Genesys Quality Management 8.1

GQM Suite User Guide

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Table of Contents

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

Type the Call Recording URL in the browser address box.

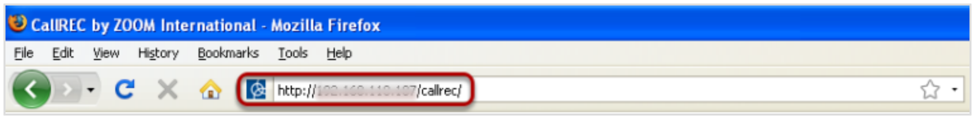


Figure 1: The Browser Address Box

The Login screen opens.

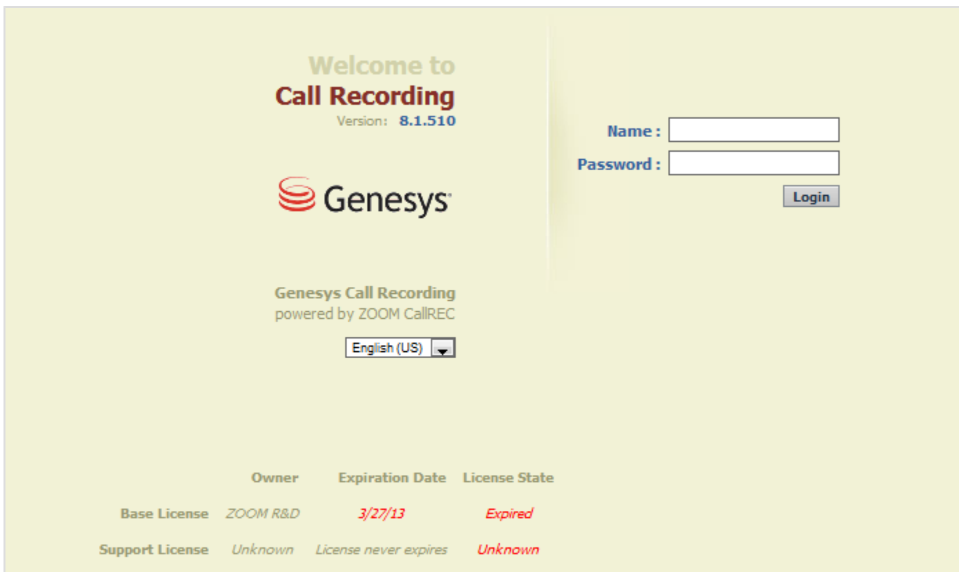


Figure 2: Opening Call Recording

Changing the Login Screen Language

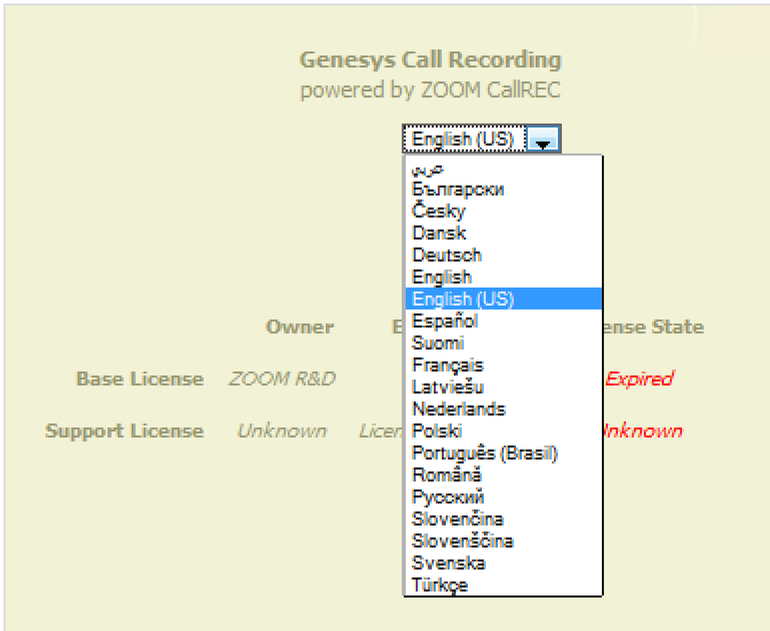


Figure 3: Login Screen Language

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

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**:

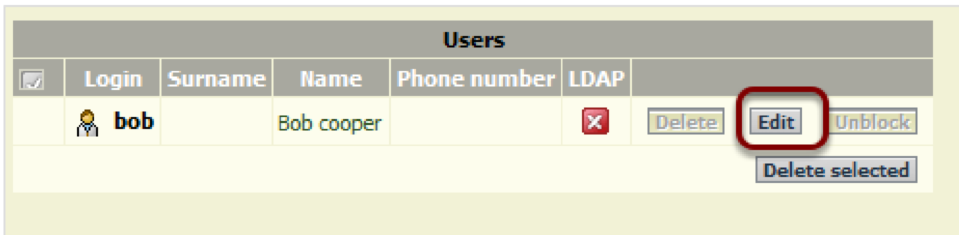


Figure 5: From Users Tab

1. Click **Edit**. The **Edit user** form opens.

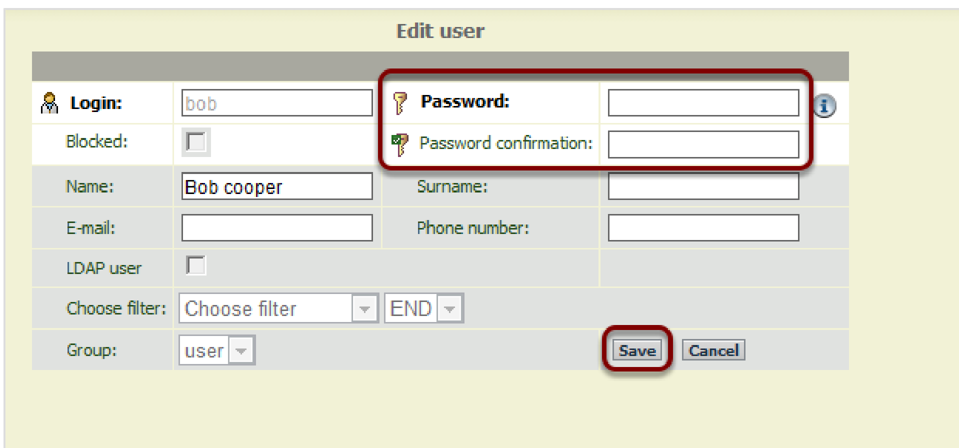


Figure 6: Edit User Form

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.

Navigate to **Settings > User Setup > Personal Setup.**

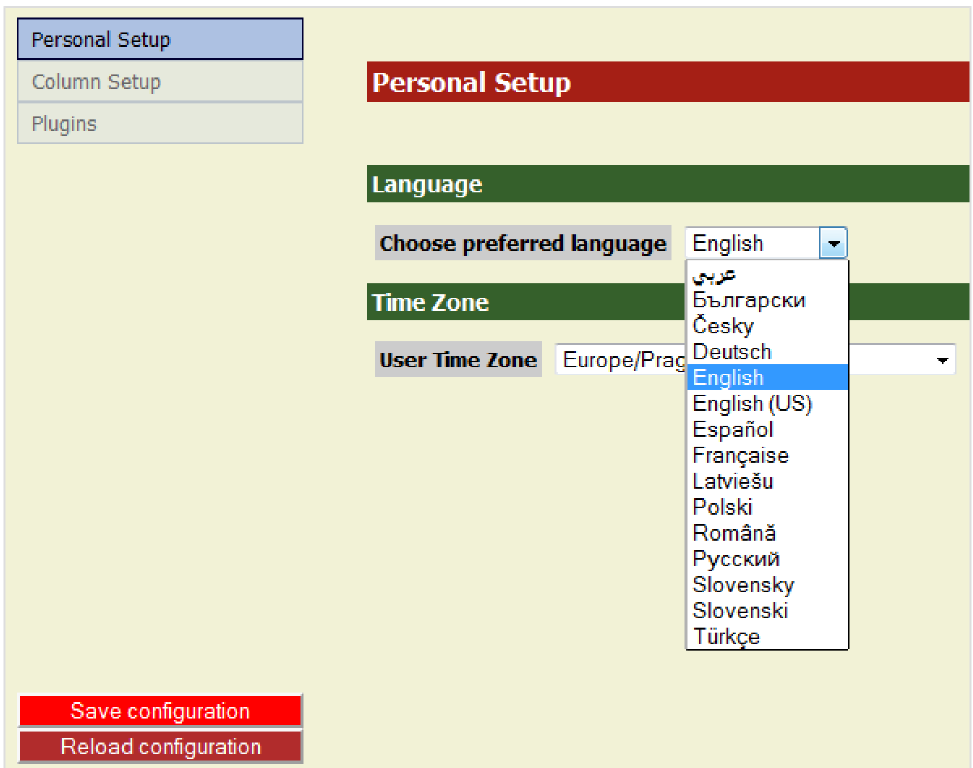


Figure 7: Changing the Default Language

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.**

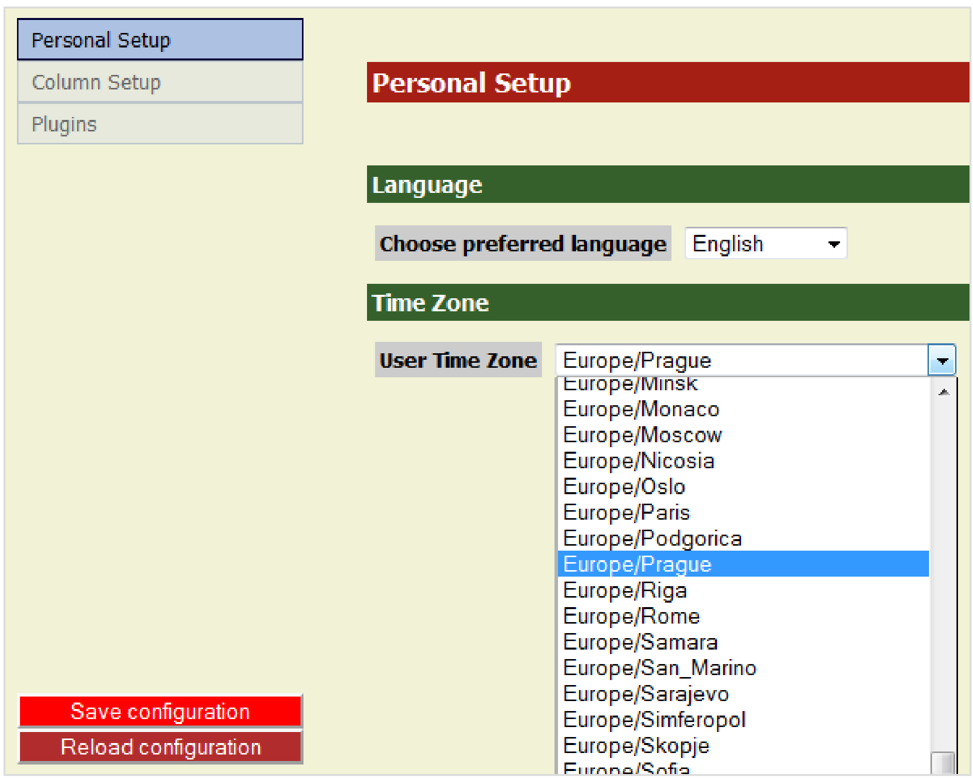


Figure 8: Changing the Default Time Zone

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

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

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

The **Recorded calls** tab displays calls recorded by Call Recording.

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.

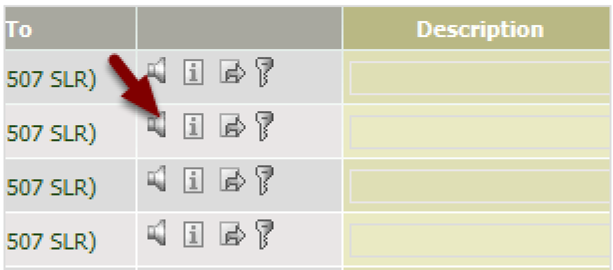


Figure 10: Recorded Call Icons

2. Click the play audio icon 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

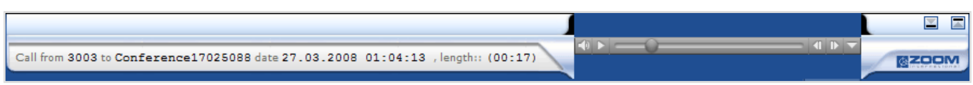


Figure 12: Integrated Player - Other Browsers and Apple QuickTime

Listening to Several Calls in a List using Advanced Player

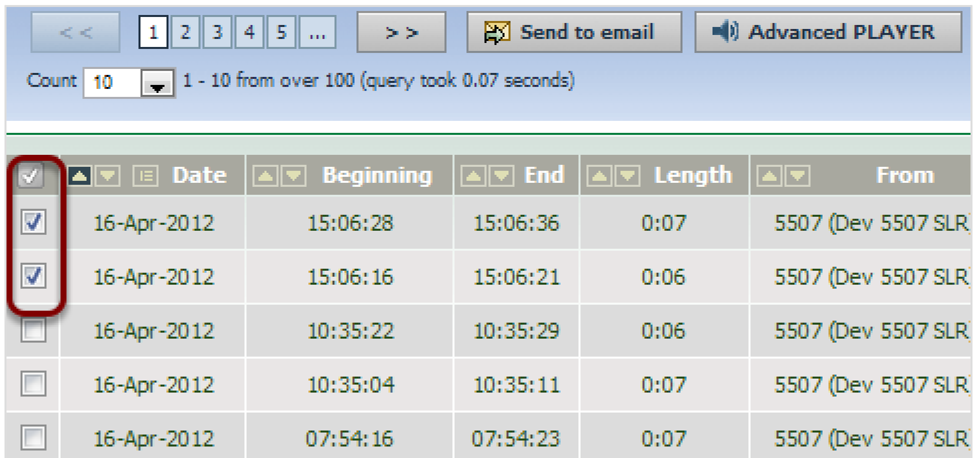


Figure 13: Selecting Multiple Recorded Calls

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.

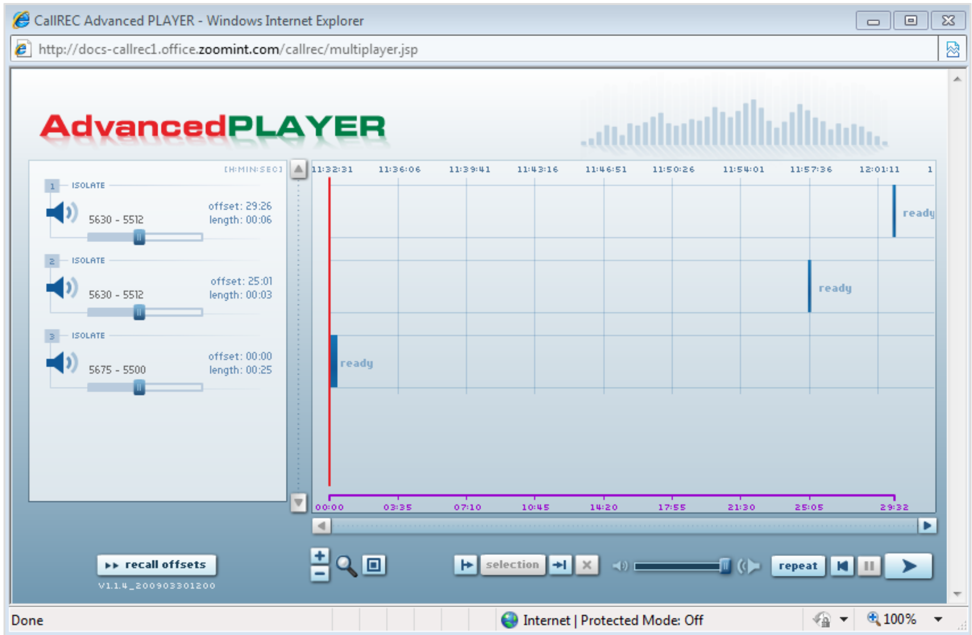


Figure 14: The Advanced Player Window

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

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.

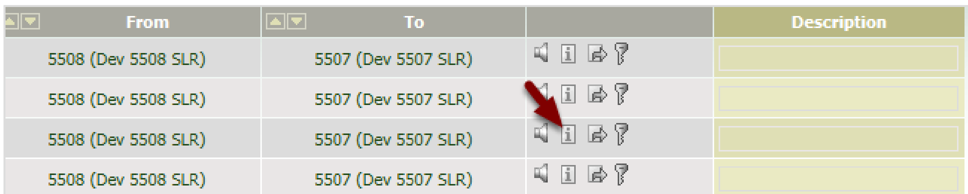


Figure 16: The Information Buttons

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

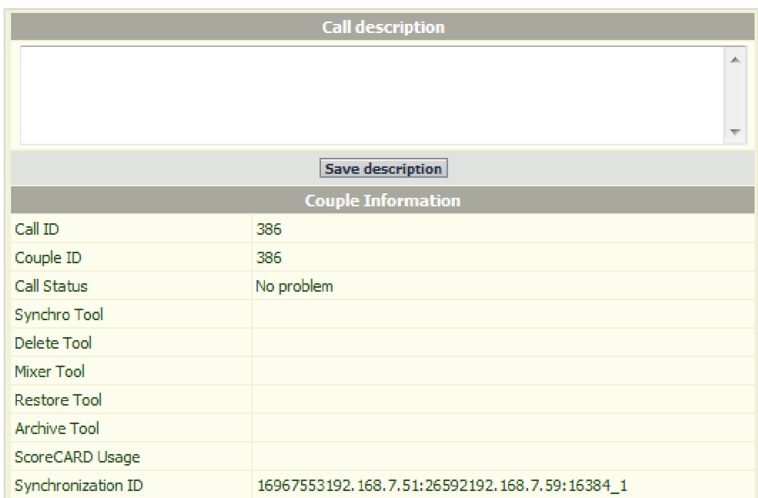


Figure 17: Call Description Window

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 .
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.

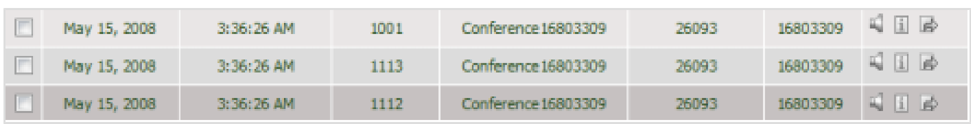


Figure 18: Identifying Conference Calls

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.

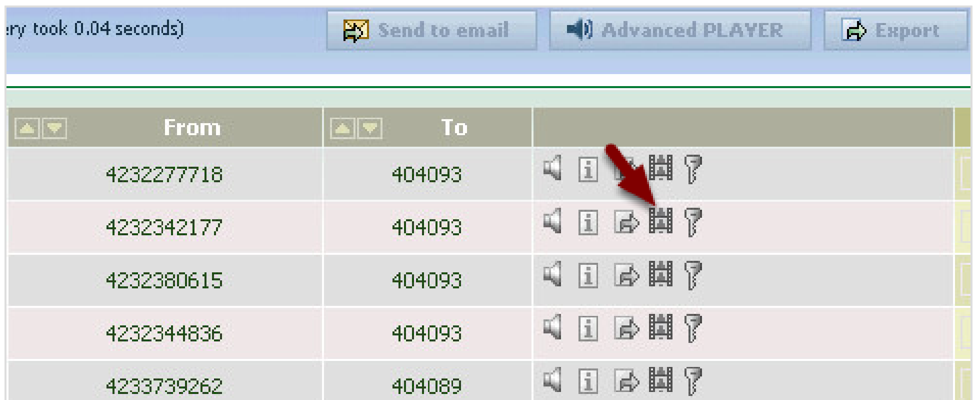


Figure 20: Recorded Calls with Screen Capture

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

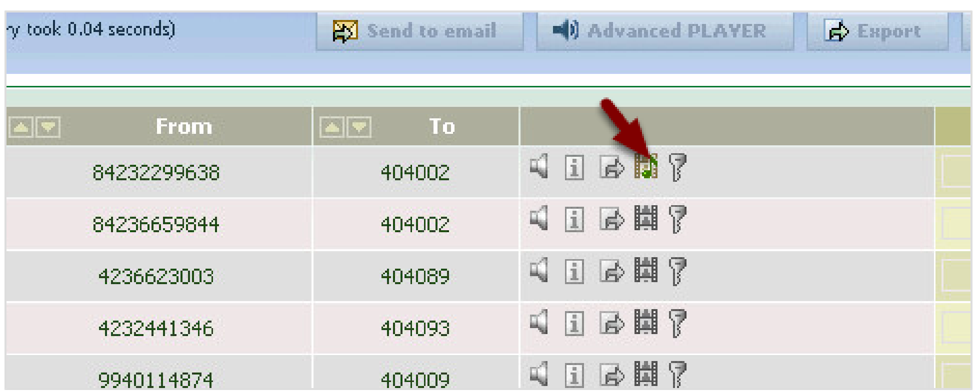


Figure 21: Mixed video

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

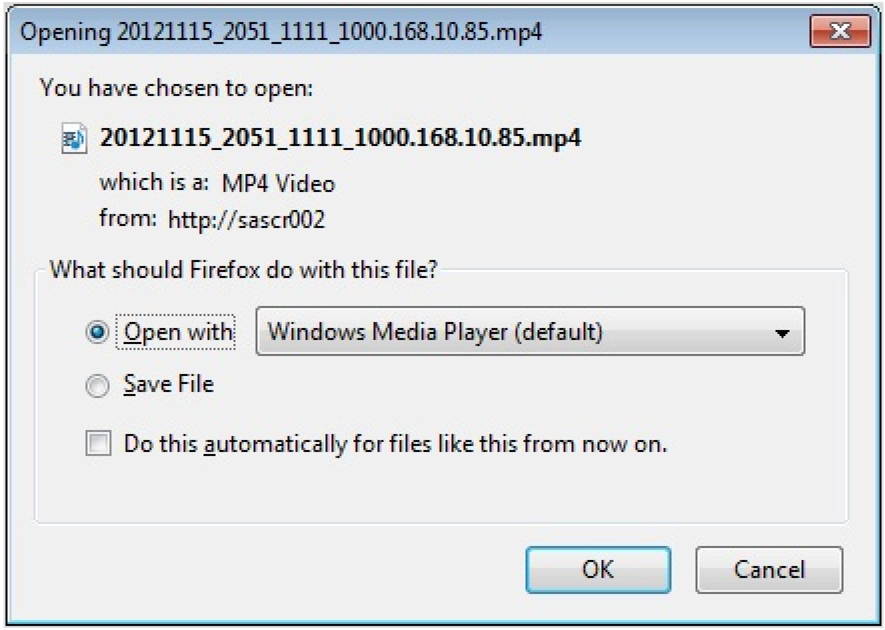


Figure 22: Recorded Calls with Screen Capture

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

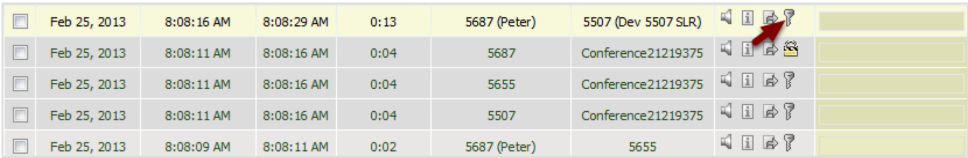


Figure 23: Protecting Calls

To protect a call from deletion:

Click the call unprotected to lock a call.

The call protected icon appears.

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

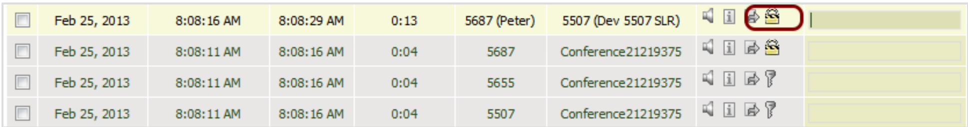


Figure 24: Protected Call

To remove protection from a call:

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

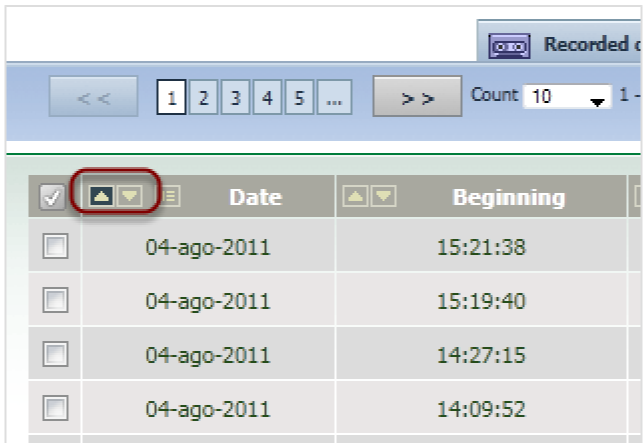


Figure 25: Up and Down Controls for Changing the Recording Order

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.

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

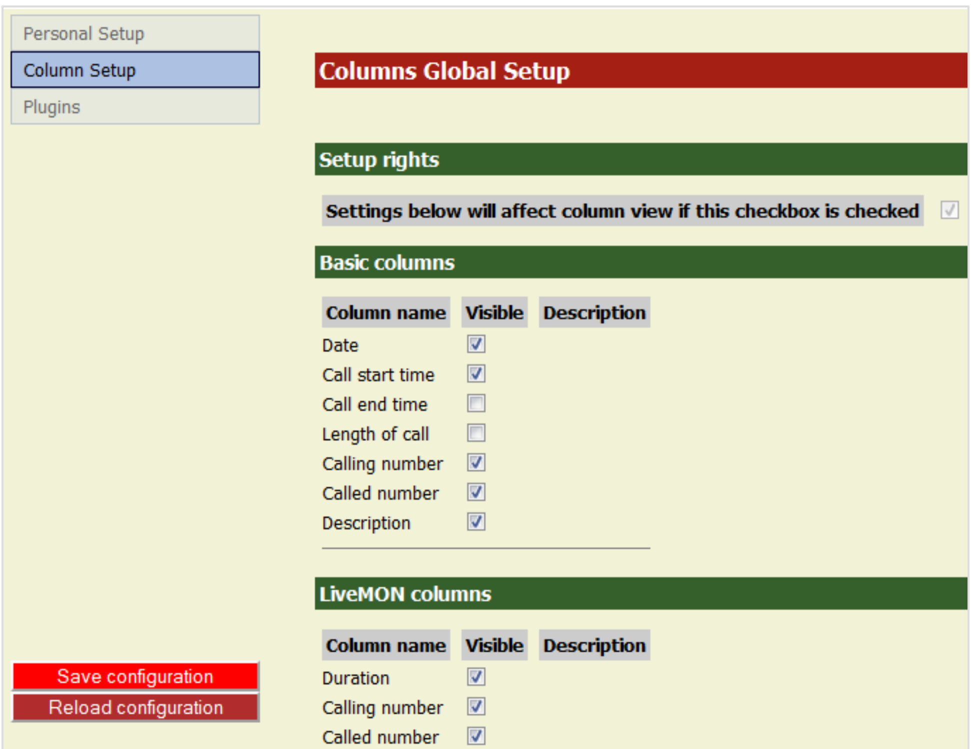


Figure 26: User's Setup - Columns

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

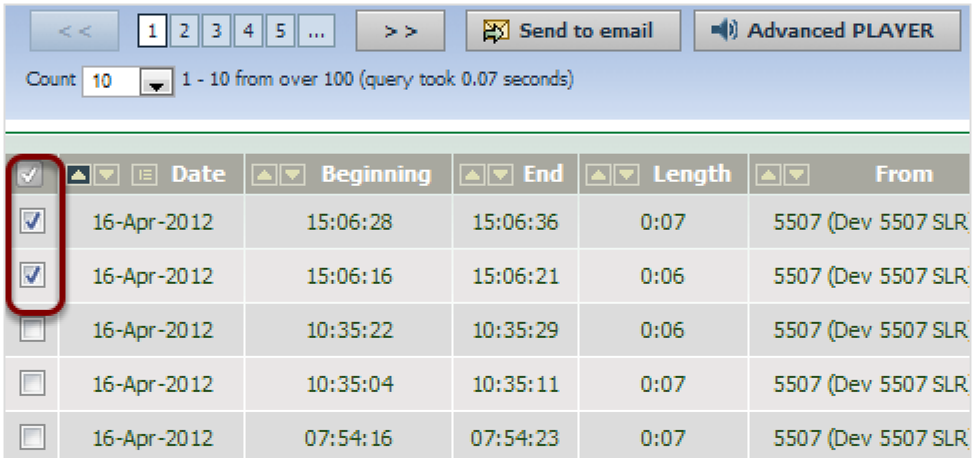


Figure 27: Selecting Multiple Recorded Calls

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.

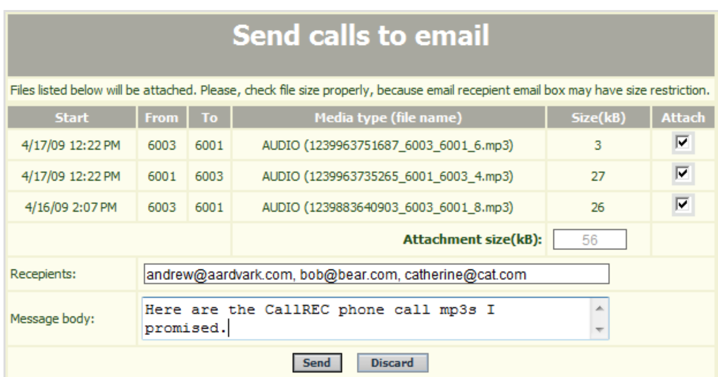


Figure 28: Sending Calls to Email

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**.

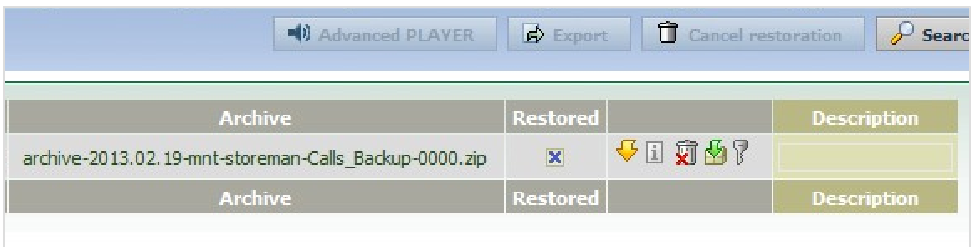


Figure 29: Selected Records Being Restored

3. The restoring call icon appears  .

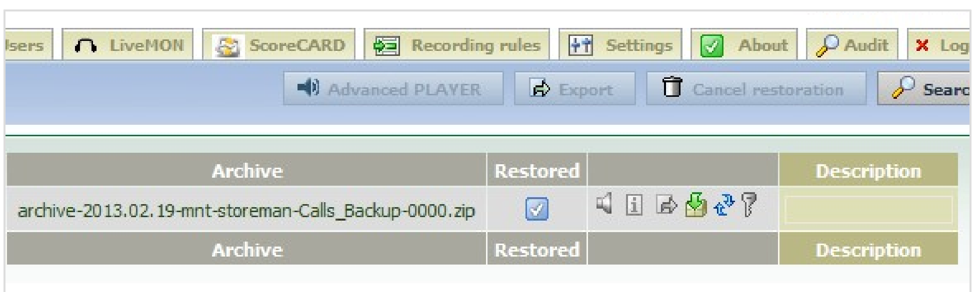


Figure 30: Selected Records Being Restored

When the call is restored, the restored call icon appears  .

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

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.

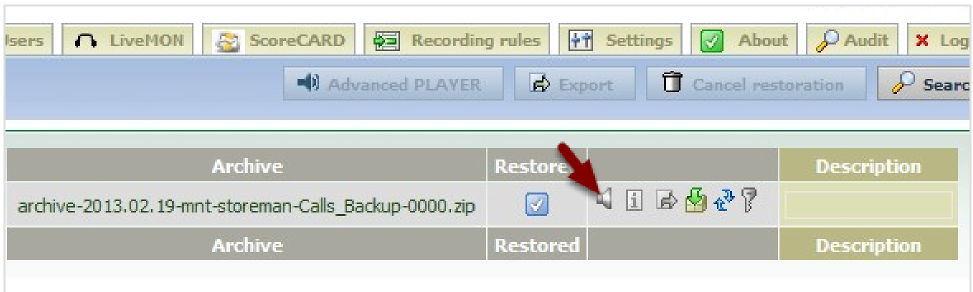


Figure 31: Restored Calls and Archived Calls in the Section "Recorded Calls"

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.

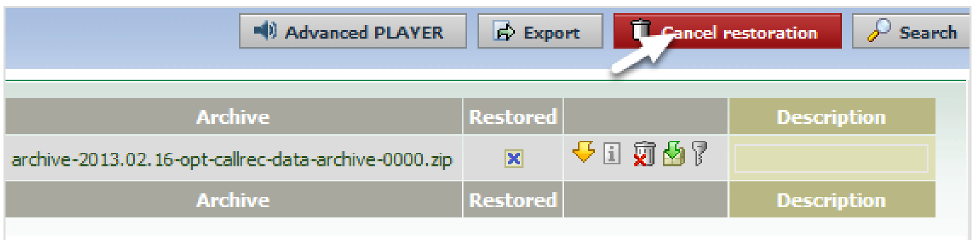


Figure 32: Canceling Call Restoration

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.

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

3 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 Dialog

Genesys Call Recording uses search filters to identify call records.

