bo	th) w	hic	h occurr	ed mo	re than	0				
From					No filte	r	-		To:					No filte	er	-
4 6	March			4 2	2010 .					lay			4 3	2012 .		
Wk	_	Мо	Tu	We	Th	Fr	Sa		Wk	Su	Мо	Tu	We	Th	Fr	Sa
<u>9</u>	Su	1	2	3	4	5	5a 6		18	Su	MO	1	vve 2	3	Fr 4	5a 5
10	7	8	9	10	11	12	13		19	6	7	8	9	10	11	12
11	14	15	16	17	18	19	20		20	13	14	15	16	17	18	19
12	21	22	23	24	25	26	27		21	20	21	22	23	24	25	26
13	28	29	30	31					22	27	28	29	30	31		
14				10.00.0					23						_	
Daily	hours f		3/6/10	12:00:0	UAM	_			Daily	hours	to				-	
			No pro													
Proble	m Statu	ISI		ne stre ream re		orded.										
	_			own coo						-						
				bove a	nd belo	w 🔘 a	and 🔘 d	or								
	nced s			م احما	nd hala		ind (ind a	_	- 1							
	 inser 				a belo	w 🕑 a			- 1							
CCX A	<u> </u>			_		_		Ŧ	CCX		/pe					•
CCXL	oqin ID							Ţ		Accour	nt					-
	Activatio		_					5	Num CCX	er Servic		_	_	_	_	-
Date			_					•	Туре							-
CCX Z	tip Code	2						•		Full Na		Collect Insurar				
ITAPI	_CISO	O_ID							Coup reaso	le start n		Sales	-			_
															_	_

Figure 44: Search with External Data

These fields display in the Advanced search: area, below standard searches.

1. Select and or or in the section Condition connecting data above and below.

Selecting **and** means that the search only returns calls that satisfy both the criteria in the top of the form and the **Advanced search:** criteria. Selecting **or** means that the search returns calls that satisfy either the criteria in the top of the form or the criteria in the **Advanced search:** or both.

 Select and or or in Condition between the options displayed below. Selecting and means that the search only returns calls that satisfy all the selected criteria in the Advanced search: criteria. Selecting or means that the search returns calls that satisfy at least one of the Advanced search: criteria. Select case **insensitive** if the data does not need to match the case in the external data selected or **sensitive** if it does need to match the case in the external data selected.

- 3. Depending on how each External data Key has been set up, type the criteria or select from the drop-down lists for each key to be searched for.
- 4. Click Search.



Chapter

5 Using On Demand Prerecording

Prerecording enables the user to save particular the calls. All other calls are recorded, but not saved.

Prerecording differs from regular recording because it is On Demand. Prerecording is activated from the Cisco IP phones that support XML services. The system administrator must configure prerecording in both CUCM and Call Recording.

This chapter contains the following sections:

Prerecording Principles Working with Calls in Progress Saving a Completed Call Tagging a Call with Call Information (External Data)

Prerecording Principles

Prerecording is the process of recording all calls, while only permanently saving the recordings identified by the phone user. This means that while a call is in progress, or shortly after a call has been completed, the phone user has the ability to save the call recording. If the user does not save the call within this time, the call recording is discarded.

The amount of time the user has to save the call can be adjusted by the system administrator. The default is 2 minutes.

Working with Calls in Progress

Note: The Cisco IP phone must be configured to provide prerecording services through Call Recording. Depending on the IP phone model and configuration, some steps may be slightly different than described here. Consult the IP phone documentation and system administrator.

When prerecording is configured for the Cisco IP phone, the user can choose to save any call in progress, or a call that has recently been completed.

Saving a Call in Progress:

Press the Services button on the Cisco IP phone.



Figure 45: Saving Call Recording Services on the Cisco IP Phone

Select Genesys Call Recording from the list of options.



Figure 46: Saving a Call in Progress

Select Save.

The call recording is saved to the database, and when it is completed it is available for playback on the **Recorded calls** tab of Call Recording.

Sending a Call in Progress as an Email Attachment

- 1. Press the Services button on the Cisco IP phone.
- 2. Select Genesys Call Recording from the list of options.
- 3. Select Send by email.

After the call is completed, Call Recording sends an email with the call recording.

Important:

The email address is set when the Cisco IP phone is configured to include prerecording.
Saving a Call in Progress and Sending it as an Email Attachment

- 1. Press the Services button on the Cisco IP phone.
- 2. Select Genesys Call Recording from the list of options.
- 3. Select Save and send by email.

The call recording is saved to the database, and when it is completed it is available for playback on the **Recorded calls** tab of Call Recording. In addition, the call recording is sent to email as an attachment.

Sending a Call Recording to a Different Email Address

- 1. Press the Services button on the Cisco IP phone.
- 2. Select Genesys Call Recording from the list of options.
- 3. Select Send by email to.



Figure 47: Inserting a New Email Address

- 4. Enter the email address. Use the # key to enter the @ symbol.
- 5. Select Send.

The call recording is sent as an attachment to the email address entered.

Saving a Completed Call

Prerecording enables the user to save calls that have already been completed. The user has a limited amount of time to save completed calls, typically 2-10 minutes.

Note: The user must save the call within the period set by the system administrator. Calls that are not saved within this time period cannot be recovered. PIN codes may be required, depending on the system setup.

- 1. Press the Services button on the Cisco IP phone.
- 2. Select Genesys Call Recording from the list of options.
- 3. Select Prerecorded calls.



Figure 48: Saving Completed Calls

- 4. Select the call from the list.
- 5. Select Save

The call recording is saved to the database, and is available for playback on the **Recorded calls** tab of Call Recording.

Tagging a Call with Call Information (External Data)

If configured by the system administrator, the user can add supplementary call information to a current or completed call through another IP phone service; this action is known as 'tagging' a call. Call tagging is often used to categorize a call for later filtering. Typical tag options can be for example: "Presales", "Sales", and "Support".

Call tagging automatically marks the call for recording and saves the tag data together with the call. Tag information is visible when browsing through recorded calls in the Call Recording user interface.

Call tagging is not enabled by default for prerecording, so must be configured by the system administrator. The call must be tagged within the period set by the administrator.

To tag an in-progress or completed call:

- 1. The system administrator provides the name of the call information IP phone service.
- 2. Press the Services button on the Cisco IP phone.
- 3. Select the service, for example "Call Recording call-info", from the list of options.



Figure 49: Tagging a Prerecorded Call

4. Select the appropriate tag value and press Select.

5. Call Recording tags the call with this value and marks the call for saving.

Chapter 5 Using On Demand Prerecording

GQM Suite User Guide



Chapter

6 Live Monitor

This chapter describes how to open and use Live Monitor.

This chapter contains the following sections:

Live Monitor Overview Running Live Monitor Understanding Live Monitor Listening to Live Calls Saving Live Call Recordings Emailing Live Call Recordings Adding Editable External Data to Live Calls Sorting Live Calls

Live Monitor Overview

Live Monitor is a key assessment tool that enables a Call Recording user to monitor an agent's calls in real time. Live Monitor enables the management team to silently listen to a call with the option of recording the call on demand, and then saving or emailing the data.

While the rest of Call Recording is devoted to monitoring saved calls, Live Monitor is specifically designed to enable the user to monitor live calls as they occur.

Depending on the system settings, it may take a few moments before Live Monitor launches.

Live Monitor runs as a standalone JAVA application outside the internet browser. The user must have JAVA Runtime Environment installed for it to work. Download it free from this URL <u>http://www.java.com/en/download/</u>

Running Live Monitor

To run Live Monitor:

Click on the Live Monitor tab in Call Recording.

A prompt appears to download and open the application.

Opening LiveMonitor.jnlp	×
You have chosen to open	
LiveMonitor.jnlp	
which is a: JNLP File	
from: http://docs-callrec1.office.zoomint.com	
What should Firefox do with this file?	
Open with Java(TM) Web Start Launcher (default)	
Save File	
Do this <u>a</u> utomatically for files like this from now on.	
OK Cancel	

Figure 50: Download Prompt for Live Monitor

Click **OK**. A security warning displays.

If the user does not have sufficient permissions they may have to contact the system administrator.

73



Figure 51: Security Warning

Click Run.

The Live Monitor User interface opens.

Understanding Live Monitor

Live Monitor only displays calls in progress that are within the defined number range. The number range is specified by the filters for that user in Call Recording. Since VoIP technologies work in real-time, high network latency can be an issue for Live Monitor.

For example, if Call Recording is deployed on a WAN that uses only T1 lines, @1.5Mbps, the network can have a latency of around 300ms, which makes use of Live Monitor impractical.

In this scenario, Live Monitor cannot be supported by Genesys Labs, Inc..

Once a call is completed, it is no longer displayed in the list. Calls display according to when they started, with earlier calls appearing at the bottom of the list. The user can change the display order of Live Monitor by right-clicking in any column heading.

Important:

Live Monitor localization is based on the computer's regional settings that Live Monitor is initialized on. For example, in Windows 7 it is at **Control Panel > Region and Language > Keyboards and Languages**.

Listening to Live Calls

When the user launches Live Monitor, all the active calls in the system that the user is permitted to view, display in a list. For Active Recording the monitored calls must be being recorded, for Passive Recording all calls are available via the SPAN port. No specific recording rules are necessary for Live Monitor. Supervisors can only view the selected calls within their assigned number range and if they have the Live Monitor Privilege. Set the Privilege and Number range in the **Users** tab for the group that the supervisor belongs to using **Edit Group**.

Calling number	Called number	Record status	
5515	5680		
Audio		Note Volu	me
Primary Sound Dri	ver, version Unkn 👻	- Yeen in	
	Audio		

Figure 52: Live Monitor User Interface

Select a call to monitor. In this case there is only one call available.



Figure 53: Live Monitor User Interface Call Selected

The background behind the call details turns orange when selected.

Select a call from the list. To listen to the call click on the user interface. Live Monitor plays the conversation on the system. When playing the call this is replaced by . To stop listening to the call click .

Audio	Balance	Volume
Primary Sound Driver, version Unkn 👻		· · · · · · · · · ·

Figure 54: Volume and Balance

The user can adjust the call Balance and Volume as appropriate.

	Calling number	Called number	Record status	
35:04	5515	5680	S 🛛	
ride black and see all do to		Non-editable external data		
Editable external data				
	Supervisor Comment Value	SPANLESS_CALLED_REC	earend	
Supervisor Comment	Supervisor Comment Value	SPANLESS_CALLED_REC n SPANLESS_CALLING_REC f		-
Editable external data Supervisor Comment Agent Rating Trained		SPANLESS_CALLING_REC f		• •

Figure 55: Live MonitorCall External Data

To view the external data related to the call, click the icon on the bottom left as shown, this displays both editable and non-editable external data information panes.

Saving Live Call Recordings

Live Monitor displays the current call recording status for each call within the call monitoring GUI. The status shown largely depends on the system configuration, however the user can select prerecorded calls to save them for later playback.

If a call is being recorded and can be saved, then the 🔜 icon is shown under the Record status header.

If it is not possible to save a call due to it not being recorded, then the $\overline{}$ icon is shown under the Record status header.

If a call is being prerecorded, then the *with the the conders of the conders of* status header for the call.

If this is the case, and the user would like to save the call for later playback, click this icon. The icon then changes to show that it can be saved, and when the call is completed, it appears in the Call Recording Recorded Calls tab.

When a call is completed, it is not saved and appears in the Recorded calls list in the Call Recording Web UI until it has been deselected in the Live Monitor client.



Emailing Live Call Recordings

While a call is in progress an email icon is visible on the right of the call details.



Figure 56: Live Monitor Email Icon

- 1. Select Send to Email.
- 2. Type the email address in the Enter your email: section.
- 3. Click OK.

When the call is completed, the call recording is sent as an attachment to the email address entered.

Adding Editable External Data to Live Calls

When the user selects a call, they can add data to the call record. This information stays with the call and can be used to evaluate agents or add notes about the conversation.

Custom data fields can be added to Live Monitor by the system administrator. The administrator must enable External Data Customization for these fields to be editable.

Duration	Caling number		Called number	Record status	_
35:36		5515	5680	R 🛛	
Editable external data			Non-editable external data		_
Supervisor Comment	Bad introduction		SPANLESS_CALLING_RE		
Agent Rating	Good -		JTAPI_CALLED_TERMIN		
Trained	V		SPANLESS_REC_ID	24752872	1
			CALLING_URL	192.168.7.36:29122(1104)	
			COUPLE_START_REASO	N NORMAL	
			SPANLESS_REC_INFO	QA-R310-A_TRUNK[7001]	
		Audio Primary Sound I	Driver, version Unkn 👻	Balance Volume	

Figure 57: Adding Editable External Call Data

- 1. Select a call from the list.
- 2. Click the notes button to display the external data.
- 3. Add comments, select from available drop-down lists, or select the appropriate checkboxes.
- 4. To save the changes, click the save notes button.

When the call is completed this data is available in both Call Recording and Quality Manager, and can be used for filtering and searching for calls.

Sorting Live Calls

The user can change the display of Live Monitor by right-clicking in a column heading. This enables the user to enter a filter, such as a phone number or agent name, and display only matching calls in the list.

To clear column display settings, and return to viewing all available calls, rightclick in a column heading and then press Enter on the keyboard.

Setting duration thresholds:



Figure 58: Record status

The **Duration** column displays calls by how long they have remained connected. To screen out longer or shorter calls, the user can change the **Duration** threshold. Right-click on the **Duration** column heading.



Figure 59: Duration

Select Less than < or Greater than > and enter the number of minutes. Click ... to apply the **Duration** threshold.

Only calls under or over the threshold display in the Live Monitor call list.

Displaying calls by **Record status**:

By default, Live Monitor displays all calls in the Call Recording system.

To change the display to only show calls with a specific recording status, right click on **Record status** a drop down list appears with the following Options:

- Call is being recorded
- Call record status is not determined yet
- · Call is not being recorded

- Call is being pre-recorded: click to save
- Call can be sent by email: click to send

Chapter 6 Live Monitor



Chapter

7 Advanced Player

This chapter describes how to use Advanced Player. This chapter contains the following sections:

Using the Advanced Player Using the Advanced Player Controls Playing Multiple Calls Finding Related Calls Adjusting Call Offsets Isolating Calls Call Couple Examples

Using the Advanced Player

Genesys Call Recording includes an Advanced Player that enables the user to listen to multiple calls, select sections of calls, arrange the order of call playback, and isolate individual call streams.

<	< 123 >>	Count 10 🚽 1 - 10 from 30 (query	took 0.15 seconds)	Send to email	Advanced	I PLAYER
	🔺 🗉 🛛 Date	Beginning	Length	From	To	
V	Jul 19, 2011	8:54:50 AM	0:15	5655 (5655 SLR)	5682	4 i B
	Jul 19, 2011	8:53:53 AM	0:12	5655 (5655 SLR)	5682	4 i 🖻
	Jul 19, 2011	8:53:11 AM	0:14	5655 (5655 SLR)	5682	4 i 🖻
V	Jul 19, 2011	8:52:48 AM	0:11	5655 (5655 SLR)	5682	4 i B
	Jul 19, 2011	8:47:48 AM	0:11	5655 (5655 SLR)	5682	4 i 🖻
	Jul 19, 2011	8:47:24 AM	0:11	5655 (5655 SLR)	5682	4 i d
	Jul 19, 2011	8:46:54 AM	0:11	5655 (5655 SLR)	5682	i d
	Jul 18, 2011	3:24:11 PM	0:06	5500	5680	🖬 i 🖻
	Jul 18, 2011	3:21:40 PM	0:07	5500	5680	i B
	Jul 18, 2011	3:13:31 PM	0:04	5500	5680	🕯 i 🖻
	🗖 🗉 🛛 Date	Beginning	Length	From	🔺 То	

Figure 60: Opening Advanced PLAYER

To open Advanced PLAYER:

- 1. Select one or more call check boxes.
- 2. Click **Advanced PLAYER**. The calls are represented on the timeline as blue bars starting on the left and finishing on the right. The word **ready** appears on each blue bar when the call is downloaded and ready to play.
- 3. The user can click on the calls and drag them across the timeline from right to left to remove any gaps in the calls where no one was speaking. To do this click on a blue bar and drag it to the left until the left hand edge of the latter call is above or below the right hand edge of the preceding call.



Figure 61: The Advanced PLAYER window

Using the Advanced Player Controls

The **Advanced PLAYER** uses standard audio playback, rewind, and repeat control buttons. The Master volume is controlled with a slider control.



Figure 62: Advanced PLAYER playback controls

The user can enlarge the audio track display, make the display smaller, or reset the size to its original position. This enables the user to navigate between tracks and move their relative positions when they are replaying multiple call recordings.



Figure 63: Audio track size and reset

To mute an individual call, click the call's speaker icon. To adjust the volume up or down, use the call's volume slider. Click **Isolate** to hear only that call recording.