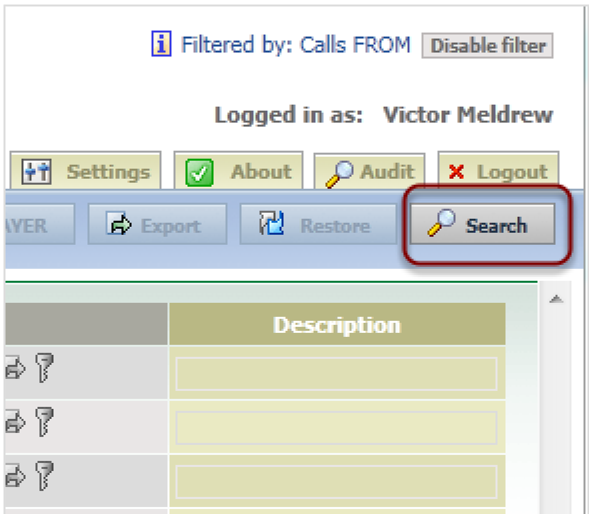


Figure 33: The Search Button

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

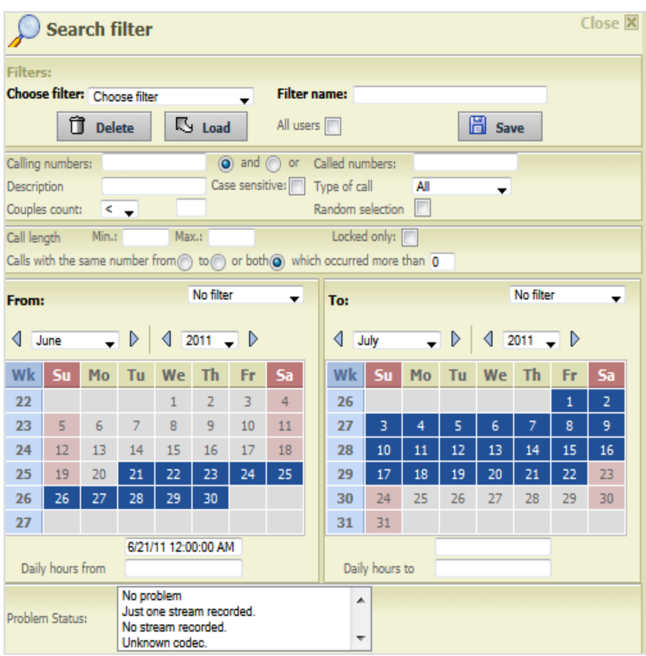


Figure 34: Search Filter

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**.

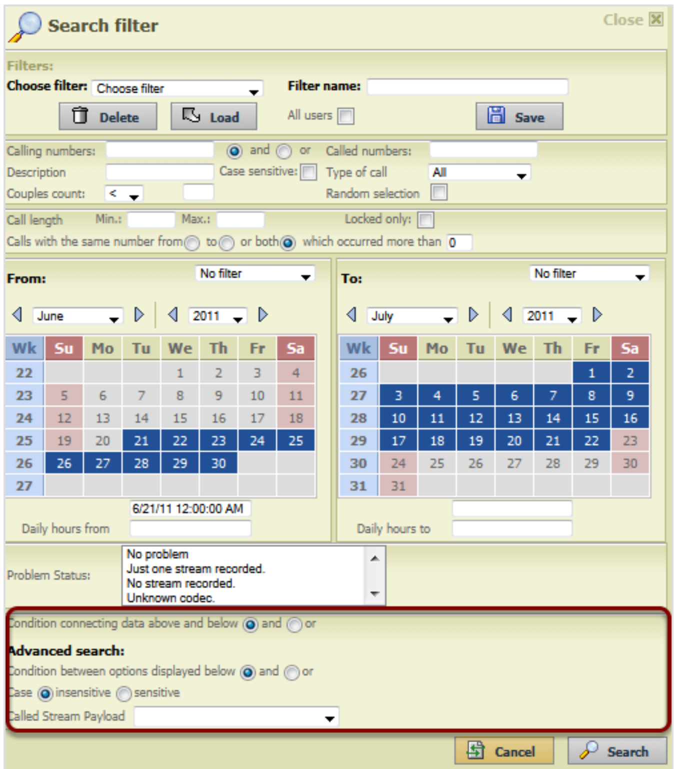


Figure 35: Advanced Search Fields

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**.

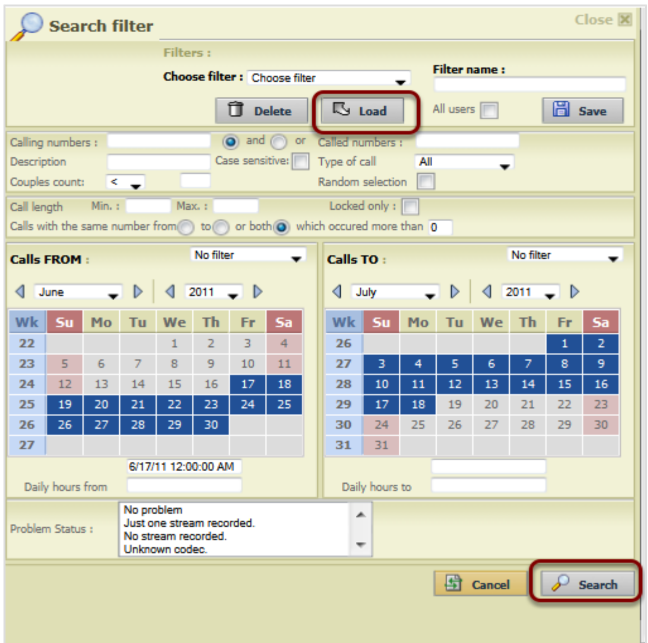


Figure 36: Search

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.

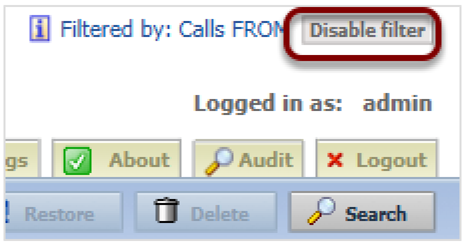


Figure 37: Clearing Filters

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

4 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

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**.

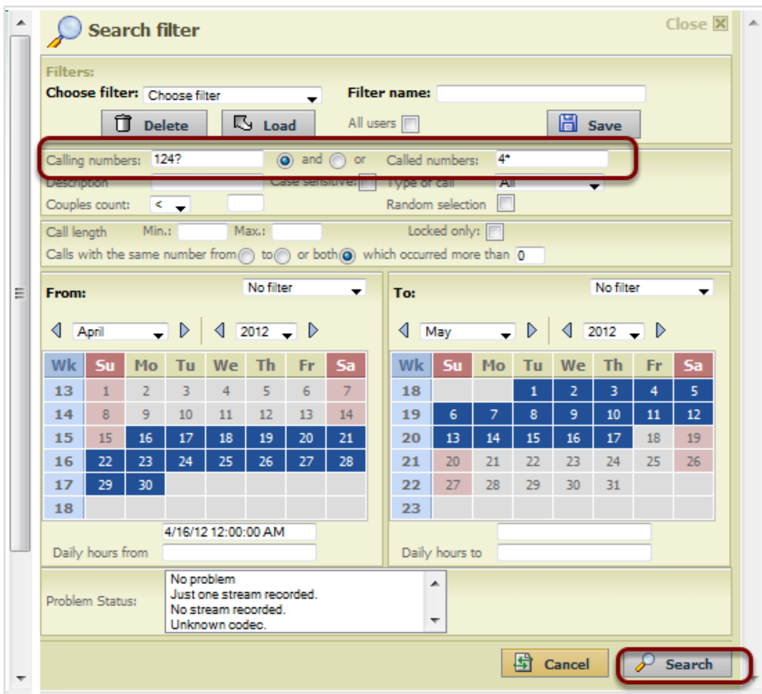


Figure 38: Searching by Calling and Called Numbers

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.

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

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.

To search for pre-configured time ranges:

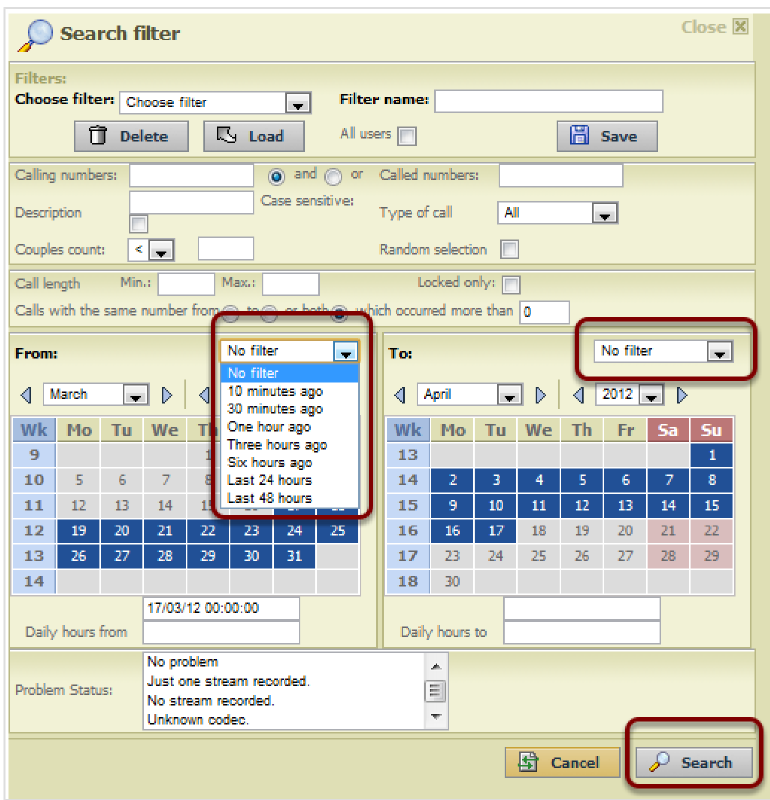


Figure 39: Search Pre-configured Time Range

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.

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

Searching for Custom Time Ranges

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

To search for Custom Time Ranges:

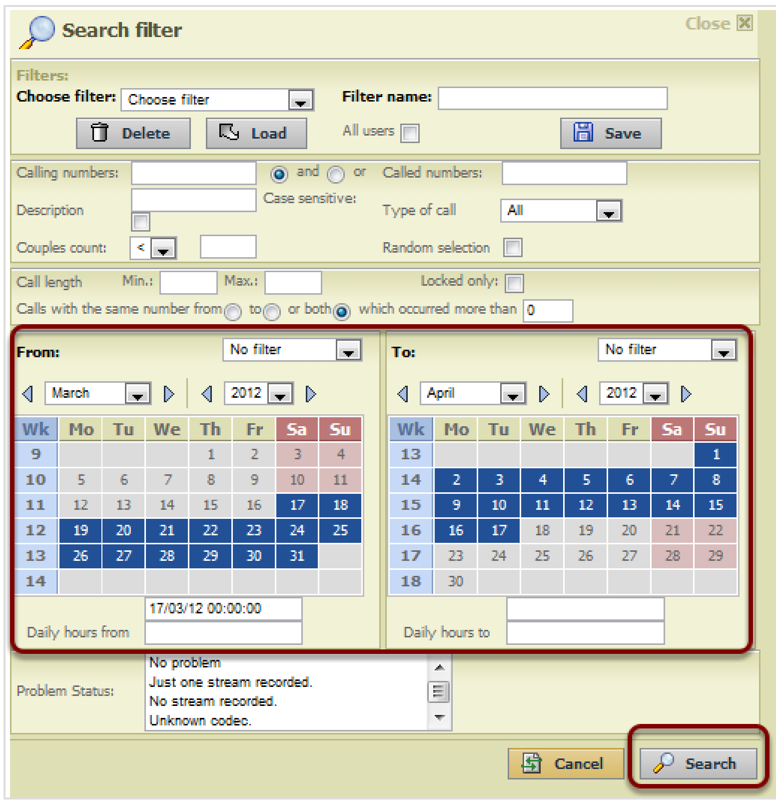


Figure 40: Search Date Range

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.

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

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.

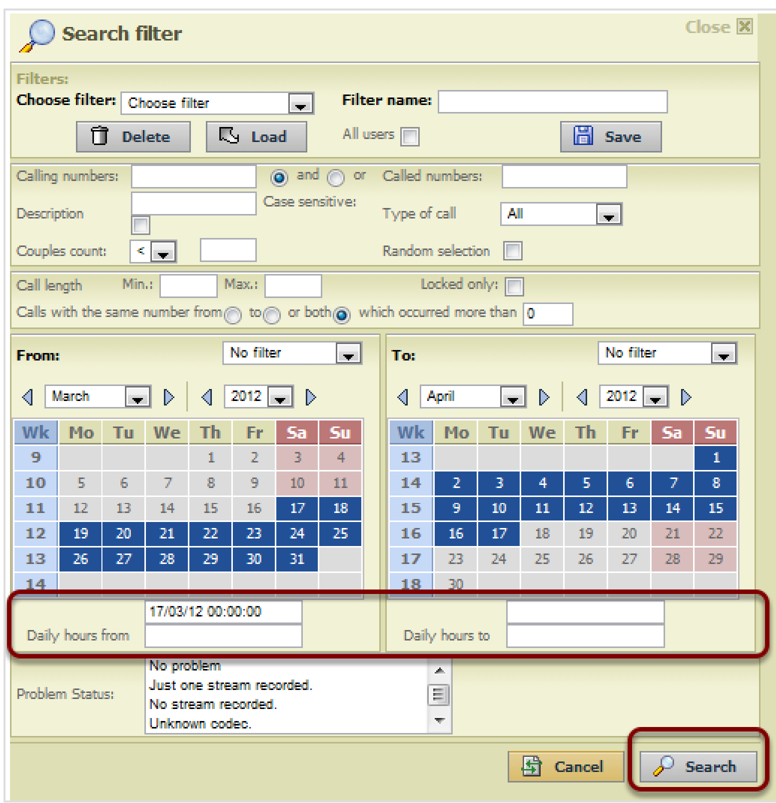


Figure 41: Search Time Range

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.

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

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.

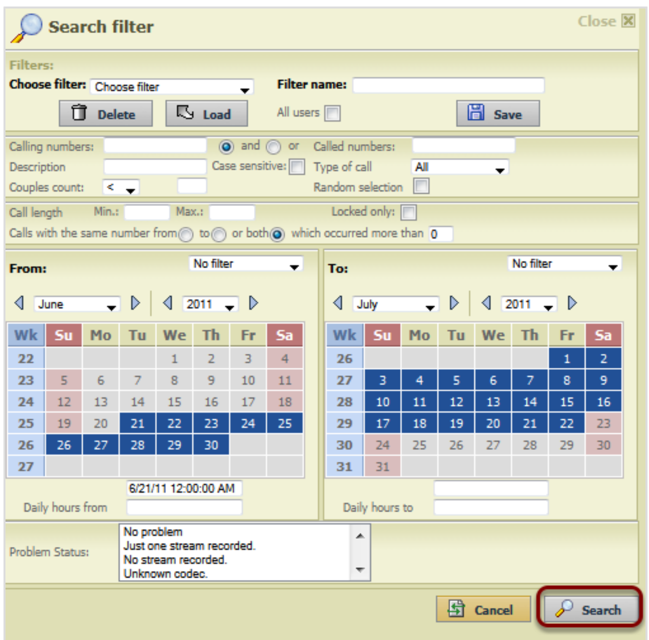


Figure 42: Search by Description

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.

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

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.

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

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.

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

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.

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

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.

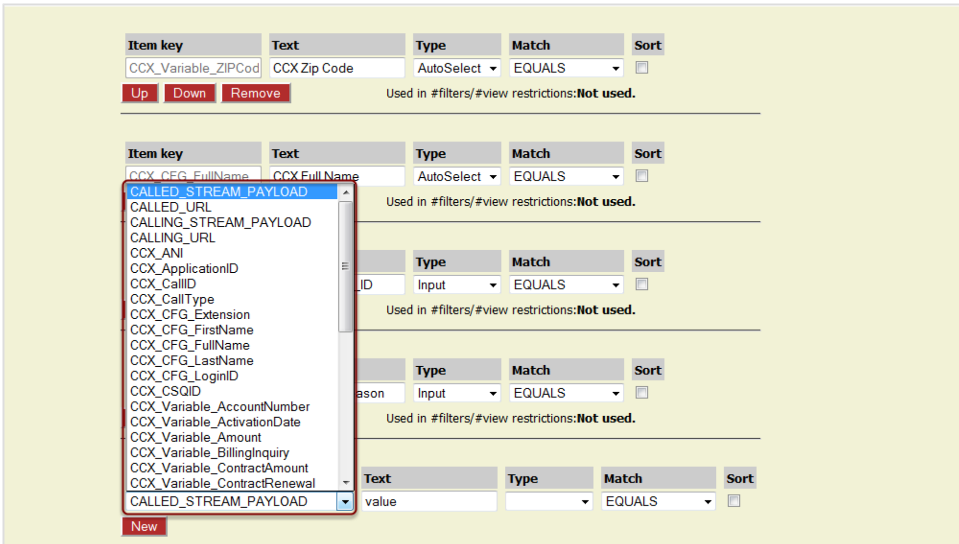


Figure 43: Selecting Data for Search Dropdown

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

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

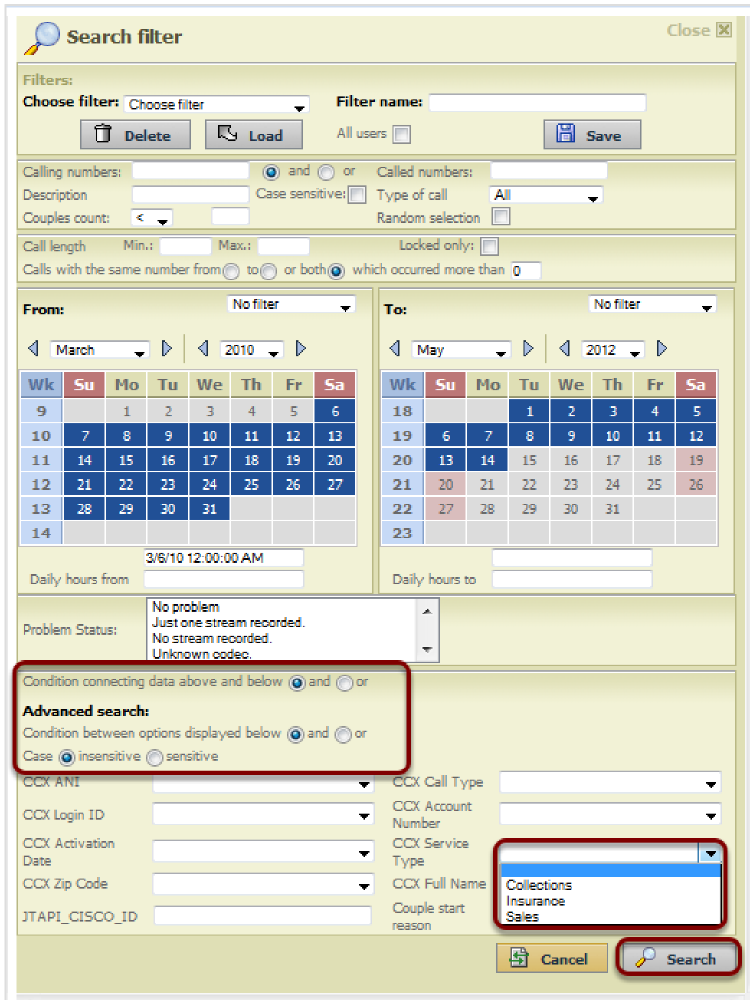


Figure 44: Search with External Data

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.
2. 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

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

6 Live Monitor

This chapter describes how to open and use Live Monitor.

This chapter contains the following sections:

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 http://www.java.com/en/download/

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.

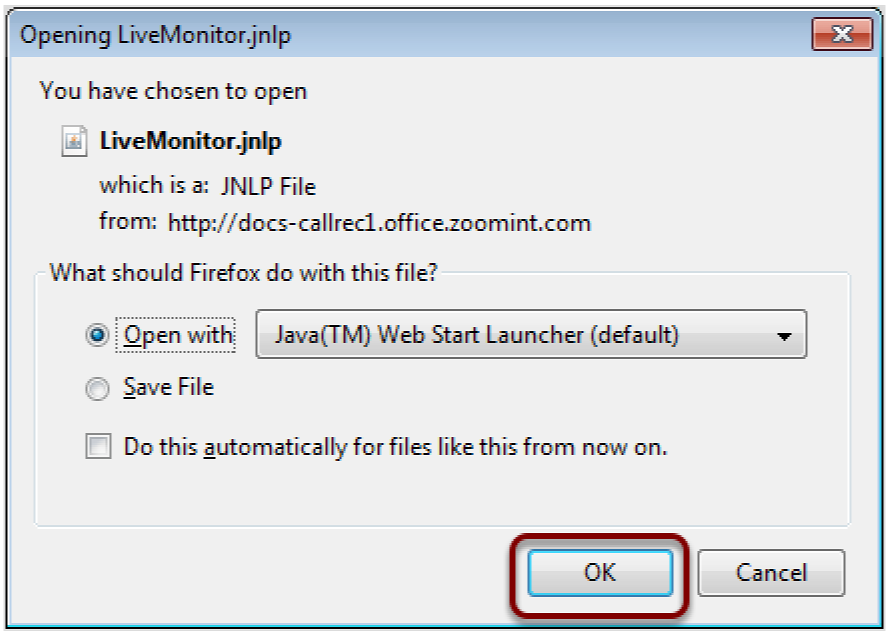


Figure 50: Download Prompt for Live Monitor

Click **OK**. A security warning displays.
If the user does not have sufficient permissions they may have to contact the system administrator.

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**.

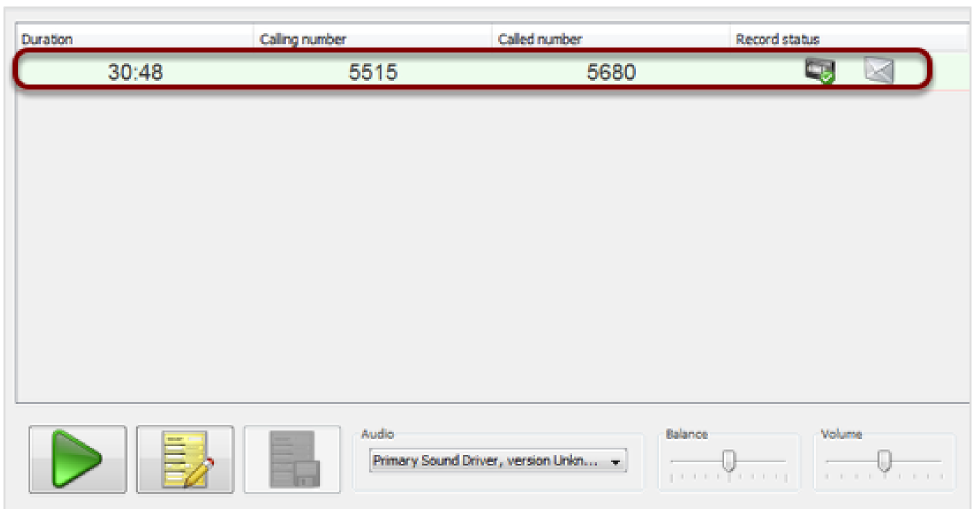


Figure 52: Live Monitor User Interface

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

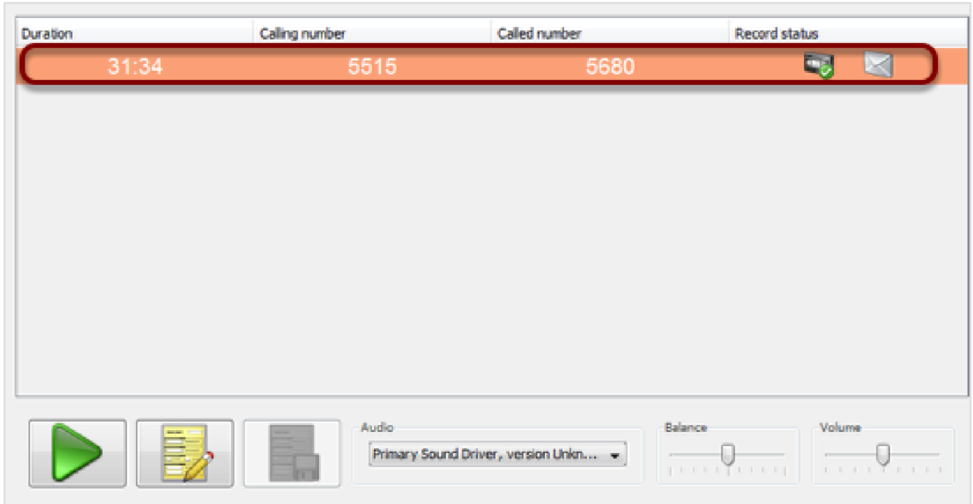


Figure 53: Live Monitor User Interface Call Selected

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 .

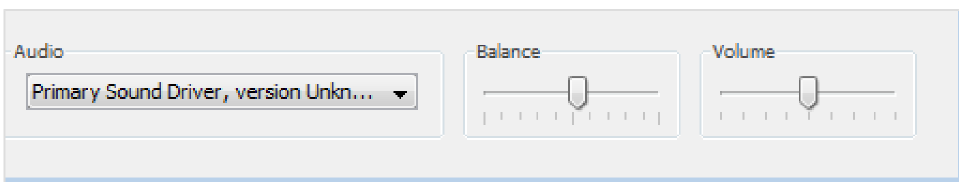


Figure 54: Volume and Balance

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

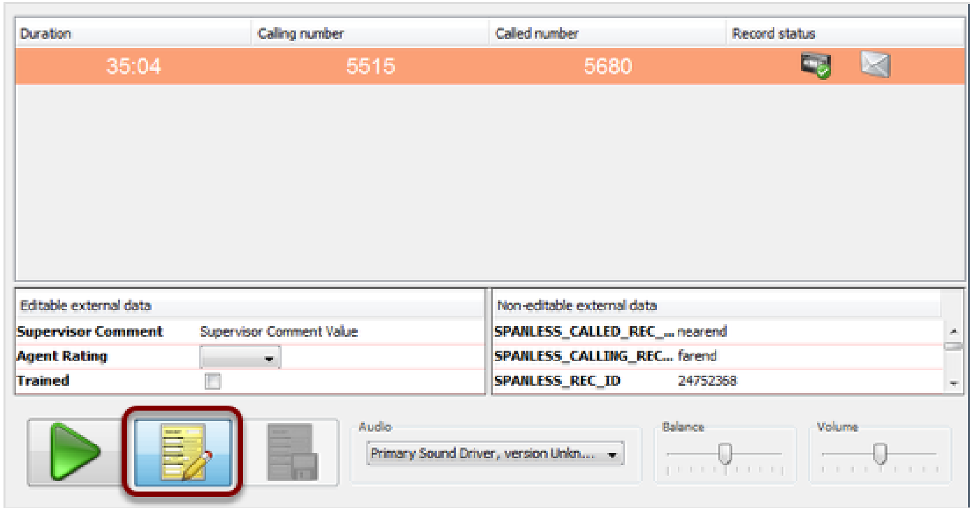


Figure 55: Live MonitorCall External Data

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  icon is shown under the **Record status** header.

If a call is being prerecorded, then the  icon is shown under the **Record 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.

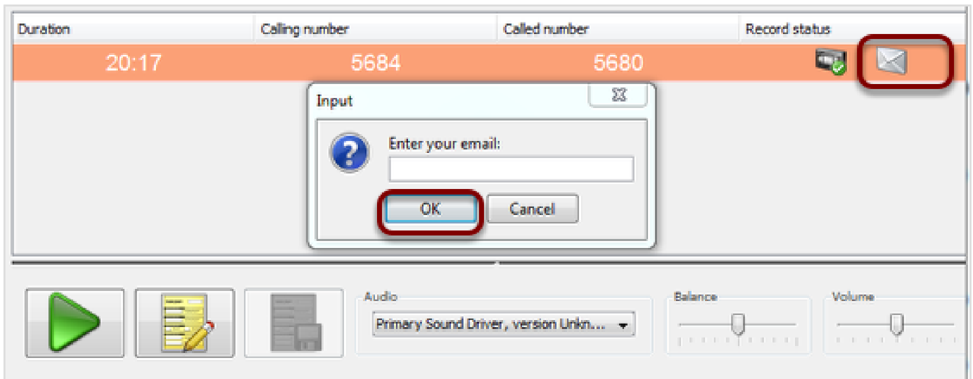


Figure 56: Live Monitor Email Icon

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.

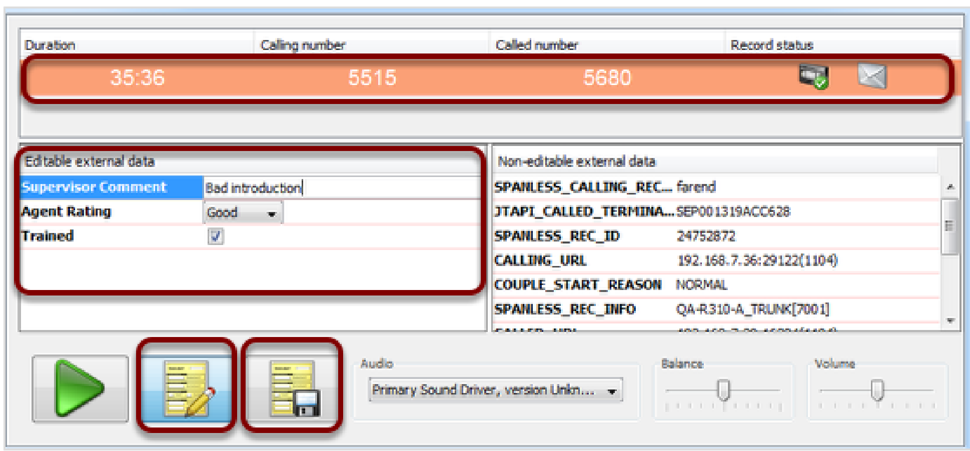


Figure 57: Adding Editable External Call Data

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, right-click 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.

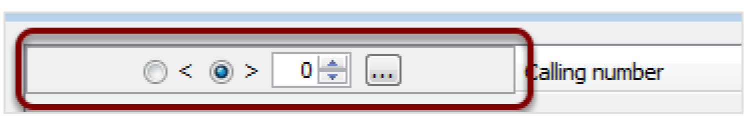


Figure 59: Duration

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

7 Advanced Player

This chapter describes how to use Advanced Player.

This chapter contains the following sections:

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.

	Date	Beginning	Length	From	To
☑	Jul 19, 2011	8:54:50 AM	0:15	5655 (5655 SLR)	5682
☐	Jul 19, 2011	8:53:53 AM	0:12	5655 (5655 SLR)	5682
☐	Jul 19, 2011	8:53:11 AM	0:14	5655 (5655 SLR)	5682
☑	Jul 19, 2011	8:52:48 AM	0:11	5655 (5655 SLR)	5682
☑	Jul 19, 2011	8:47:48 AM	0:11	5655 (5655 SLR)	5682
☐	Jul 19, 2011	8:47:24 AM	0:11	5655 (5655 SLR)	5682
☐	Jul 19, 2011	8:46:54 AM	0:11	5655 (5655 SLR)	5682
☐	Jul 18, 2011	3:24:11 PM	0:06	5500	5680
☐	Jul 18, 2011	3:21:40 PM	0:07	5500	5680
☐	Jul 18, 2011	3:13:31 PM	0:04	5500	5680
	Date	Beginning	Length	From	To

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.

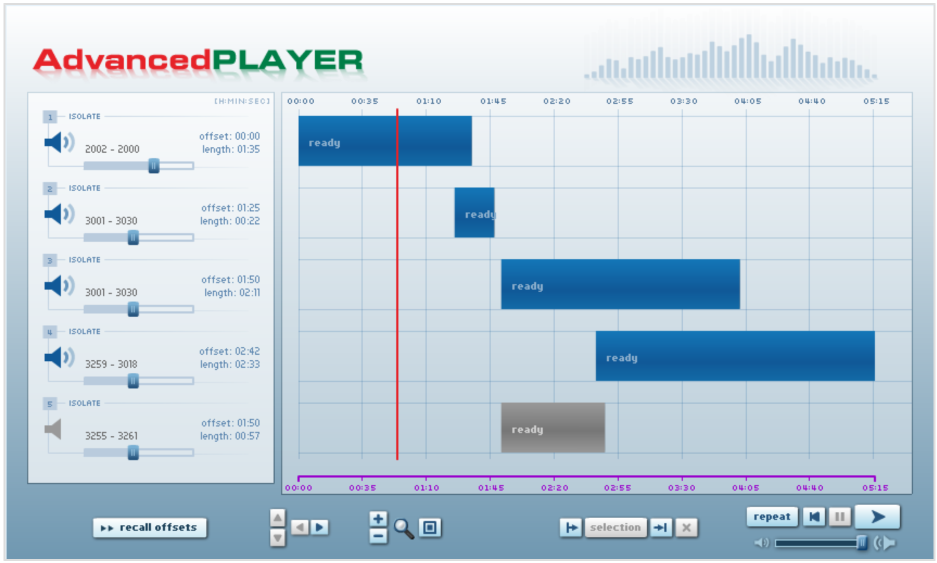


Figure 61: The Advanced PLAYER window

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.

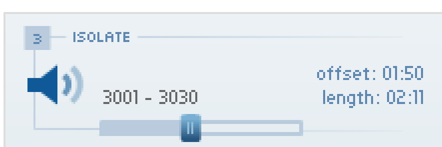


Figure 64: Call's Related Controls

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.

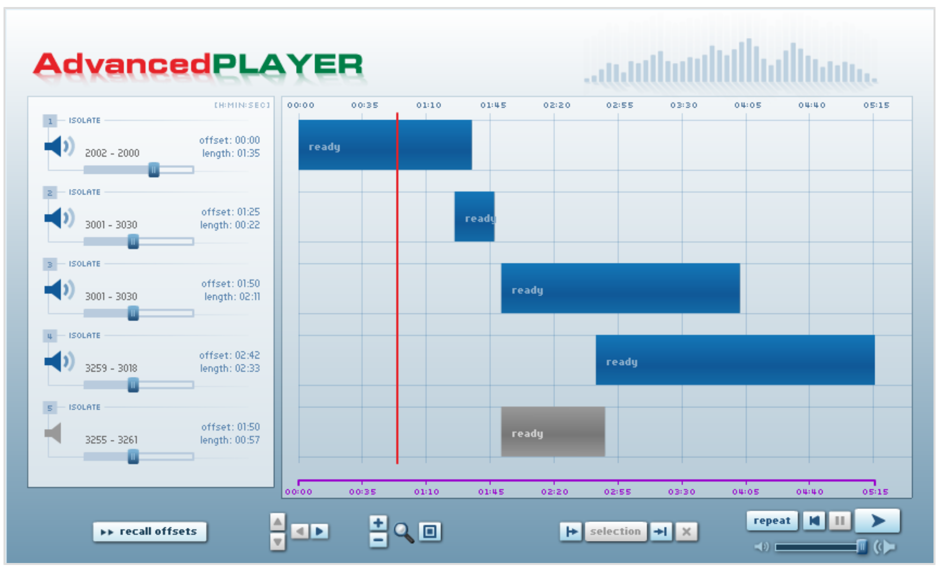


Figure 67: The **Advanced PLAYER** window

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

In the **Recorded calls** list:

	Date	Beginning	From	To	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	To	GEN_TEV_CALL_Uuid

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	
Key	**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.

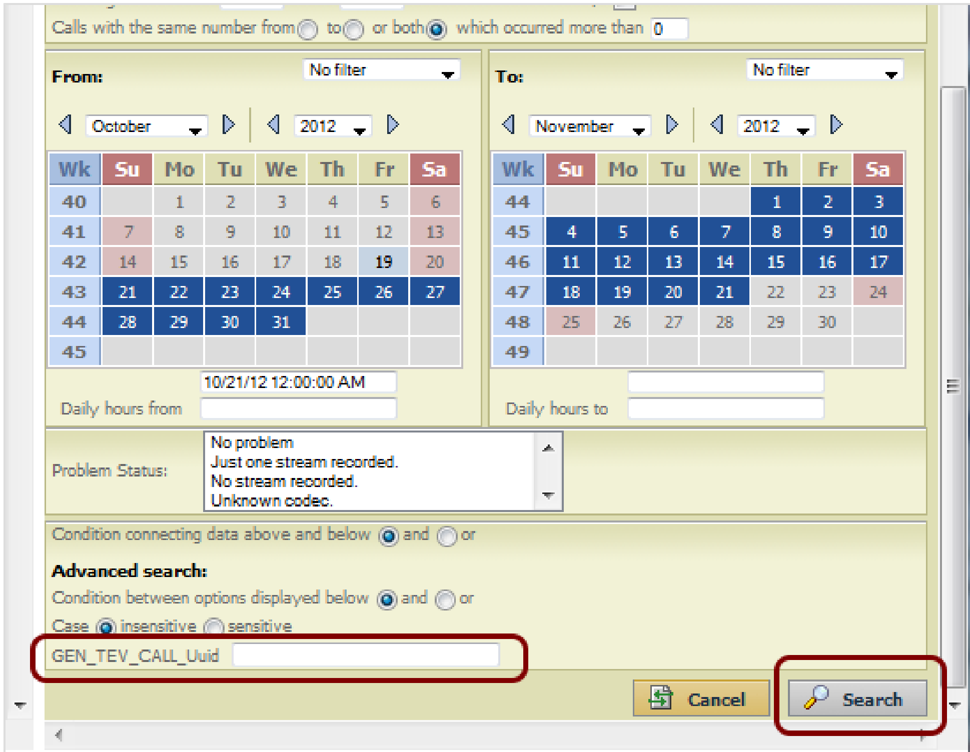


Figure 69: Showing Item key

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.

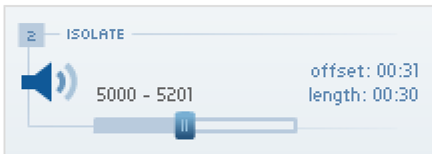


Figure 71: Isolating a Call

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
A	File 1	File 2	File 3
B		hanging-up	
C		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.

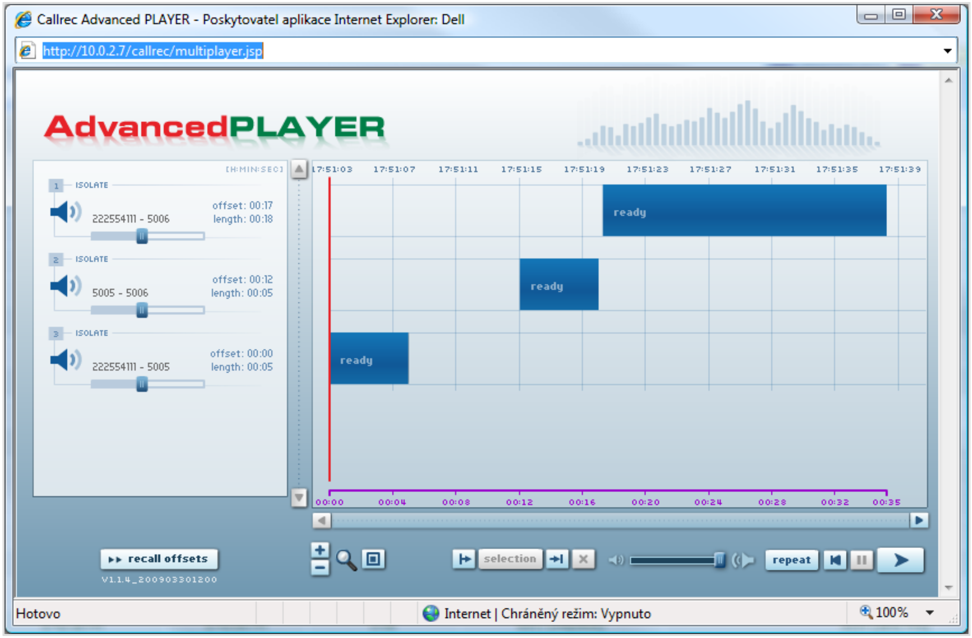


Figure 72: Transfer Call in **Advanced PLAYER**

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.

	A -> B	C Listen-in
A	File 1	
B		
C		File 2

Table 3: Storing listening-in (Barge)

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

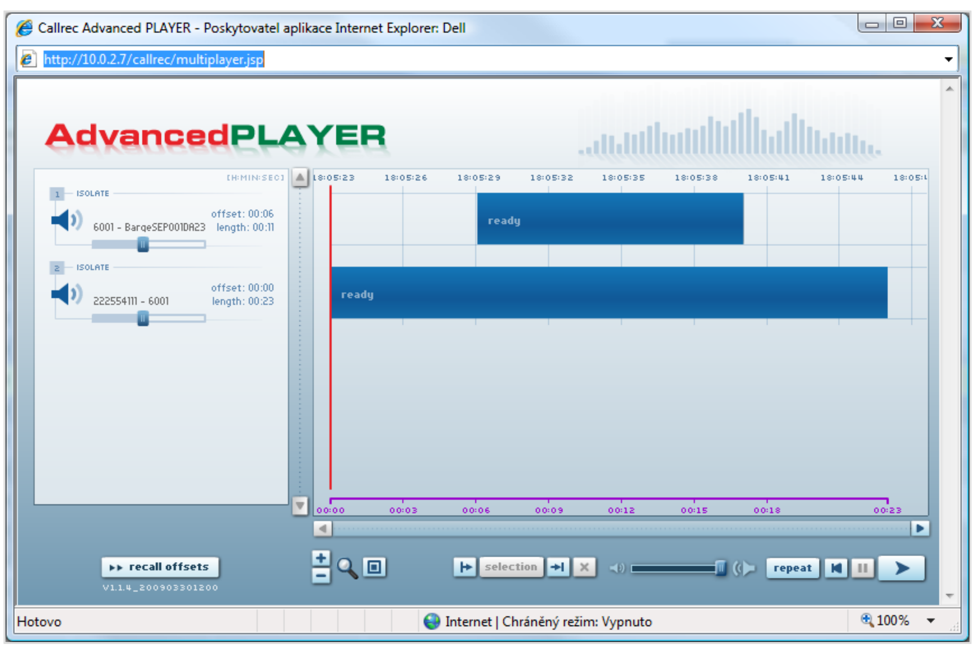


Figure 73: Barge Call in **Advanced PLAYER**

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
A	File 1	File 2
B		File 3
C		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.

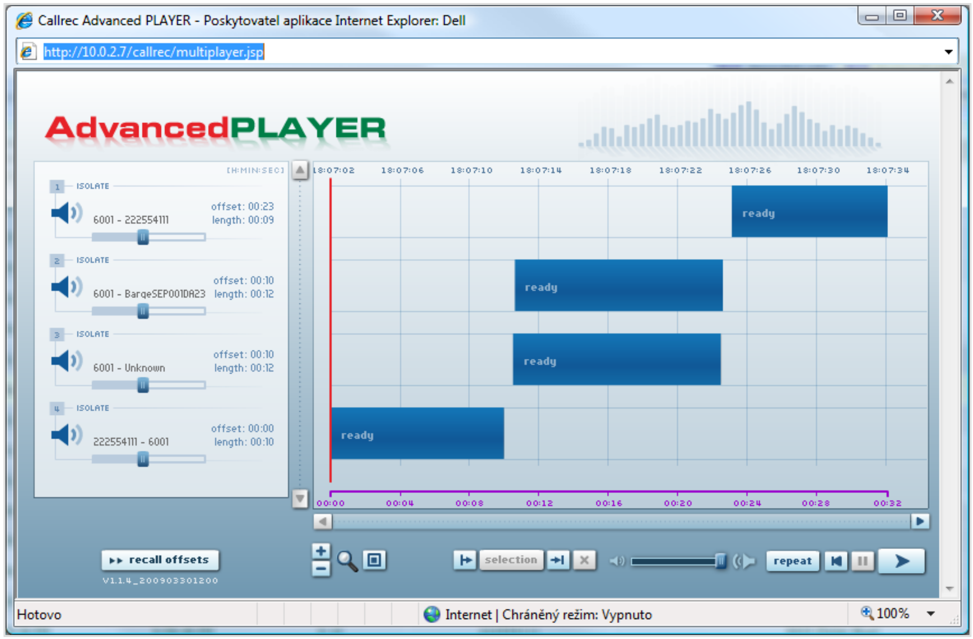


Figure 74: cBarge Call in **Advanced PLAYER**

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.

<table>
<tr><th></th><th>A -> B</th><th>A -> C</th><th>A + B + C</th><th>A + B</th></tr>
<tr><td>A</td><td rowspan="2">File 1</td><td>File 2</td><td>File 3</td><td rowspan="2">File 6</td></tr>
<tr><td>B</td><td></td><td>File 4</td></tr>
<tr><td colspan="2">C</td><td>File 2</td><td>File 5</td><td></td></tr>
</table>

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.

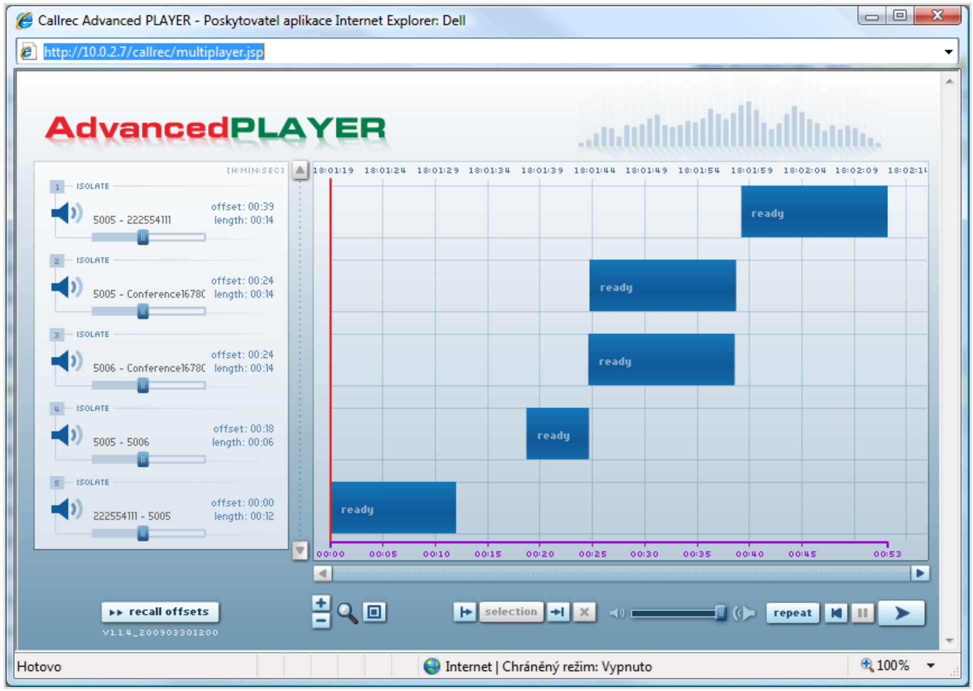


Figure 75: Conference Call in Advanced Player

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

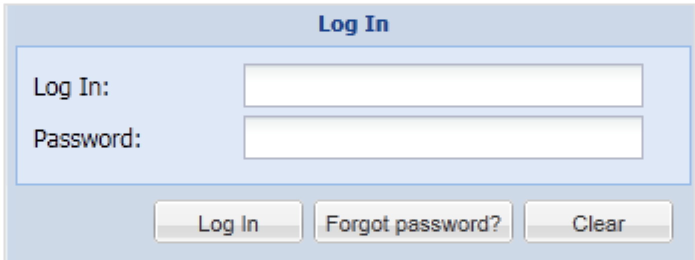


Figure 76: Log In To Quality Manager

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.

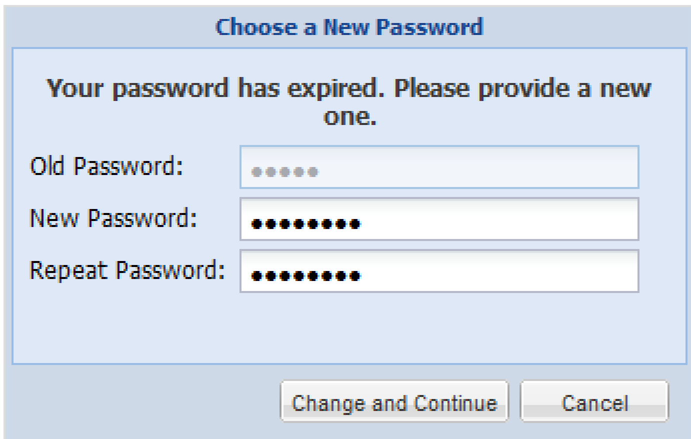


Figure 77: Choosing a New Password

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

Retrieving a Forgotten Password

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:

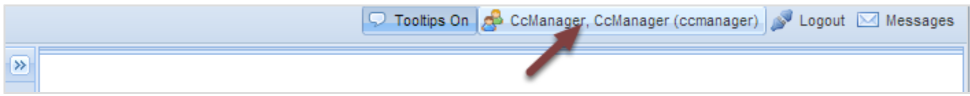


Figure 79: Editing the User Profile

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

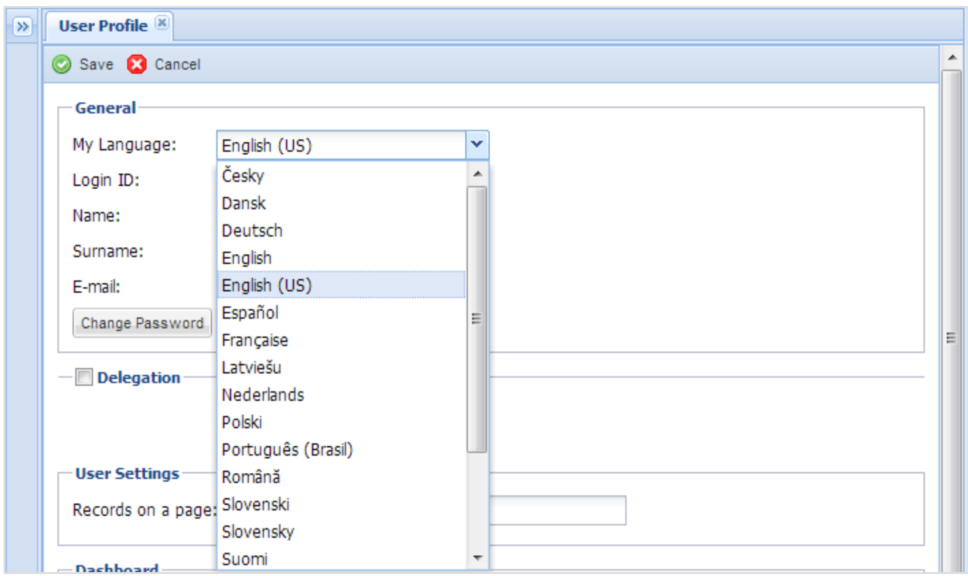


Figure 80: Selecting the Language

2. Select the language settings of the application from the **My Language:** drop-down 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 **Logout**.

Disabling Tooltips

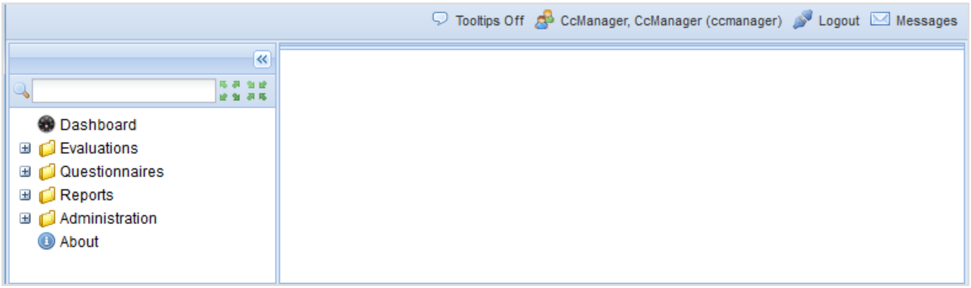


Figure 81: Quality Manager User Interface

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:

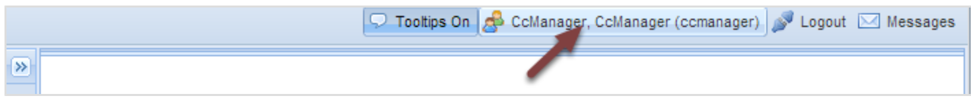


Figure 82: Editing the User Profile

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

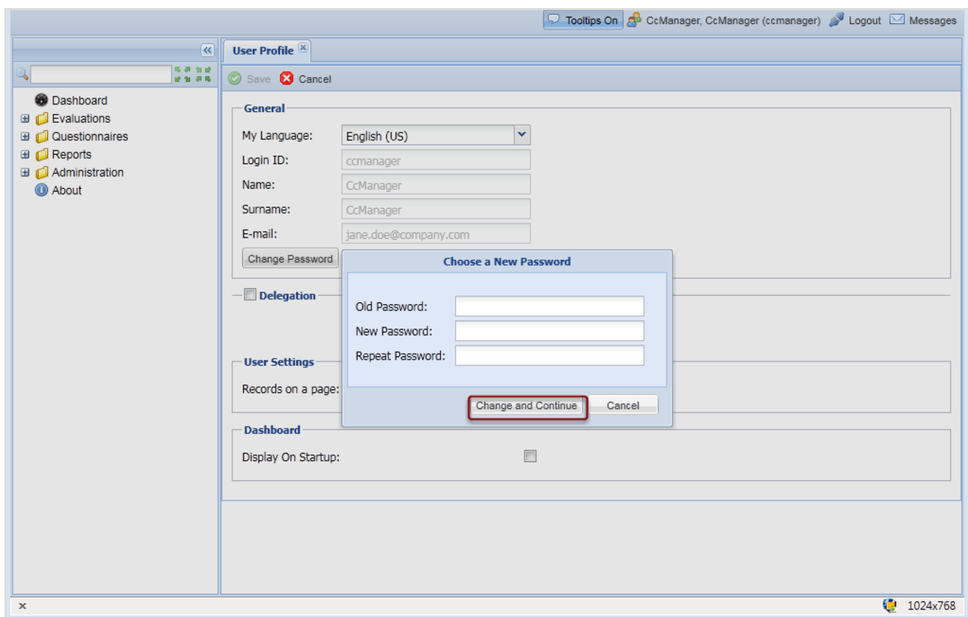


Figure 83: Changing The password

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:

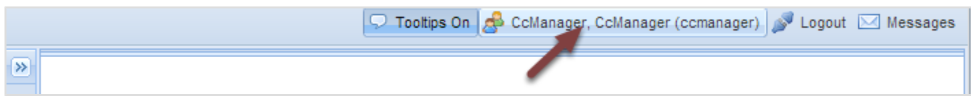


Figure 84: Editing the User Profile

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

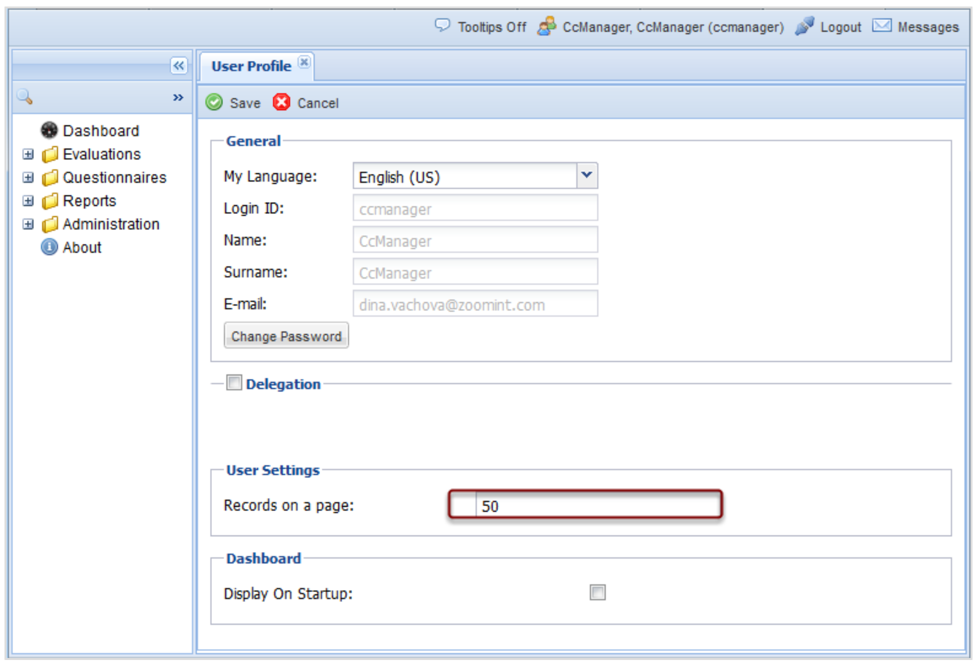


Figure 85: Changing the number of Records on a Page

2. 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 **Logout**.

Displaying the Dashboard on Startup

To display the dashboard on startup.

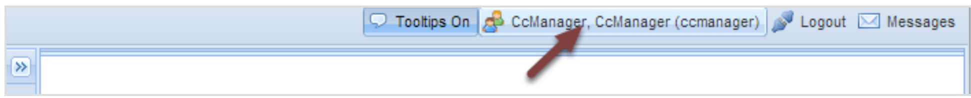


Figure 86: Editing the User Profile

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

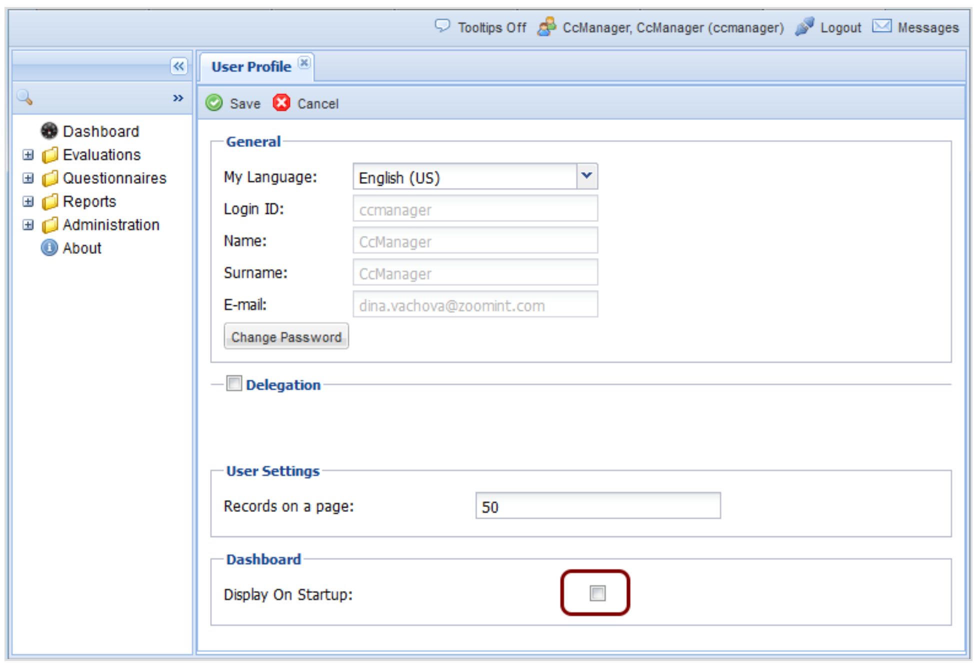


Figure 87: Displaying the Dashboard on Startup

2. 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 **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.

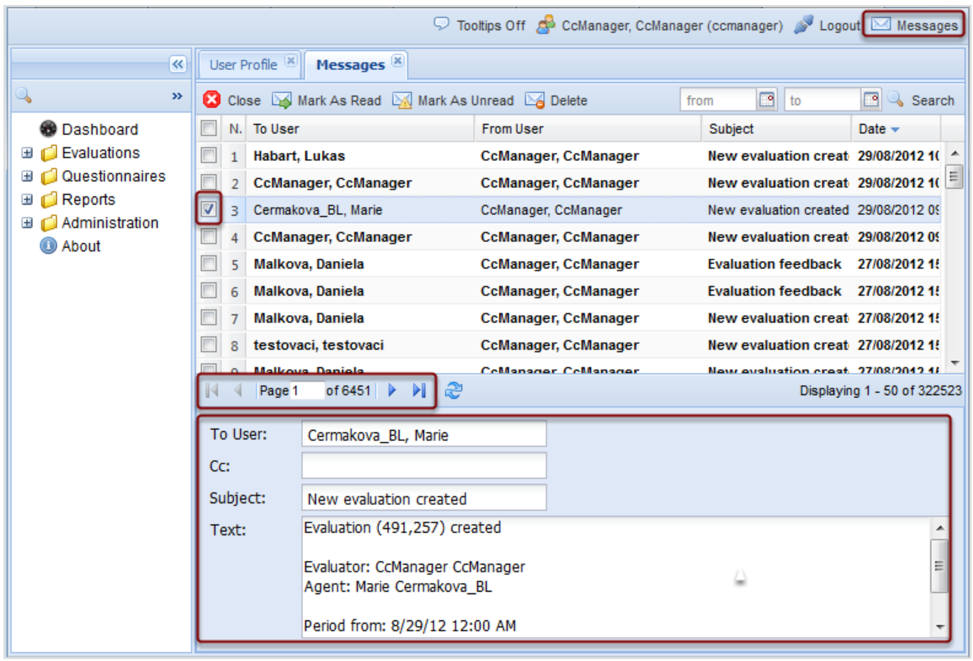


Figure 88: Viewing System Messages

1. Click **Messages**to open the messages tab.
2. Select or type a date range in the **from** and **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 **Refresh** button.

Delegating Evaluations

To delegate evaluations:

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

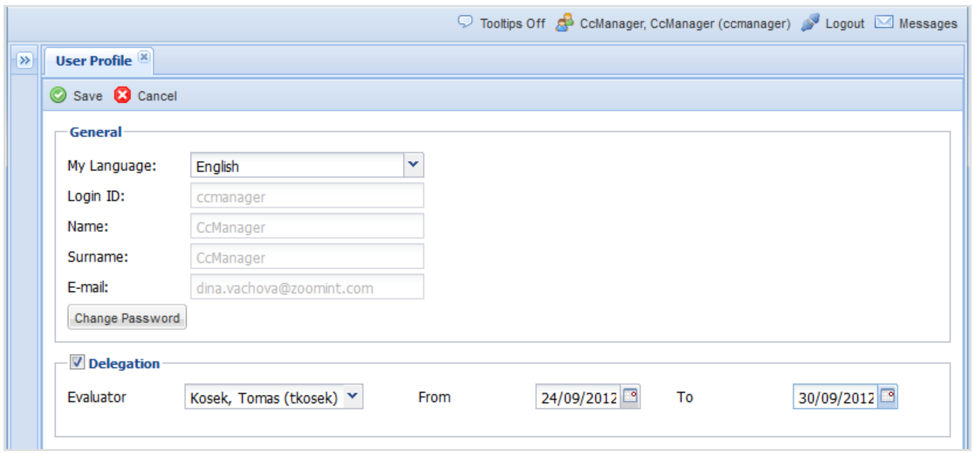


Figure 89: Delegating Evaluations

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

9 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

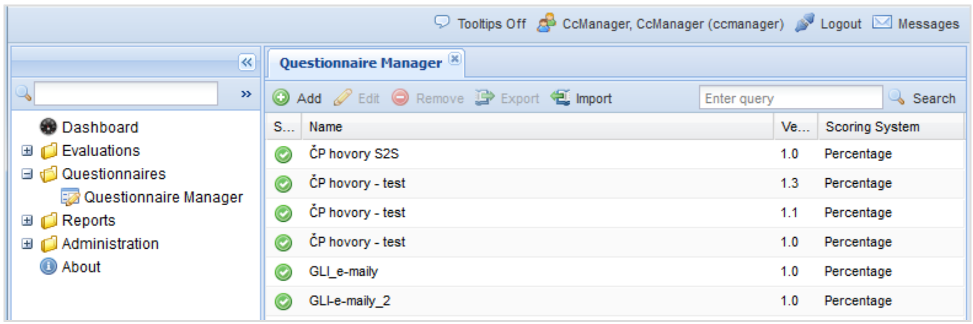


Figure 90: Creating A New Questionnaire

To add a new questionnaire:

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

Specifying a Name and Version for a Questionnaire

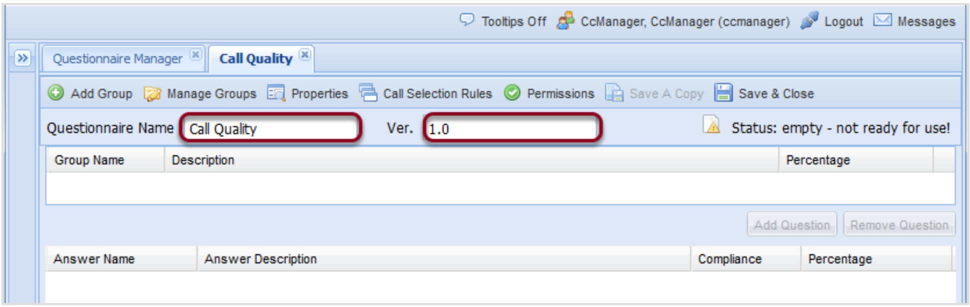


Figure 91: Specifying a Name and Version

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 **Properties** on the Questionnaire toolbar to view the **Questionnaires Properties** dialog.