Figure 64: Call's Related Controls

Use the **Call Selection** controls to identify a section of recordings. Use the red cursor line to select the Start (|<) and End (>|) points. If the user clicks **Selection**, only the selection between these points plays. Click on X to clear the selection area.



Figure 65: Calls Selection Controls

Playing Multiple Calls

Figure 66: Opening the Advanced PLAYER

- 1. In the **Recorded calls** tab, select multiple calls by clicking their check boxes.
- 2. Click Advanced PLAYER. The Advanced PLAYER window opens with those calls ready to play in sequential order.



Figure 67: The Advanced PLAYER window

Use the red cursor line to move within the recordings. Click the **Play** button to hear the calls.

Finding Related Calls

If the user can only find one segment of a call, for example, where there has been a transfer or consultation, the user can search for the other sections of the call using the external data that is common to all parts of the call.

To search for the related segments of the call first, the user must have the following External Item keys available in the **Advanced search**:

For Genesys CIM use:

GEN_TEV_CALL_Uuid

GEN_TEV_ConnID

Finding Related Calls Using an Item Key Value

▲ 💌 🗉 Date	Beginning	From	▲ ▼ То	GEN_TEV_CALL_Uuid
Nov 21, 2012	1:11:26 PM	5646	5622	20597325
Nov 21, 2012	1:11:24 PM	5640	5616	20597324
Nov 21, 2012	1:11:23 PM	5642	5618	20597323
Nov 21, 2012	1:11:22 PM	5648	5624	20597322
Nov 21, 2012	1:11:20 PM	5644	5620	20597321
Nov 21, 2012	1:11:19 PM	5646	5622	20597320
Nov 21, 2012	1:11:17 PM	5640	5616	20597319
Nov 21, 2012	1:11:16 PM	5642	5618	20597318
Nov 21, 2012	1:11:15 PM	5648	5624	20597317
Nov 21, 2012	1:11:13 PM	5644	5620	20597316
🔺 🗉 🗉 Date	▲ ▼ Beginning	From	▲▼ То	GEN_TEV_CALL_Uuid

In the Recorded calls list:

Figure 68: Recorded Calls list Showing Item key

If the Item key is displayed in a column, then copy and paste the value from the column corresponding to the call segment already found into the corresponding part of the **Advanced search:** If the item key is not in a column click the call information icon in the row corresponding to the part of the call that was found. The call description frame displays.

	External Data
Кеу	Value
GEN_CFG_EmployeeID	MA
GEN_CFG_FirstName	Michel
GEN_CFG_FULLNAME	Michel Angelou
GEN_CFG_LastName	Angelou
GEN_CFG_Switch	SIP_Switch
GEN_CFG_Tenant	Resources
GEN_CFG_UserName	MAngelou
GEN_REC_RECORDING_STATUS_GIM	RECORDING_YES
GEN_REC_RECORDING_VIDEO_STATUS_GIM	RECORDING_NO
GEN_TEV_AgentID	1802
GEN_TEV_CallID	57
GEN_TEV_CallType	Outbound
GEN_TEV_CallUuid	4JBJVTNB216E397G36FOS18C1G00001P
GEN_TEV_ConnID	0072021a63f80037

Call Description with External Data

Scroll down to find the appropriate Item key, for example, GEN_TEV_CALL_Uuid and right click and copy the value.

Navigate to **Recorded calls > Search**. The search dialog box displays.

From: No filter 🗸						To:					No filte	er	-				
۵ ک	ctober	Ŧ		4 🛛	2012 -				4	lovemb	er 🗸		4 🛛	2012			
Wk	Su	Мо	Tu	We	Th	Fr	Sa		Wk	Su	Мо	Tu	We	Th	Fr	Sa	
40		1	2	3	4	5	6		44					1	2	3	
41	7	8	9	10	11	12	13		45	4	5	6	7	8	9	10	
42	14	15	16	17	18	19	20		46	-11	12	13	14	15	16	17	
43	21	22	23	24	25	26	27		47	18	19	20	21	22	23	24	
44	28	29	30	31					48	25	26	27	28	29	30		
45									49								
Daily	hours f		10/21/1	12 12:00):00 AN	4			Daily	hours t	to						
Proble	m Statu	151	No str	oblem ne strei ream rei own coo	corded.					Î.							
Condit	ion con	necting	data a	bove a	nd belo	w 🔘	and 🔘 o	r									
Advanced search: Condition between options displayed below () and () or																	
Case (i) insensitive (in sensitive																	
Gancel & Search																	



Paste the value into the field provided.

Click Search.

The search returns all the sections of the call.

In the **Recorded calls** list, select the checkboxes for all the segments of the call and then select **Advanced PLAYER**.

Adjusting Call Offsets

Call offsets are the gaps between calls. These gaps can be small, less than one second, or large. To close the gaps, use the mouse to drag the call tracks closer together.

To return all the offsets to their original positions, click recall offsets.



Figure 70: Recall Offsets Button

Isolating Calls

To hear only one of the selected calls, and mute all other calls, click **ISOLATE** next to the call identification information.



Figure 71: Isolating a Call

Clicking **ISOLATE** again turns all calls back on.

Call Couple Examples

The number of recorded call files created by Call Recording depends on the type of call. Conference Calls, Transferred Calls, Barged Calls, and cBarge Calls are all handled differently, resulting in different combinations and lengths of recorded call files.

Call Recording enables the user to play any individual call by clicking on it. The user can also select groups of related calls to be played back together. When the user plays back a group of related call recordings in **Advanced PLAYER**, they see and hear all call streams in their proper sequence.

Transferred Calls

- Caller A connects with Caller B.
- Caller B connects with Caller C, requesting a transfer.
- Call is accepted by Caller C, and Caller B hangs up.
- Caller A connects with Caller C.
- The result is three different files.

Caller A connects with Caller B. File 1 is created.

Caller B connects with Caller C. File 2 is created.

Caller A connects with Caller C. File 3 is created.

	A -> B	B Transfers to C	A + B
Α	File 1	File 2	File 3
В		hanging-up	
С		File 2	File 3

Table 2: Storing transferred calls

When the user listens to a Transfer call in **Advanced PLAYER**, they see and hear all three call recording files.



Figure 72: Transfer Call in Advanced PLAYER

Barge Calls

- Caller A connects with Caller B.
- Caller C listens to the conversation between Caller A and Caller B.
- The result is two different files.

Caller A connects with Caller B. File 1 is created.

Caller C listens to conversation. File 2 is created, containing only the portion of the call that Caller C hears. Compare the following table with that for cBarge Calls.



Table 3: Storing listening-in (Barge)

When the user listens to a barge call in **Advanced PLAYER**, they see and hear both calls.



Figure 73: Barge Call in Advanced PLAYER

cBarge Calls

The cBarge model turns a two-sided call into a conference call when a third person listens in.

- Caller A connects with Caller B.
- Caller C listens in to the conversation between Caller A and Caller B.
- The result is four different files.

Caller A connects with Caller B. File 1 is created.

Caller C listens to the conversation. Files 2, 3, and 4 are created.

	A -> B	C Listen-in
А	File 1	File 2
В		File 3
С		File 4

Table 4: Storing listening-in (cBarge)

When the user listens to a cBarge call in **Advanced PLAYER**, they see and hear all four call recording files.


Figure 74: cBarge Call in Advanced PLAYER



Conference Calls

- Caller A connects with Caller B.
- Caller C joins the conversation in the middle, and leaves it before Caller A and Caller B finish their conversation.
- The result is six different files.

Caller A calls Caller B. File 1 is created.

Caller A calls Caller C, and invites them into a conference call. This is stored as File 2.

When Caller C joins the conference, Files 3, 4, and 5 are created.

When Caller C leaves the conference before its end, the call reverts to a classic two-sided call, and the remainder of the conversation is stored as File 6.

	A -> B	A -> C	A + B + C	A + B
Α	File 1	File 2	File 3	File 6
в			File 4	
С		File 2	File 5	

Table 5: Storing a Conference Call

When the user listens to a Conference call in **Advanced PLAYER**, they see and hear all of the call recording files.



Figure 75: Conference Call in Advanced Player





Chapter

8

Getting Started with Quality Manager

This chapter describes how to access Genesys Quality Manager, update the user profile, and view system messages.

This chapter contains the following sections:

Logging in to Quality Manager Changing the Password when the System Displays a Prompt Retrieving a Forgotten Password Changing the User Language Disabling Tooltips Changing Passwords Changing the number of Records on a Page Displaying the Dashboard on Startup Viewing System Messages Delegating Evaluations

Logging in to Quality Manager

		Log In		
Log In: Password:				
	Log In	Forgot password?	Clear	

Figure 76: Log In To Quality Manager

To Log in, navigate to the Quality Manager application URL in the browser:

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

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

Important:

After two incorrect passwords, Quality Manager displays: "Warning: The next incorrect entry will lead to the account being locked." After the third attempt with the wrong password Quality Manager blocks the account for a configurable period and displays:

"Please contact your administrator to unblock your account".

Changing the Password when the System Displays a Prompt

The system displays a prompt to change the password when a password expires. A default password can only be used once. Passwords have a limited period of validity.

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

Figure 77: Choosing a New Password

Type a new password in the New Password: and Repeat Password: fields.

Retrieving a Forgotten Password

Í	
	Log In
	Log In: Anne.Agent Password:
	Log In 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	lane OK Cancel

Figure 78: Retrieving a Forgotten Password

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

Quality Manager sends a new password to the registered email account. Refresh the browser window before attempting to log in again.

Changing the User Language

To change the language:



Figure 79: Editing the User Profile

1. Click 💣 [user name] to open the User Profile tab.

User Profile 🗵			
📀 Save 😢 Cancel			
General			
My Language:	English (US)	~	
Login ID:	Česky	~	
Name:	Dansk Deutsch		
Surname:	English		
E-mail:	English (US)		
Change Password	Español Française	E	
Delegation	Latviešu Nederlands		
	Polski		
	Português (Brasil)		
User Settings	Română		
Records on a pag	e: Slovenski Slovensky		
Deathered	Suomi	-	

Figure 80: Selecting the Language

- 2. Select the language settings of the application from the **My Language:** dropdown list.
- 3. Click Save to save the changes.
- 4. Click 🛛 close on the User Profile tab to close the window.

Log out of the Quality Manager and log back in again to view the language changes. Set the browser to use the same language as the user profile, to avoid mixed-language alert messages.

To log out of the Quality Manager click *Solution* Logout.

Disabling Tooltips



Figure 81: Quality Manager User Interface

Tooltips are enabled by default, and show information boxes when the cursor points to certain Quality Manager features.

To disable Tooltips, click 🤛 Tooltips off .

Changing Passwords

To change the password:



Figure 82: Editing the User Profile

1. Click 💣 [user name] to open the User Profile tab.

		🔽 Tooltips On 🍰 CcManager, CcManager (ccmanager) 🖋 Logout 🖂 Messages
×	User Profile 🗵	
2 2 2 3 2 2 2 2 3 3 5 2 2 3 5 5 2 2 3 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5	📀 Save 😫 Cancel	
 Dashboard Dashboard 	General	
Questionnaires	My Language:	English (US)
Geports Geports Generation	Login ID:	comanager
Administration About	Name:	CcManager
	Surname:	CcManager
	E-mail:	jane.doe@company.com
	Change Password	Choose a New Password
	User Settings Records on a page: Dashboard Display On Startup:	Change and Continue Cancel
×		🧶 1024x768

Figure 83: Changing The password

- 2. Click **Change Password**. The **Choose a New Password** dialog box displays.
- 3. Type the original password in the Old Password: field.
- 4. Type the new password in the **New Password:** and **Repeat Password:** fields.
- 5. Click Change and Continue to save the changes.
- 6. Click 🛛 exit on the User Profile tab to close the User Profile tab.

Important:

Choose a password that has not been used for the last four password changes.

Use eight or more characters with at least: one number (0-9), one lowercase letter (a-z), and one upper case letter (A-Z).

Where Quality Manager imports users from external systems, the external system dictates passwords for those users.

Please contact the administrator for details of settings.

Changing the number of Records on a Page

To change the number of records that Quality Manager displays on a page:



Figure 84: Editing the User Profile

1. Click 🍰 [user name] to open the User Profile tab.

		🖓 Tooltips Off 🍰 CcManager, CcManager (ccmanager) 🎤 Logout 🖂 Messages
«	User Profile 🗵	
la series and series a	📀 Save 😫 Cancel	
😨 Dashboard 🗄 💋 Evaluations	General	
	My Language:	English (US)
⊞	Login ID:	ccmanager
 Administration About 	Name:	CcManager
	Surname:	CcManager
	E-mail:	dina.vachova@zoomint.com
	Change Password	
	User Settings	
	Records on a page	: 50
	Dashboard Display On Startup	:

Figure 85: Changing the number of Records on a Page

- Type the number of rows that display in **Records on a Page** to display in the **Evaluation List** and **User Manager** screens. The default number of rows is 50. This displays a whole screen of rows with minimal scrolling on a 1680 x 1050 screen. For smaller screens type a smaller number in **Records on a Page**.
- 3. Click Save to update the user profile, or Cancel to close the tab without saving.

Log out of Quality Manager and log back in again to view the changes.

To log out of the Quality Manager click P Logout.

Displaying the Dashboard on Startup

To display the dashboard on startup.



Figure 86: Editing the User Profile

1. Click 💣 [user name] to open the User Profile tab.

		🖓 Toottips Off 🍰 CcManager, CcManager (ccmanager) 🚀 Logout 🖂 Messages
«	User Profile 🗷	
♀ >>	📀 Save 😢 Cancel	
 Dashboard Dashboard 	General	
🗉 📁 Questionnaires	My Language:	English (US)
⊞	Login ID:	ccmanager
About	Name:	CcManager
	Surname:	CcManager
	E-mail:	dina.vachova@zoomint.com
	Change Password	
	User Settings	
	Records on a page	:: 50
	Dashboard Display On Startur	

Figure 87: Displaying the Dashboard on Startup

 Select the Display on Startup: checkbox if one or more Dashboard widgets are defined, to display the Dashboard immediately after logging in if required.

Log out of Quality Manager and log back in again to view the changes.

To log out of the Quality Manager click *P* Logout.

Log in to Quality Manager, the dashboard displays if any widgets are defined.

Viewing System Messages

Quality Manager generates system messages when an evaluation is created or completed.

		▽ To	oltips Off 🔏 CcManager, CcManag	ger (ccmanager) 🔊 Logo	ut 🖂 Messages
«	User Profile 🗷 🖡	lessages 🕷			
🔍 »	😢 Close 🗔 Marl	k As Read 🛛 🖂 Mark As I	Jnread 🖂 Delete	from 🔝 to	📑 🔍 Search
🛞 Dashboard	N. To User		From User	Subject	Date 🔻
Evaluations	🔲 1 Habart, Lu	kas	CcManager, CcManager	New evaluation creat	29/08/2012 1(🔺
∃ □ Questionnaires ∃ □ Reports	2 CcManage	er, CcManager	CcManager, CcManager	New evaluation creat	29/08/2012 1(💻
Generation	3 Cermakova	_BL, Marie	CcManager, CcManager	New evaluation created	29/08/2012 05
About	4 CcManage	er, CcManager	CcManager, CcManager	New evaluation creat	29/08/2012 09
	5 Malkova, D	Daniela	CcManager, CcManager	Evaluation feedback	27/08/2012 1
	6 Malkova, D		CcManager, CcManager	Evaluation feedback	
	7 Malkova, D	Daniela	CcManager, CcManager	New evaluation creat	27/08/2012 1
	8 testovaci,		CcManager, CcManager	New evaluation creat	
	A Page 1	of 6451 🕨 🔰 🎅	Collanader Collanader	New evaluation creat Displayin	g 1 - 50 of 322523
	To User: Ce	ermakova_BL, Marie			
	Cc:				
	Subject: Ne	ew evaluation created			
	Text: Eva	aluation (491,257) crea	ated		^
		aluator: CcManager CcM ent: Marie Cermakova_		Δ	E
	Pe	riod from: 8/29/12 12:	00 AM		-

Figure 88: Viewing System Messages

- 1. Click Messages to open the messages tab.
- 2. Select or type a date range in the effect from and effect to fields and click search.
- 3. Click an message to view the text in the Text: field.
- 4. Manage the messages in the tab. Select items and click **Mark As Read**, Mark As Unread, or **□** Delete.
- 5. To view results by page, add a page number to jump to, or tab through the pages using the arrow buttons.
- 6. Click the ² **Refresh** button.

Delegating Evaluations

To delegate evaluations:

1. Click 🍰 [user name] to open the User Profile tab.

User Profile 🛞			Ӯ Tooltips Off 🦽 CcManager, C		
📀 Save 🔀 Cancel	l.				
General					
My Language:	English	~			
Login ID:	ccmanager				
Name:	CcManager				
Surname:	CcManager				
E-mail:	dina.vachova@zoomint.com				
Change Password	d				
Delegation					
Evaluator	Kasak Tamas (tkasak)	Fro	m 24/09/2012 🔤	То	30/09/2012
Evaluator	Kosek, Tomas (tkosek) 🎽	Fro	1 24/09/2012	10	30/09/2012

Figure 89: Delegating Evaluations

- 2. Select the **Delegation** checkbox to delegate the evaluation activities to another evaluator.
- 3. Select an evaluator from the Evaluator drop down list.
- 4. Select the delegation period 🔤 From.
- 5. Select the delegation period **To**.
- 6. Click 🥝 Save.

The delegated evaluator can perform the evaluations during the specified period.



Chapter

Questionnaires

This chapter describes how to create and use questionnaires in Quality Manager. The questionnaires enable 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:

Adding a New Questionnaire

Specifying a Name and Version for a Questionnaire

Setting the Questionnaire Properties

Adding a Question Group to a Questionnaire

Adding Additional Questions and Groups to a Questionnaire

Adding Answers to a Question in a Questionnaire

Adding Additional Answers to a Question in a Questionnaire

Specifying Call Selection Rules for a Questionnaire

Specifying Access Permissions

Adding a Question to a Questionnaire

Adding and Removing Question Groups

Importing and Exporting Questionnaires

Modifying an Exported Questionnaire

Importing a Questionnaire - 1

Importing a Questionnaire - 2

Exporting a Questionnaire

Adding a New Questionnaire

🖓 Tooltips Off 🍰 CcManager, CcManager (ccmanager) 🔊 Logout 🖂 Messages									
«									
۹ 	•	Add 🖉 Edit 🤤 Remove 違 Export 🐔 Import	Enter query		🔍 Search				
🐵 Dashboard	S	Name		Ve	Scoring System				
Evaluations	\odot	ČP hovory S2S		1.0	Percentage				
Questionnaires Questionnaire Manager	\bigcirc	ČP hovory - test		1.3	Percentage				
	\bigcirc	ČP hovory - test		1.1	Percentage				
🗄 📁 Administration	\odot	ČP hovory - test		1.0	Percentage				
 About 	\odot	GLI_e-maily		1.0	Percentage				
	٢	GLI-e-maily_2		1.0	Percentage				

Figure 90: Creating A New Questionnaire

To add a new questionnaire:

- 1. Select **Questionnaires** and **Questionnaire Manager** to display the current list of questionnaires in Quality Manager.
- 2. Click O Add to add a new, blank questionnaire.

Specifying a Name and Version for a Questionnaire

			🖓 Tooltips Off 🏼 🛔 🕻	CcManager, CcManager (ccmanage	er) 🎤 Logout 🖂 Messages				
>>	Questionnaire Manage	er 🗷 Call Quality 🙁							
	📀 Add Group 🔯 Manage Groups 🔄 Properties 🚍 Call Selection Rules 📀 Permissions 🔓 Save A Copy 블 Save & Close								
	Questionnaire Name	Call Quality	Ver. 1.0	Call Status:	empty - not ready for use!				
	Group Name [Description			Percentage				
	Add Question Remove Question								
	Answer Name	Answer Description		Compliance	Percentage				

Figure 91: Specifying a Name and Version

- 1. Type a name for the questionnaire in the Questionnaire Name field.
- 2. Use the default value of 1.0 for the version if this is the first questionnaire with that name or type a new version number in the **Ver.** field if the name has been used before. The name and version combination must be unique in Quality Manager.

Setting the Questionnaire Properties

With the questionnaire selected:

1. Click Reperties on the Questionnaire toolbar to view the **Questionnaires Properties** dialog.

			🖓 Tooltips Off 🍰 CcManager, CcManager (ccmanager) 🚀 Logout	🖂 Messages
>>	Ques	tionnaire Manager 🕱 🛛 Call Quality 🛎		
	🛈 A	dd Group 🛛 😥 Manage Groups 🔄 Proper	erties 🖷 Call Selection Rules 📀 Permissions 🔒 Save A Copy 📄 Save & Close	
	Quest	tionnaire Name Call Quality	Ver. 1.0 Status: empty - not re	ady for use!
	Grou	Questionnaire Properties	Decembran	×
	Ans	Scoring System C Points Percent G Grades	Answers Auto-Sort Answers By:	2 Question
		Weight (q) for Reports: 1.00		
			OK Cancel	

Figure 92: Setting the Questionnaire Properties

- 2. Select the **Scoring System**. The default is **Percent**. The following options are available:
 - Points: Each answer is assigned a "weight" in points, for example 10. The questionnaire score is the sum of all selected answer points. Answers can have a negative point value, for example. -10.
 - **Percent**: Each question and answer group is assigned a "weight" in percent. The minimum is 1%, the maximum is 100. The final questionnaire percentage score is the weighted average of the selected answers.
 - **Grades**: Each answer is assigned a "weight" in grade value .minimum: 0.001 equals "best", maximum: 5 equals "worst", where each question and question group must be assigned a percentage weight ,minimum: 1, maximum is 100. The final questionnaire score grade is the weighted average of the selected answers.
- 3. Select the **Auto-Sort Answers By:** method to display all answer listings using this questionnaire. The following options are available:
- Creation Time: when the questionnaire was created.
- Weight (Ascending)
- Weight (Descending)

- 4. Type a **Weight (q) for Reports**: The default is 1.00. The "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. In all reports, the total score is calculated as a weighted average of the final scores from each questionnaire.
- 5. Click OK.

Important:

Changing the scoring system for a questionnaire after question groups or questions and answers are added causes inaccuracy. Therefore check all weight values in the questionnaire for accuracy after changing the scoring system used.

Adding a Question Group to a Questionnaire

			🖓 Tooltips Off 🏾 🛃 Cc	Manager, CcMana	ger (ccmanager)	🎤 Logout 🖂 Messages				
»	Questionnaire Manager 🛎 Call Qu	ality 🗵								
	📀 Add Group 🔯 Manage Groups	🔄 Properties 🗧 Call Se	election Rules 📀 Permissions	Save A Cop	oy 📙 Save & Cl	lose				
	Questionnaire Name Call Quality Ver. 1.0 Status: empty - not ready for u									
	Group Name Description					Percentage				
		Add Question Group			Add Qu	Add Question Remove Question				
	Answer Name Answer De	Group Name:	Call Opening		Compliance	Percentage				
		Group Description:	start							
		Group Weight:	5							
			Save	Cancel						
		L								

Figure 93: 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.
- 3. 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. With a percentage or points scoring system, add a percentage Weight value, to set what percentage the group contributes to 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.
- 6. Save regularly while creating or editing a questionnaire. Click 🔚 Save & Close and double-click on the questionnaire's name, or click Edit to re-open the questionnaire for further editing.

Adding Additional Questions and Groups to a Questionnaire

🕽 Add Group 🛛 Manage Groups 📰 Prope	erties 🗧 Call Selection Rules 📀 Permis	sions 📄 Save A Copy 💾 Save & Close
uestionnaire Name Call Quality	Ver. 1.0	Status: incomplete - not ready for use
Group Name	Description	Percentage
Call Opening, 5% (1 item)		
Correct Greeting / Introduction		100%
Body of Call, 40% (6 items)		. L
Active Listening		20%
Active Questioning		20%
Provided Information		10%
dentified Issue		20%
Call Wrapup		10%
Froubleshooting		20%

Figure 94: Adding Additional Questions and Groups

Create additional question groups and questions in a similar way.

- 1. Click O Add Group to add a new question group.
- 2. Click Add Question to add a new question.
- 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 in a Questionnaire

🕽 Add Group 🛛 🕞 Ma	anage Groups 📻 Properties 튺 Call Selection Rules 📀 Permissions 🔓 Save A Copy 블 Save & C	ose	
Questionnaire Name		Status: already used - save a copy	to make
Group Name	Description		Percentage
Start call, 30.0 %	(1 item)		
Opening script foll			100.0 %
E Application usage	, 40.0 % (2 items)		
		Add Question	Remove Quest
Answer Name	Answer Description	Compliance	Percentage
Completely		None	100.0 %
Partially		None	50.0 %
Not at all		None	0.0 %
		Add Answer	Remove Answ

Figure 95: Adding Answers to a Question

- 1. Click to select a question.
- 2. Click Add Answer at the bottom right of the screen.

Answer Name	Answer Description	Compliance	Percentage
Completely		None	100.0 %
Partially		None	50.0 %
Not at all		None	0.0 %
Yes	Enter description	None	40
	Cancel Save		

Figure 96: Adding Answers to a Question 2

- 3. Type the **Answer Name**. Type an optional **Answer Description**.
- 4. Select a Compliance from the following :
- None: This is the default compliance setting, and is used for most answers. Set a weight for the answer. Type the answer's Percentage or Points or Grade for this question's scoring.
- Use **Success all** if the compliance issue is the most important part of the questionnaire: this overrides the scores of all the questions in the questionnaire by the weight of the highest score set in a question with a

compliance **None**. The agent automatically passes the evaluation if this answer is given.

- Use **Success group**: if the compliance issue is the most important part of the group. Overrides the scores of all the questions in the group by the weight of the highest score set in a question with a compliance **None**. The agent automatically passes the group if this answer is given.
- Use n/a to set an average score: Not applicable. There are three calculating methods for non-applicable (N/A) answers. Set the method in Quality Manager Options. See the section about Quality Manager Options.
- Use Fail all: if the compliance issue is the most important part of the questionnaire: this overrides the scores of all the questions in the questionnaire by the weight of the lowest score set in a question with a compliance None. The agent automatically fails the evaluation if this answer is given
- Use Fail group: if the compliance issue is the most important part of the group. Overrides the scores of all the questions in the group by the weight of the lowest score set in a question with a compliance None. The agent automatically fails the group if this answer is given.
- 5. Click Save to save the answer.
- 6. Click Save & Close on the questionnaire taskbar to save the questionnaire and close it.

Adding Additional Answers to a Question in a Questionnaire

		🖓 Toottips O	off 🛯 🔗 Valer, Peter (d	comanager) 🔊 Lo	gout 🖂 Messa	age
Questionnaire List 🗷 🛛 Call Quality	×					
🕽 Add Group 🛛 🔀 Manage Groups 🗄	🔄 Properties 🛛 🗧 Call Selection Rules	Permissions	📄 Save A Copy	Save & Close		
uestionnaire Name Call Quality	Ver. 1.0			Status: complet	te - ready for u	JSE
Group Name	Description		_		Percentage	
3 Call Opening, 5% (1 item)						•
Correct Greeting / Introduction					100%	
∃ Body of Call, 40% (6 items)						
Active Listening					20%	- 3
Active Questioning					20%	
Provided Information					10%	
Identified Issue					20%	
Call Wrapup					10%	
Troubleshooting					20%	
∃ Call Skills, 35% (11 items)						•
				Add Question	Remove Ques	tio
Answer Name	Answer Description			Compliance	Percentage	
Yes				None	100%	
No				None	0%	
Partially correct				None	50%	
				None	75%	

Figure 97: 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, the message at the top right of the questionnaire tab updates.
- 3. Save your progress regularly using the Save & Close.

Specifying Call Selection Rules for a Questionnaire

This is an optional feature of the questionnaire, and is only necessary if the user wants to filter specific calls to be available for evaluation.

» هو جو ا	Questionnaire List 🖲 Call Quality 🛞		
2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2	🔇 Add Group 🔯 Manage Groups 🔄 Properties 🚍 Call Selection Rules 📀 Permissions 🕞 Save A Cop	y 님 Save & Close	
Carling and a second seco	Questionexine. None. Cell Cusite Ver. 1.0. Call Selection Rules X Group Inbound-Outbound Call Identification Call Exact Number: Body SIP Number: Agent Extension Length: 4 Allow Internal Call Scoring: Y Provide Matching Part: Coll W Week Days Trouble Sunday From: 9:00 AM Y To: 6:00 PM Y	Status: complet	te - ready for us Percentage 100% 20% 20% 20% 20% 20%
	Answe Yes No Partially Correct Correct Cencel	Add Guestion Compliance None None None	Remove Questic Percentage 100% 0% 50% 75%

Figure 98: 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. Select the **Questionnaires** and click **Questionnaire Manager** to display the current list of questionnaires in Quality Manager.
- 2. Select a Questionnaire from the list.
- To edit the call selection rules click Call Selection Rules on the main questionnaire toolbar to open the Call Selection Rules dialog box.
- 4. The Call Selection Options 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 extension. 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 the **SIP Number** is enabled, then 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 drop-down shows 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.
- 5. The **Record Criteria Panel** enables 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.

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

- Min-Max Recording: Select the minimum or maximum length of the call recording in seconds.
- 6. 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.

	• •		ς	Tooltips	Off 💰 CcManager, Co	cManager (c	cmanager) 🔊 Logout	Messages			
»	Questionnaire Manager	🗶 Call Quality 🗶									
	🗿 Add Group 🛛 🔀 Ma	nage Groups 🔄 Properties 📇 Ca	II Selec	tion Rules	📀 Permissions 🔒 S	Save A Copy	Save & Close				
Que	Questionnaire Permissions										
	Access Permissions										
	O Allow For All	O Deny For All		@ A	llow Selected Only	Ô	Deny Selected Only				
	Surname 🔺	First Name			Surname		First Name				
	Antonovicova	Alena	-		Balakova		Simona				
	Balakova	Simona									
	Beranova	Sona									
	Beskydova	Eva									
	Bocevova	Magdalena									
	Boruvkova	Jitka									
	Bratreoveka	Zdenka	Ŧ								
	A Page 1 of 4	🕨 📔 😂 🛛 Displaying 1 - 50	of 153								
							ок	Cancel			

Figure 99: Specifying Access Permissions

- To limit or customize access to a questionnaire, click Permissions on the questionnaire toolbar. The Access Permissions dialog opens.
- 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 >> 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 <<.

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

Adding a Question to a Questionnaire

		🖓 Tooltips Off 🍰 CcManager, CcManage	er (ccmanager) 🧯	🖗 Logout 🖂 Messages						
»	Questionnaire Ma	nager 🛞 Call Quality 🛞								
	🔇 Add Group 🔯 Manage Groups 🔄 Properties 🚍 Call Selection Rules 🔇 Permissions 🔓 Save A Copy 💾 Save & Close									
	Questionnaire Na	te - 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	ıt							
	Correct Greeting	Did you say Hello welcome to mycompany this is [agent] speaking?		10						
		Cancel Save								
			Add Ques	tion Remove Question						
	Answer Name	Answer Description	Compliance	Percentage						

Figure 100: Adding A Question

- 1. Select the question group.
- 2. Click Add Question to add a new question.
- Type a question name. This is the text that the user sees. Do not name a question the same as the question group name, because the results for that question can not be included in excel reports based on the evaluation containing them.
- 4. Type a description if required.
- 5. Type a question weight for this group if required. If a percentage or grading score system is being used, enter the percentage weight value that the question has in this question group.
- 6. Click **Save** below the description field to add this question to the current group.

Adding and Removing Question Groups

Questi	onnaire Manage	er 🗵 Call Qualit	ty ×						
Ado	i Group 🛛 🍃 N	lanage Groups	Properties 🔚 C	Call Selection Rul	les 📀 Permissions 📄	Save A Co	py 📙 Save & Clos	se	
uestic	onnaire Name	Call Quality	Ver.	1.0	🤌 Statu	is: already	used - save a cop	y to make changes	
Group	Name	Description					F	Percentage	
∃ Оре	ning call, 40.	0 % (5 items)							
Greeti	ng, introducing						2	0.0 %	
Dete	Question Gro	up Manager				20.0 %			
Cust	Add Group	p 🤤 Remove Gr	oup 😢 Close			20.0 %			
Com	Group Name	Group Des	scription		Percentage		20.0 %		
Swite	Opening call				40.0 %		2	.0.0 %	
	Merchant's sk	ills			20.0 %		Add Question	Remove Question	
	Call control				20.0 %		Compliance	Demostere	
Ansv	Closing the ca	all			20.0 %		Compliance	Percentage	

Figure 101: Managing Question Groups

- 1. Click S 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. The 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 box enables the user 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, CcManager	r (ccmanag	er) 🔊 Logout 🖂 Messages
» (Ques	tionnaire Manager 🛞			
0	Ad	d 🥜 Edit 🤤 Remove 達 Export 🐔 Import		Enter quer	y 🔍 Search
S	Sta	Name		Version	Scoring System
(0	ČP hovory S2S		1.0	Percentage
(0	ČP hovory - test		1.3	Percentage
(0	ČP hovory - test		1.1	Percentage
(0	ČP hovory - test		1.0	Percentage

Figure 102: 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

Modifying an Exported Questionnaire



Figure 103: Modifying an Exported Questionnaire

View and edit exported questionnaire files in any XML-compatible text editor. Edit the name of an exported questionnaire and use the renamed questionnaire as the basis of a simple questionnaire template system.