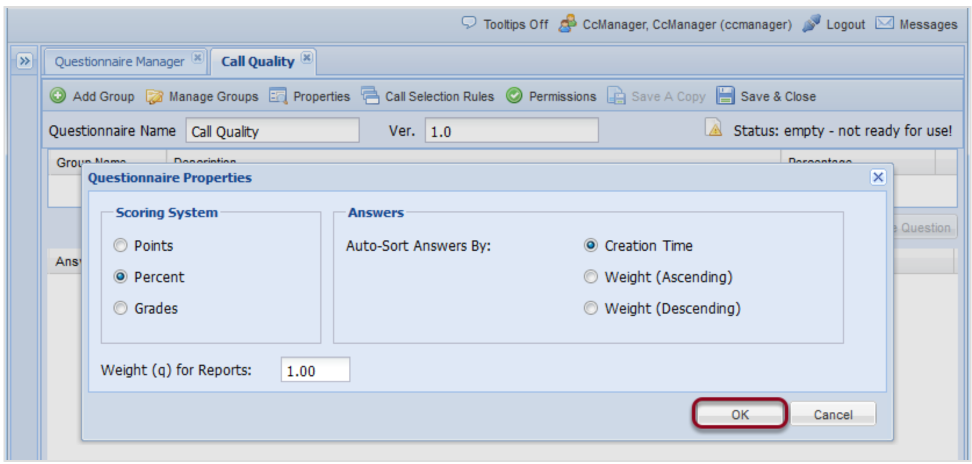


Figure 92: Setting the Questionnaire Properties

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

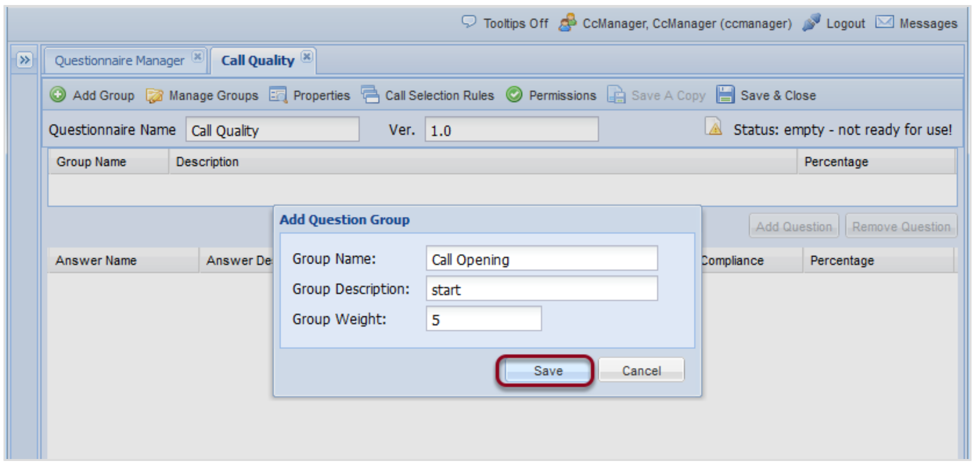


Figure 93: Adding a Question Group

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

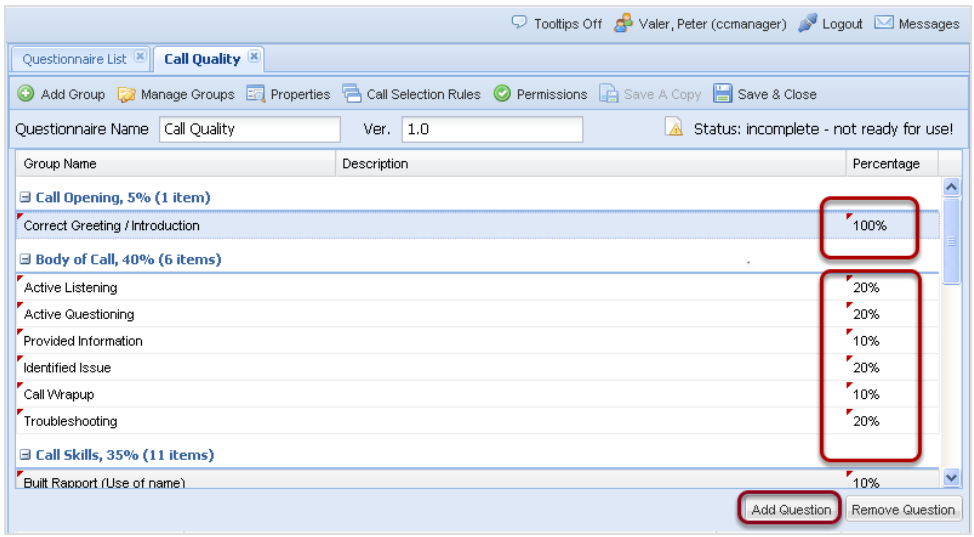


Figure 94: Adding Additional Questions and Groups

Create additional question groups and questions in a similar way.

1. Click **Add Group** to add a new question group.
2. Click **Add Question**to add a new question.
3. The sum of the weights of all questions in a question group can be viewed on the right side.
4. The weight of each individual question is displayed on the right side.

Important:

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

Adding Answers to a Question in a Questionnaire

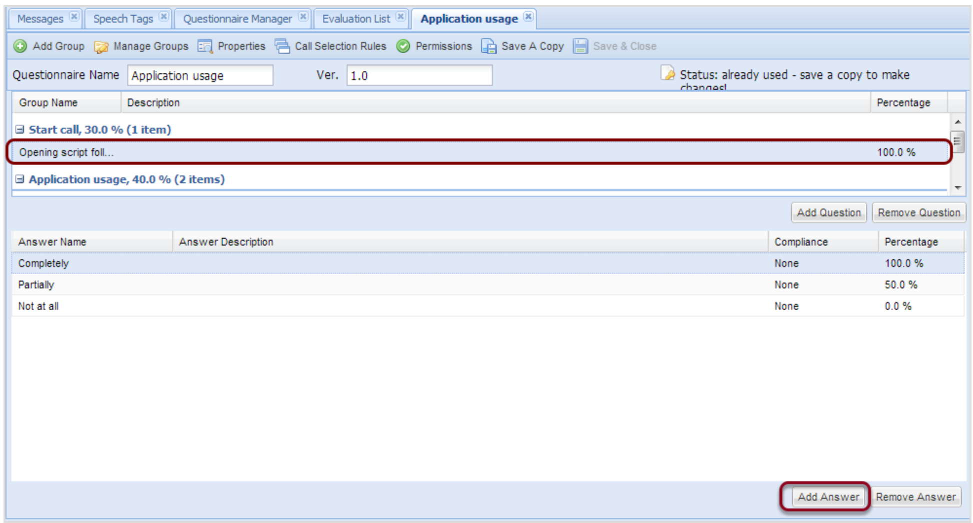


Figure 95: Adding Answers to a Question

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

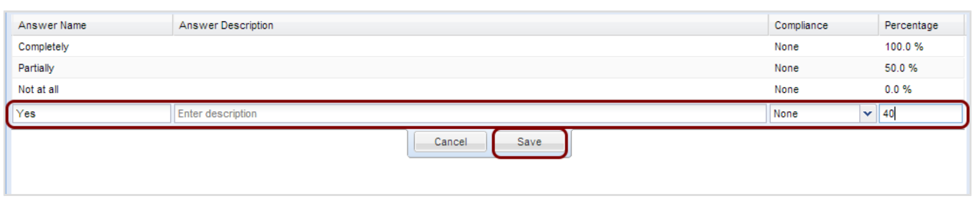


Figure 96: Adding Answers to a Question 2

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

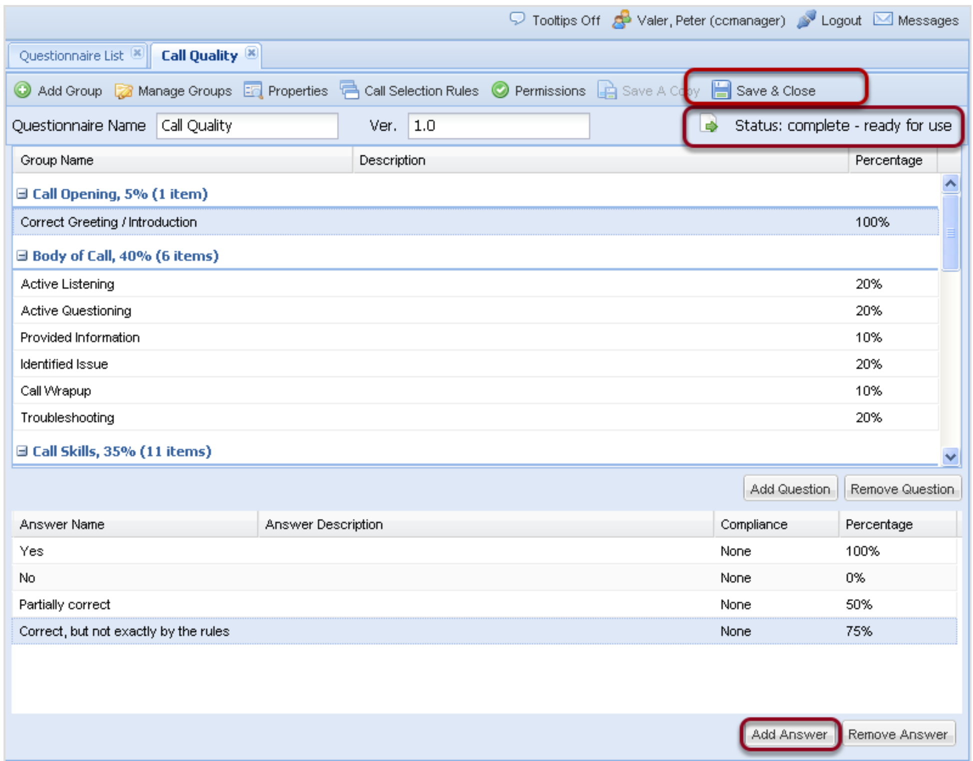


Figure 97: Adding Additional Answers

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.

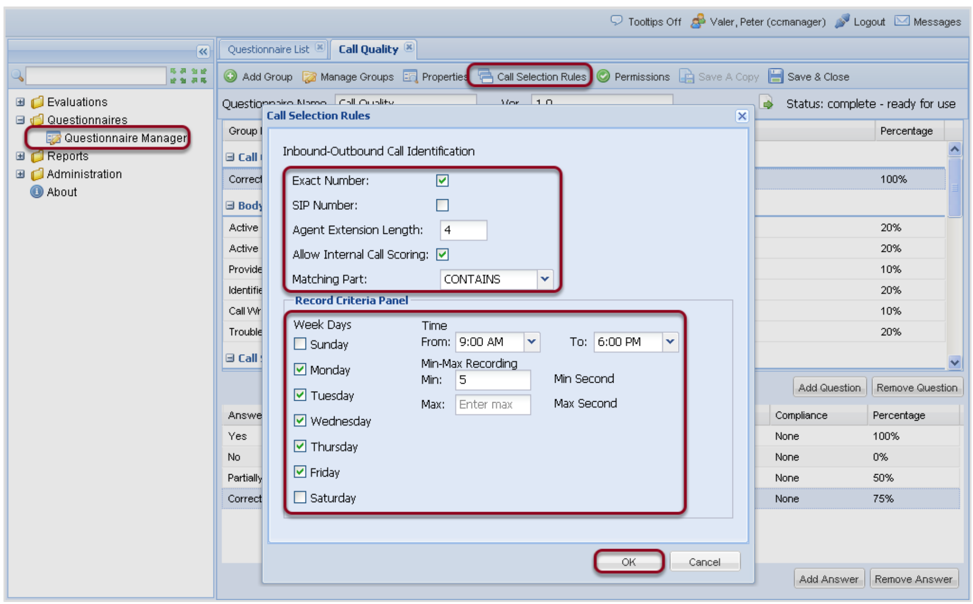


Figure 98: Specifying Call Selection Rules

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.
3. 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, 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.

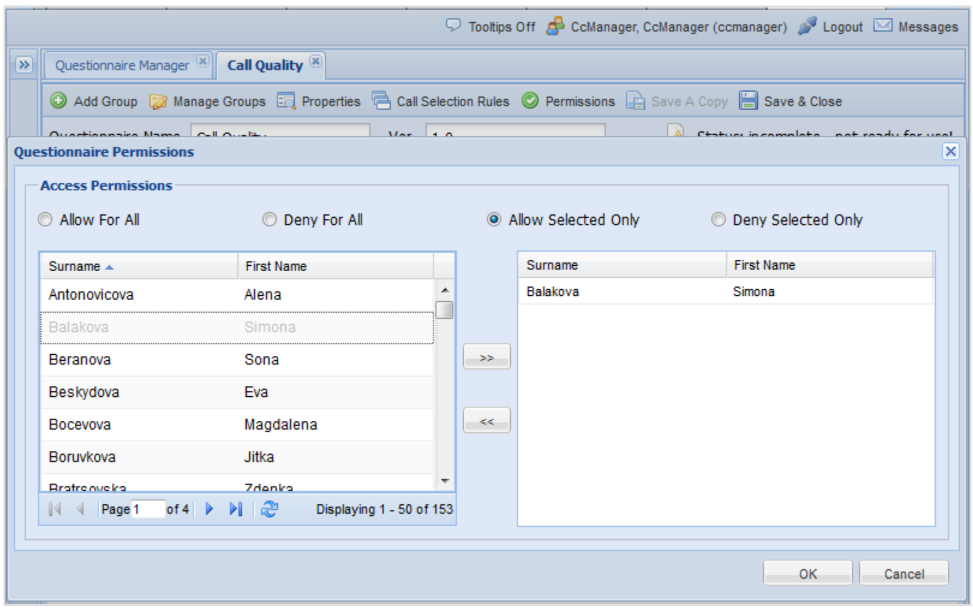


Figure 99: Specifying Access Permissions

1. To limit or customize access to a questionnaire, click **Permissions** on the questionnaire toolbar. The **Access Permissions** dialog opens.
2. 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

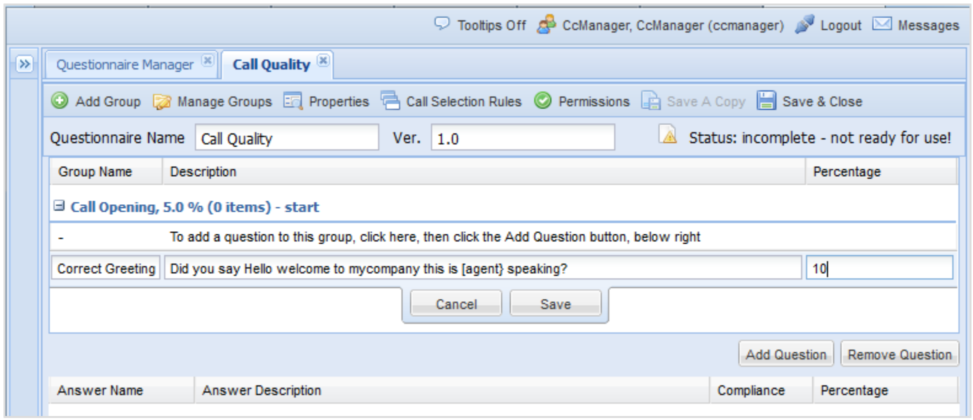


Figure 100: Adding A Question

1. Select the question group.
2. Click **Add Question** to add a new question.
3. 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

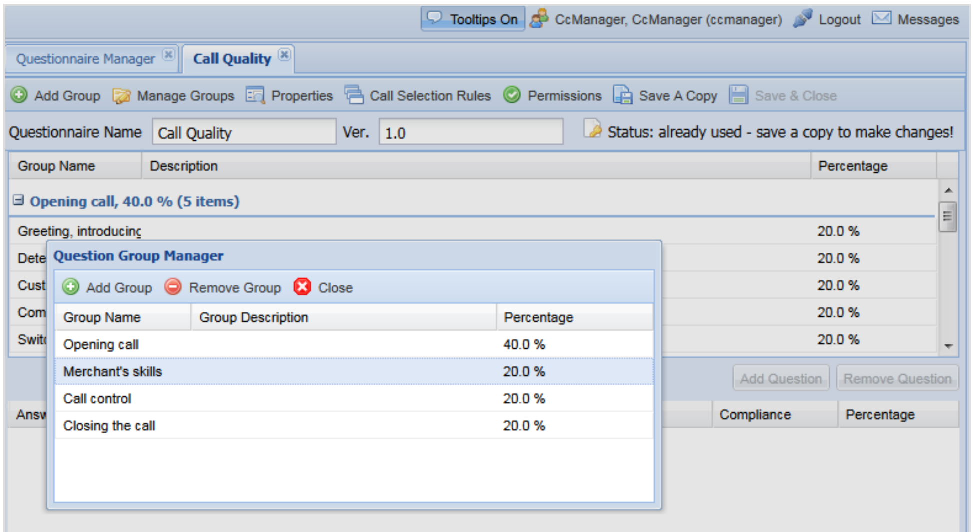


Figure 101: Managing Question Groups

1. Click **Manage Groups** on the questionnaire toolbar to manage question groups.
2. Select a question group.
3. 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

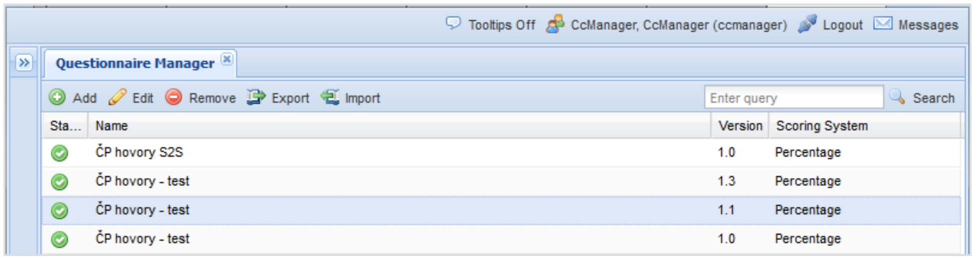


Figure 102: Importing and Exporting Questionnaires

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

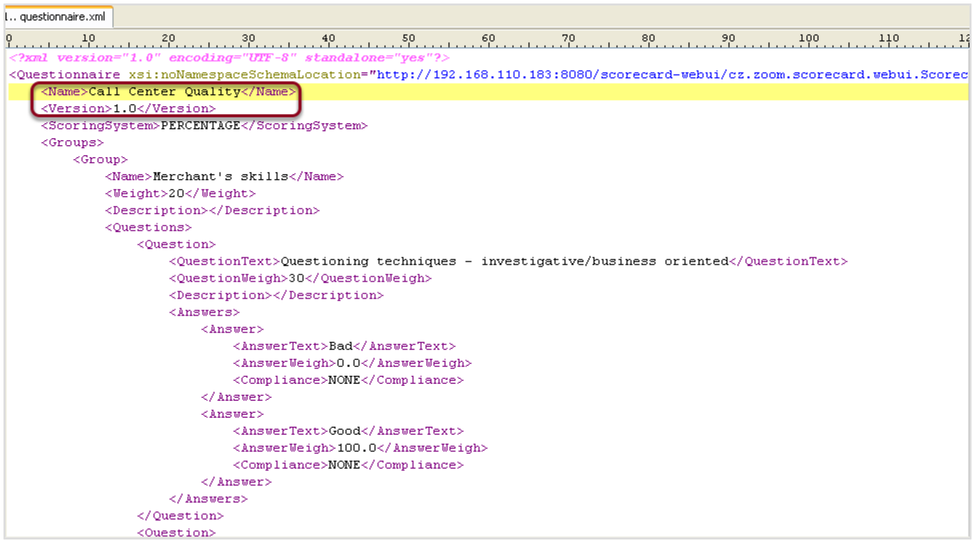


Figure 103: Modifying an Exported Questionnaire

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

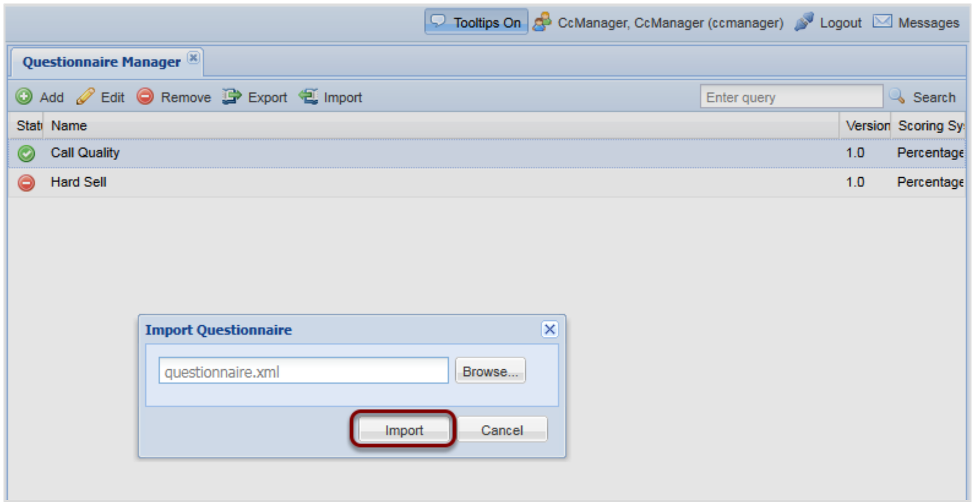


Figure 104: Importing a Questionnaire

To import a questionnaire:

1. Click **Import** on the **Questionnaire Manager** screen.
2. 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

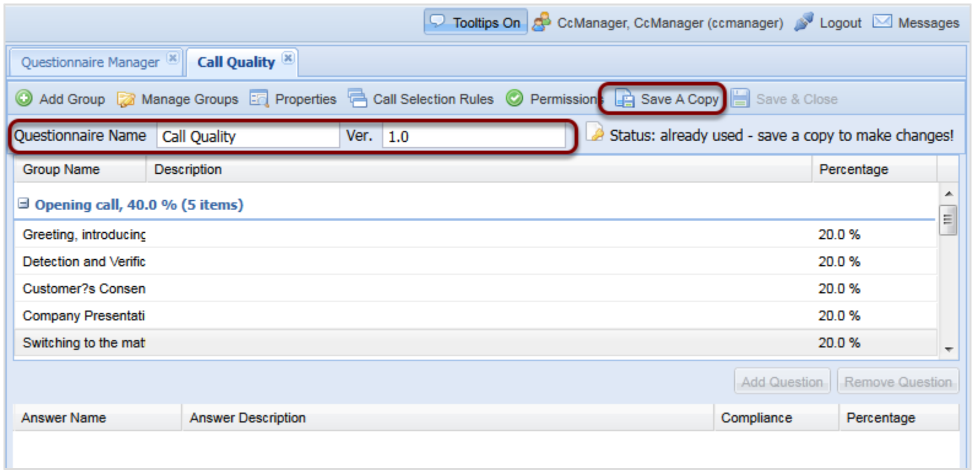


Figure 105: The Imported Questionnaire

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

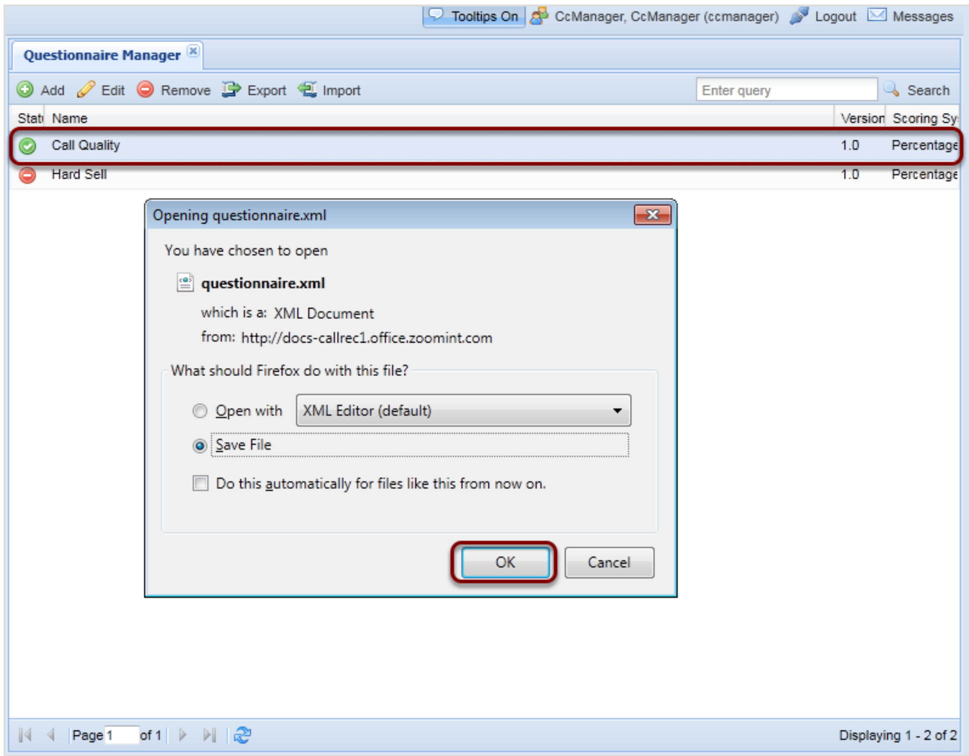


Figure 106: Exporting a Questionnaire

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

This is a short tutorial to show how to plan a new agent evaluation in Quality Manager.

Opening the Evaluation Planner

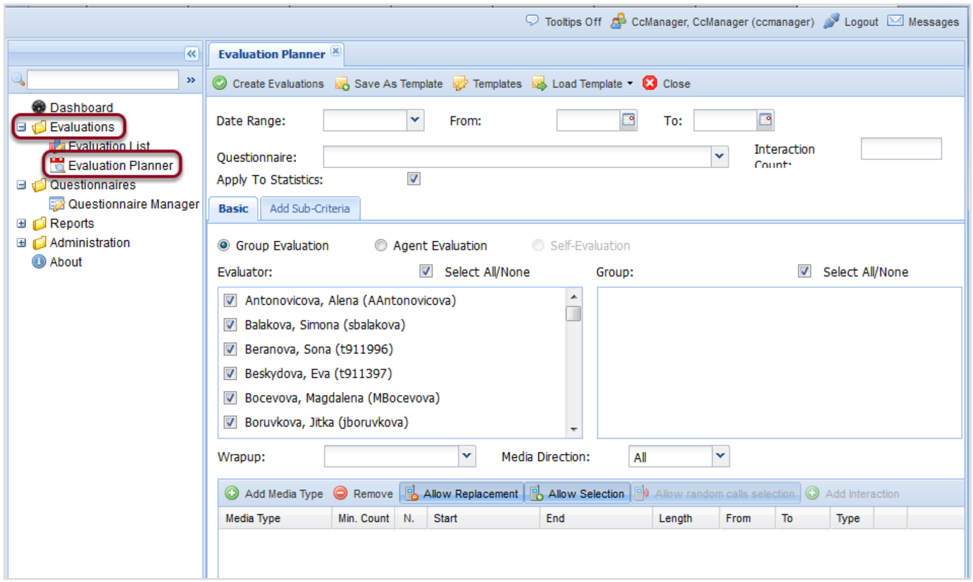


Figure 107: Opening the Evaluation Planner

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

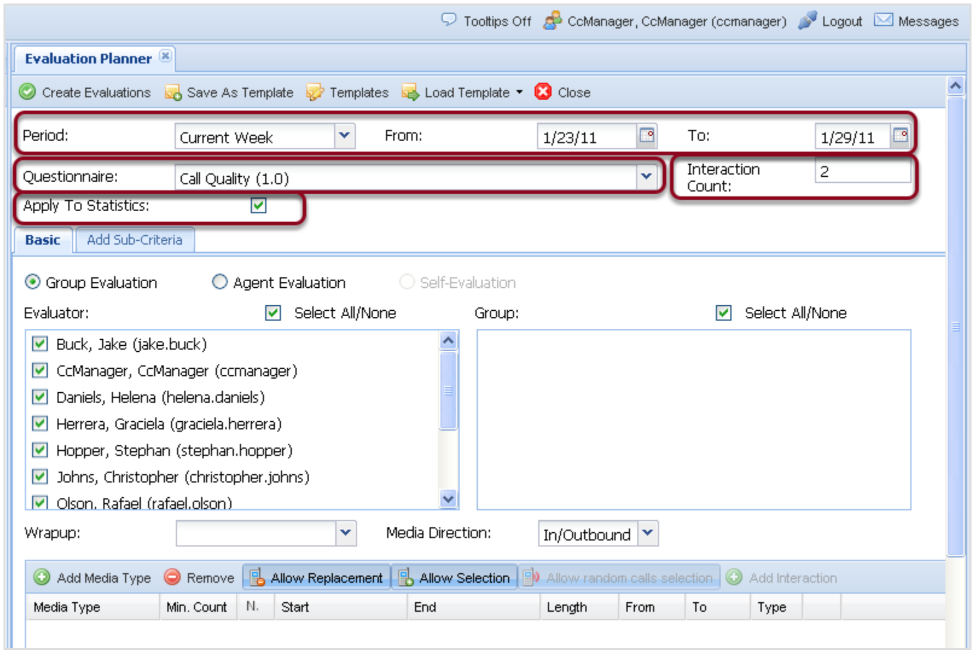


Figure 108: Specifying an Evaluation Period and Questionnaire

1. 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. See Questionnaires.
3. Set the **Interaction Count**. This specifies the minimum number of interactions ,calls, messages, or other media, to be used for this evaluation. This number should equal the sum of all the media type counts specified in the **Basic** and **Sub-Criteria** tabs.
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

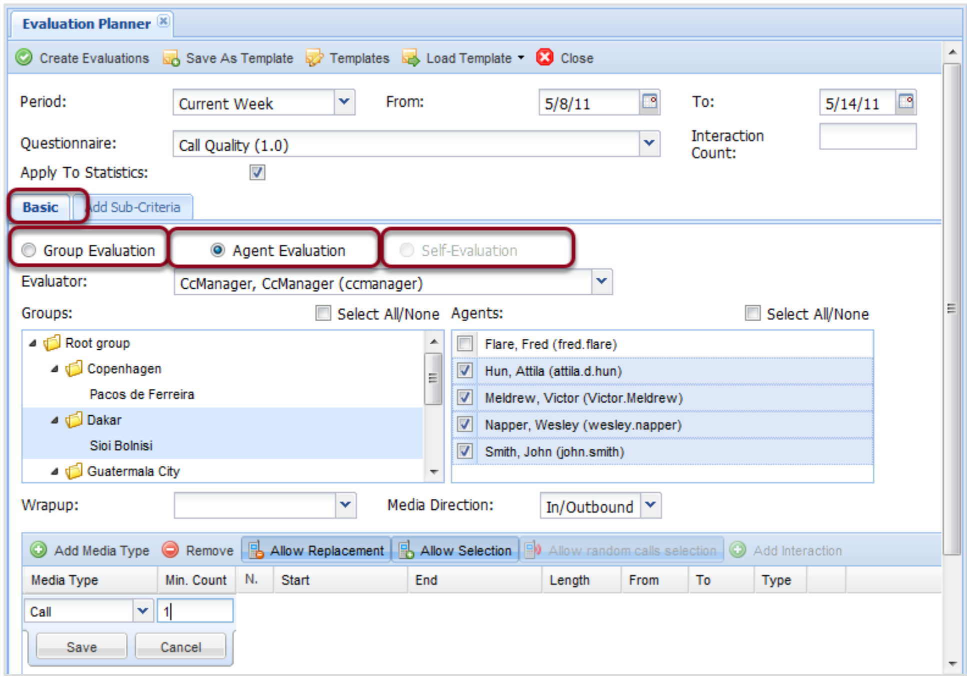


Figure 109: Selecting a Target User or Group

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 self-evaluate 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

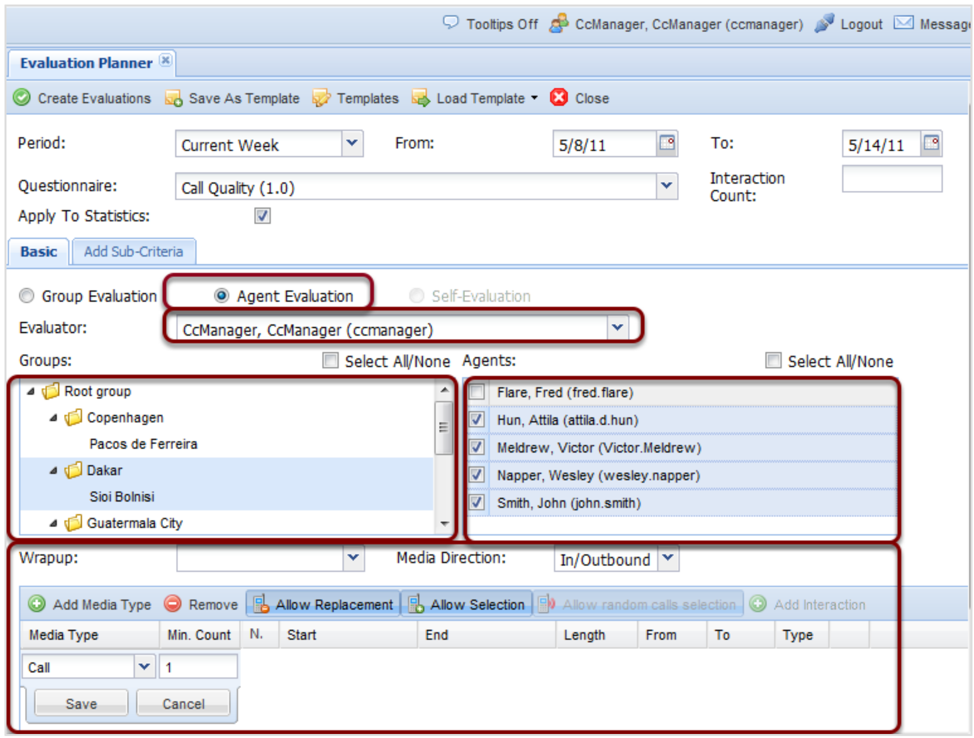


Figure 110: Selecting Agents for Evaluation

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

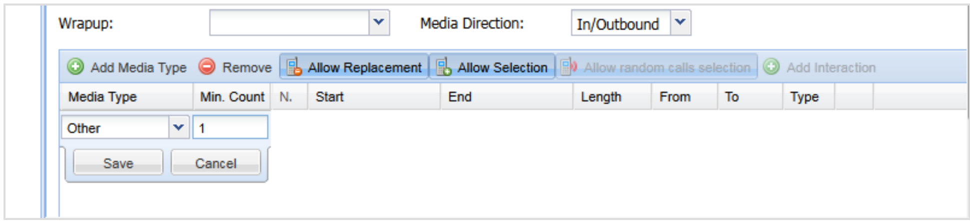


Figure 111: Adding Evaluation Media Types

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.
3. **The Min. Count** field is the minimum number of media records that should be sampled for this type. Unless **Sub-Criteria** are specified, the sum of all **Media Type** record counts on this tab must equal the **Interaction Count** value at the top of the Planner screen.
4. 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**.