Importing a Questionnaire - 1

	Tooltips On	🔗 CcManage	er, CcManager	r (ccmanager)	🎤 Logout 🖂	Messages
Questionnaire Manager 🛞						
🛈 Add 🥜 Edit 🤤 Remove 📴 Export 🐔 Import				Enter query		Search
Stati Name					Version	Scoring Sy
📀 Call Quality					1.0	Percentage
Hard Sell					1.0	Percentage
Import Questionnaire		×				
questionnaire.xml	Browse					
Import	Cancel					

Figure 104: Importing a Questionnaire

To import a questionnaire:

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

Important:

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

Tip:

If the 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

Questionnaire Manag	call Quality 🗷				
🗿 Add Group 🛛 🏹 I	Manage Groups 🔣 Prop	perties 📑 Call Selection R	ules 📀 Permission 📄 Save A C	opy 🔚 Save & Close	
Questionnaire Name	Call Quality	Ver. 1.0	Status: alread	ly used - save a copy to make o	:hange
Group Name	Description			Percentage	
Opening call, 40	.0 % (5 items)				
Greeting, introducing				20.0 %	l
Detection and Verific				20.0 %	
Customer?s Consen				20.0 %	
Company Presentati			20.0 %		
Switching to the mat				20.0 %	
				Add Question Remove	Questi
Answer Name	Answer Descriptio			Compliance Percenta	

Figure 105: The Imported Questionnaire

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

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

	Tooltips On 8	CcManager, CcManag	er (ccmanager) 🔊	Logout 🖂	Messages
Questionnaire Manager 🛞					
🔾 Add 🥜 Edit 🤤 Remove 📴 Export 📹 Import			Enter query		Search
Stati Name				Version	Scoring Sy
📀 Call Quality				1.0	Percentage
Hard Sell				1.0	Percentage
Opening questionnaire.xml		—			
You have chosen to open					
guestionnaire.xml					
which is a: XML Document					
from: http://docs-callrec1.office.zo	omint.com				
What should Firefox do with this file?					
Open with XML Editor (defaul)				
Save File					
Do this automatically for files like	this from now on.				
	ОК	Cancel			
🛯 🖣 Page 1 of 1 🕨 🕅 🧞				Displayi	ng 1 - 2 of 2

Figure 106: Exporting a Questionnaire

To export an existing questionnaire:

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



Chapter

10 Planning 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 Quality Manager.

Opening the Evaluation Planner

	🖓 Tootlips Off 🍰 CcManager, CcManager (ccmanager) 🧬 Logout 🖂 Messages
×	Evaluation Planner 🛞
S ≫	🥝 Create Evaluations 🔜 Save As Template 🤿 Templates 🔜 Load Template 🔻 🔇 Close
Dashboard Evaluation List Cuestionnaires Questionnaire Manager Questionnaire Manager	Date Range: From: G To: Questionnaire: Apply To Statistics: Basic Add Sub-Oriteria
 Administration About 	Group Evaluation Agent Evaluation Evaluator: I Select All/None Group: Select All/None
	Ø Antonovicova, Alena (AAntonovicova) Ø Balakova, Simona (sbalakova) Ø Beranova, Sona (t911996)
	Image: Statistic Statistics Statistics Image: Statistic Statistics Statistics Image: Statistics Statistics
	🖉 Boruvkova, Jitka (jboruvkova)
	Wrapup: V Media Direction: All V
	🛇 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 107: Opening the Evaluation Planner

To create a new evaluation:

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

Specifying an Evaluation Period and Questionnaire

Evaluation Planner * Create Evaluations Save As Template Templates Load Template Close Period: Current Week Period: Current Week Prom: 1/23/11 Questionnaire: Call Quality (1.0) Questionnaire: Call Quality (1.0) Apply To Statistics: Interaction 2 Group Evaluation Safet Evaluation Self-Evaluation Evaluator: Select All/None Group: Select All/None Vertice: Select All/None Group: Select All/None Vertice: Select All/None Group: Select All/None Vertice: Select All/None Vertice: Select All/None Vertice: Select All/None Vertice: Group: Vertice: Select All/None Vertice: Select All/None Vertice: Group: Select All/None Vertice: Select All/None Vertice: Vertice: Select All/None Vertice: Vertice: Othorereraic Vertice:				🖓 Tooltips Off	🔗 CcMana	iger, CcMa	nager (coma	nager) 🧯	🆻 Logout 🖂 Me	ssages
Period: Current Week Prom: 1/23/11 To: 1/29/11 Questionnaire: Call Quality (1.0) Apply To Statistics: Interaction Basic Add Sub-Criteria Image: Image: Add Sub-Criteria Image:	Evaluation Planner	×								
Questionnaire: Call Quality (1.0) Apply To Statistics: Basic Add Sub-Criteria Immeraction Count: Basic Add Sub-Criteria Immeraction Count: Pasic Add Sub-Criteria Immeraction Immeraction Provide Evaluation Select All/None Group: Version: Immeraction Count: Pasic Add Sub-Criteria Immeraction Count: Pasic Add Sub-Criteria Immeraction Count: Pasic Add Sub-Criteria Immeraction Version: Immeraction	📀 Create Evaluations	🔜 Save As Templat	e 🤯 Templates	樳 Load Template 🝷	🔀 Close					^
Apply To Statistics: Basic Add Sub-Criteria	Period:	Current Week	▼ Fr	om:	1/23/11		To:		1/29/11	
Basic Add Sub-Criteria Image: Select All/None Group Evaluation Evaluator: Image: Select All/None Image: Select All/None Group: Image: Select All/None Group: Image: Select All/None Image: Select All/None Image: Select All/None Image: Select All/None <t< td=""><td>Questionnaire:</td><td>Call Quality (1.0)</td><td></td><td></td><td></td><td>~</td><td></td><td>n</td><td>2</td><td></td></t<>	Questionnaire:	Call Quality (1.0)				~		n	2	
Image: Select All/None Group: Image: Select All/None Evaluator: Image: Select All/None Group: Image: Select All/None Image: Media Type Remove Image: Select All/None Image: Select All/None Image: Media Type Remove Image: Select All/None Image: Select All/None Image: Media Type Remove Image: Allow Replacement	Apply To Statistics:	✓								' I
Evaluator: Image: Select All/None Group: Image: Select All/None Image: Media Type Buck, Jake (jake.buck) Image: Select All/None Image: CcManager (ccmanager) Image: Select All/None Image: Select All/None Image: CcManager (ccmanager) Image: Select All/None Image: Select All/None Image: CcManager (ccmanager) Image: Select All/None Image: Select All/None Image: CcManager (ccmanager) Image: Select All/None Image: Select All/None Image: CcManager (ccmanager) Image: Select All/None Image: Select All/None Image: CcManager (ccmanager) Image: Select All/None Image: Select All/None Image: CcManager (ccmanager) Image: Select All/None Image: Select All/None Image: Ccmanage: Ccmanager (ccmanager) Image: Select All/None Image: Select All/None Image: Ccmanage: Ccmanage: Ccmanager (ccmanager) Image: Select All/None Image: Select All/None Image: Ccmanage: Ccmanage: Ccmanager (ccmanager) Image: Select All/None Image: Select All/None Image: Ccmanage: Ccmanage: Ccmanager (ccmanager) Image: Select All/None Image: Select All/None Image: Ccmanage: Ccmanager (ccmanager) Image: Select All/None Image: Select All/None	Basic Add Sub-Cri	eria								
Image: Section in the section is a selection in the section in the section in the section in the section is a selection in the section in the section in the section in the section is a selection in the section in the section in the section is a selection in the section in the section in the section is a selection in the section in the section in the section is a selection in the section in the section in the section is a selection in the section in the section in the section is a selection in the section in the section in the section in the section is a selection in the section in the section in the section is a selection in the section in the section in the section is a selection in the section in the section in the section is a selection in the section in the section in the section is a selection in the section in the section in the section is a selection in the section in the section in the section is a selection in the section in the section in the section is a selection in the section in the section in the section is a selection in the section in the section in the section is a section in the section in the section in the section is a section in the section in the section in the section is a section in the section in the section in the section is a section in the section in the section in the section is a section in the section	 Group Evaluation 	🔘 Agent E	valuation	O Self-Evaluation						
V CcManager, CcManager (ccmanager) V Daniels, Helena (helena.daniels) V Herrera, Graciela (graciela.herrera) V Hopper, Stephan (stephan.hopper) V Johns, Christopher (christopher.johns) V Olson. Rafael (rafael.olson) Wrapup: Media Direction: In/Outbound Add Media Type Remove Allow Replacement Allow Selection Add Interaction	Evaluator:		Select All/None	Group:			v 9	Select All	/None	
	 CcManager, Ccf Daniels, Helena Herrera, Graciel Hopper, Stepha Johns, Christop Olson. Rafael (r Wrapup: 	Nanager (ccmanage (helena.daniels) a (graciela.herrera) ın (stephan.hopper her (christopher.joh afael.olson)) ns)							
Media Type Min. Count N. Start End Length From To Type			A						action	
	Media Type	Min. Count N. S	tart	End	Length	From	То	Туре		

Figure 108: Specifying an Evaluation Period and Questionnaire

- Specify the evaluation Period: using the Period: drop-down list for example, select Current Week and the From: and To: dates 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.
- 2. The **Questionnaire** drop-down list enables the user to pick an available questionnaire to use for the evaluation. If the questionnaire is not visible, ensure that it is marked as completed in the Questionnaire Manager. <u>See</u> 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 🛞	
🥝 Create Evaluations 🛛 🗟 Save As Template 😽 Templates 😹 Load Template 🝷 🔇 Close	-
Period: Current Week V From: 5/8/11 To: 5/14/11 I	
Questionnaire: Call Quality (1.0)	
Apply To Statistics:	
Basic dd Sub-Criteria	
Group Evaluation Self-Evaluation	
Evaluator: CcManager, CcManager (ccmanager)	
Groups: Select All/None Agents: Select All/None	Ε
A 🕼 Root group	
a 🕼 Copenhagen 🗧 💟 Hun, Attila (attila.d.hun)	
Pacos de Ferreira	
A 💭 Dakar 📝 Napper, Wesley (wesley.napper)	
Sioi Bolnisi V Smith, John (john.smith)	
Wrapup: Media Direction: In/Outbound	
📀 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 🗸 1	
Save Cancel	+

Figure 109: Selecting a Target User or Group

- 1. On the **Basic** tab the user 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. Users must have the selfevaluate privilege in their user profile. 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.

Selecting a Target User

			🖓 Tooltips (Off 🦽 CcManage	er, CcMana	iger (ccman	ager) 🗯	🖗 Logout 🛽	🛛 Messag
Evaluation Planner	K)								
Create Evaluations	🜄 Save As Temp	olate 🤯 Templat	es 🛛 😽 Load Template	e 🕶 🔀 Close					
Period:	Current Week	· *	From:	5/8/11		To:		5/14/11	
Questionnaire:	Call Quality (1	.0)			~	Interacti Count:	on		
Apply To Statistics:	\checkmark								
Basic Add Sub-Crite	eria								
Group Evaluation	Agent	t Evaluation	Self-Evaluatio	n					
Evaluator:	CcManager, C	cManager (ccma	anager)	*)				
Groups:		🔲 Selec	t All/None Agents:				Selec	t All/None	
A 🕼 Root group				e, Fred (fred.flare)					
⊿ [™] Copenhagen Pacos de Fe				, Attila (attila.d.hun)					
Pacos de Pe	rreira			drew, Victor (Victor					
Sioi Bolnisi				per, Wesley (wesle th, John (john.smith)					
a 🧊 Guatermala C	City		-	in, com gonnomin,					
⊿ 🥬 Guatermala C Wrapup:	City	¥	Media Direction:	In/Outbour	nd 💌				
		Allow Replacement		In/Outbour		ection 💽	Add Inter	raction	
Wrapup:		Allow Replacement	Media Direction:	In/Outbour		ection 💿	Add Inter	raction	
Wrapup:	Remove L Min. Count N.		Media Direction:	In/Outbour	m calls sel			raction	

Figure 110: Selecting Agents for Evaluation

The example above shows an **Agent Evaluation**.

To select Agents for 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 that the evaluator are responsible for display in the **Groups:** list. Click on one or more groups. Clicking on a group displays the agents in the **Agents:** list on the right.
- 4. Select the checkboxes of the agents to be evaluated.
- 5. Agent interactions can be filtered by selecting a Wrapup value, if one is available, and whether the Media Direction: is inbound, outbound or both. The Media Direction: drop down enables the user to specify whether the evaluation should use INTERNAL or ALL interactions to that agent. The default is BOTH, meaning both inbound and outbound internal and external interactions are sampled.

Important:

If usernames or phone extensions are re-allocated, the evaluation period starting in the past may include calls from previous agents that were allocated the same username or extension. Ensure the evaluation starting date is not earlier than that of the agent to be evaluated.

Adding Evaluation Media Types

Add Micula Type	W Remove	B Allow Replacement	Allow Selection	Allow rando		ection	Add Interaction
Media Type	Min. Count	N. Start	End	Length	From	То	Туре
Other 🗸	1						

Figure 111: 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 ,such as 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 disables the functionality available during an evaluation.
- 5. To save, click Save.

Agent:			Descri	ation									
Barker, Deanna			Descri	puon:		_		emplate 👻 Close					
Media Direction:			Media	Type:									
All		~	Call	1790.		~		1/23/11		To:		1/29/1	1 🖻
External Data Key:			Wrapu	in:					~	Interacti	on Count	: 2	
		*	mapa			~							
External Data Value:			Period	:									
			Curre	nt Week		~							
Customer Number:			1/23/	1-1	/11			luation					
			Count		/11								
			1										
Ain, length alon Max, le	enoth		1					ents:			Selec	t All/None	
Min. length 0:00 Max. I	ength		1				· .	rker, Deanna (deann			Selec	t All/None	
Min. length 0:00 Max. I	ength	Search	1 Add In	teractions				rker, Deanna (deann nson, Mattie (mattie	benson)		Selec	t All/None)
	-							rker, Deanna (deann nson, Mattie (mattie rg, Camille (camille.)	benson)		Selec	t All/None	
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Adding Media for Evaluation

Figure 112: Adding Media for Evaluation

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

To add specific interactions:

- 1. Click **Add Interaction**. A selection dialog box opens and enables the evaluator to filter results by specific parameters.
- 2. Select an Interaction.
- 3. Click Search to display a list of matching interactions. If the currently selected agent does not have an ID, for example extension number, specified in their Quality Manager 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.
- 4. Select the checkbox for each record to add it to the evaluation.
- 5. Click Add Interactions.
- 6. The chosen interactions appear in the media window and the selection window closes.

To remove an interaction click 😣 delete.