Adding Media for Evaluation

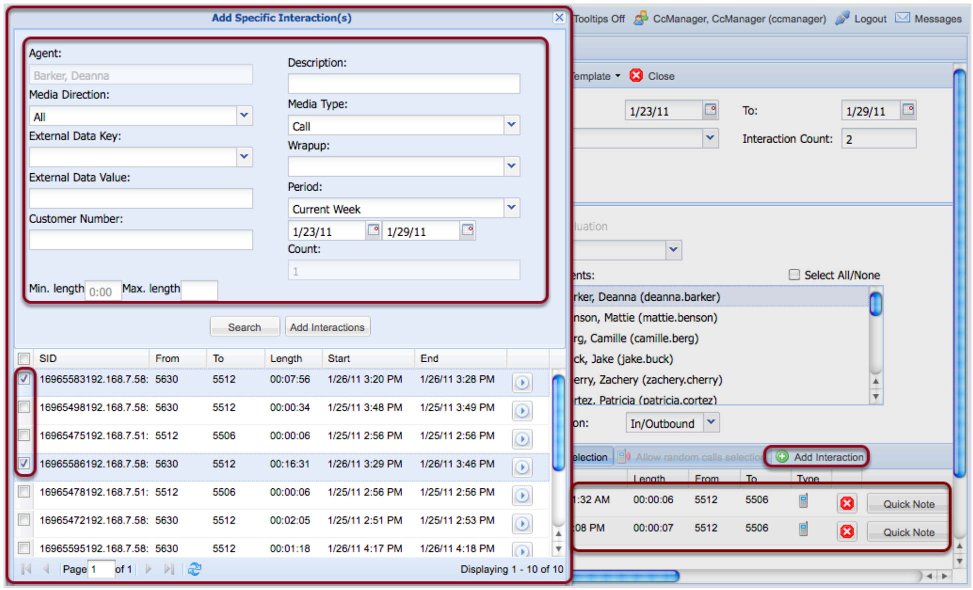


Figure 112: Adding Media for Evaluation

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

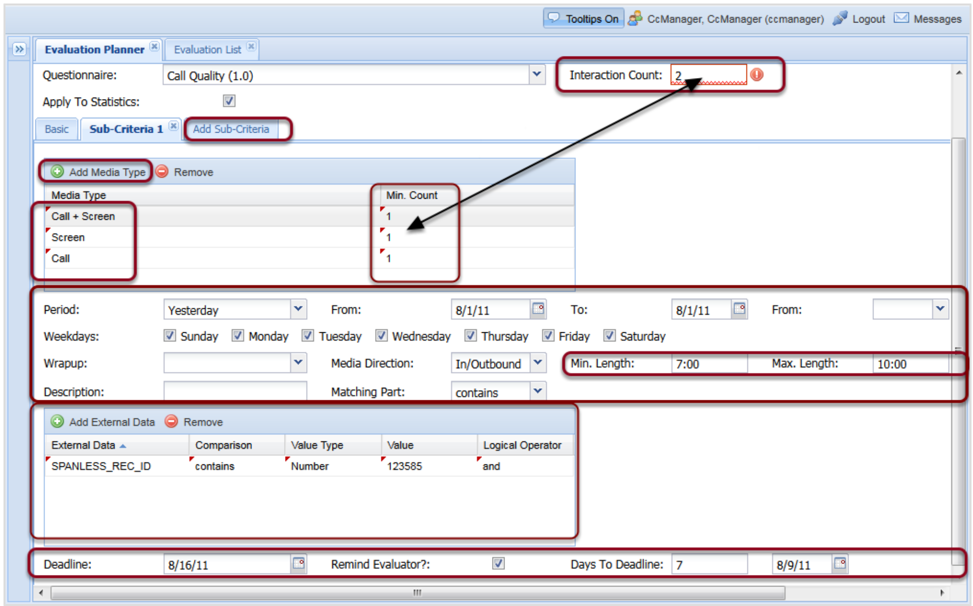


Figure 113: Adding Sub-Criteria

1. Click the **Add Sub-Criteria** tab.
2. Click **Add Media**.
3. The **Media Type** dialog box opens. Select a **Media Type** from the drop-down 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.

4. 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.
8. 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

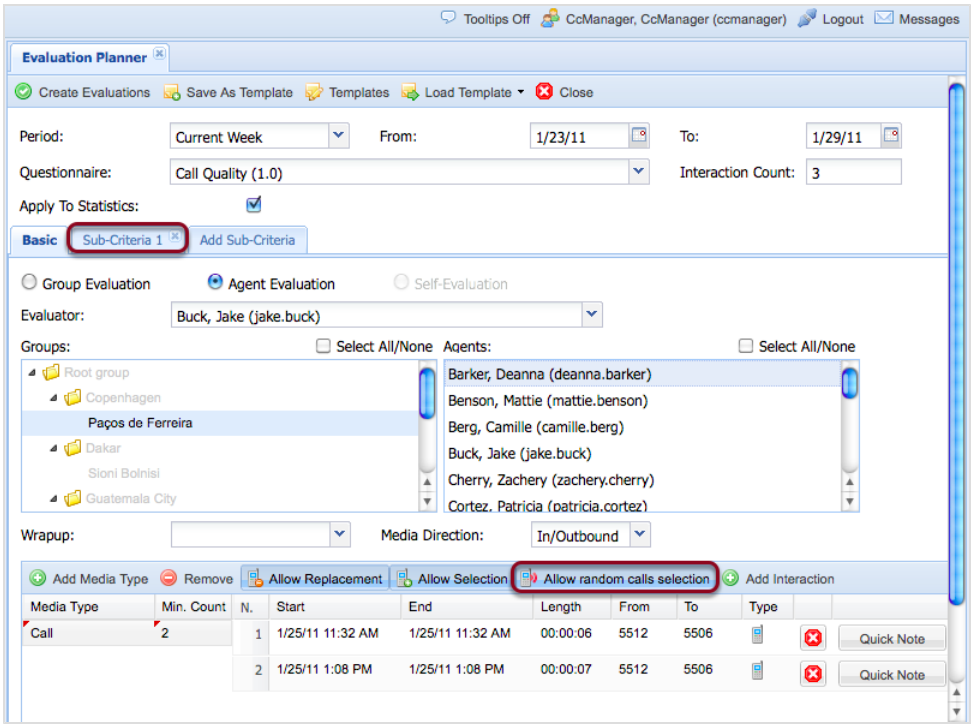


Figure 114: Selection of Random Calls

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

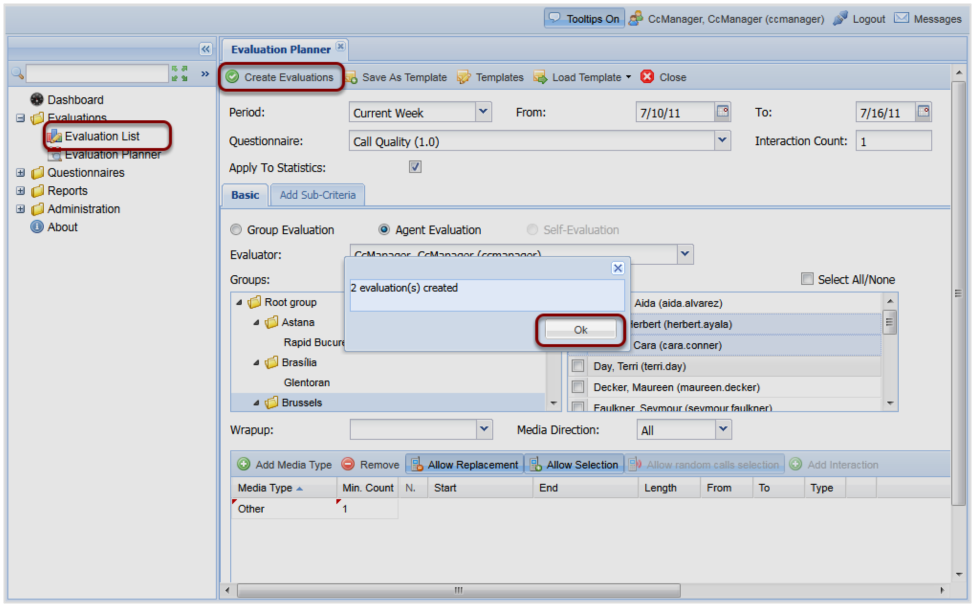


Figure 115: Creating the Evaluation

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

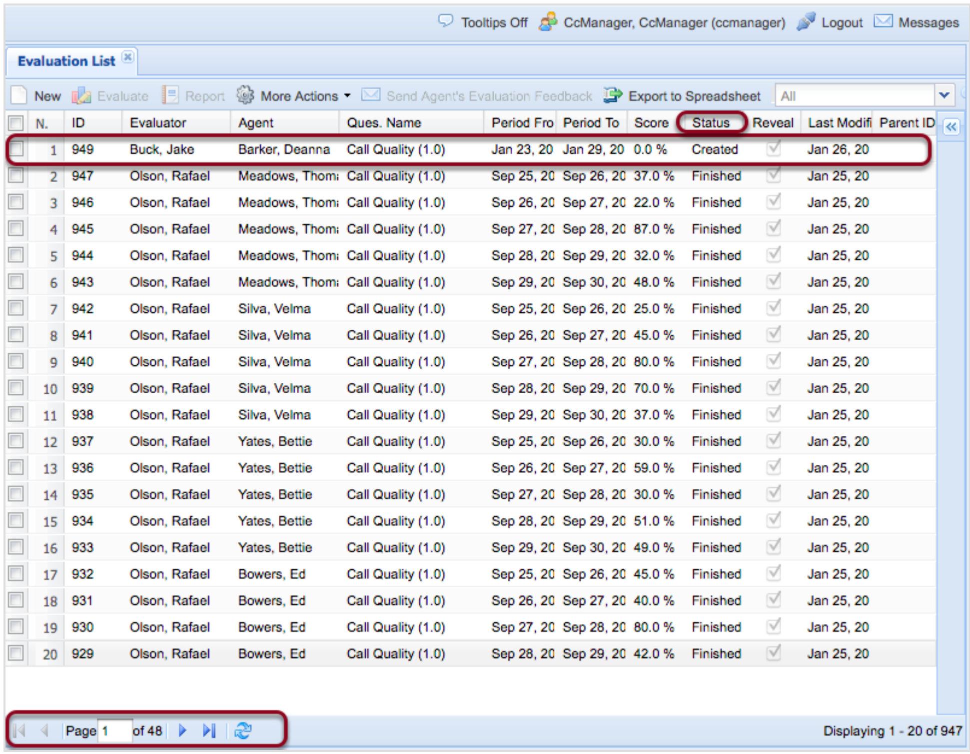


Figure 116: Viewing Created Evaluations

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**.
3. 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.

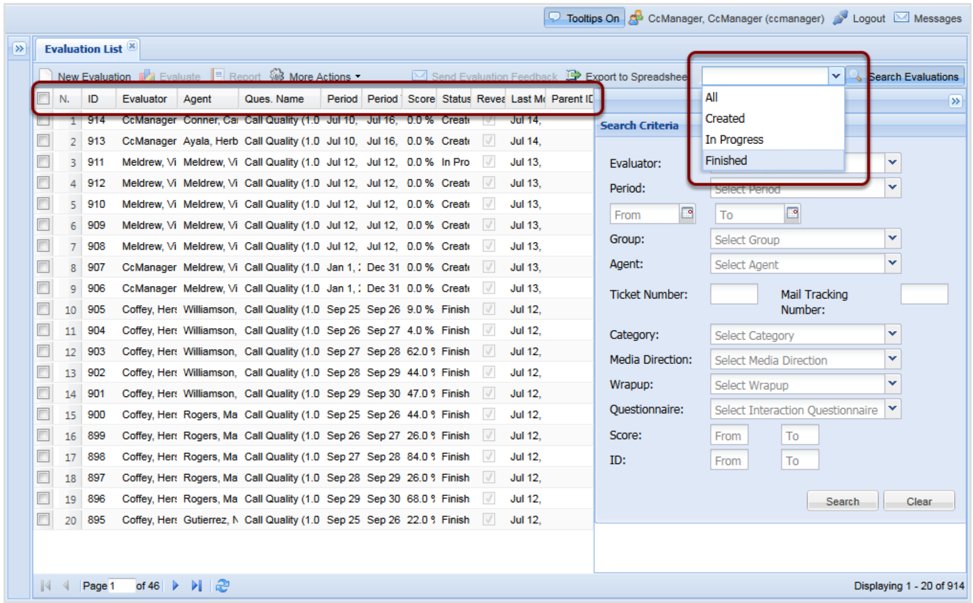


Figure 117: Show evaluations that have a specific status with the drop down list

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.

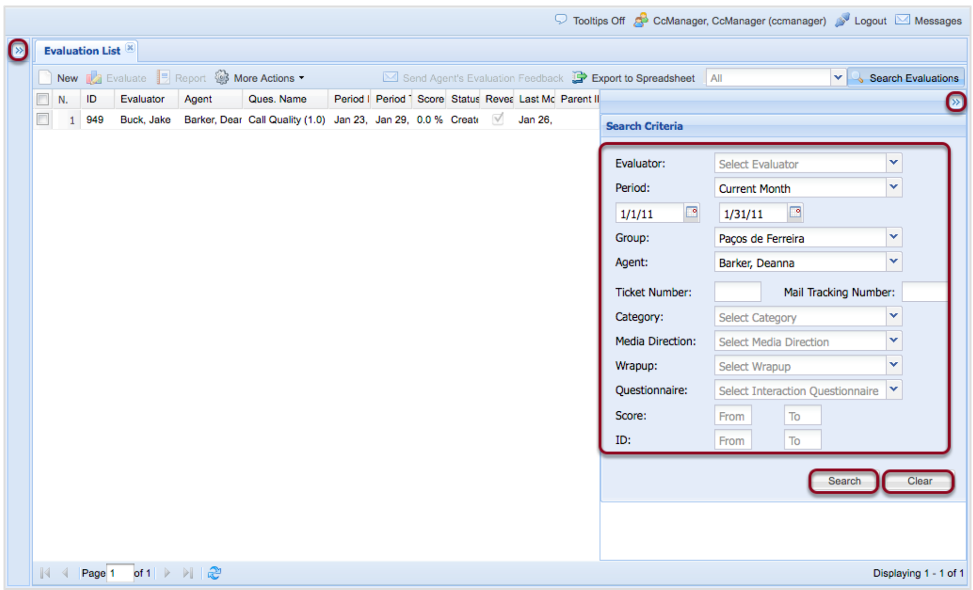


Figure 118: Searching for Evaluations

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**.
2. Select a **Period** and the **Questionnaire** to be used to evaluate the call from the drop-down list. Type the **Interaction Count**. See Specifying an 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.
11. 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

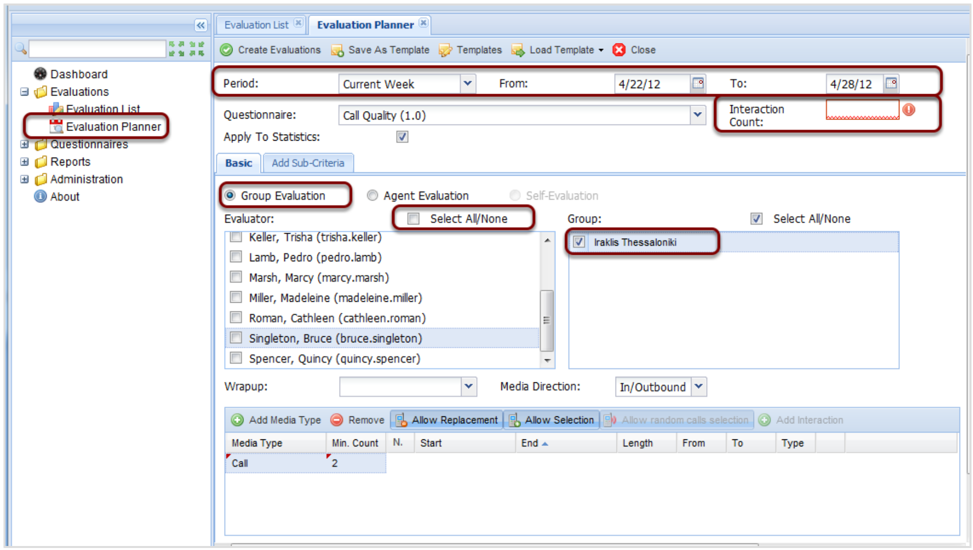


Figure 119: Creating Multiple Evaluations

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 Specifying an Evaluation Period and Questionnaire.
3. On the Basic tab select **Group Evaluation**.
4. The **Evaluator** list appears and by default every evaluator is selected. The select Evaluator: **All/None** checkbox 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.

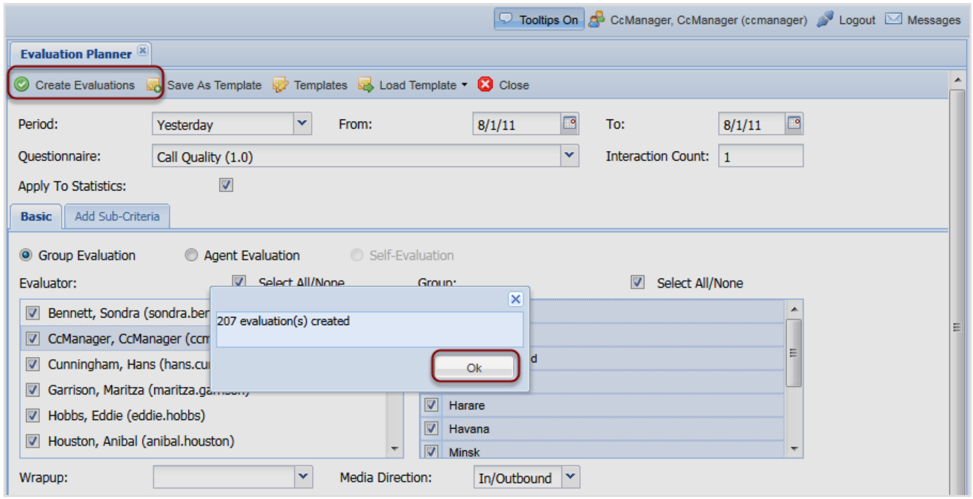


Figure 120: Created Evaluations

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.

Genesys

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

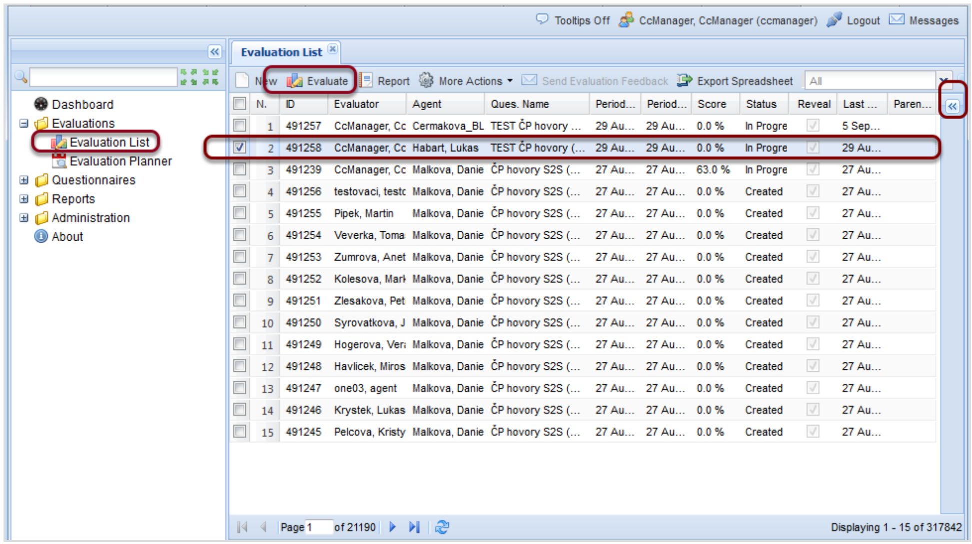


Figure 121: Opening an Evaluation

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

The Evaluator Screen

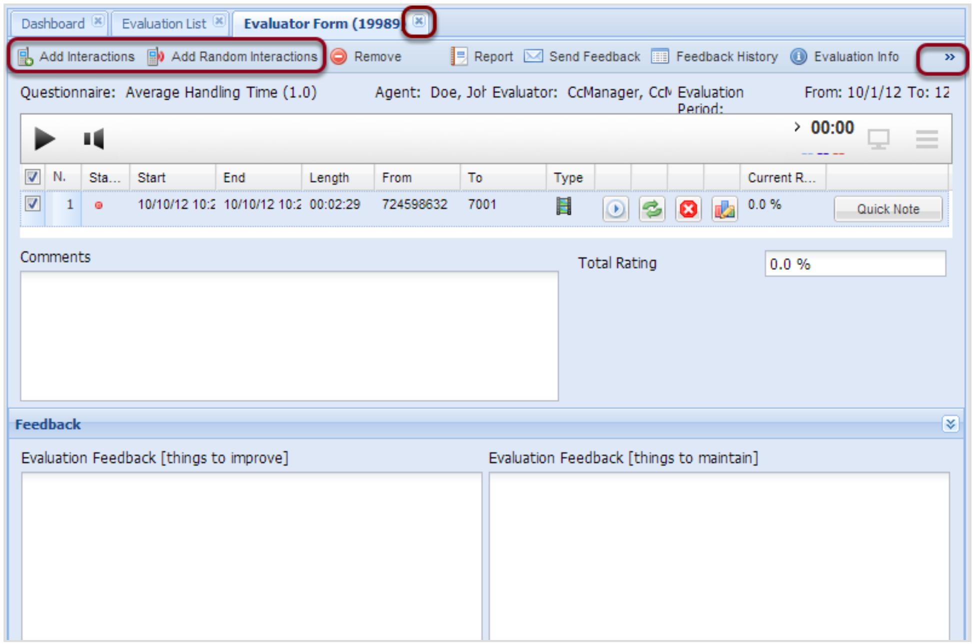


Figure 122: The Evaluator Screen

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 » 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

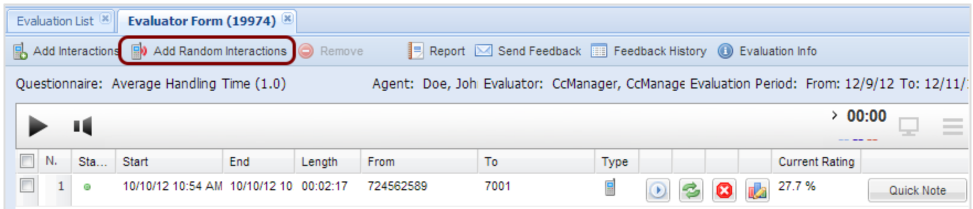


Figure 123: Adding Random Media for Evaluation

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.

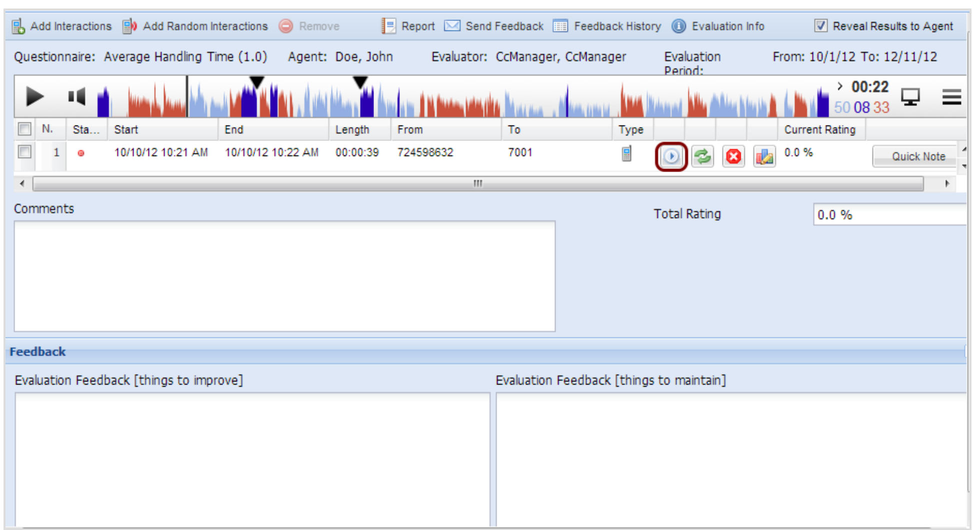


Figure 124: Adding Random Media for Evaluation

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

Click **Media** to replace the media record.

Click **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

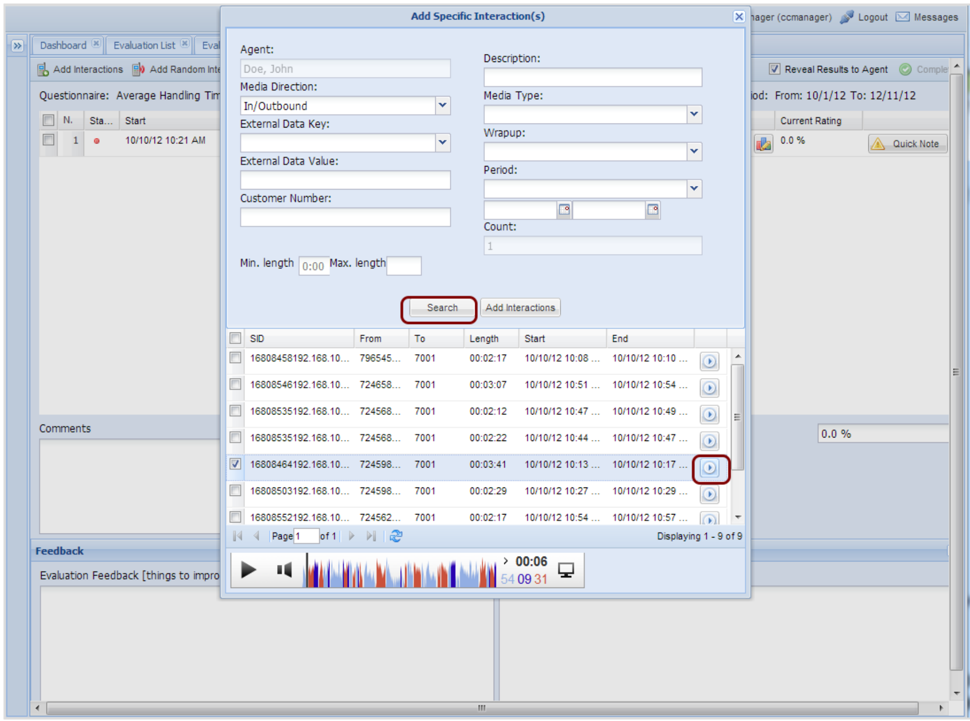


Figure 125: Adding Specific Media for Evaluation

1. 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

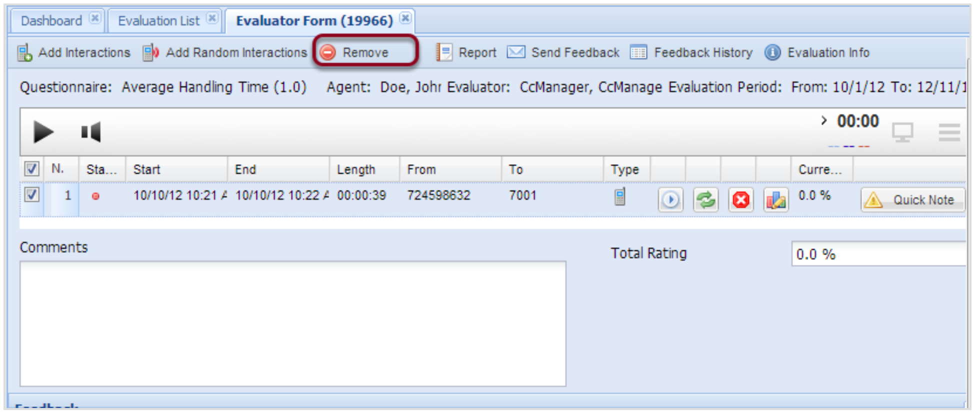


Figure 126: Replacing Media for Evaluation

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

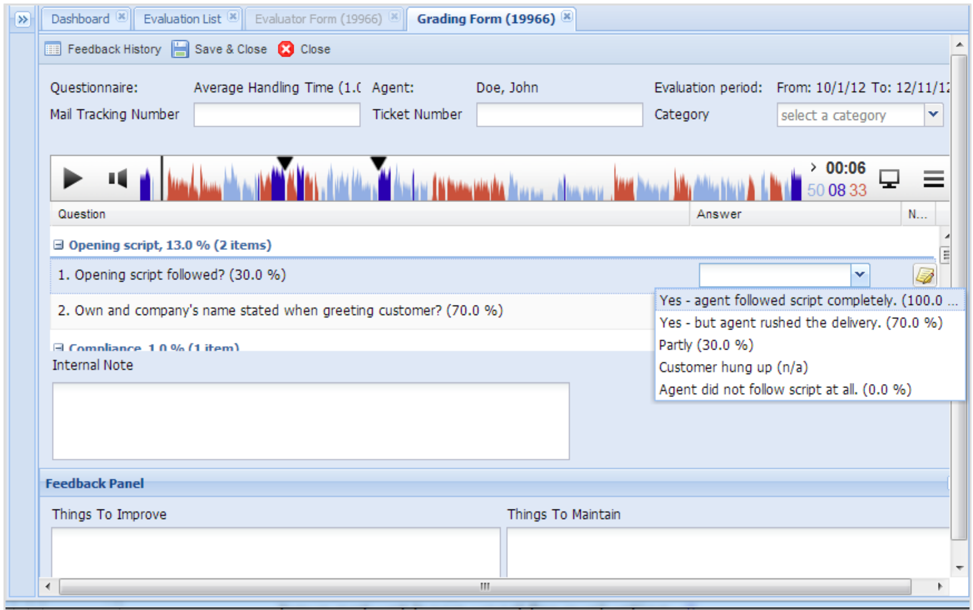


Figure 127: Grading a Media Record

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

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

1. 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 **Close** to close the grading form.

Completing the Evaluation

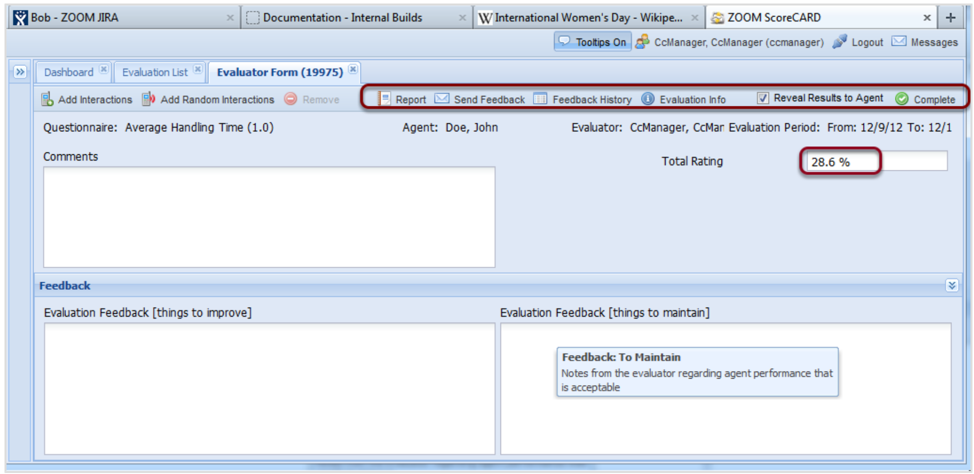


Figure 128: Completing the Evaluation

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

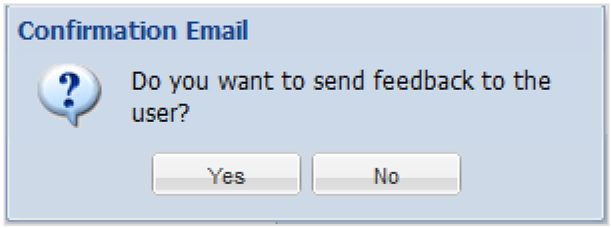


Figure 129: Sending Feedback to an Agent

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 Re-Open An Evaluation. This would normally be an extraordinary occurrence.
Completed evaluations can be opened in read-only view, where they can be printed or used as a source for a report.

Deleting Evaluations

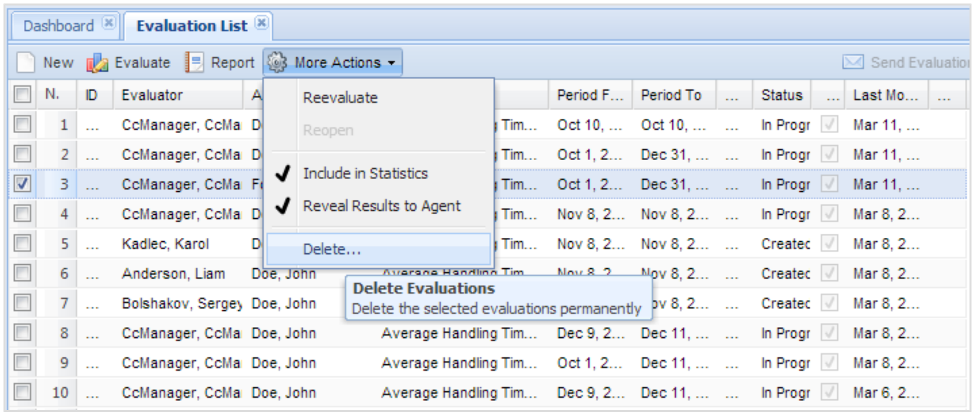


Figure 130: Deleting Evaluations

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

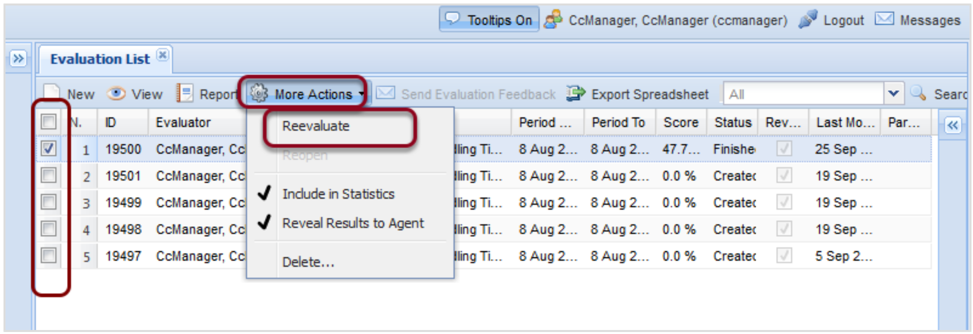


Figure 131: Re-Using the Evaluation - 1 (Optional)

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 Calibrating Evaluations.