Adding Sub-Criteria

		🔽 Tooltips On 🦽 CcManager, CcManager (ccmanager) 🔊 L	ogout 🖂 Messages
»	Evaluation Planner	Evaluation List (8)	
	Questionnaire:	Call Quality (1.0)	
	Apply To Statistics:	V	
	Basic Sub-Criteria	1 CAdd Sub-Criteria	
	Add Media Type	S Remove	
	Media Type	Min. Count	
	Call + Screen		
	Screen	1 =	
	Call	' 1	
	Period:	Yesterday Y From: 8/1/11 3 To: 8/1/11 From:	~
	Weekdays:	🕼 Sunday 🕼 Monday 🕼 Tuesday 🕼 Wednesday 🕼 Thursday 🕼 Friday 🕼 Saturday	
	Wrapup:	 Media Direction: In/Outbound Min. Length: 7:00 Max. Length: 	10:00
	Description:	Matching Part: contains	
	Add External Data	G Remove	
	External Data 🔺	Comparison Value Type Value Logical Operator	
	SPANLESS_REC_ID	contains Number 123585 and	
(Deadline:	8/16/11 Remind Evaluator?: V Days To Deadline: 7 8/9/11	
	•		•

Figure 113: Adding Sub-Criteria

- 1. Click the Add Sub-Criteria tab.
- 2. Click Add Media.
- 3. The **Media Type** dialog box opens. Select a **Media Type** from the dropdown list. Specify a **Min. Count** and 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

Quality Manager creates rows for **Chat**, **Email**, or **Other** media in the grading, this enables 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 dialog

box is highlighted with red edges, change the **Interaction Count**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. The user 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. The evaluator can 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, enabling the evaluator to select calls from various customer types.
- The Deadline field enables 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.
- 9. 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. If there are no calls that satisfy the sub-criteria available then, calls that satisfy the **Basic** criteria are added.
- 11. 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 the Selection of Random Calls

					Tooltips O	ff 📌 CcMan	ager, Ccl	Manager (ccr	nanager)	🔊 Logout	Message
Evaluation Planner	×										
Oreate Evaluations	d Save As	s Temp	olate 🤯 Templat	tes 🛃 Lo	ad Template 🔻	🔀 Close					
Period:	Current V	Veek	•	From:		1/23/11		To:		1/29/11	
Questionnaire:	Call Qual	ity (1	.0)				~	Interacti	on Count:	3	
Apply To Statistics:		\checkmark									
Basic Sub-Criteria	1 💌 Add S	ub-Cri	iteria								
Group Evaluation	•	Agent	Evaluation	🔘 Self	Evaluation						
Evaluator:	Buck, Jak	ke (ja	ke.buck)			*					
Groups:			Select	All/None	Agents:				Select	All/None	
4 📁 Root group					Barker, Dea	nna (deanna.	barker)				
4 👘 Copenhager				U	Benson, Ma	ttie (mattie.b	enson)			-	
Paços de Fe	erreira				-	e (camille.be	rg)				
I Dakar Sioni Bolnis					Buck, Jake						
a 🕼 Guatemala (*		nery (zachery				*	
	City			Ŧ		icia (patricia.				Y	
Wrapup:			*	Media Dir	ection:	In/Outbour	nd 🎽				
Add Media Type	Remove		Allow Replacement	nt 🔒 Allo	w Selection	Allow rand	om calls s	selection	Add Inte	raction	
Media Type	Min. Count	N.	Start	End		Length	From	То	Туре		
Call	2	1	1/25/11 11:32 AM	1/25/	11 11:32 AM	00:00:06	5512	5506			Quick Note
		2	1/25/11 1:08 PM	1/25/	11 1:08 PM	00:00:07	5512	5506			Quick Note

Figure 114: Selection of Random Calls

A powerful method of performing evaluations is to automatically select the minimum number of calls required for evaluation at random. 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. 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 is for private 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 the user has permission to load can be permanently deleted by clicking the **Templates** button in the menu bar of the **Evaluation Planner**, and by clicking **Remove** on the appropriate template in the **Templates** dialog box.

Important:

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

Creating the Evaluation

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×	Evaluation Planner				
S. 8	Create Evaluations Save	As Template 🤯 Templates 竭	Load Template 👻 🔀 Close		<u>^</u>
 Dashboard Usulutions Evaluation List Questionnaires Questionnaires Administration 	Period: Curren Questionnaire: Call Qu Apply To Statistics: Basic Add Sub-Criteria	Week Y From: ality (1.0)	7/10/11	77207	11
About	Evaluator: CoMan	Agent Evaluation S	elf-Evaluation	Select All/Nor	e E
	Glentoran Gientoran Gientoran Gientoran Wrapup:	▼ Media	Day, Terri (terri.day) Decker, Maureen (maureen Eaulkner Seymour (seymour Direction: All	r faulkner)	-
	Add Media Type Remo Media Type Min. Cour Other 1		Allow Selection) (1) Allow random ca Id Length From		
	•	III			•

Figure 115: Creating the Evaluation

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

- 1. Click **Create Evaluation** at the top of the **Evaluation Planner** page to create the evaluation. If any parameters or options are not correct during creation, a validation error dialog box helps the user identify the cause of the issue; otherwise a confirmation dialog box confirms that the evaluation has been created.
- 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	 Send Agent's Ev 		lback 📴	Export to	Spreadshee	t All		1
	N.	ID	Evaluator	Agent	Ques. Name	Period Fro	Period To	Score (Status	Reveal	Last Modifi Parent II	D
]	1	949	Buck, Jake	Barker, Deanna	Call Quality (1.0)	Jan 23, 20	Jan 29, 20	0.0 %	Created	1	Jan 26, 20	Ĩ
	2	947	Olson, Rafael	Meadows, Thoma	Call Quality (1.0)	Sep 25, 20	Sep 26, 20	37.0 %	Finished	\checkmark	Jan 25, 20	1
1	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	
1	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	
1	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	
1	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	
1	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	
1	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	
1	20	929	Olson, Rafael	Bowers, Ed	Call Quality (1.0)	Sep 28, 20	Sep 29, 20	42.0 %	Finished	\checkmark	Jan 25, 20	

Figure 116: 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.
- Use the forward, back, and shuffle controls to navigate through the pages of results.

This list screen enables the user to also permanently **Delete** evaluations and create **New evaluations**. Click **New evaluations**.

Important:

After an evaluation is created, it is no longer possible to modify the interaction selection parameters for that interaction.

The status of a newly scheduled evaluation is **Created**, but this changes to **In Progress** or **Finished** during the life cycle of the evaluation.

-					eport 🚳 More A		_			port to Spreadshee	All	v 4	Search Evalu
		ID 914	Evaluator	Agent	Ques. Name	 		 Revea	Last M Parent IE		Created		
	-		-		Call Quality (1.0					Search Criteria	In Progress		
	-		-		Call Quality (1.0				Jul 14, Jul 13.		Finished		~
		911			Call Quality (1.0					Evaluator:	Fillistieu		
		912			Call Quality (1.0				Jul 13,	Period:	Select Perio	bd	*
	-	910			Call Quality (1.0				Jul 13,	From 🛄	То		
	-	909			Call Quality (1.0				Jul 13, Jul 13.	Group:	Select Grou	ID	~
		908 907			Call Quality (1.0				Jul 13, Jul 13.	Agent:	Select Ager	at	~
		907	-		Call Quality (1.0				Jul 13, Jul 13.		Joioce Ager		
	-	905	-		Call Quality (1.0 Call Quality (1.0			V	Jul 13, Jul 12.	Ticket Number:		Mail Tracking Number:	
-		904			Call Quality (1.0	 			Jul 12,				
-		903			Call Quality (1.0				Jul 12,	Category:	Select Cate	gory	*
-		902	-		Call Quality (1.0	 			Jul 12,	Media Direction:	Select Medi	a Direction	~
-	13	901			Call Quality (1.0				Jul 12.	Wrapup:	Select Wrap	oup	*
-		900			Call Quality (1.0				Jul 12.	Questionnaire:	Select Inter	action Questionnai	e 💌
_		899			Call Quality (1.0				Jul 12,	Score:	From	То	
_		898			Call Quality (1.0				Jul 12,				
-		897			Call Quality (1.0				Jul 12,	ID:	From	То	
_		896			Call Quality (1.0				Jul 12,			Caamb	Clear
	19	895			Call Quality (1.0				Jul 12,			Search	Clear

Figure 117: 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. The statuses are:

- All
- Created
- In Progress
- Finished

Searching for Evaluations

To search for evaluations, navigate to the **Evaluation List** tab and click **Search** on the right hand side.



Figure 118: Searching for Evaluations

Search for evaluations using the search dialog.

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 to reveal the search dialog box.

To search for an evaluation:

- 1. Set as few or many search fields as required.
- 2. Click Search to apply the filter, or Clear to reset the search fields.

This searches for any set criteria within the evaluation. If one criteria fulfils requested values then the whole evaluation is displayed and data from main criteria is shown.

This also applies for all sub-evaluations. This means if at least one criteria matches a search field, for example, the direction, then the evaluation is listed.

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 drop-down list. Type the Interaction Count. See <u>Specifying an</u> Evaluation 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 appears 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 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 box displays. Most fields on the form are optional but the more information that is entered, the more specific the search is 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 appear. The user may then play the call to confirm that they have the correct one.
- Once the correct call is selected, select the checkbox for that call and ensure that all other calls are not selected. Click Add Interactions. The Add Specific Interactions dialog box closes and the call is added to the evaluation.
- 12. Click **Create Evaluations** to create the evaluation. The evaluation is created and a message dialog box states how many evaluations were created. Click **OK** to close the message dialog box.
- 13. Select Evaluation List to view the created evaluation.

Important:

After an evaluation is created, it is no longer possible to modify the interaction selection parameters for it.

Creating Multiple Evaluations

>> *****	Create Evaluations	Save As Temple		ites 😝 Load Template	- 🙁 Close		
🚭 Dashboard 3 💋 Evaluations	Period:	Current Week	~	From:	4/22/12	To:	4/28/12
Evaluation List Evaluation Planner Evaluation Planner Cuestionnaires CReports Administration	Questionnaire: Apply To Statistics: Basic Add Sub-Crite	Call Quality (1.0))		~	Interaction Count:	•
About	Group Evaluation Evaluator: Keller, Trisha (tri Lamb, Pedro (pp Marsh, Marcy (m Miler, Madeleine Roman, Cathleer Singleton, Bruce Spencer, Quincy	dro.lamb) arcy.marsh) (madeleine.miller (cathleen.romar (bruce.singleton] Select All/M))			Select /	All/None
	Media Type	-	Ilow Replacem	Media Direction:	In/Outbound Allow random calls s Length From	Add Inte	eraction

Figure 119: Creating Multiple Evaluations

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

- 1. Open the Evaluation Planner.
- 2. Select a **Period** and the **Questionnaire** to be used to evaluate the calls from the drop-down lists. Type the **Interaction Count**. See <u>Specifying an</u> Evaluation Period and Questionnaire.
- 3. On the Basic tab select Group Evaluation.
- The Evaluator list appears and by default every evaluator is selected. The select Evaluator: All/None checkbox selects 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 appear in the evaluator's box on the right hand side.

			💭 Tooltips On 🐰	🖗 CcManager, CcMan	ager (ccmanager)	🎤 Logout 🖂 Message	s
Evaluation Planner 🗵							
Create Evaluations	Save As Template 🐶 Templates	s 🗟 Load Template	- 😫 Close				-
Period:	Yesterday Yesterday	From:	8/1/11	To:	8/1/11		
Questionnaire:	Call Quality (1.0)		~	Interaction Count:	1		
Apply To Statistics:							
Basic Add Sub-Criter	ia						
Group Evaluation	Agent Evaluation	Self-Evaluation					
Evaluator:	Select All/None	Group		Select All/	None		
🗵 Bennett, Sondra (s	sondra.ber 207 evaluation(s) create	d			<u>_</u>		
CcManager, CcMa							E
🗹 Cunningham, Han	s (hans.cu		Ok d		=		
Garrison, Maritza ((maritza.ga	I Ha	irare				
Hobbs, Eddie (edd	die.hobbs)		ivana				
Houston, Anibal (a	anibal.houston)		nsk				
Wrapup:	× N	Media Direction:	In/Outbound				

Figure 120: 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

11 Performing an Evaluation

This chapter describes how to complete a scheduled agent evaluation in Genesys Quality Manager. The same basic procedure applies to self evaluations. Evaluations contain one or more interactions. Each interaction must be graded by answering all the questions shown in the questionnaire.

This chapter contains the following sections:

Opening an Evaluation

The Evaluator Screen

Adding Random Media for Evaluation

Adding Specific Media for Evaluation

Replacing Media for Evaluation

Grading a Media Record

Completing the Evaluation

Sending Feedback to an Agent

Deleting Evaluations

Re-Using the Evaluation - 1

Re-Using the Evaluation - 2

Reopening an Evaluation

Sending Evaluation Feedback to the Evaluator

Using the Evaluation Detail Report

Linking to a Read-only Grading Form

Opening an Evaluation

■ N.	D 1 491257 2 491258 3 491239 4 491256	Evaluator CcManager, Cc CcManager, Cc CcManager, Cc	Agent Cermakova_BL	ons Version Send Eva Ques. Name TEST ČP hovory TEST ČP hovory (ČP hovory \$25 (Period 29 Au 29 Au	Period 29 Au	Score 0.0 %	preadsheet Status In Progre In Progre	Reveal	5 Sep	Paren
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Figure 121: Opening an Evaluation

To open 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

	dd Int	teraction	ivaluation List ⁽ s () Add Rai Average Hand	ndom Interactio		<u> </u>				-	uation	n Fro	valuation Info Com: 10/1/12 To:
v	N.	Sta	Start	End	Length	From	То	Туре				Current R	
v	1	•	10/10/12 10:2	10/10/12 10:2		724598632	7001		0 🕏	8		0.0 %	Quick Note
ed	back	5											
			back [things t	o improve]			Evalua	tion Feed	back [thin	ıs to m	nainta	in]	

Figure 122: The Evaluator Screen

After opening an evaluation, the evaluator form displays the evaluation with any associated interaction.

- Click Add interactions if it is important to select a particular interaction.
- Click Add Random interactions if Quality Manager can select an interaction.

Some buttons mentioned in this tutorial may not be visible on smaller displays and can only be accessed via the expansion symbol \gg on the right-hand side.

If no existing interactions are specified during the creation of the evaluation, then the new evaluation does not have any interactions associated with it.

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

Adding Random Media for Evaluation

Evalu	ation	List 🗵	Evaluator Form	(19974) 🛎										
🖞 Add Interactions 🎒 Add Random Interactions 🤤 Remove 🛛 📃 Report 🖂 Send Feedback 🔟 Feedback History 🕕 Evaluation Info														
Que	stionr	naire: A	verage Handling	Time (1.0)		Agent: Doe,	Joh Evaluator: Ccl	Manager, Co	Manag	je Eval	luatio	n Pe	riod: From: 12	/9/12 To: 12/11
	•	4											> 00	.00
	Ν.	Sta	Start	End	Length	From	To	Туре					Current Rating	

Figure 123: Adding Random Media for Evaluation

To add random media for evaluation:

Click **Add Random Interactions** to add media records for the evaluation. This retrieves the minimum number of appropriate agent calls specified when the evaluation was scheduled . Quality Manager only selects interactions that have not yet been used for evaluation.

🔥 Add Inter	raction	s 🗐 Add Random I	nteractions 🤤 Rem	ove	📃 Report 🖂 Send	d Feedback	Feedback Histo	ry 🕕 Evalua	tion Info	Revea	al Results to Agen
Questionna	aire: /	Average Handling T	ime (1.0) Agent	:: Doe, Joh	n Evaluator:	CcManager,	CcManager	Evaluation Period:	F	From: 10/1/12	To: 12/11/12
		In the second	an the second	1	in a in 1 N factor, tales (I Muss .	MA DAVE	librad Min M	la Nath	> 0	0:22 8 33 모 Ξ
🔲 N. 💠	Sta	Start	End	Length	From	То	Туре			Current Rating	
1	•	10/10/12 10:21 AM	10/10/12 10:22 AM	00:00:39	724598632	7001		0\$	8	0.0 %	Quick Note
•											•
Comments								Total Rating		0.0 %	
								-			
eedback											
Evaluation	Feed	back [things to imp	rove]			Evaluation I	eedback [thing	s to maintain			

Figure 124: Adding Random Media for Evaluation

Click 🕑 Play to play the call or video on Universal Player.

Click 🍄 Media to replace the media record.

Click **I** Grade to evaluate the media record.

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.

To remove the interaction click 😫 delete.

The **Comments** and **Evaluation Feedback** text fields visible on this screen display the text added in these fields for all media evaluations.

Adding Specific Media for Evaluation

				Add Spec	ific Interac	tion(s)		×	nage	r (ccmanager) 🧯	👂 Logout 🖂 Messi
Dashboard 🗷 Evaluation List 🗷 Eva	Agent:										
Add Interactions 📄 Add Random Inter	-				Descri	otion:			I	Reveal Results	to Agent 📀 Comp
<u> </u>	Media Direc										
Questionnaire: Average Handling Tin	In/Outbou	und		~	Media	Type:			iod:	From: 10/1/12	To: 12/11/12
N. Sta Start	External Da	ata Key:					*			Current Rating	
1 • 10/10/12 10:21 AM				~	Wrapu	ip:	~			0.0 %	🛕 Quick Note
	External Da	ata Value:			Period		•				
					Penou	•	~				
	Customer N	Number:									
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					1						
	Min. length	non Max.	. length								
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			. (Search	Add In	teractions					
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	16808546	192.168.10	724658	7001	00:03:07	10/10/12 10:51	10/10/12 10:54				
Comments	16808535	192.168.10	724568	7001	00:02:12	10/10/12 10:47	10/10/12 10:49	• E			
comments	16808535	192.168.10	724568	7001	00:02:22	10/10/12 10:44	10/10/12 10:47			0.0 %	6
	16808464	192.168.10	724598	7001	00:03:41	10/10/12 10:13	10/10/12 10:17				
	16808503	192.168.10	724598	7001	00:02:29	10/10/12 10:27	10/10/12 10:29	٢			
	16808552	192.168.10	724562	7001	00:02:17	10/10/12 10:54	10/10/12 10:57	•			
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Feedback	∥4 4 Page										
Feedback Evaluation Feedback [things to impro	14 4 Page					10/10/12 10:54 00:06 09 31					
	14 4 Page										
	14 4 Page										
	14 4 Page										
	14 4 Page										
	14 4 Page										

Figure 125: Adding Specific Media for Evaluation

- Click Add Interactions to select one or more specific interactions to add for evaluation.
- 2. Specify filters as necessary in the Add Specific interactions form.
- 3. Click Search to find suitable interactions .
- 4. Click **Play** button to play the interaction on Universal Player to assess the suitability of the interaction for the evaluation.
- 5. Select the checkboxes for the required interactions.
- 6. Click Add Interactions.
- 7. The interactions appear in the main evaluation window.

Replacing Media for Evaluation

-			s 📄 Add Rando Average Handling				t 🖂 Send Fee or: CcManage					Ŭ		
	•	14						.,					> 00	:00
V	N.	Sta	Start	End	Length	From	То	Туре					Curre	
7	1	0	10/10/12 10:21 A	10/10/12 10:22 A	00:00:39	724598632	7001			3	8		0.0 %	🛕 Quick I
om	ment	ts						Total	Rating				0.0 %	

Figure 126: Replacing Media for Evaluation

To replace the list of media records available for evaluation, the **Allow Call Replacement** option must be enabled when creating an evaluation.

If Allow Call Replacement is enabled:

Click 🦈 Media to replace the media record.

Click 🕴 delete to remove the interaction .

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 is offered, that 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

Dashboard 🗷 Evaluation List 🗶 Evaluator Form (19966) 🗵 Grading Form (19966) 🛞	
🔢 Feedback History 📙 Save & Close 😫 Close	
Questionnaire: Average Handling Time (1.C Agent: Doe, John Mail Tracking Number Ticket Number	Evaluation period: From: 10/1/12 To: 12/11/1: Category select a category
🕨 📧 👔 band ban bin a tha "Al bi, d th' din a "An ba the bana state barrow data b	> 00:06 50 08 33 모 ≡
Question	Answer N
□ Opening script, 13.0 % (2 items)	-
1. Opening script followed? (30.0 %)	
2. Own and company's name stated when greeting customer? (70.0 %)	Yes - agent followed script completely. (100.0
G Compliance 1.0% (1 item)	Yes - but agent rushed the delivery. (70.0 %) Partly (30.0 %)
Internal Note	Customer hung up (n/a)
	Agent did not follow script at all. (0.0 %)
Feedback Panel	
Things To Improve Things To Maintain	

Figure 127: Grading a Media Record

To grade a media record, click the Evaluate icon for that record.

Click 🕑 Play to play the call or video on Universal Player.

- The questionnaire associated with the evaluation displays 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.
- 2. Select a suitable answer for each question, stopping and replaying the media as necessary. All questions must be answered for all media records present in the evaluation before the evaluation can be marked as complete.
- 3. The **Internal Note** text field can be used for keeping notes about a media record that are only visible to evaluators, not to agents.
- 4. 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.

- 5. 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.
- 6. Click S Close to close the grading form.

Completing the Evaluation

Bob - ZOOM JIRA × Documentation - Int	ternal Builds 🛛 🛛 🗙 🗍 🗰 W International Women's Day - Wikipe 👋 🔯 ZOOM ScoreCARD 🛛 🗙 🗍 +
	💭 Toottips On 🏄 CcManager, CcManager (ccmanager) 🚀 Logout 🖂 Messages
>> Dashboard × Evaluation List × Evaluator Form (19975) ×	
🚯 Add Interactions 🎒 Add Random Interactions 🤤 Remove	📑 Report 🖂 Send Feedback 💷 Feedback History 🕕 Evaluation Info 🛛 📝 Reveal Results to Agent 📀 Complete
Questionnaire: Average Handling Time (1.0)	Agent: Doe, John Evaluator: CcManager, CcMar Evaluation Period: From: 12/9/12 To: 12/1
Comments	Total Rating 28.6 %
Feedback	<u>x</u>
Evaluation Feedback [things to improve]	Evaluation Feedback [things to maintain]
	Feedback: To Maintain Notes from the evaluator regarding agent performance that
	is acceptable

Figure 128: Completing the Evaluation

Before completion, click **Send Feedback** to send feedback to the agent.

To view feedback from earlier evaluations for the same agent, click **Feedback History**.

To enable the agent to view the results, click **Reveal Results to Agent**.

View the media rating in the **Current Rating** column.

View the average of all media in the evaluation in the **Total Rating** field.

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

Confirm	onfirmation Email							
2	Do you want to send feedback to the user?							
	Yes No							

Figure 129: 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

Da	ashboa	ard 🗵	Evaluation List								
	New	Ų.	Evaluate 📃 Report 🎑	3 More A	ctions 👻					Send Eva	aluatio
	Ν.	ID	Evaluator A	Reeva	luate		Period F	Period To	 Status	 Last Mo	
	1		CcManager, CcMa D) Tim	Oct 10,	Oct 10,	 In Progr	Mar 11,	
	2		CcManager, CcMa D	•) Tim	Oct 1, 2	Dec 31,	 In Progr	Mar 11,	
	З		CcManager, CcMa F		e in Statistics) Tim	Oct 1, 2	Dec 31,	 In Progr	Mar 11,	
	4		CcManager, CcMa D	Revea	al Results to Agent) Tim	Nov 8, 2	Nov 8, 2	 In Progr	Mar 8, 2	
	5		Kadlec, Karol D	Delete	·) Tim	Nov 8, 2	Nov 8, 2	 Createc	Mar 8, 2	
	6		Anderson, Liam Doe,	John	Delete Evaluation		Nov 8-2	Mov 8, 2	 Created	Mar 8, 2	
	7		Bolshakov, Sergey Doe,	John	Delete the selected e		ns permanent	y ov 8, 2	 Created	Mar 8, 2	
	8		CcManager, CcMa Doe,	John	Average Handlin				In Progr	Mar 8, 2	
	9		CcManager, CcMa Doe,	John	Average Handlin	ng Tim	Oct 1, 2	Dec 11,	 In Progr	Mar 8, 2	
	10		CcManager, CcMa Doe,	John	Average Handlin	ng Tim	Dec 9, 2	Dec 11,	 In Progr	Mar 6, 2	

Figure 130: Deleting Evaluations

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

To delete an evaluation:

- 1. Select the evaluation.
- 2. Select More Actions.
- 3. Click **Delete** from the drop-down list. If this option cannot be clicked, the **Evaluate Agents** permission needs to be added to the users role.

Important:

Only the original creator of an evaluation has the right to delete it. An agent must be assigned the **Evaluate Agents** permission, in addition to the **Self-Evaluate** permission to create and delete evaluations. If the agent does not have the **Evaluate Agents** permission, then the agent's self evaluations cannot be deleted.

Re-Using the Evaluation - 1

Eva	alua	tion Lis	t 💌										
New 💿 View 📙 Report 🎯 More Actions 🔉 🖂 Send Evaluation Feedback 😰 Export Spreadsheet 🛛 All 🔤 🔍 Sear													
	Ν.	ID	Evaluator	Reevaluate		Period	Period To	Score	Status	Rev	Last Mo	Par	<
	1	19500	CcManager, Cc	Reopen	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		
	з	19499	CcManager, Cc	 Include in Statistics 	-	8 Aug 2	8 Aug 2	0.0 %	Created		19 Sep		
	4	19498	CcManager, Cc	Reveal Results to Ager	nt Iling 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 131: 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, while keeping the same media associated with it. The new evaluator can then evaluate the same call, that enables a first stage in a calibration procedure that is 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. Click the evaluation or select the checkbox of the evaluation to select it.
- 2. Select More Actions.
- 3. Select Reevaluate from the More Actions drop-down list.

Re-Using the Evaluation - 2

			•	Tooltips On 🔗 Col	Manager, CcMana	ager (ccmanag	jer) 🎤 Logout 🖂 I	Message			
Evaluation List 🕷 🛛 Ev	aluation Planne	er 🗷									
Oreate Evaluations	🛃 Save As Tem	plate 🤯 Templates	😽 Load Template 🔹	🔀 Close							
Date Range:	*	From:	08/08/20:	To: 08/08/							
Questionnaire: A	verage Handling	g Time (2.0)	Interaction 1 Count:								
Apply To Statistics:	V		emove Interaction								
Basic Add Sub-Crite	eria			n to remove all ag	ant						
Group Evaluation	Ager	nt Evaluation	Do you wis interactions								
Evaluator:	CcManager,	CcManager (ccm	Yes	No							
Groups:		Select /	All/None Agents:			Select Al	/None				
a 🅼 Root group			Admin,	Admin (admin)							
TestGroup1			Bloggs	, Joe (vklatil)							
			Doe, John (agent1)								
			ipccim	orterdaemon, ipccin	porterdaemon (i	occimporterdae	emon)				
Wrapup:		✓ Med	lia Direction:	nbound 💌							
O Add Media Type	🤤 Remove 🔒	Allow Replacement	Allow Selection	Allow random ca	Ills selection 🛈	Add Interacti					
Media Type	Min. Count N.	Start	End	Length Fr	om To	Туре					
Call + Screen	1 1	08/08/2012 15:28	08/08/2012 15:32	00:03:19 22	234558 8003		Quick Note				

Figure 132: 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 is 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.

Reopening an Evaluation

» Evaluation List [®]													
🗋 New 🏭 Grade 📳 Report 🚳 More Actions 🔹 💿 Send Agent's Evaluation Feedback. 🍃 Export to Spreadsheet 🛛 All									👻 🔍 Search Evaluations				
	Ν.	ID	Evaluator		Reevaluate	Ques. Name	Period From	Period To	Score	Status	Last Modified	Parent ID	ł
✓	1	949	Buck, Jake		Reopen	Call Quality (1.0)	Jan 23, 2011	Jan 29, 2011	74.0 %	Finished	Jan 27, 2011 13		
	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		
	4	765	Buck, Jake	1	Reveal Results to Agent Cal	Call Quality (1.0)	Sep 27, 2010	Sep 28, 2010	70.0 %	Finished	Jan 25, 2011 13		
	5	764	Buck, Jake		Delete	Call Quality (1.0)	Sep 28, 2010	Sep 29, 2010	7.0 %	Finished	Jan 25, 2011 13		
	6	763	Buck, Jake		Barker, Deanna	Call Quality (1.0)	Sep 29, 2010	Sep 30, 2010	64.0 %	Finished	Jan 25, 2011 1:		

Figure 133: Reopening 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** privilege 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 drop-down list. The status of the evaluation becomes **In Progress**.

Important:

After reopening an evaluation, only the assigned evaluator can view and modify the evaluation scores.

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 enables 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	/aluat	tion Li	st 🗵								
	New	🕑 V	'iew 📃 Report 🎡	More Actions -	Send Evaluation Feedb	ack 🖻 Expo	rt Spreadshee	t All			•
	Ν.	ID	Evaluator	Agent	Ques. Name	Period From	Period To	Sc	Status	Last Modi	Pa.
	1	19	CcManager, CcMana	Doe, John	Average Handling Time (Oct 10, 2	Oct 10, 2	0	In Progre	Mar 11, 2	
	2	19	CcManager, CcMana	Doe, John	Average Handling Time (Oct 1, 2012	Dec 31, 2	0	In Progre	Mar 11, 2	
	З	19	CcManager, CcMana	Doe, John	Average Handling Time (Nov 8, 2012	Nov 8, 2012	0	In Progre	Mar 8, 20	
	4	19	CcManager, CcMana	Doe, John	Average Handling Time (Dec 9, 2012	Dec 11, 2	27	In Progre	Mar 8, 20	
	5	19	CcManager, CcMana	Doe, John	Average Handling Time (Oct 1, 2012	Dec 11, 2	0	In Progre	Mar 8, 20	
	6	19	CcManager, CcMana	Doe, John	Average Handling Time (Dec 9, 2012	Dec 11, 2	28	In Progre	Mar 6, 20	
	7	19	CcManager, CcMana	Doe, John	Average Handling Time (Nov 8, 2012	Nov 8, 2012	27	Finished	Dec 12, 2	
☑	8	19	CcManager, CcMana	Doe, John	Average Handling Time (Nov 8, 2012	Nov 8, 2012	68	Finished	Dec 12, 2	
	9	19	CcManager, CcMana	Doe, John	Average Handling Time (Nov 8, 2012	Nov 8, 2012	30	Finished	Dec 12, 2	
	10	19	CcManager, CcMana	Doe, John	Average Handling Time (Dec 9, 2012	Dec 11, 2	0	In Progre	Dec 12, 2	
	11	19	CcManager, CcMana	Doe, John	Average Handling Time (Dec 9, 2012	Dec 11, 2	1	Finished	Dec 12, 2	

Figure 134: Sending Evaluation Feedback Button

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

The message entry window displays.

s	end Evaluation Feedback	×
Γ	Evaluation ID: 919	٦
	Please can we meet in person regarding this evaluation? I need to give you some background information which could affect the evaluation result. Thanks.	
	Send	C

Figure 135: Send Evaluation Feedback Message

- 3. Add a message to the evaluator including the Evaluation ID.
- 4. Click Send.



Figure 136: 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 appears in the evaluator's system message inbox. For more information about how the evaluator retrieves the message, see <u>Viewing System</u> <u>Messages</u>.

Using the Evaluation Detail Report

The **Evaluation Detail** report is the main report that an evaluator uses when providing feedback to an evaluated agent. At the very minimum it contains the questions on the grading form and the answers given. Evaluator notes are 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, this is generally for HR purposes.

	«	Ev	aluat	tion Lis	t 🗵		
Q, ::	»		New	🚺 Ev	valuati 📃 Report 🔯	More Actions -	🖂 Send Agent's Evaluation
😨 Dashboard			Ν.	ID	Evaluator	Agent	Ques. Name
Evaluations			1	903	Rutledge, Matthew	Blair, Kendra	Call Quality (1.0)
🛃 Evaluation List	כ		2	900	Gibson, Dominic	Herring, Kendall	Call Quality (1.0)
Evaluation Plann	er		3	899	Gibson, Dominic	Herring, Kendall	Call Quality (1.0)
∃			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 137: 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.

) C	Evaluation List 🗵 Evaluation I						
	Evaluation #4912	258 - TE	ST ČP hovory 1.0				
	Agent: Evaluator:	Lukas Habart (Ihabart) CcManager CcManager (ccmanager)					
	Interaction #491,412	Start:	29-Aug-2012 08:49:56				
	Screen	From: Direction: Category:	5655 All				

Figure 138: 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 displays not only the answer that was selected, but all of the other possible answers as well 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 creates 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 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 displays.



Figure 139: Open the Spreadsheet

Click **OK** to open the spreadsheet.

The Evaluation Detail report displays.

Linking to a Read-only Grading Form



Figure 140: Detail Report Showing Interaction

The Evaluation Detail enables the user to link to the grading form.

- 1. Point to the word and number **Interaction #xxx**, where xxx is the interaction number. The word and number turns red to reveal that it is a link.
- 2. Click the link Interaction #xxx, the read-only access Grading Form opens.

				🖓 Tooltips Of	f 🧬 CcManager, CcMa	nager (ccmanager)	🔊 Logout 🖂	Message	es
»	Evaluation List 🙁 Evalu	uator Form (491258) 🙁	Grading Form (49	1258) 🗵					
	Feedback History	Save & Close 😢 Close							^
	Questionnaire: Mail Tracking Number	TEST ČP hovory (1.0)	Agent: Ticket Number	Habart, Lukas	Evaluation pe Category	eriod: From: 29/0 29/08/201	2		
	Question					Answer		N	
	🗏 Ověření, 20.0 % (1	item)						-	
	Ověření dle MP a PP (100.0 %)					*		
	🖻 Struktura hovoru, 1	10.0 % (2 items)							E
	Internal Note				Play 19	:44:00 - 💙 Tota	Rating 0.0	%	
					•				
	Feedback Panel								
	Things To Improve			Things To	Maintain				
									+
	•							Þ	

Figure 141: 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 appears in the **Play** drop down list and can be selected to play in the Media player.



Chapter

12 Using Universal Player

This chapter describes how to use Universal Player.

This chapter contains the following sections:

Features of Universal Player Playing Media Using Universal Player in Default Mode Playing Media Using Universal Player in View Segments Mode Viewing Call Segments Viewing screen captures Clicking the Waveform to Start Playback from a Certain Point Adjusting the Volume and Muting Selecting Channels Setting the Playback Speed Selecting a Portion of the Call for a Playback Loop



Features of Universal Player

Universal Player displays separate waveforms for the agent channel, customer channel, and cross talk.