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

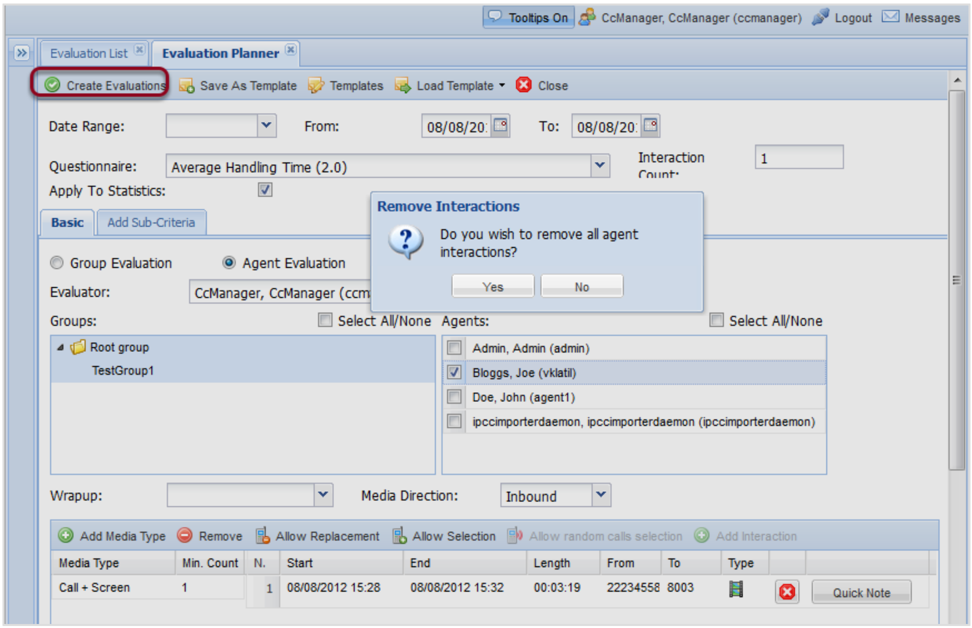


Figure 132: Re-Using the Evaluation - 2 (Optional)

1. Open the **Evaluation Planner**. The **Remove Interactions** dialog appears. Select **Yes** to remove all the agent interactions used in the initial evaluation or **No** to keep them. The criteria of the original evaluation 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

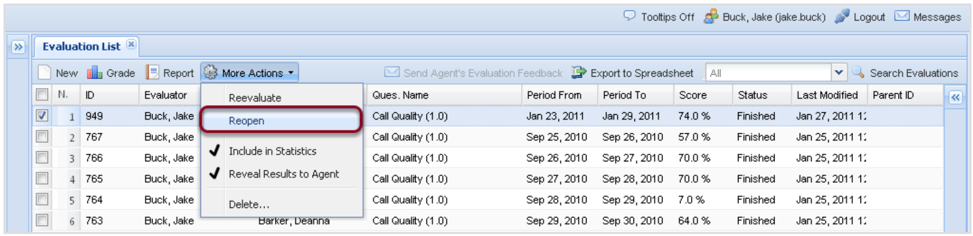


Figure 133: Reopening an Evaluation

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.

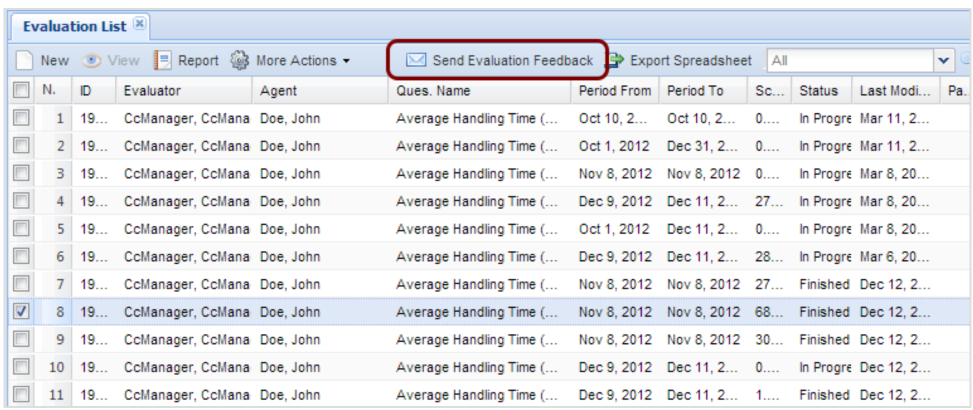


Figure 134: Sending Evaluation Feedback Button

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.

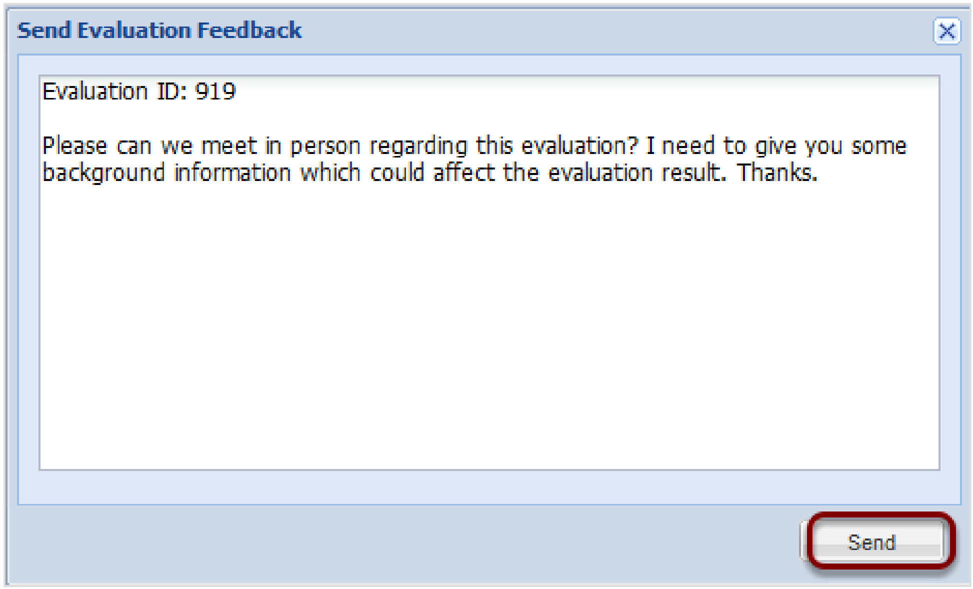


Figure 135: Send Evaluation Feedback Message

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

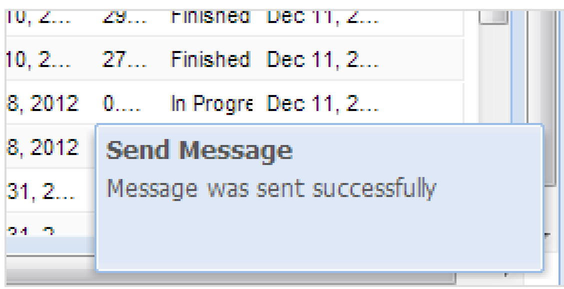


Figure 136: Send Evaluation Feedback Message Sent

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 Viewing System Messages.

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.

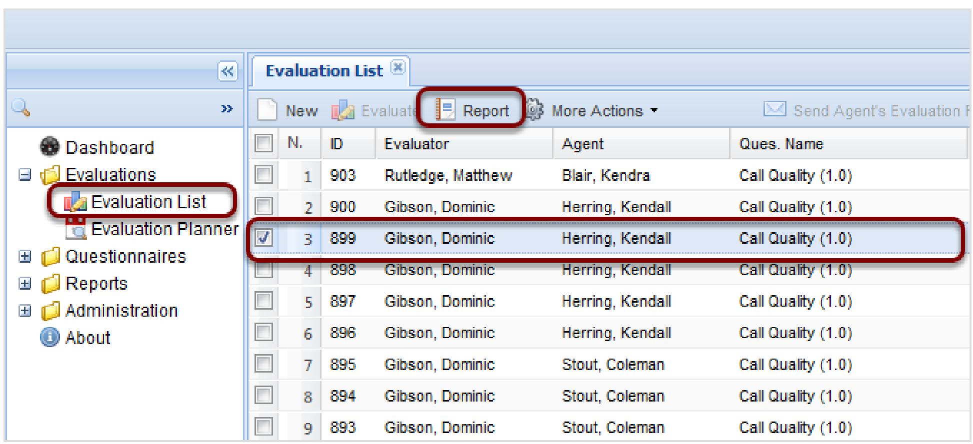


Figure 137: Evaluation List

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.

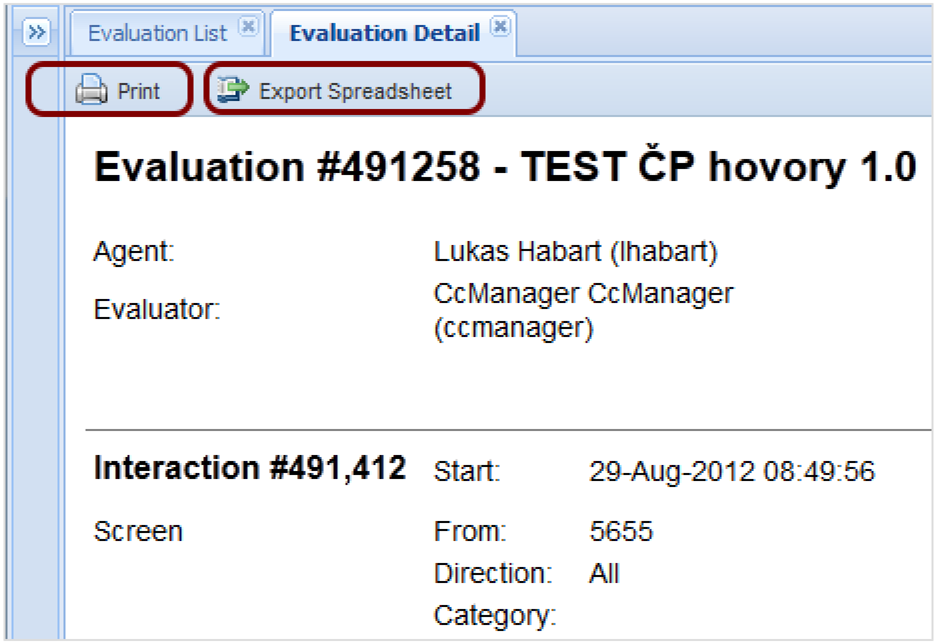


Figure 138: Evaluation Detail Report

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.

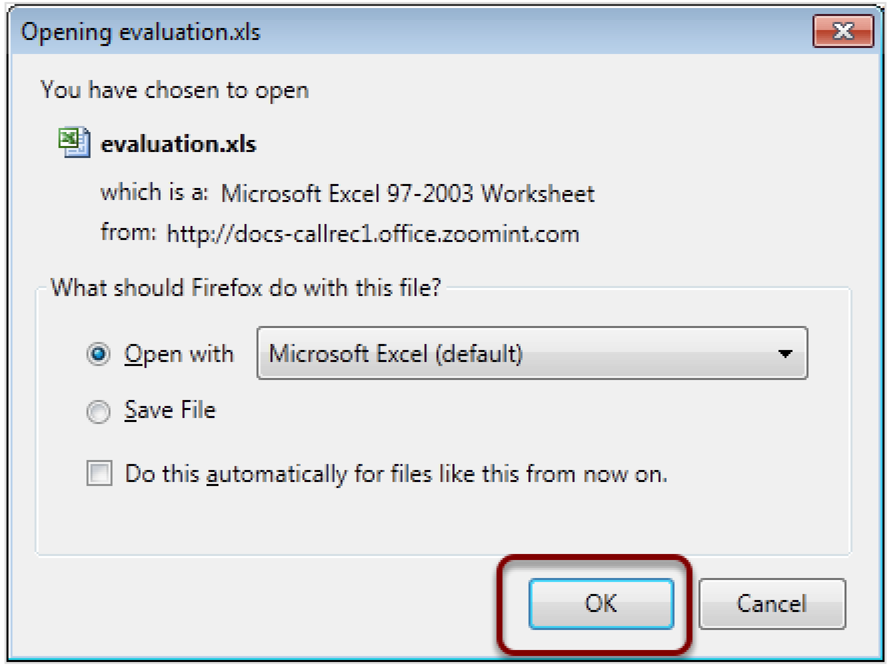


Figure 139: Open the Spreadsheet

Click **OK** to open the spreadsheet.

The **Evaluation Detail** report displays.

Linking to a Read-only Grading Form

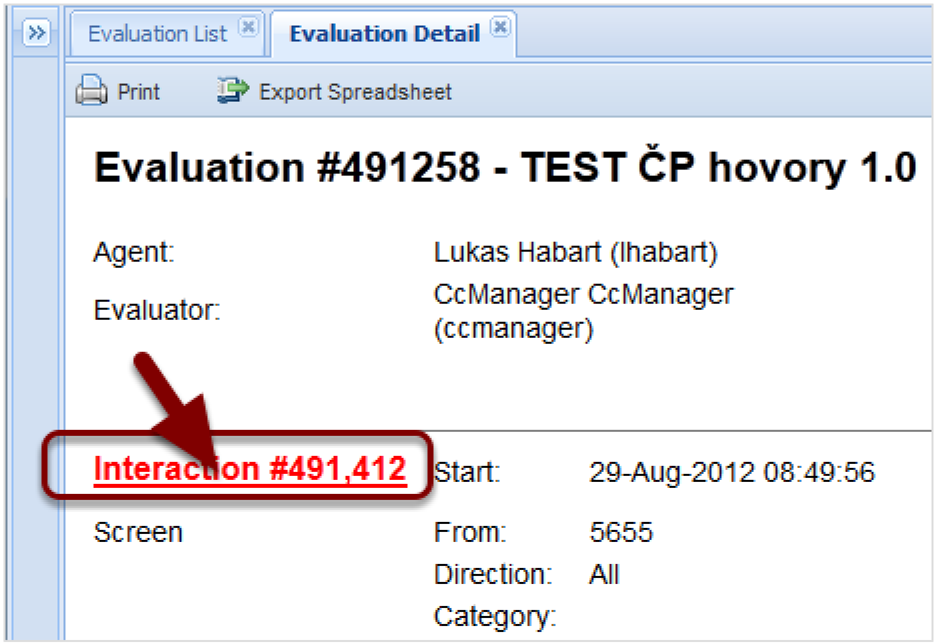


Figure 140: Detail Report Showing Interaction

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.

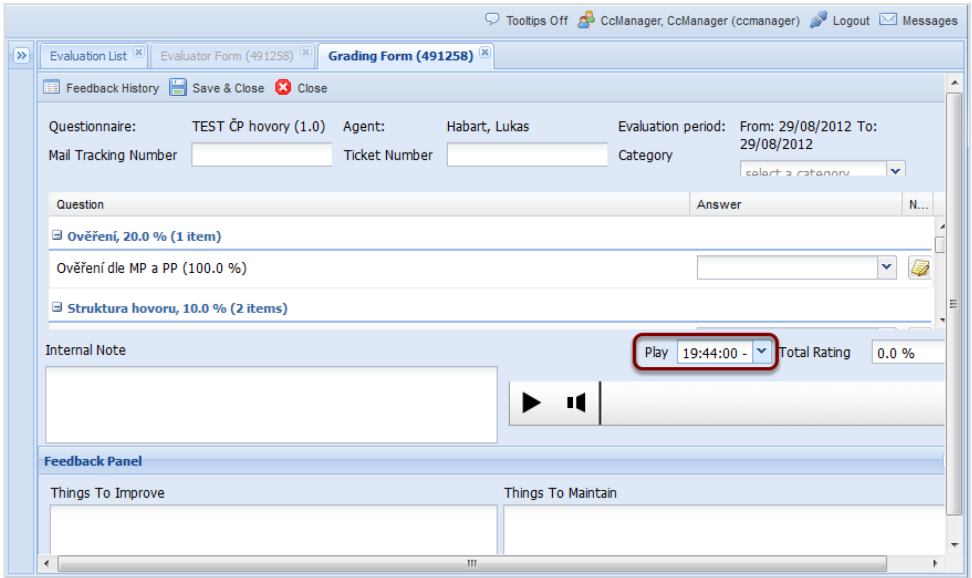


Figure 141: Grading Form

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

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.

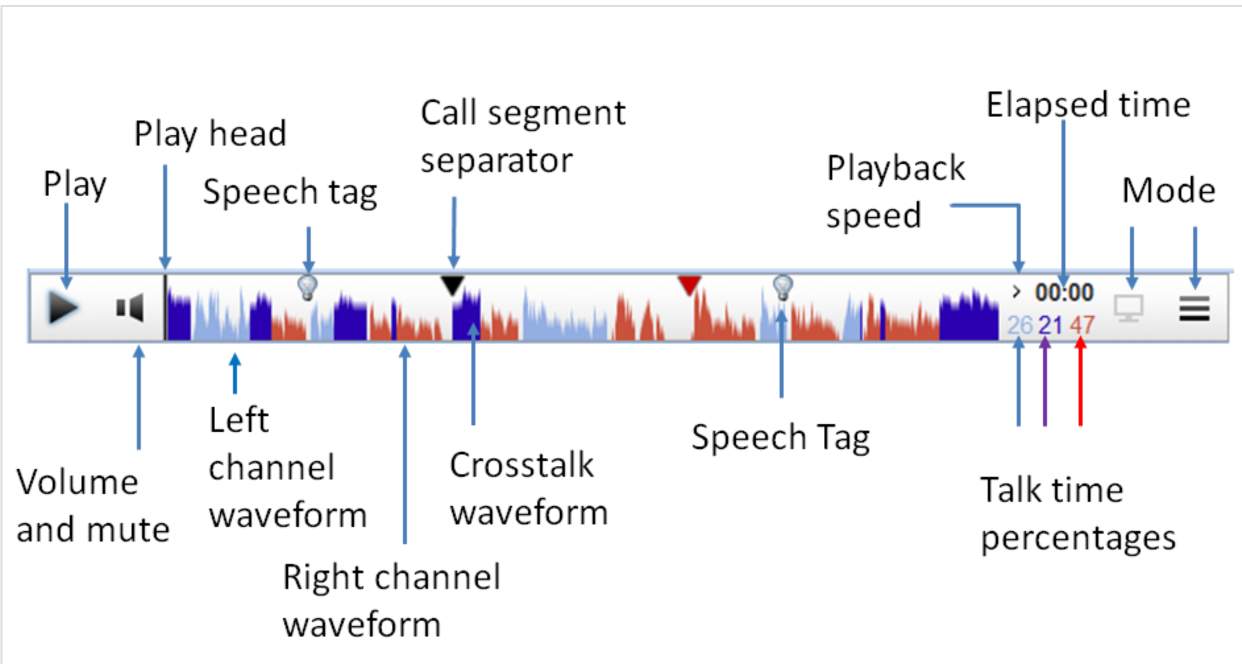


Figure 142: Showing Universal Player Playing in Default Mode

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 ▼ for a short gap and ▼ 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

Click toggle segments to view the call segments.

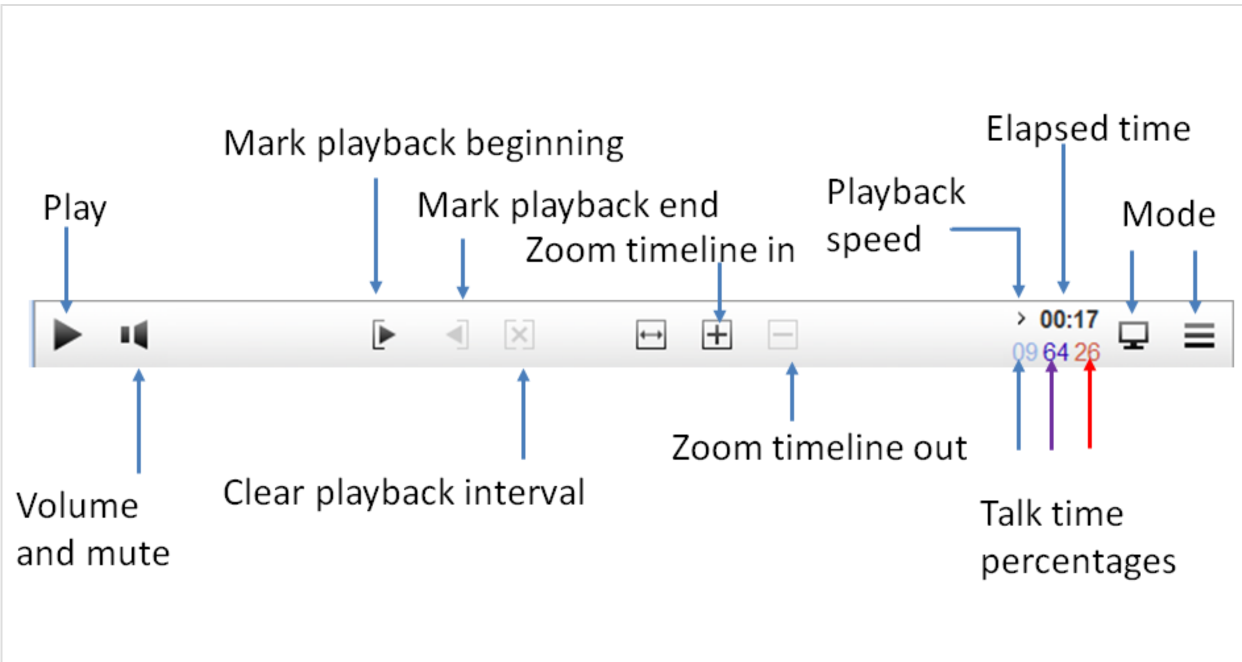


Figure 143: Playing Media in View Segments Mode

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

Viewing Call Segments

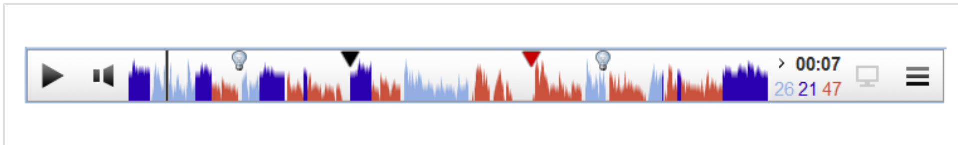


Figure 144: Default View

Calls that are transferred are composed of several segments.

Click  toggle segments to view the call segments.

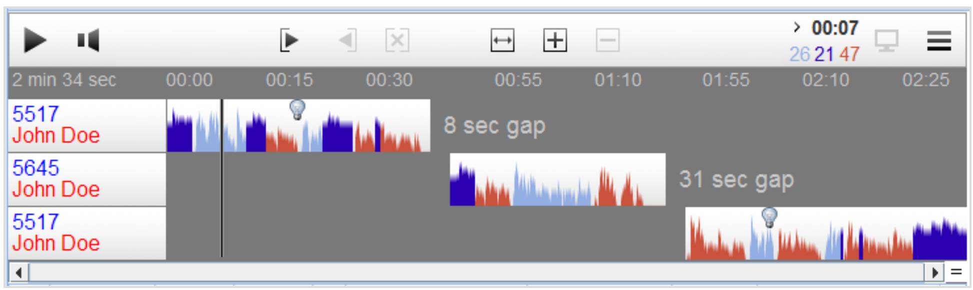


Figure 145: Multi Segment View

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.

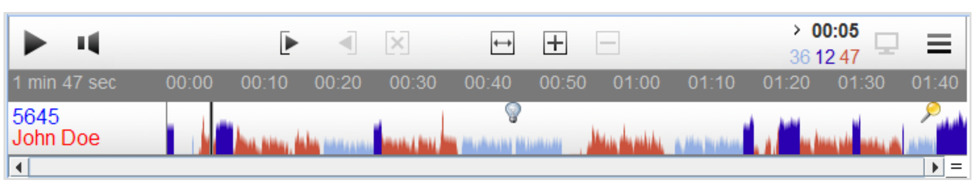


Figure 146: Single Segment View

Click again to return to default mode.

Viewing screen captures

Figure 147: Single Segment View

If there are screen captures available the  toggle screens icon displays in black.

Click  toggle screen to view screen captures.

To open the screen in a separate window hold down the Alt key and click  toggle screen.

Figure 148: Viewing Screen Captures

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

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

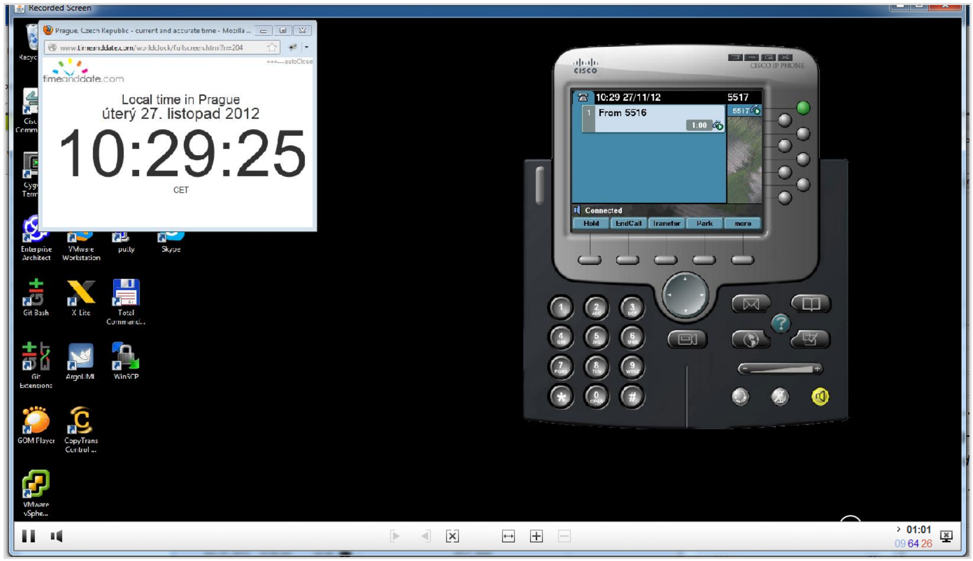


Figure 149: Full screen view

All controls are active even when playback is paused.

Clicking the Waveform to Start Playback from a Certain Point

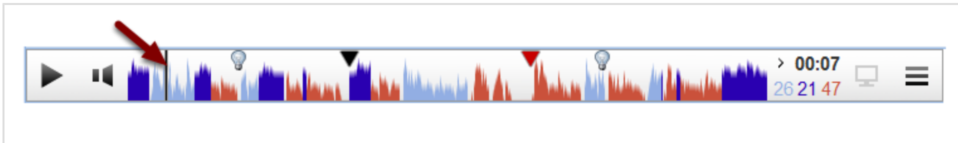


Figure 150: Clicking the Waveform to Start Playback from a Certain Point

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

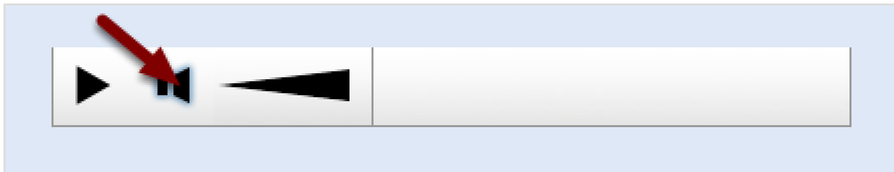


Figure 151: Volume Slider

To adjust the playback volume, point to volume and then adjust the volume slider that appears.

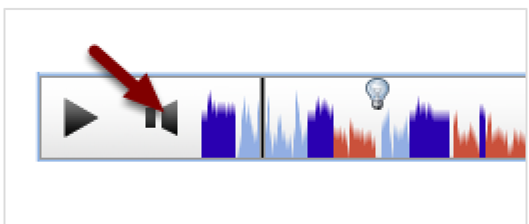


Figure 152: Muting the Playback

To mute the playback click volume and mute off displays.

To hear the playback click mute off and volume displays.

Selecting Channels

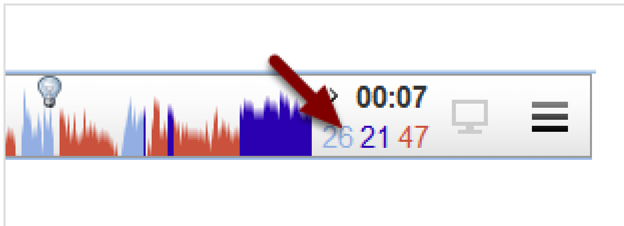


Figure 153: Selecting Playback Channels

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

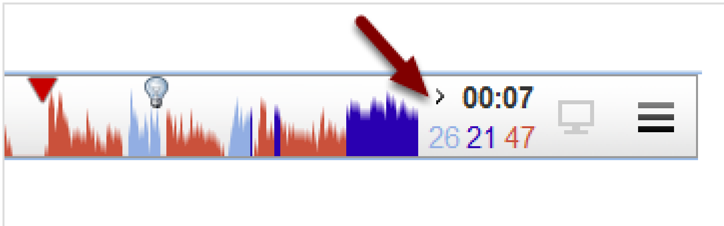


Figure 154: Selecting Playback Channels

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 › 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.

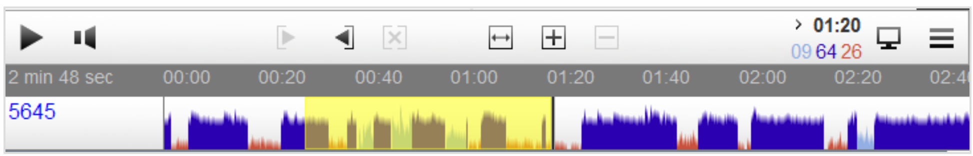
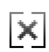


Figure 155: Playing Back a Selection

Click  selection start, at the start of the selection, listen to the playback until the section of interest finishes and click  selection end, at the end. The selection displays in yellow. Click  play to start playback. Universal Player plays that selection over and again.

To clear the selection click  .

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

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 Exporting Report Data section.

Setting Up a Report

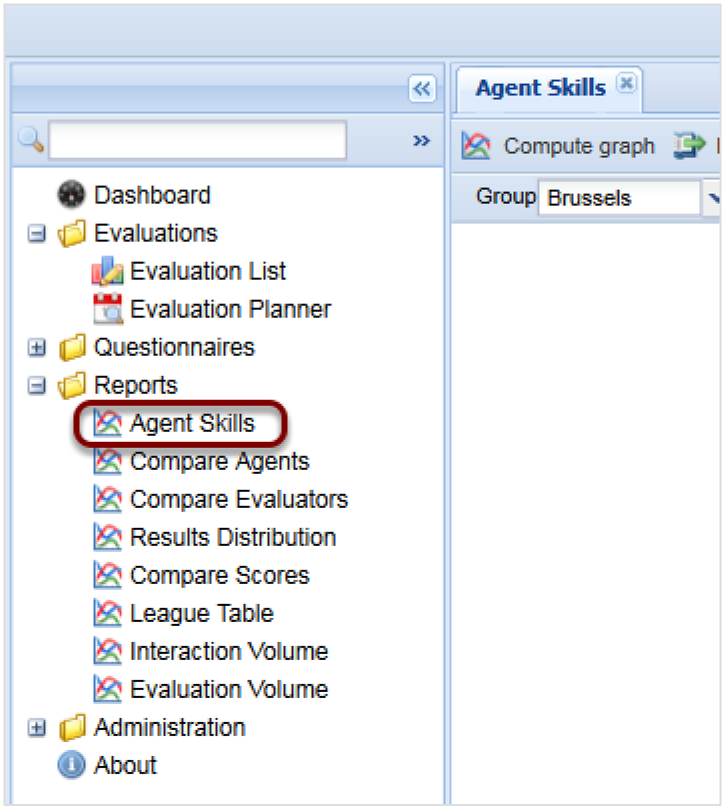


Figure 156: Selecting Agent Skills

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

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

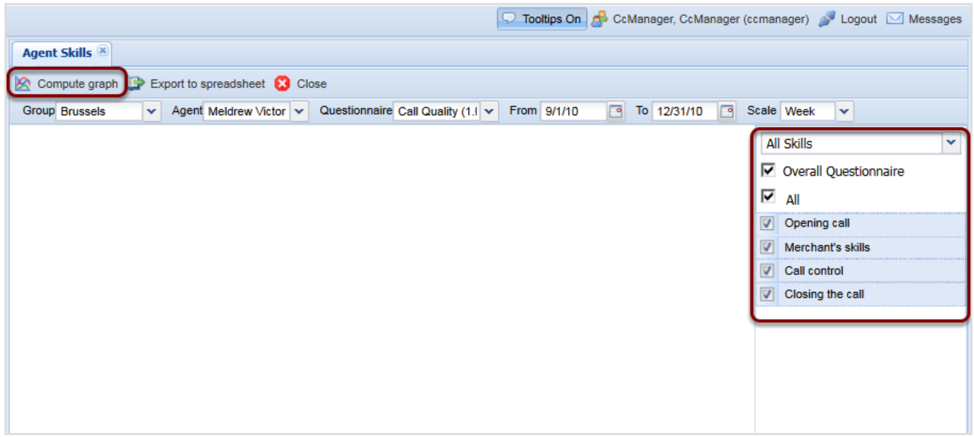


Figure 157: Setting Up a Report

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**.
6. 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.
7. 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 [Exporting Report Data].