- Waveforms display separately, in blue for the left channel and red for the right channel so that the customer and agent can be identified. The silent portions of the call display in the background white.
- Universal Player normalizes the volumes for interactions. This prevents the perception that the calls are recorded at different volumes and reduces the necessity to constantly adjust the volume manually. The normalization is applied to both channels in stereo recordings.
- In Default and Advanced Modes Universal Player skips silent portions of the call over 3 seconds and plays a sound effect to denote the gaps. Universal Player skips silence of over 10 seconds and plays a different sound effect to denote the longer gaps. In Screen Mode, Universal Player does not skip silent portions.
- Where the agent and the customer are speaking at the same time, the crosstalk is shown as a purple waveform.
- The percentage of talk time displays in blue for the right channel, red for the left channel left channel, and purple for the crosstalk. The player can play one channel or just crosstalk separately by one, by clicking on the appropriate color percentage displayed.
- Accelerated playback increases the playback speed of the recording. There are 3 speeds available 100% normal speed, 140% and 170% accelerated.
- Screen mode provides video playback of recorded agent desktops. Video playback can provide users with several views. Zoom view enables users to magnify areas of the agent desktop for a closer view. Users may open the video playback in separate screen and view it on another monitor.
- Advanced mode displays interactions that contain multiple segments.
 Selecting this option displays the segments in a timeline that depicts any hold or transfer times.

Playing Media Using Universal Player in Default Mode

There are two viewing modes for the call waveforms.

Default mode, and view segments mode.

Default mode displays the whole call on one row including the controls.



Figure 142: Showing Universal Player Playing in Default Mode

Double click the media to be played, the player displays a graphical representation of the audio waveform and starts to play the audio. The waveforms displays all segments of the call separated by $\mathbf{\nabla}$ for a short gap and $\mathbf{\nabla}$ for a long

gap. Click pause to pause the playback at any time. Click play to restart playback.

Playing Media Using Universal Player in View Segments Mode



Double click the media to be played. Click pause to pause the playback at any time. Click play to restart playback.

Viewing Call Segments



Figure 144: Default View

Calls that are transferred are composed of several segments.



toggle segments to view the call segments.



Figure 145: Multi Segment View

The segments of the call display on separate rows. The controls for the player display at the top.

If there is only one segment available because the call has not been transferred then that segment displays with the controls in a separate row on the top.

▶ 14		Þ	•	×	\leftrightarrow	+			> 0 36 1	0:05 2 47	Ξ
1 min 47 sec	00:00	00:10	00:20	00:30	00:40	00:50	01:00		01:20	01:30	01:40
5645 John Doe		ha mail		and the		lukuli "J	Manylopathika	e ile balan		en pli	

Figure 146: Single Segment View



Viewing screen captures



Figure 148: Viewing Screen Captures

Screen mode shows the waveform and any tags and screen captures.

Click the expand symbol **I** to see the full screen in a new window.



Figure 149: Full screen view

All controls are active even when playback is paused.

Clicking the Waveform to Start Playback from a Certain Point



Figure 150: Clicking the Waveform to Start Playback from a Certain Point

Click on a particular place in the waveform to start playing from that point. The play head moves to the new position. This is possible even when Universal Player is playing.

Adjusting the Volume and Muting



Selecting Channels



Figure 153: Selecting Playback Channels

When a customer and agent speak at the same time or there is interference on the line one of the parties to the call it is sometimes useful to listen to just one channel or the other

To listen to a specific channel:

- Click the blue number, representing the percentage of talking time, to listen to only the left hand channel. To listen to both channels click the blue number again.
- Click the purple number, representing the percentage of talking time, to listen to only cross-talk, this is when both parties are talking at the same time. To listen to both channels click the purple number again.
- Click the red number, representing the percentage of talking time, to listen to only the right hand channel. To listen to both channels click the red number again.

In the screenshot the left hand channel was talking 52% of the time, for 11% of the time both parties were talking, and the right hand channel was talking for 53% of the time.

These figures indicate how well the agent is communicating. In general the middle figure, the cross talk, should be as low as possible.

Setting the Playback Speed



Figure 154: Selecting Playback Channels

Often the whole content of a call is not significant. Alter the playback speed to listen quickly through parts of the call that are not of interest and then resume normal speed where it is necessary to pay attention to detail.

By default \rightarrow normal playback speed displays playback is at normal speed.

Click > normal playback speed and > 140% playback speed, displays.

The playback is 40% faster than normal speed.

Click » 140% playback speed and » 170% playback speed displays.

The playback is 70% faster than normal speed.

Click » 170% playback speed and > normal playback speed displays.

The playback returns to normal speed.

The figures to the right hand side show the elapsed time of the interaction.

Selecting a Portion of the Call for a Playback Loop

Select specific portions of the interaction to play back more than once.





Chapter

13 Reporting

This chapter describes how to create and export evaluation charts and reports in Genesys Quality Manager.

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 can be created:

- Agent Skills: Select an agent, questionnaire, evaluation period question groups or skills, and questions to view an agent's skill profile.
- **Compare Agents:** Select a questionnaire, evaluation period and question groups or skills, 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 an agent, 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 157: Setting Up a Report

- 2. Select an agent group from the Group drop-down.
- 3. Select an agent from the Agent drop-down.
- 4. Select a questionnaire from the Questionnaire drop-down.
- 5. Select an evaluation start date in **From** and select an evaluation end date in **To**.
- Select an initial report Scale from the drop-down, 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 drop-down. The user can choose from All skills or select different sections of the questionnaire, these 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 <u>Exporting</u> <u>Report Data</u>.

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 🖂 Message
«	Results Distribution 🗵
● 2010年1月	🖄 Compute graph 🆆 Export Spreadsheet 🔞 Close
😨 Dashboard	Parameters
Constitutions Constitution Constitution	Show:
🖃 🧀 Reports	Number of Agents
Agent Skills	Questionnaire:
Compare Evaluators	~
Results Distribution	Question Group:
Compare Scores	▼ .
Interaction Volume	Question:
Evaluation Volume	
Administration About	Period
	From Date: 14/08/2012
	To Date: 25/09/2012
	Scale: Month

Figure 158: Opening the Results Distribution Tab

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

Re	sults Distribution 📧									
8	Compute graph 🍺 Export to spreadsheet 🛛 Close									
Show	Number of Agents Questionnaire: Call Quality ((1.0)	Questio	on Group:	(Entire Questionnai	e) 🗸	Question:	(Entire Question Group	~	
	Number of Agents			Parame	ters					
	Number of Evaluations			Period						
	Number of Interactions			From	Date:	6/1/11				
				To Da	te:	6/1/11				
				Scale:		Month			~	

Figure 159: 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**: drop-down to base the analysis on.
- 3. Select a question group from the **Question Group:** drop-down to base the analysis on. This is optional.

4. Select a question from the **Question:** drop-down to base the analysis on. This is optional.

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

Figure 160: 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 🧔 Root group				<u></u>		
a 🃁 Alan Wand	erer			=		
mobile						
a 🃁 Apia						
FC Sion						
a 📹 Asunción				Ψ.		
Agents:			Select All/	None		
Barron, Glenn (g	lenn.barron)					
Buckner, Randy	(randy.buckner)				
Gomez, Harley (harley.gomez)					
Hendricks, Kristo	opher (kristophe	er.hendricks)				
Macdonald, Earr	nest (earnest.m	acdonald)				
Malone, Trenton	(trenton.malon	e)		-		
Constant						
 Scoring 						
Scoring Type:	Percenta	ge				
Good Threshold:	75	Maximum:	100			
Bad Threshold:	25	Minimum:	0			
Saa miconola.	25	Pining in	0			

Figure 161: The Results Distribution Tab Parameters / Select Agents

- Select one or more agent Groups:. The user can select all or none by selecting or deselecting Select All/None. The agents in the groups display in the Agents: section. The user can select more than one group by pressing and holding the CTRL key while selecting additional groups.
- 2. Select the checkboxes of one or more **Agents:**. The user can select all or none by selecting or deselecting **Select All/None**.

The **Scoring** parameters enable the user to determine the threshold 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 162: Compute Graph

- Click Compute Graph to begin the chart creation process. A graph displays if there is data available. If the user receives a message warning about no data being available for the specified parameters, they must modify their 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 op	pen					
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 of	do with this file?					
Open with Microsoft Excel (default)						
Save File						
Do this <u>a</u> utomatically for files like this from now on.						
	OK Cance					

Figure 163: Export to Spreadsheet Dialog

Click **OK** to open the spreadsheet.

The exported spreadsheet opens in MS Excel 2007-10 or compatible alternative.

X	🚽 ing 🗸 (t	si , ∣÷ Ag	gents+	Score+Hi	s	. 0	23
F	File Hor	Inse Pag	For D	at Rev	v• 🗠	? -	e X
	∼			%	A	Cells	Σ,
Pa	ste ▼ 🝼	Y Alig	*	Number	Styles	v ⊂elis	2-
Clip	board 🕞						Ed
	G16 • <i>f</i> x						
	Α	В	(2	D	E	
1	Agents	Score	His	tory -	Mon	thly	
2	ory From:	15.7.2011		Hist	ory To:	15.7.2	011
3	tionnaire:	ງuality 1.0		S	coring:	RCENTA	AGE
4	on Group:	All			Good:	75,0	00%
5	Question:	All			Bad:	25,0	00%
6	Groups:	Brussels					sels
7	Agents:	Herbert Ayala				/ala	
	<u> </u>						

Figure 164: Example of Exported Spreadsheet

The cells can be resized as required.



Results Distribution Graph - 2

Figure 165: Results Distribution Graph 2

The graph bars display **Good** in green, **Average** in orange, and **Bad** in 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 166: 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							
Questionnai	ire:	Call (Qualit	y (1.0)				
	Group/Question name				1			
		Base Evaluati on, Deanna Barker, 20/10/10	Deanna Barker,		Deanna Barker, 20/10/10		Deanna Barker, 20/10/10	
		, Eval	,	Deanna`	,	Deanna`	P	Deanna`
Opening call		Id: 1741 4.00%	Id: 1742 0.00%	s Diπ -4.00%	Id: 1743 24.00%	s Diff 20.00%		s Diff 24.00%
Opening can	Greeting, introducing the agent and the company	10.00%			24.00%			-10.00%
	Detection and Verification of a competent person	0.00%		0.00%	20.00%	20.00%		
	Customer?s Consent to interview him/her (time, topic)	0.00%			20.00%	20.00%		
	Company Presentation	0.00%			0.00%	0.00%		
	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%

Figure 167: 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 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 and question group than the base evaluation.

League Table - 1

**	League Table 🛎	
5 8 2 2 8 5 2 2 8 5 5 5 5 5 5 5 5 5 5 5	Export to Spreadsheet	Close
 Dashboard Caluations Questionnaires Reports Agent Skills Compare Agents Compare Evaluators Results Distribution Compare Scores League Table Interaction Volume Evaluation Volume Evaluation Volume Administration About 	Time Interval Period: Date From: Questionnaire Scoring System: Questionnaire:	Yesterday 7/14/11 Percentage Select All/None: Call Quality (1.0)
	Mainstream Thresho	olds
	Bad Threshold: Good Threshold:	25 75
	Agents	
	Grouping:	Agent Group
	Groups: Groups	Select All/None Agents: Select All/None Admin, Admin, admin) Agent, Anne (Anne. Agent) CcManager, CcManager (ccmanager) ipccimporterdaemon, ipccimporterdaemon (ij

Figure 168: 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 the **Date from:** and **To:**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 enables 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, this is 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								
Questionnaire Call Quality (1.0)										
From:		9/26/2	010	,						
To:		9/29/2	010							
					Average					
#	Name	Surname	Login	Group	Score					
1.	Patricia	Cortez	patricia.cortez	Paços de Ferreira	52.56%					
2.	Eva	Sanders	eva.sanders	Paços de Ferreira	51.52%					
3. 4. 5.	Charlie	Lester	charlie.lester	Paços de Ferreira	51.19%					
4.	Marco	Ochoa	marco.ochoa	Paços de Ferreira	50.13%					
	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 169: 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.

	🔽 Tooltips On 🧟 CcManager, CcM	anager (comanager) 🎤 Logout 🖂 I	Messages
Interactions Volume			
🖄 Compute graph		📴 Export to spr	eadsheet
		Chart Data	A >>
		Volume	~
		V Evaluated	
		Replaced	
		Not Evaluated	
		Filter:	
		All Evaluators	~
		All Groups	*
		All Questionnaires	~
		Date Range:	
		From: 6/1/11	
		To: 6/30/11	
		Scale: Day 🍸	
		Interaction Types:	
		Call + Screen	
		Chat	
		Email	
		Other	
		Registration	

Figure 170: 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** drop-down list. The **Volume** dropdown list 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, Replaced, or Not Evaluated.
 - 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 is negligible.

- 2. Select 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 drop-down 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, this is the default.
- Week
- Month
- Quarter
- Year
- 5. Select 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
 - 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 171: 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 only functions 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 **Completed** or all three, over a specific time period.

🗢 то	oltips On 🧟 CcManager, CcM	lanager (ccr	manager) 🔊 Logout 🖂	Messages
Interactions Volume				
🖄 Compute graph			😭 Export to s	preadsheet
		Chart Dat	ta	A >>
		Volume		*
		🔽 Planne	ed	
		🗹 In Pro	gress	
		🔽 Compl	eted	
		Filter:		
				v
		All Evalu		
		All Group	0S	*
		All Quest	tionnaires	*
		Date Rang	ge:	
		From:	6/1/11	
		то:	6/30/11	
		Scale:	Day 💙	

Figure 172: 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** drop-down list. The **Volume** dropdown list has 2 options:
 - Volume: Shows total number of interactions.
 - Volume Ratio: Shows percentage ratio between interactions in the given state.

Volume is selected by default.

- 2. Select the boxes **Planned**, **In Progress**, and **Completed**, and select which states are shown in the chart.
- 3. Select filters from the drop-down 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 displays.

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



Figure 173: Evaluations Vol Chart

The graph displays the following bar colors:

- Red for Planned
- Orange for In Progress
- Green for Finished

Point to 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) 🎤 Log	out 🖂 Messa	iges			
«	Evaluation List 🛞 Evaluation	n Detail 🗵								
Q 日本 1 1 1 1 1 1 1 1 1 1 1 1 1	📄 Print 🛛 🍺 Export to Spre	adsheet		0	Include All Possible Answers	Eco Printi	ing			
😨 Dashboard 🖃 💋 Evaluations	Evaluation #949 - Call Quality 1.0									
Leadin List Constitution Planner Constitution Planner Constitution Constitution Constitution	Agent: Evaluator:		arker (deanna.barker) (jake.buck)	Evaluation date: Eval. period from: Eval. period to:	27/01/11 23/01/11 12:00 29/01/11 11:59					
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 agent and the company Detection and Verification of a competent person Customer?s Consent to interview him/her (time, topic) Company Presentation Switching to the matter of the call Merchant's skills Questioning techniques - investigative/business oriented			Average Good Bad Average Good		50.0% 100.0% 100.0% 0.0% 50.0%				
	Understanding custome Solution proposal Customer care Call control	r needs		Good Average Good		100.0% 50.0% 100.0%	*			

Figure 174: 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 checkbox 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 selected grayed out.

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, click Export to Spreadsheet.

Tip:

To produce a report for multiple evaluations, select more checkboxes in step 1.

Exporting Report Data



Figure 175: Exporting Graph Data to a Spreadsheet - 1

To export all graph data to an Excel 2007 or above spreadsheet:

- 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/N	one	Select Evaluators Select	All/None	Select Base Evaluation:		
Call Quality (1.0)	🔺 🃁 Root g	group	^	Buck, Jake (jake.buck)		Benson Mattie 9/29/10 -		
	a 💋 o	openhagen		Ryan, Melinda (melinda.rya	n)	Benson Mattie 9/28/10		
	P	aços de Ferreira				Benson Mattie 9/27/10 -		
	🖉 🖉 🖉	akar		Benson Mattie 9/26/10 -				
	Opening export.	xlsx		Benson Mattie 9/25/10 -				
	You have chosen t	onen		Watson Fannie 9/29/10				
	issues and a second sec	·				Watson Fannie 9/28/10		
	-	۰ ۱icrosoft Office Excel W	Jorkel			Watson Fannie 9/27/10		
		/docs-callrec1.office.zo		Watson Fannie 9/26/10				
	⊂What should Firef	ox do with this file?		Watson Fannie 9/25/10				
Evaluations for Compariso			a el Ze	lefault) 🗸				
	Open with	Microsoft Office Ex	.cer (c					
Selected Questionnaire:	🔘 <u>S</u> ave File				l/None	Select Evaluations to Com		
Call Quality (1.0)	📃 Do this <u>a</u> u	tomatically for files like	this f	rom now on.		Benson Mattie 9/29/10 -		
					þ	Benson Mattie 9/28/10 -		
						Benson Mattie 9/27/10 -		
			- (OK Cancel		Benson Mattie 9/26/10 -		
				Benson Mattie 9/25/10 -				
	a 💋 G	uatemala City				Watson Fannie 9/29/10 -		
	в	reidablik				Watson Fannie 9/28/10 -		
						Watson Fannia 0/27/10 .		

Figure 176: Exporting Graph Data to a Spreadsheet - 2

Export to Spreadsheet creates a downloadable .xlsx file.

- 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.

Compare	Scores							
Questionnai	re:	Call	Quality	y (1.0)	1			
	Group/Question name							
		Base	1					
		Evaluati						
		on,						
		Deanna			Deanna		Deanna	
		Barker.			Barker.		Barker.	
		20/10/10	20/10/10 . Eval	Deanna`	20/10/10 . Eval	Deanna`	20/10/10	Deanna`
		,	Id: 1742		,		,	s Diff
Opening call		4.00%		-4.00%	24.00%	20.00%	28.00%	24.00%
	Greeting, introducing the agent and the company	10.00%	0.00%		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%	20.00%	
	Switching to the matter of the call	0.00%		0.00%		0.00%	20.00%	
Merchant's skills		4.00%		8.00%		2.00%	18.00%	
	Questioning techniques - investigative/business orien					0.00%	30.00%	
	Understanding customer needs	0.00%				0.00%	40.00%	
	Solution proposal Customer care	10.00%		0.00%		10.00%	20.00%	10.00%
Call control	Customer care	10.00%			10.00%	2.00%	0.00%	
Call Control	Following the script	10.00%	0.00%		20.00%	0.00%	0.00%	
		10.00 /	0.00%	-10.00 %	10.00%	0.00 %	0.00%	-10.00 %

Figure 177: 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, this is 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. Using an ID number, the user can search for the specific evaluation in the Quality Manager evaluation list using the search, enter the same ID into **From** and **To** ID fields.



Chapter

14 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 can all use.

This chapter contains the following sections:

Selecting a Suitable Evaluation for Calibration Assigning Evaluators to the Agents Group Creating Evaluations for each Evaluator Comparing Evaluators Compare Evaluators Chart

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.

E	valua	tion List 🗵										
	New	🖲 View	📃 Report	🙀 More Ac	🐉 More Actions 👻 🖂 Send Evaluation Feedback 🍃 Export Spreadsheet 🛛 All							
	Ν.	D	Evaluator	Agent	Ques. N	Period F	Period To	Score	Status 🔻	Reveal	Last Mo	Parent ID
	201	19548	Kadlec, Kar	Doe, John	Averag	Jan 1, 2	Jan 4, 2	64.0 %	Finished		Oct 4, 2	19546
	202	19547	Doe, John	Doe, John	Averag	Jan 1, 2	Jan 2, 2	100.0 %	Finished		Oct 4, 2	
	203	19508	CcManager	Smith, John	Averag	Jan 1, 2	Jan 2, 2	98.1 %	Finished	1	Sep 5, 2	
	204	19507	CcManager	Smith, John	Averag	Jan 1, 2	Jan 2, 2	100.0 %	Finished		Sep 5, 2	
	205	19546	Anderson, I	Doe, John	Averag	Jan 1, 2	Jan 3, 2	81.1 %	Finished		Oct 4, 2	
	206	19502	Anderson, I	Smith, John	Averag	Aug 1,	Sep 2, 2	78.9 %	Finished		Sep 4, 2	
	207	19500	Smith, John	Smith, John	Averag	Aug 1,	Sep 2, 2	100.0 %	Finished		Sep 4, 2	
	208	19499	CcManager	Smith, John	Averag	Aug 1,	Sep 2, 2	54.1 %	Finished		Sep 4, 2	

Figure 178: Select a Suitable Evaluation

- 1. Select the checkbox 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 be used for calibration across the evaluation team.

E I (; #00					
Evaluation #89	6 - Call Qual	ity 1.0			
Agent:	Dora Vargas (de	ora.vargas)	Evaluation Date:	18/07/11	
Evaluator:	Jannie Spears (jannie.spears)	Eval. Period From:	30/03/11 12:00	
			Eval. Period To:	31/03/11 12:00	
Interaction #896	Start:	-	End:	-	
Call	From:	-	To:	-	
	Direction:	All	Wrap Up:		
	Category:				
Question			Answer		Rating
Opening call					
Greeting, introducing the	e agent and the con	npany	Good		100.0%
Detection and Verification	on of a competent p	erson	Good		100.0%
Customer?s Consent to	interview him/her (time, topic)	Good		100.0%
Company Presentation			Good		100.0%
Switching to the matter	of the call		Good		100.0%
Merchant's skills					
Questioning techniques	 investigative/busi 	ness oriented	Bad		0.0%
Understanding custome	r needs		Average		50.0%
Solution proposal			Good		100.0%
Customer care			Good		100.0%
Call control					
Following the script			Excellent		100.0%
The Language, length o	f sentences, speed	of speech	Excellent		100.0%
Listening			Average		45.0%
Responding			Good		100.0%
Overcoming objections			Good		100.0%
Tone / pitch of the call /	Positive speech		Excellent		100.0%
Closing the call					
Thanks and farewell to t	he customer		Average		11.0%
Summary after call - rec	ар		Bad		0.0%
Inviting the customer to	call anytime the info	oline	Bad		0.0%
				Total Rating:	68.0%

Figure 179: Evaluation Detail

Assigning Evaluators to the Agents Group

Before calibrating evaluators, the user 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.

E	valuation List 🗵 🗍 Interacti	ions 🖲 User Manager 🗷									
•	Add 🥜 Edit 🤤 Remo	ve 🞯 Reset Password									🔍 Searc
	N. Surname	Name	Login ID		User Role	Belong	gs To Group	Database		Status	
	9 Bolshakov	Sergey	ccmanager	ru	CC Manager	Leade	rship	ScoreCard	DB	0	
	Add or Edit User				• ·					×	
	Database:	ScoreCardDB		Groups:			Groups Assig	gned to Sup	ervisor:		
	Status:	Active 💌		-	iot group		Group A				
Ē	User Role:	CC Manager	~				Group B				
	Language:	Русский	~		roup B roup C						
	Login ID:	ccmanagerru			roup D						
	First Name:	Sergey		G	roup E						
	Surname:	Bolshakov			roup F						
	Email:	sbolshakov@ccru.com		L	eadership						
	💿 Phone										
	💿 Agent ID										
	None										
Ē	Agent Group:	Leadership	~								
	Reset Password										
				Add	Add All	Remo	ove Rem	ove All			
	Delegation										
								Save	Cancel		
K								care	Ganosi	splayi	ing 1 - 50 of

Figure 180: 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.
- Drag the group into the Groups Assigned to Supervisor field.
- 5. Click Save.

Repeat steps 2 to 5 for each evaluator.

Creating Evaluations for each Evaluator

Ev	Evaluation List 🖲 Interactions 🗵											
	📄 New 💿 View 📃 Report 🔯 More Actions -											
	Ν.	ID	Evaluato	ſ	Reevaluate	Period From	Period To	Score	Status 👻			
	201	19548	Kadlec, ł	1	Reopen	Jan 1, 2012	Jan 4, 2013	64.0 %	Finished			
	202	19547	Doe, Joh	,		Jan 1, 2012	Jan 2, 2013	100.0 %	Finished			
	203	19508	CcManag	~	Include in Statistics	Jan 1, 2011	Jan 2, 2012	98.1 %	Finished			
	204	19507	CcManag		Reveal Results to Agent	Jan 1, 2011	Jan 2, 2012	100.0 %	Finished			
☑	205	19546	Anderso		Delete	Jan 1, 2012	Jan 3, 2013	81.1 %	Finished			
	206	19502	Anderson	, Lia	Smith, John Average H	Aug 1, 2012	Sep 2, 2012	78.9 %	Finished			

Figure 181: 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.

Remove	Interactions	
2	Do you wish to remove all agent interactions?	
	Yes No	

Figure 182: Remove Interactions

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

Date Range:	▼ From: 1/1/12 To: 1/3/13 ■
Questionnaire: A	verage Handling Time (1.0)
pply To Statistics:	
Basic Add Sub-Crite	zria
Group Evaluation	Agent Evaluation Self-Evaluation
Valuator:	
Groups:	Anderson, Liam (landerson)
🔺 💋 Root group	Bolshakov, Sergey (ccmanagerru)
Group A	Brunner, Alan (abrunner)
Group B	CcManager, CcManager (ccmanager)
Group C	Jasper, Matt (mjasper)
	Kadlec, Karol (kkadlec)
Group D	Karch, Rod (rkarch)
Group E	Sippo, Kristy (ksippo)
	Sippo, Kristy (ksippo) Snow, Ty (tsnow)
Vrapup:	Sippo, Kristy (ksippo) Snow, Ty (tsnow)
Vrapup:	Sippo, Kristy (ksippo)

Figure 183: 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	
	ОК

Figure 184: Evaluation Created

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.

							🖵 та	oltips On	🝰 CcMar	nager, Co	Manager	(ccmana	ger) 🔊 l	Logout 🖂 M	essages
	~	Ev	/aluat	tion List											
C, K #	912 215		New	Evaluatio	n 🕼 Evaluate	📃 Report 🚳	More Actions -	Send Eval	uation Feed	lback 🍹	Export	to Spread	dsheet A	All	
Dashboard			N.	ID	Evaluator	Agent	Ques. Name	Period Fr	Period To	Score	Status 4	Reveal	Last Mo	Parent ID	N
Evaluations		C	1	1731	Spears, Jannie	Gross, Carolina	Call Quality (1.0)	Mar 26, 2	Mar 27, 2	0.0 %	Created	7	Aug 4, 20	895	
🛃 Evaluation List			2	1332	CcManager, Cc	Hartman, Nane	Call Quality (1.0)	Aug 1, 20	Aug 1, 20	0.0 %	Created	V	Aug 2, 20		_
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 Genorte			4	1330	CcManager, Cc	Hobbs, Eddie	Call Quality (1.0)	Aug 1, 20	Aug 1, 20	0.0 %	Created		Aug 2, 20		

Figure 185: 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 .

Evaluation #1	731 - Call Qual	ity 1.0				Evaluation #173	32 - Call Quality	y 1.0			
Agent: Evaluator:	Carolina Gross (c: Jannie Spears (ja	,	Evaluation Date: Eval. Period From: Eval. Period To:	04/08/11 26/03/11 12:00 27/03/11 11:59		Agent: Evaluator:	Carolina Gross (caro Winston Stephens (v	<i>2</i> ,	Evaluation Date: Eval. Period From: Eval. Period To:	04/08/11 26/03/11 12:00 27/03/11 11:59	
nteraction #903	Start:	-	End:	-		Interaction #903	Start:		End:		
Call	From: Direction: Category:	- All	To: Wrap Up:			Call	From: Direction: Category:	All	To: Wrap Up:		
Question			Answer		Rating	Question			Answer		Rating
Opening call						Opening call					
	he agent and the comp		Good		100.0%	Greeting, introducing the	agent and the company	y	Good		100.0%
	tion of a competent per		Good		100.0%	Detection and Verificatio	n of a competent persor	n	Average		50.0%
	to interview him/her (tim	ne, topic)	Average		50.0%	Customer?s Consent to	interview him/her (time,	topic)	Good		100.0%
Company Presentation			Good		100.0%	Company Presentation			Average		50.0%
Switching to the matte Merchant's skills	r of the call		Average		50.0%	Switching to the matter of	of the call		Average		50.0%
	s - investigative/busine	ss oriented	Good		100.0%	Merchant's skills					
Understanding custom		55 onemed	Average		50.0%	Questioning techniques	-	oriented	Good		100.0%
Solution proposal			Good		100.0%	Understanding customer	needs		Good		100.0%
Customer care			Good		100.0%	Solution proposal			Average		50.0%
Call control						Customer care Call control			Good		100.0%
Following the script			Excellent		100.0%	Following the script			Good		80.0%
The Language, length	of sentences, speed of	speech	Good		78.0%	The Language, length of	contoneor, enoud of en		Excellent		100.0%
Listening			Average		45.0%	Listening	semences, speed of sp	Jeeun	Average		45.0%
Responding			Good		100.0%	Responding			Good		40.0%
Overcoming objection			Bad		0.0%	Overcoming objections			Bad		0.0%
Tone / pitch of the call	/ Positive speech		Good		89.0%	Tone / pitch of the call / F	Deeitiva enaarh		Good		89.0%
Closing the call						Closing the call	onare spectf		0000		03.074
Thanks and farewell to			Good		100.0%	Thanks and farewell to th	he customer		Average		11.0%
Summary after call - re			Good		100.0% 100.0%	Summary after call - reca			Good		100.0%
inviting the customer t	o call anytime the infoli	ne	Good		100.0%	Inviting the customer to e			Good		100.0%
				Total Rating:	81.0%						
										Total Rating:	71.0%

Figure 186: 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 Gross, 04/08/11, Eval Id: 1,731	Carolina Gross, 04/08/11, Eval Id:	Carolina's Diff
Opening call		80.00%	70.00%	-10.00%
	Greeting, introducing the agent and the company	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%	
	Company Presentation	100.00%	50.00%	-50.00%
	Switching to the matter of the call	50.00%		
lerchant's skills		80.00%	90.00%	10.00%
	Questioning techniques - investigative/business orient	100.00%	100.00%	0.00%
	Understanding customer needs	50.00%	100.00%	
	Solution proposal	100.00%	50.00%	-50.00%
	Customer care	100.00%	100.00%	0.00%
all 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%
losing 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%
otal Weighted Sco	re:	81.00%	71.00%	-10.00%

Figure 187: Compare Scores

Comparing Evaluators

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



Figure 188: 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 189: 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 columns represent the scores for Call Control.
- The purple columns represent the scores for Closing the call.

Hover over a particular column or the name of the column, and the precise percentage displays.



Chapter

15 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:

<u>The Quality Manager Dashboard</u> <u>Setting Up a Dashboard - 1</u> <u>Setting Up a Dashboard - 2</u> <u>Setting Up a Dashboard - 3</u>

The Quality Manager Dashboard

		🖓 Too	itips Off 🛛 🝰 CcManager, CcManager (comanager	r) 🎤 Logout 🖂 Messages
«	Dashboard 🗷			
0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	💷 Widgets per Row 🔹 🥥 Add Widget 🔹	Save		
Dashboard Dashboard Dashboard	Pacos de Ferreira Summary	3 × •	Pacos Top Scorers	⊜×▲
🗄 💋 Questionnaires	- Bad - 257 - Average - 523-	Good - 166	Agent	Score
Reports Administration			Mason, Horace	60
() About			Hebert, Noemi	59
			Petersen, Duane	56
			Wilcox, Alonzo	55
			Oliver, Robin	54
			Pacos - Poor Performers	@ X ▲
			Agent	Score
			Reid, Lucinda	34
			Blake, Rico	35
	Paco Trends		Young, Ivy	35
	Week	Month 🔒	Silva, Velma	36
		-	Walter, Cristina	38
	46 ₀₀	46 ₍₁₀₎		
	User Dashboard Default Dashboard			<u> </u>

Figure 190: The Quality Manager Dashboard

The Quality Manager **Dashboard** is available to users with certain roles within Quality Manager, team leader, supervisor, cc manager.

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

The widgets take data directly from the Quality Manager database, so the **Dashboard** reflects an up-to-the-minute overview of the 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

their own requirements.

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 191: 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 drop-down 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 drop-down 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, or bad for a group or all groups. For an example of this, see <u>Setting Up a Dashboard - 2</u>.

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

Setting Up a Dashboard - 2

Compare Evaluators 🛞 Dashboard 🛞	Pie - Configuration		×	-	
Widgets per Row • ③ Add Widget • 🔚 Save	Refresh (minutes):	30			•
	Date Range:	×			
	Title:				
	Questionnaire:	×			
	Groups:	Select All/None			
		🔺 🧊 Root group 📃 🔺			
		Group A			_
		Group B 🗧			E
		Group C			
		Group D			
		Group E 🔻			
	Good Threshold:				
	Bad Threshold:				
	Min-Max Value:				
		Save			-

Figure 192: 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.
- 2. The **Pie-Configuration** dialog box appears. In the **Pie-Configuration** dialog box:

Pie - Configuration		×
Refresh (minutes):	30	
Period:	Yesterday	~
Description:	Summary	
Questionnaire:	Call Quality (1.0)	~
Groups:	Select All/No	ne
	4 🃁 Root group	
	Dungate	
Good Threshold:	75	
Bad Threshold:	25	
Min-Max Value:	0 - 100	
	Sav	re D

Figure 193: Pie Widget Configuration

- 1. Type a **Refresh (minutes):** rate in minutes. This dictates how often the data is refreshed for the widget. It is recommended that this value should not be less than 5 minutes to avoid browser performance issues with multiple widgets refreshing together.
- Select a Period: from which the data is 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 drop-down list. If a **Description:** is not provided for a widget during configuration, Quality Manager displays setting 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

, for Windows, or **CMD**, for 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 194: 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. Click $_$ to minimize the widget. Click $_$ to maximize.

Important:

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

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.