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

Important:

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

Results Distribution Graph - 1

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

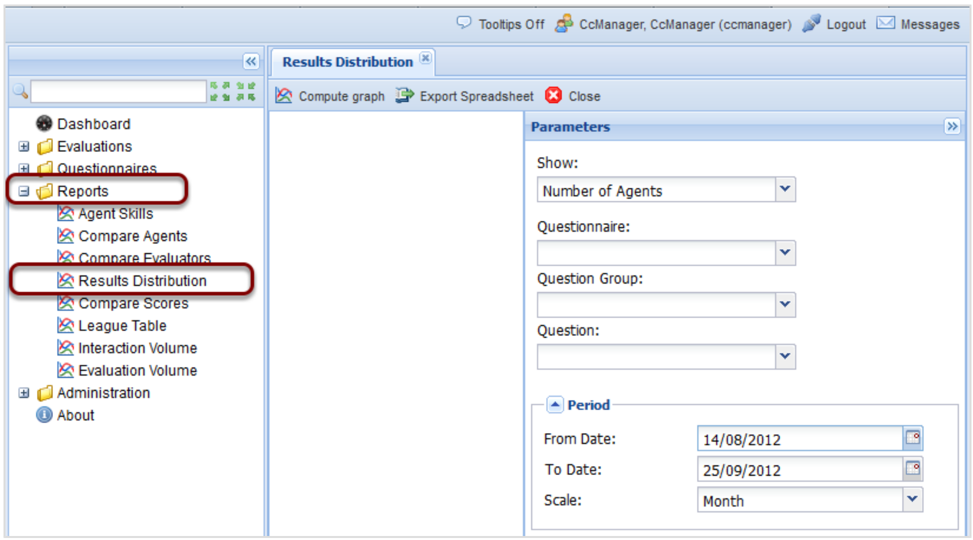


Figure 158: Opening the Results Distribution Tab

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

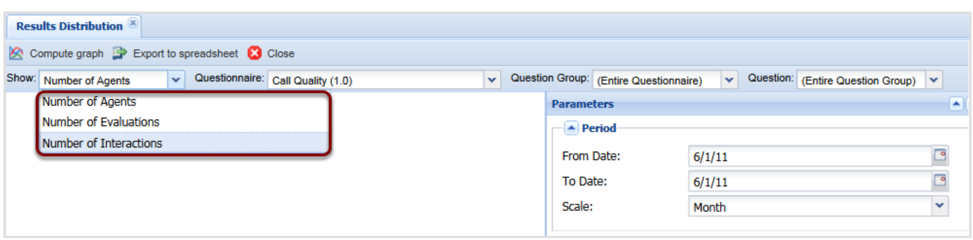


Figure 159: Results Distribution Tab

1. The **Show:** drop-down list has the alternatives **Number of Agents**, **Number of Evaluations**, and **Number of Interactions**. Click on one of these to select what is displayed in the chart.
2. Select a questionnaire from the **Questionnaire:** 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.

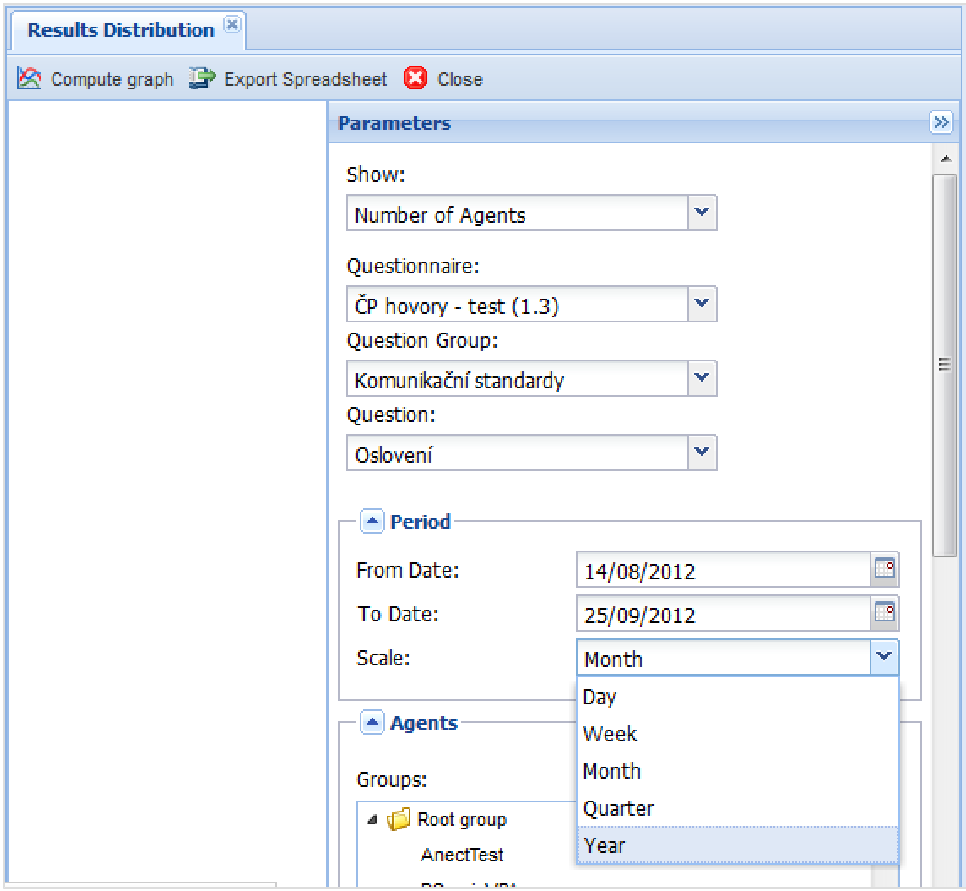


Figure 160: The Results Distribution Tab Parameters

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.

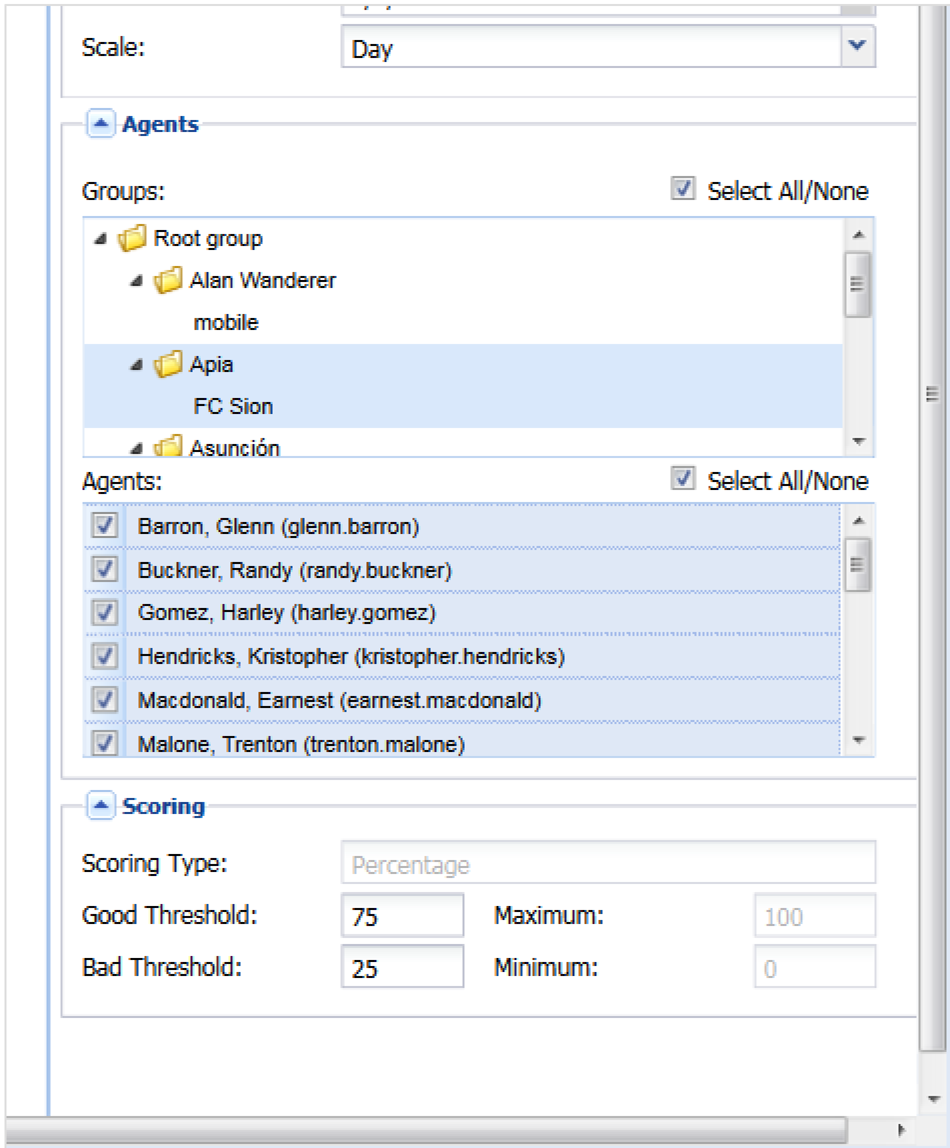


Figure 161: The Results Distribution Tab Parameters / Select Agents

1. 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.

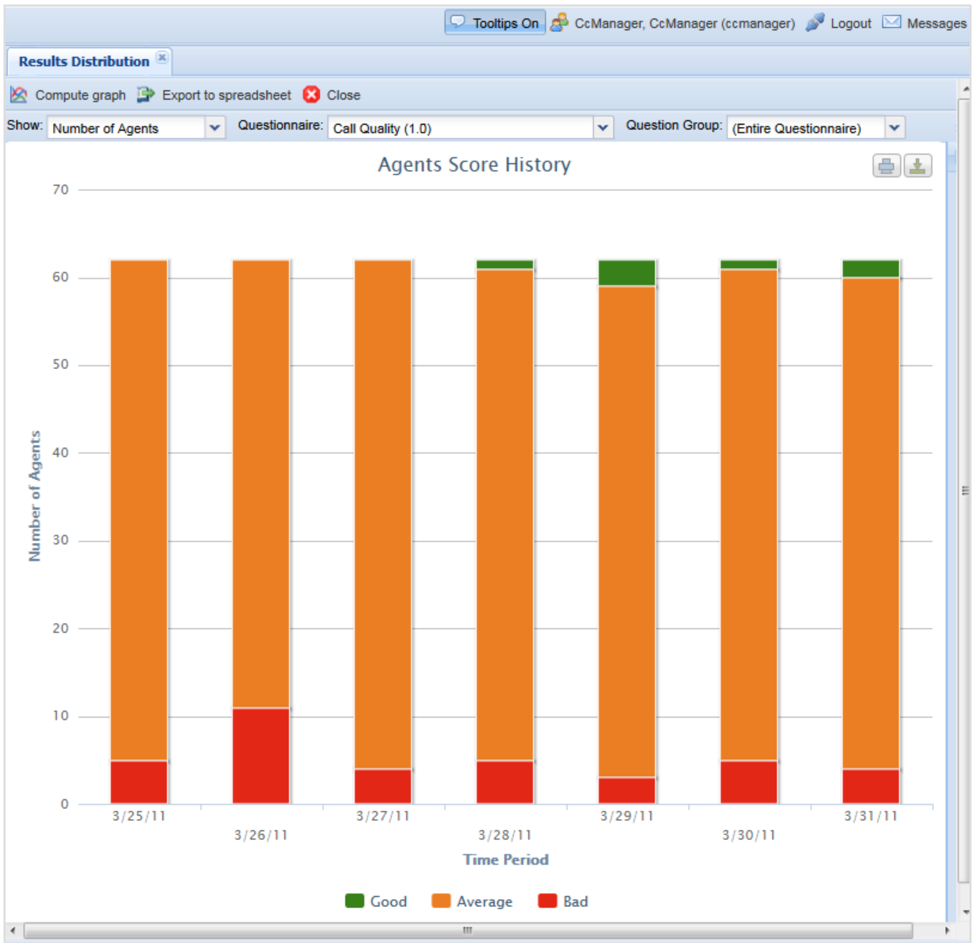


Figure 162: Compute Graph

1. 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.

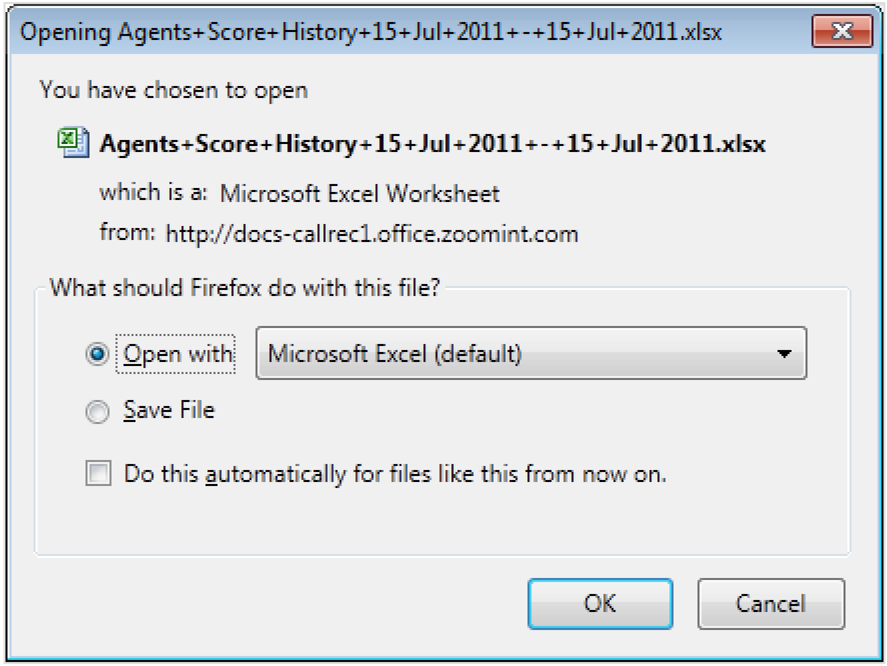


Figure 163: Export to Spreadsheet Dialog

Click **OK** to open the spreadsheet.

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

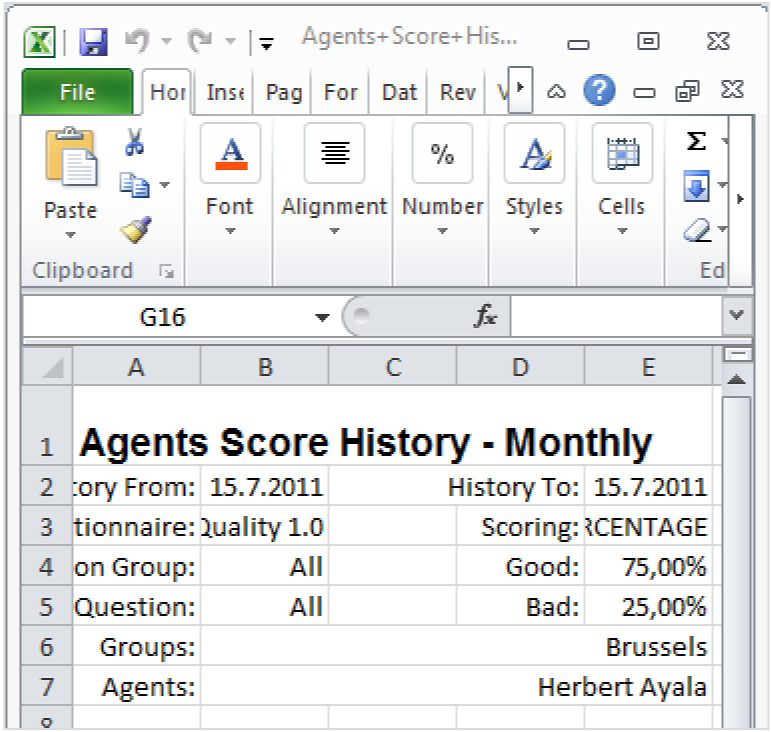


Figure 164: Example of Exported Spreadsheet

The cells can be resized as required.

Results Distribution Graph - 2

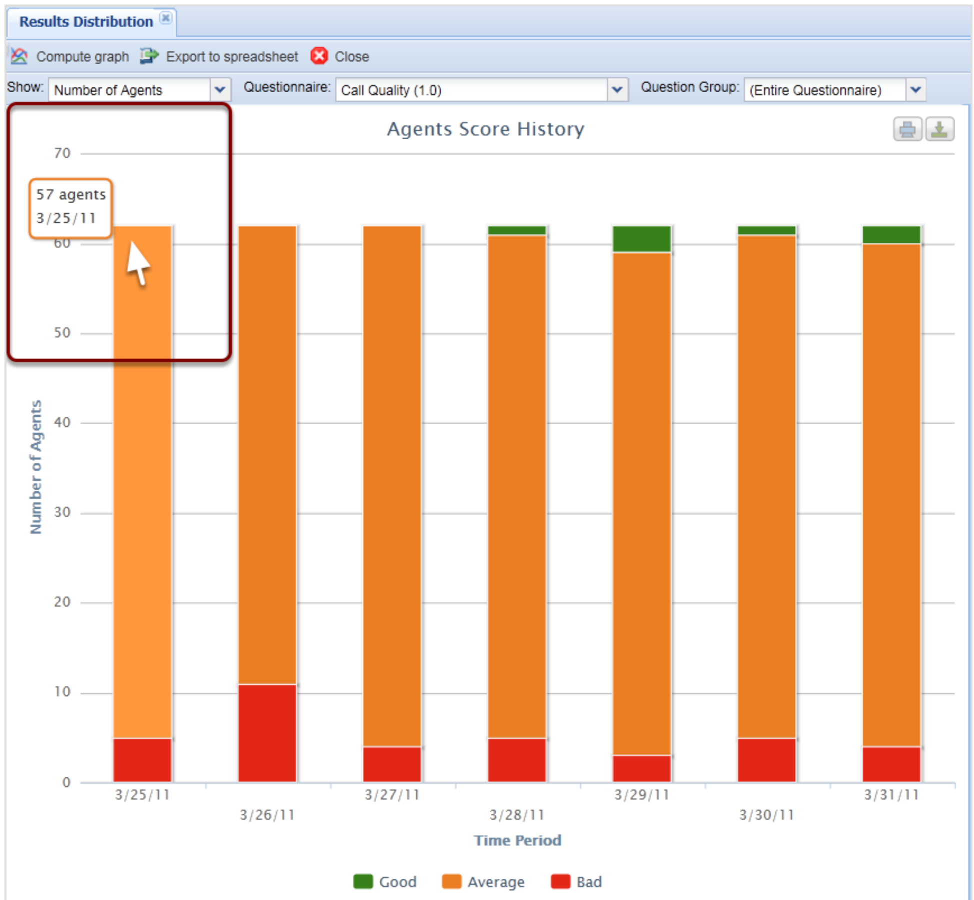


Figure 165: Results Distribution Graph 2

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

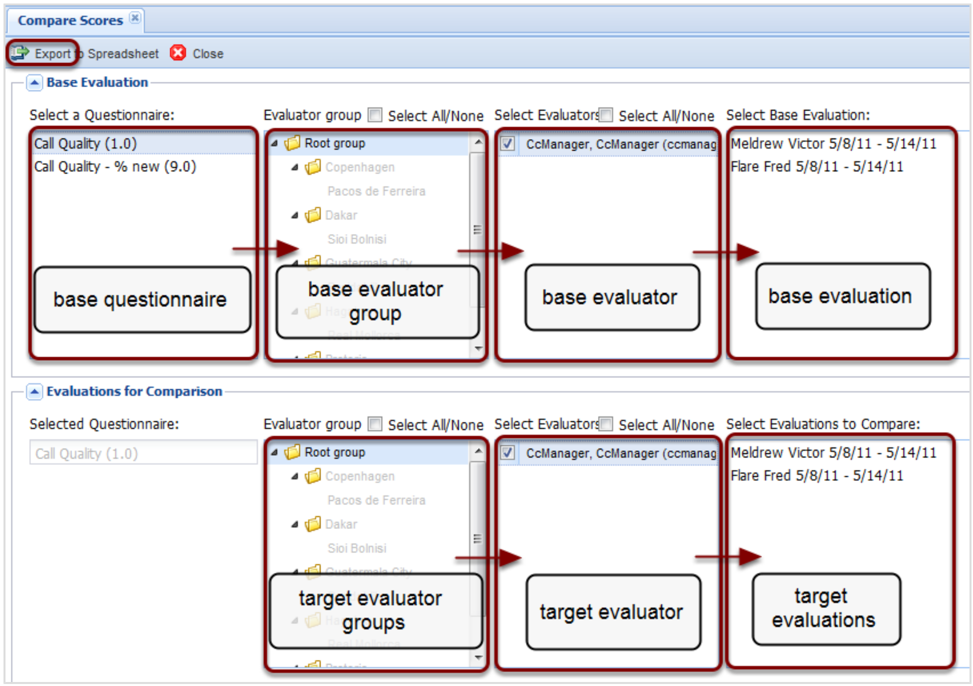


Figure 166: Compare Scores Report – 1

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

Questionnaire: **Call Quality (1.0)**

Group/Question name		Base Evaluation, Deanna Barker, 20/10/10, Eval Id: 1741	Deanna Barker, 20/10/10, Eval Id: 1742	Deanna`s Diff	Deanna Barker, 20/10/10, Eval Id: 1743	Deanna`s Diff	Deanna Barker, 20/10/10, Eval Id: 1744	Deanna`s Diff
Opening call		4.00%	0.00%	-4.00%	24.00%	20.00%	28.00%	24.00%
	Greeting, introducing the agent and the company	10.00%	0.00%	-10.00%	20.00%	10.00%	0.00%	-10.00%
	Detection and Verification of a competent person	0.00%	0.00%	0.00%	20.00%	20.00%	10.00%	10.00%
	Customer?s Consent to interview him/her (time, topic)	0.00%	0.00%	0.00%	20.00%	20.00%	20.00%	20.00%
	Company Presentation	0.00%	0.00%	0.00%	0.00%	0.00%	20.00%	20.00%
	Switching to the matter of the call	0.00%	0.00%	0.00%	0.00%	0.00%	20.00%	20.00%
Merchant's skills		4.00%	12.00%	8.00%	6.00%	2.00%	18.00%	14.00%
	Questioning techniques - investigative/business orient	0.00%	30.00%	30.00%	0.00%	0.00%	30.00%	30.00%
	Understanding customer needs	0.00%	20.00%	20.00%	0.00%	0.00%	40.00%	40.00%
	Solution proposal	10.00%	10.00%	0.00%	20.00%	10.00%	20.00%	10.00%
	Customer care	10.00%	0.00%	-10.00%	10.00%	0.00%	0.00%	-10.00%
Call control		18.00%	0.00%	-18.00%	20.00%	2.00%	0.00%	-18.00%
	Following the script	10.00%	0.00%	-10.00%	10.00%	0.00%	0.00%	-10.00%

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

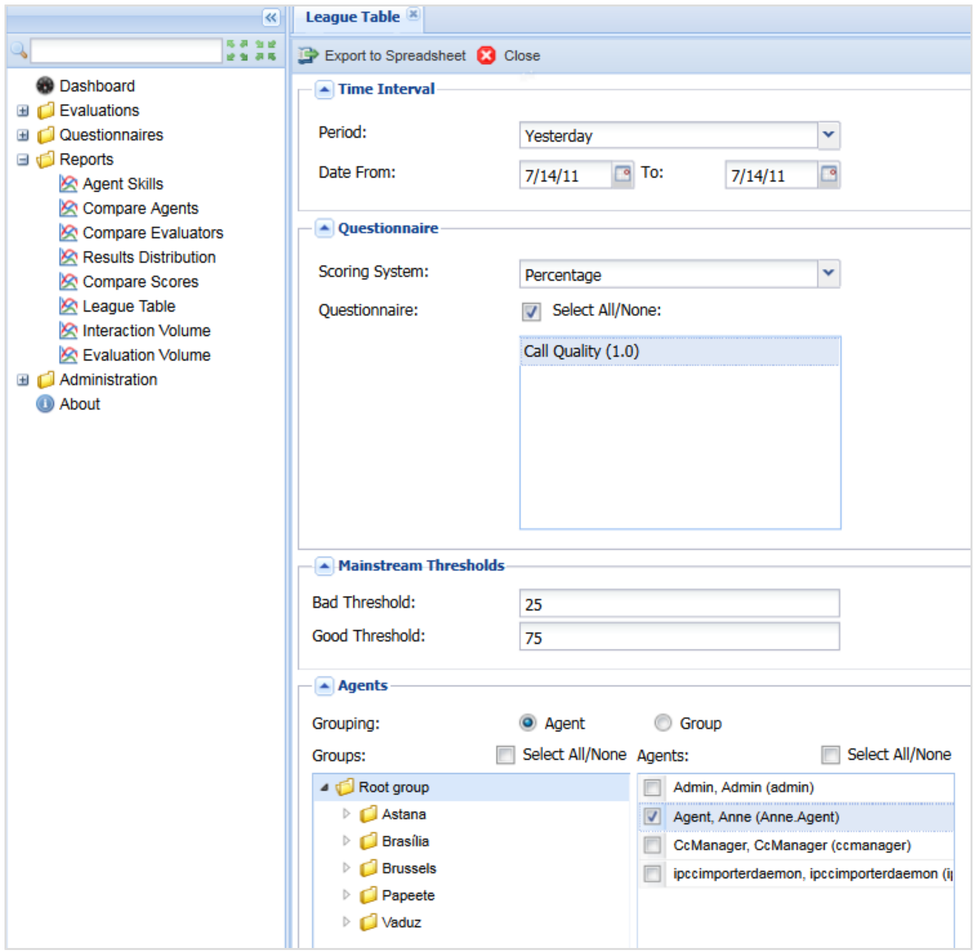


Figure 168: League Table – 1

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

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

Figure 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.

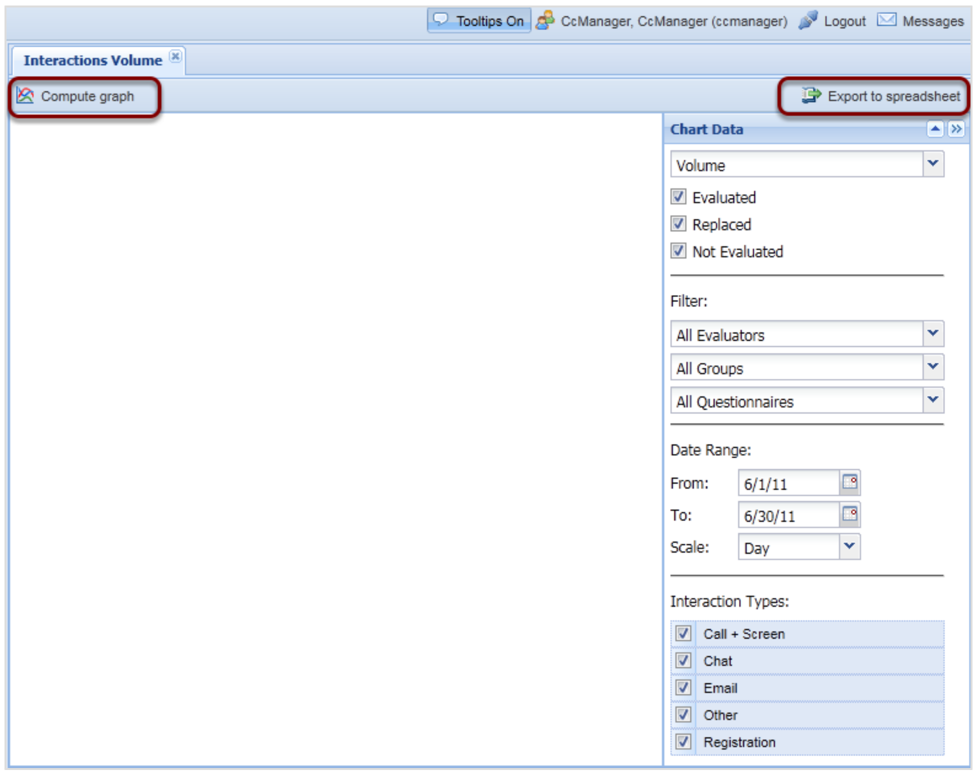


Figure 170: Interaction Volume Tab

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** drop-down 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**.

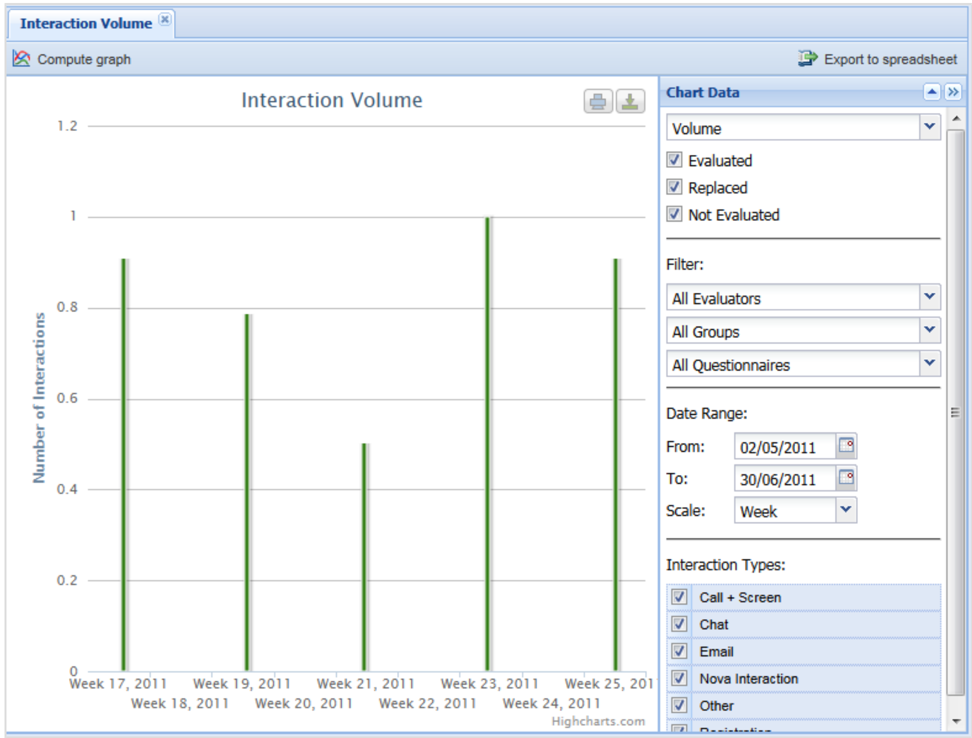


Figure 171: Interaction Volume Chart

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.

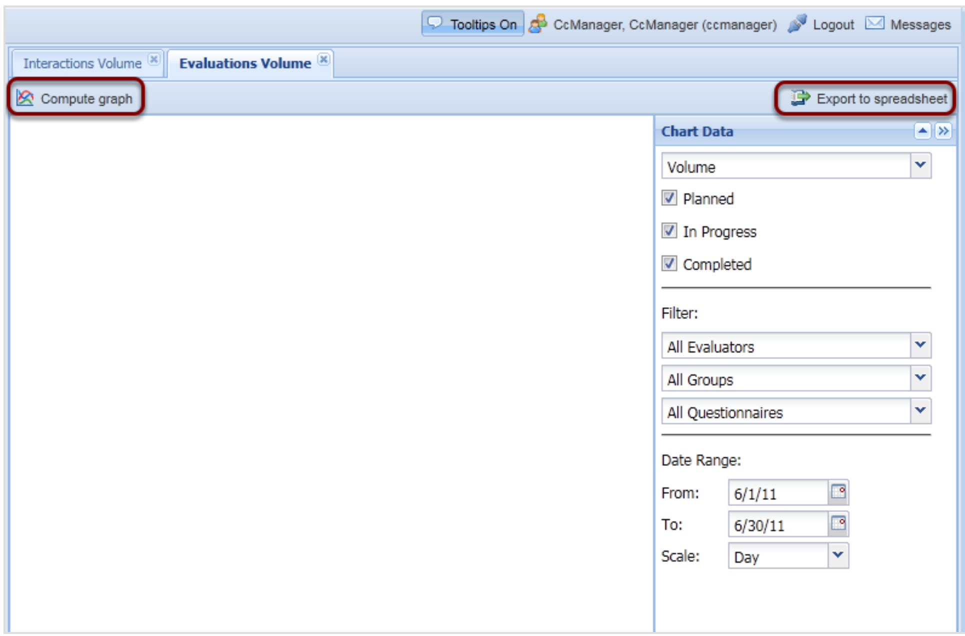


Figure 172: Evaluations Volume Tab

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** drop-down 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**.

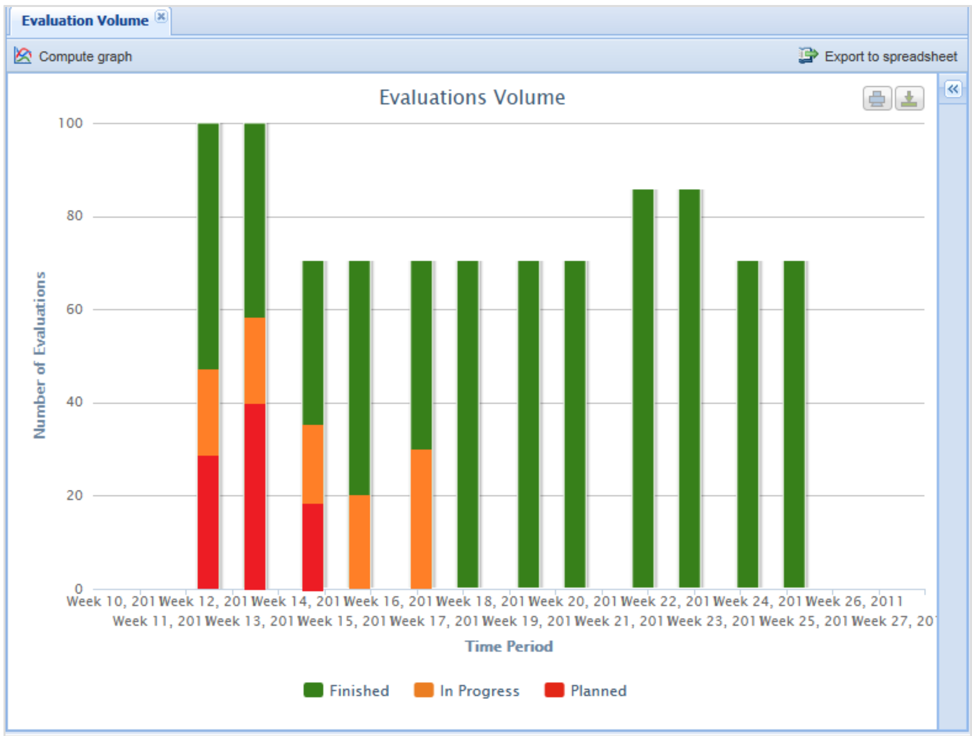


Figure 173: Evaluations Vol Chart

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

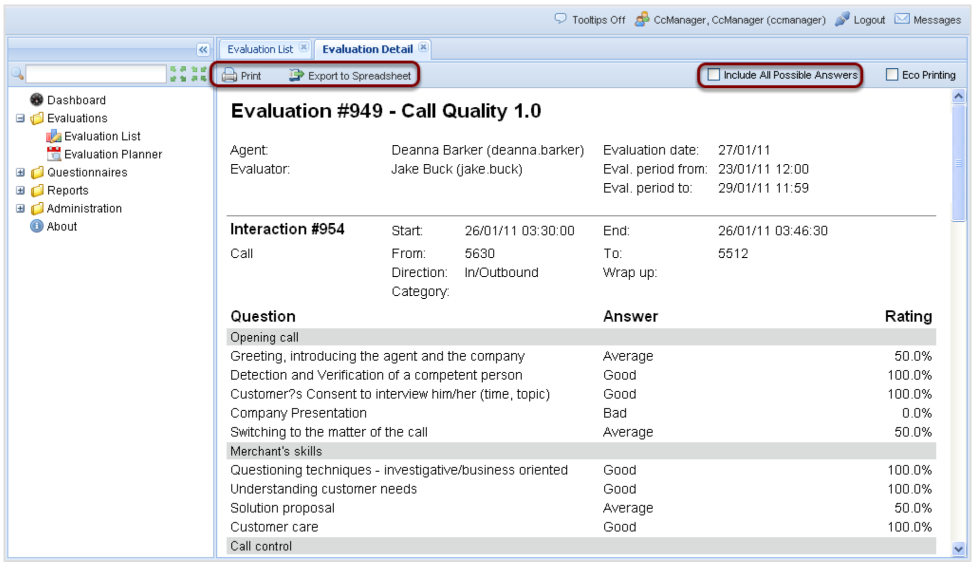


Figure 174: Reports for a Single Evaluation

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**.
2. Click **Report** at the top of the **Evaluation List** tab. This creates a simple text-based report with the following options:
   Include All Possible Answers: Shows all possible answers , with those not selected grayed out.
   Eco Printing: Creates a simpler text-based version of the report, with graphical borders removed for more economic printing.
3. To print, click **Print**.
   To save as an Excel file, click **Export to Spreadsheet**.

Tip:

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

Exporting Report Data

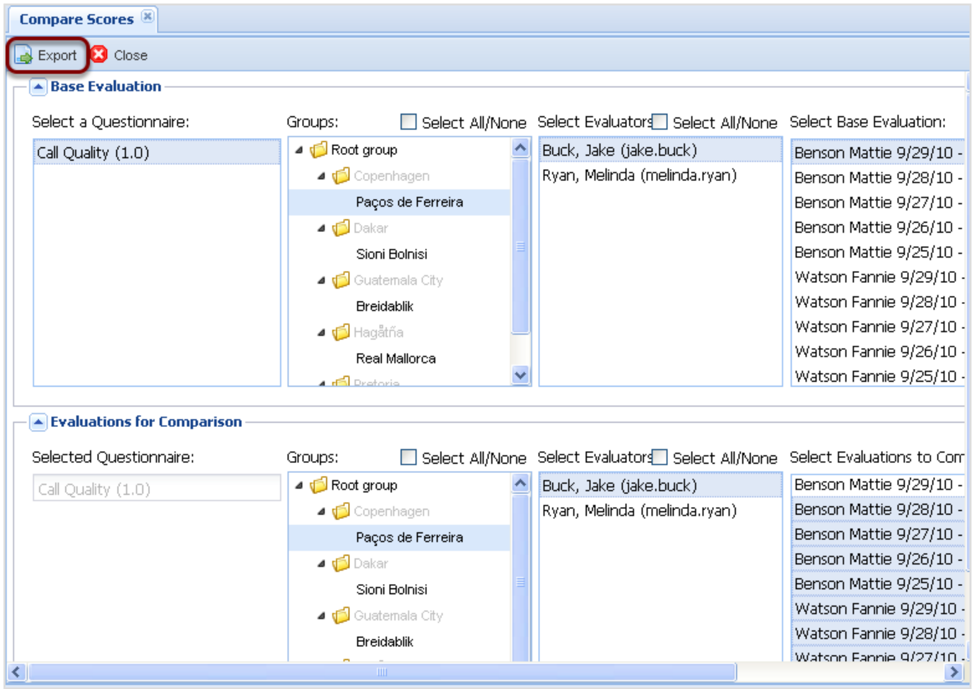


Figure 175: Exporting Graph Data to a Spreadsheet - 1

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.

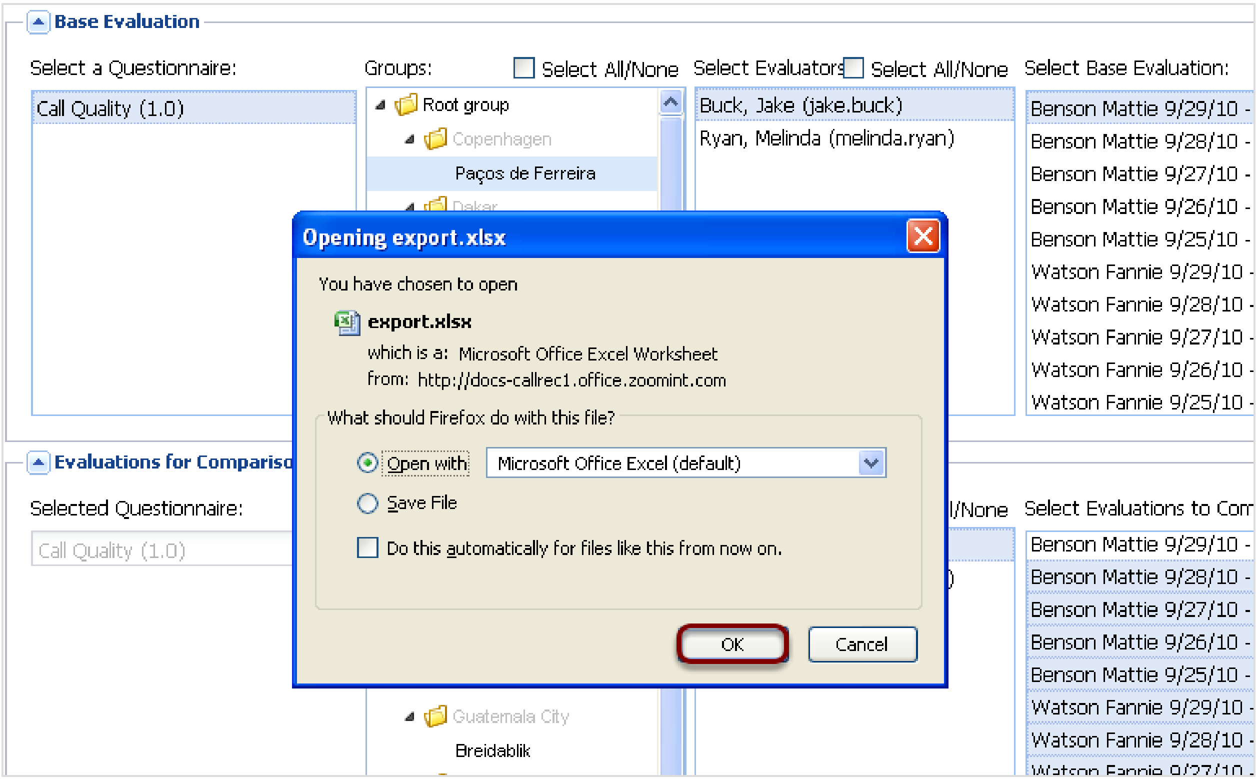
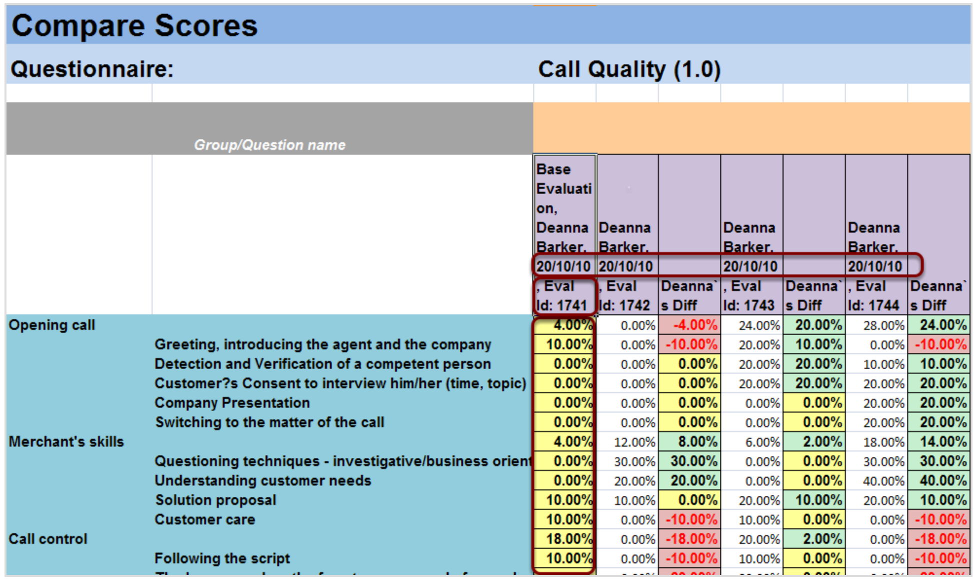


Figure 176: Exporting Graph Data to a Spreadsheet - 2

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

Questionnaire:		Call Quality (1.0)						
Group/Question name								
		Base Evaluation, Deanna Barker, 20/10/10, Eval Id: 1741	Deanna Barker, 20/10/10, Eval Id: 1742	Deanna`s Diff	Deanna Barker, 20/10/10, Eval Id: 1743	Deanna`s Diff	Deanna Barker, 20/10/10, Eval Id: 1744	Deanna`s Diff
Opening call		4.00%	0.00%	-4.00%	24.00%	20.00%	28.00%	24.00%
	Greeting, introducing the agent and the company	10.00%	0.00%	-10.00%	20.00%	10.00%	0.00%	-10.00%
	Detection and Verification of a competent person	0.00%	0.00%	0.00%	20.00%	20.00%	10.00%	10.00%
	Customer?s Consent to interview him/her (time, topic)	0.00%	0.00%	0.00%	20.00%	20.00%	20.00%	20.00%
	Company Presentation	0.00%	0.00%	0.00%	0.00%	0.00%	20.00%	20.00%
	Switching to the matter of the call	0.00%	0.00%	0.00%	0.00%	0.00%	20.00%	20.00%
Merchant's skills		4.00%	12.00%	8.00%	6.00%	2.00%	18.00%	14.00%
	Questioning techniques - investigative/business orient	0.00%	30.00%	30.00%	0.00%	0.00%	30.00%	30.00%
	Understanding customer needs	0.00%	20.00%	20.00%	0.00%	0.00%	40.00%	40.00%
	Solution proposal	10.00%	10.00%	0.00%	20.00%	10.00%	20.00%	10.00%
	Customer care	10.00%	0.00%	-10.00%	10.00%	0.00%	0.00%	-10.00%
Call control		18.00%	0.00%	-18.00%	20.00%	2.00%	0.00%	-18.00%
	Following the script	10.00%	0.00%	-10.00%	10.00%	0.00%	0.00%	-10.00%

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

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.

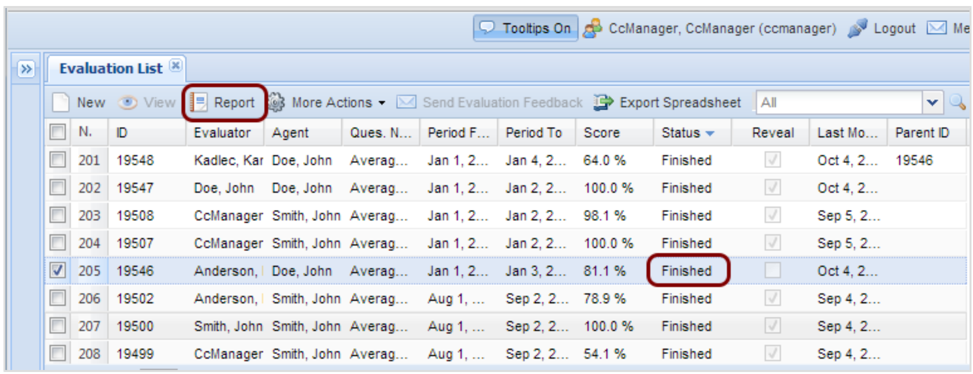
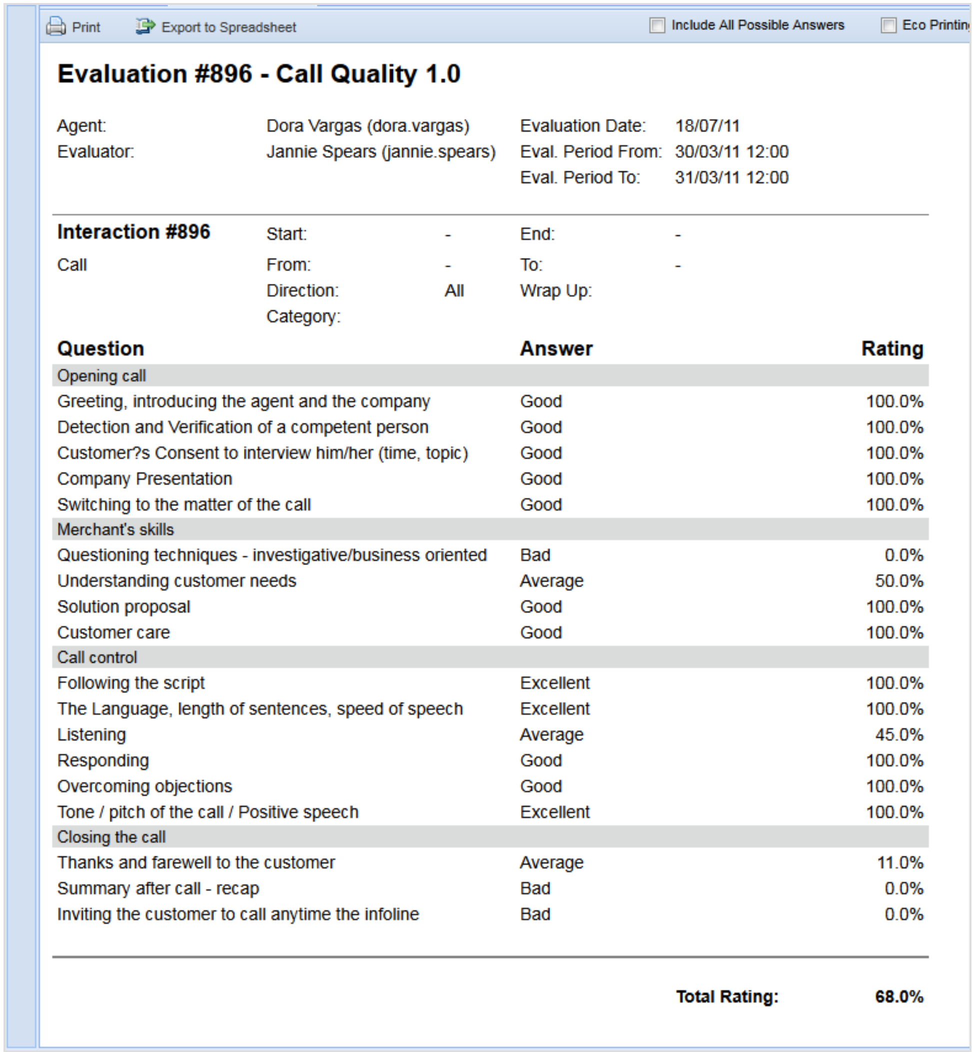


Figure 178: Select a Suitable Evaluation

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.



Print Export to Spreadsheet Include All Possible Answers Eco Printin

Evaluation #896 - Call Quality 1.0

Agent:	Dora Vargas (dora.vargas)	Evaluation Date:	18/07/11
Evaluator:	Jannie Spears (jannie.spears)	Eval. Period From:	30/03/11 12:00
		Eval. Period To:	31/03/11 12:00

Interaction #896	Start:	-	End:	-
Call	From:	-	To:	-
	Direction:	All	Wrap Up:	
	Category:			

Question	Answer	Rating
Opening call		
Greeting, introducing the agent and the company	Good	100.0%
Detection and Verification of a competent person	Good	100.0%
Customer?s Consent to interview him/her (time, topic)	Good	100.0%
Company Presentation	Good	100.0%
Switching to the matter of the call	Good	100.0%
Merchant's skills		
Questioning techniques - investigative/business oriented	Bad	0.0%
Understanding customer needs	Average	50.0%
Solution proposal	Good	100.0%
Customer care	Good	100.0%
Call control		
Following the script	Excellent	100.0%
The Language, length of sentences, speed of speech	Excellent	100.0%
Listening	Average	45.0%
Responding	Good	100.0%
Overcoming objections	Good	100.0%
Tone / pitch of the call / Positive speech	Excellent	100.0%
Closing the call		
Thanks and farewell to the customer	Average	11.0%
Summary after call - recap	Bad	0.0%
Inviting the customer to call anytime the infoline	Bad	0.0%

Total Rating: 68.0%

Figure 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.

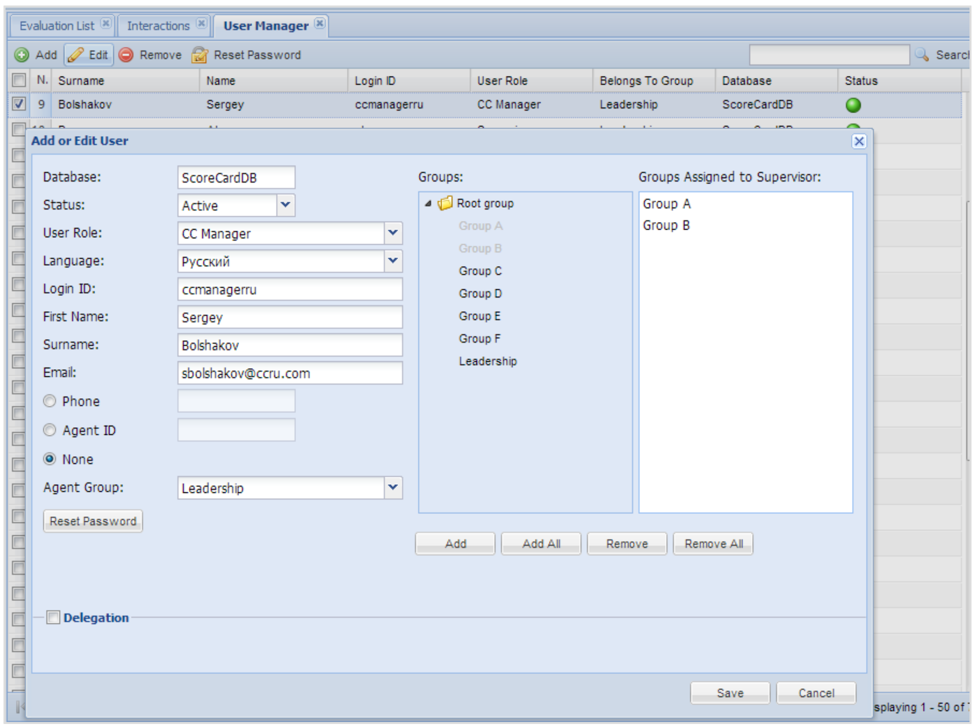


Figure 180: Assign Evaluators to Group

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.
4. 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

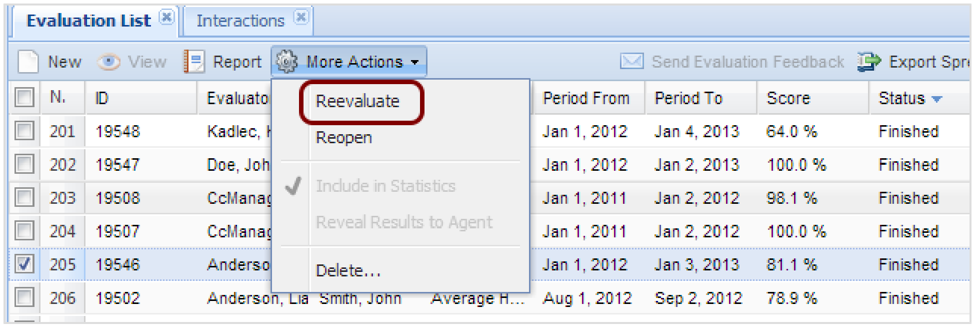


Figure 181: More Actions on Evaluation List

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.

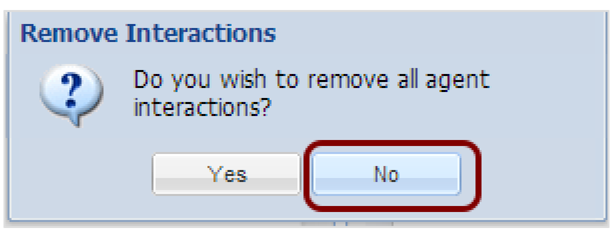


Figure 182: Remove Interactions

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

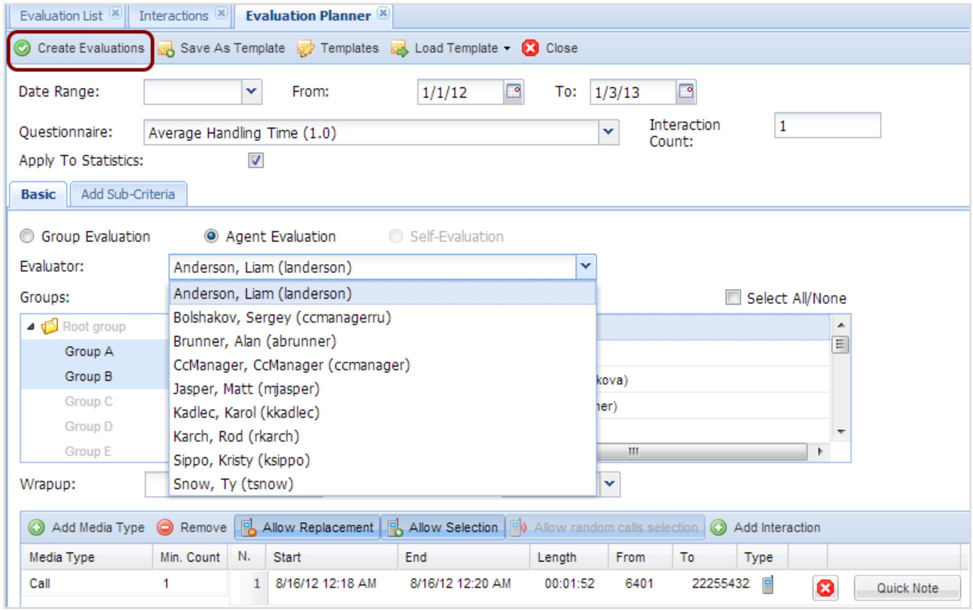


Figure 183: Choose an Evaluator

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

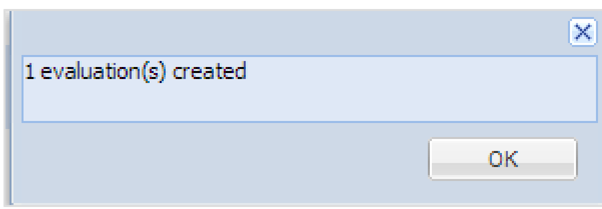


Figure 184: Evaluation Created

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.

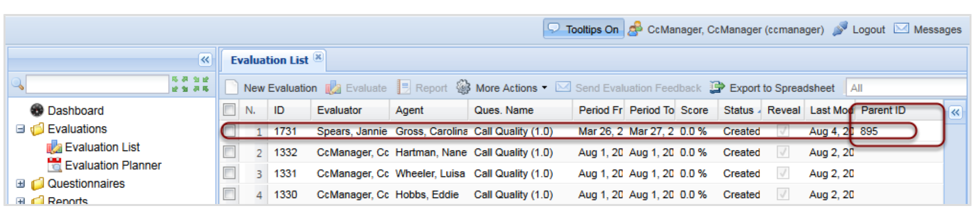
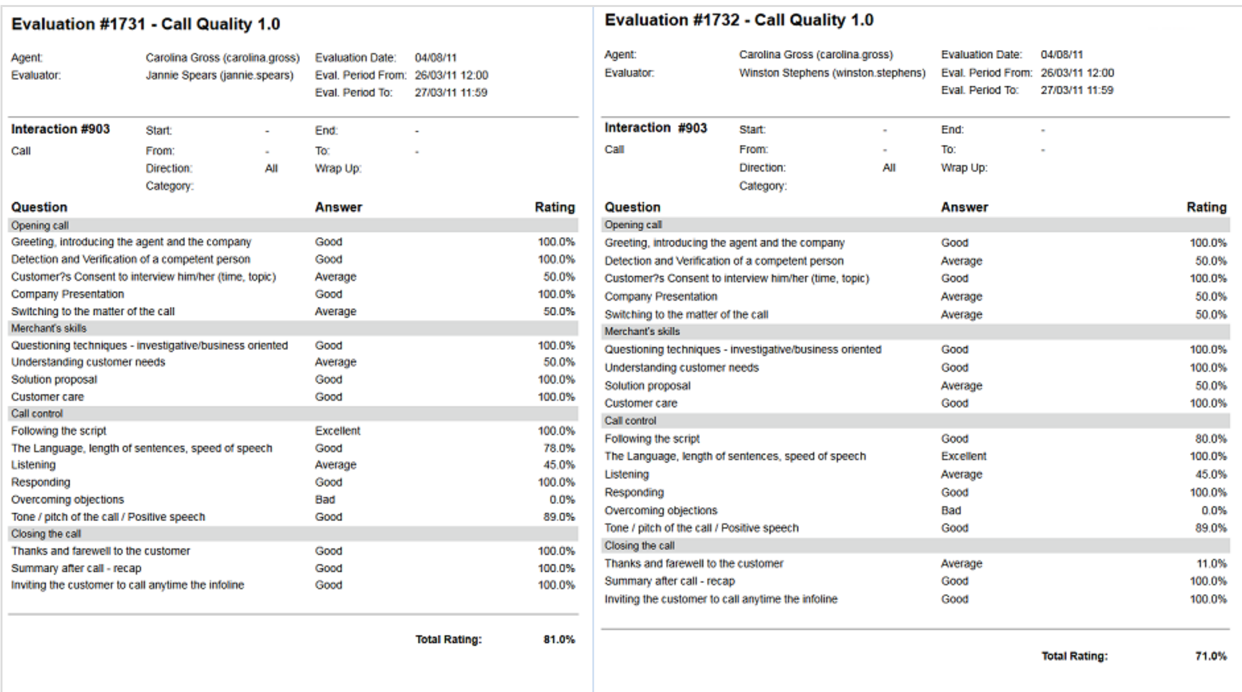


Figure 185: Showing Created Evaluation with Parent ID

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 #1731 - Call Quality 1.0

Agent:	Carolina Gross (carolina.gross)	Evaluation Date:	04/08/11
Evaluator:	Jannie Spears (jannie.spears)	Eval. Period From:	26/03/11 12:00
		Eval. Period To:	27/03/11 11:59

Interaction #903	Start:	-	End:	-
Call	From:	-	To:	-
	Direction:	All	Wrap Up:	
	Category:			

Question	Answer	Rating
Opening call		
Greeting, introducing the agent and the company	Good	100.0%
Detection and Verification of a competent person	Good	100.0%
Customer?s Consent to interview him/her (time, topic)	Average	50.0%
Company Presentation	Good	100.0%
Switching to the matter of the call	Average	50.0%
Merchant's skills		
Questioning techniques - investigative/business oriented	Good	100.0%
Understanding customer needs	Average	50.0%
Solution proposal	Good	100.0%
Customer care	Good	100.0%
Call control		
Following the script	Excellent	100.0%
The Language, length of sentences, speed of speech	Good	78.0%
Listening	Average	45.0%
Responding	Good	100.0%
Overcoming objections	Bad	0.0%
Tone / pitch of the call / Positive speech	Good	89.0%
Closing the call		
Thanks and farewell to the customer	Good	100.0%
Summary after call - recap	Good	100.0%
Inviting the customer to call anytime the infoline	Good	100.0%
	Total Rating:	**81.0%**

Evaluation #1732 - Call Quality 1.0

Agent:	Carolina Gross (carolina.gross)	Evaluation Date:	04/08/11
Evaluator:	Winston Stephens (winston.stephens)	Eval. Period From:	26/03/11 12:00
		Eval. Period To:	27/03/11 11:59

Interaction #903	Start:	-	End:	-
Call	From:	-	To:	-
	Direction:	All	Wrap Up:	
	Category:			

Question	Answer	Rating
Opening call		
Greeting, introducing the agent and the company	Good	100.0%
Detection and Verification of a competent person	Average	50.0%
Customer?s Consent to interview him/her (time, topic)	Good	100.0%
Company Presentation	Average	50.0%
Switching to the matter of the call	Average	50.0%
Merchant's skills		
Questioning techniques - investigative/business oriented	Good	100.0%
Understanding customer needs	Good	100.0%
Solution proposal	Average	50.0%
Customer care	Good	100.0%
Call control		
Following the script	Good	80.0%
The Language, length of sentences, speed of speech	Excellent	100.0%
Listening	Average	45.0%
Responding	Good	100.0%
Overcoming objections	Bad	0.0%
Tone / pitch of the call / Positive speech	Good	89.0%
Closing the call		
Thanks and farewell to the customer	Average	11.0%
Summary after call - recap	Good	100.0%
Inviting the customer to call anytime the infoline	Good	100.0%
	Total Rating:	**71.0%**

Figure 186: Detail Report Comparison

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

Compare Scores

	Questionnaire:			Call Quality (1.0)
	Group/Question name	Evaluations		
		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%	100.00%	0.00%
	Detection and Verification of a competent person	100.00%	50.00%	-50.00%
	Customer?s Consent to interview him/her (time, topic)	50.00%	100.00%	50.00%
	Company Presentation	100.00%	50.00%	-50.00%
	Switching to the matter of the call	50.00%	50.00%	0.00%
Merchant's skills		80.00%	90.00%	10.00%
	Questioning techniques - investigative/business orient	100.00%	100.00%	0.00%
	Understanding customer needs	50.00%	100.00%	50.00%
	Solution proposal	100.00%	50.00%	-50.00%
	Customer care	100.00%	100.00%	0.00%
Call control		66.90%	69.30%	2.40%
	Following the script	100.00%	80.00%	-20.00%
	The Language, length of sentences, speed of speech	78.00%	100.00%	22.00%
	Listening	45.00%	45.00%	0.00%
	Responding	100.00%	100.00%	0.00%
	Overcoming objections	0.00%	0.00%	0.00%
	Tone / pitch of the call / Positive speech	89.00%	89.00%	0.00%
Closing the call		100.00%	55.50%	-44.50%
	Thanks and farewell to the customer	100.00%	11.00%	-89.00%
	Summary after call - recap	100.00%	100.00%	0.00%
	Inviting the customer to call anytime the infoline	100.00%	100.00%	0.00%
Total Weighted Score:		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.

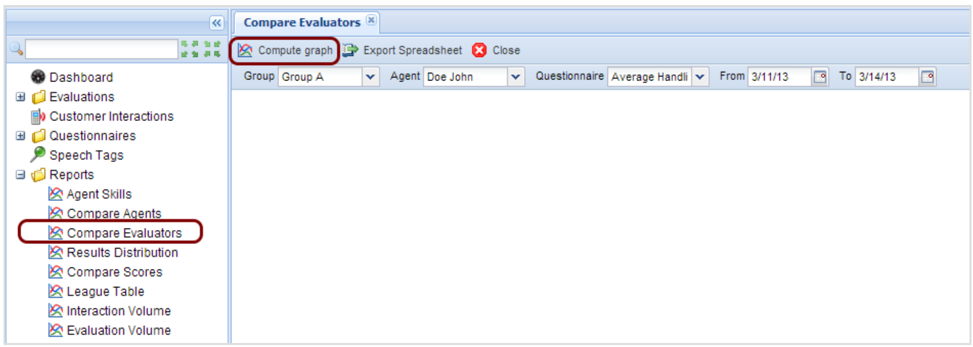


Figure 188: Select Compare Evaluators

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

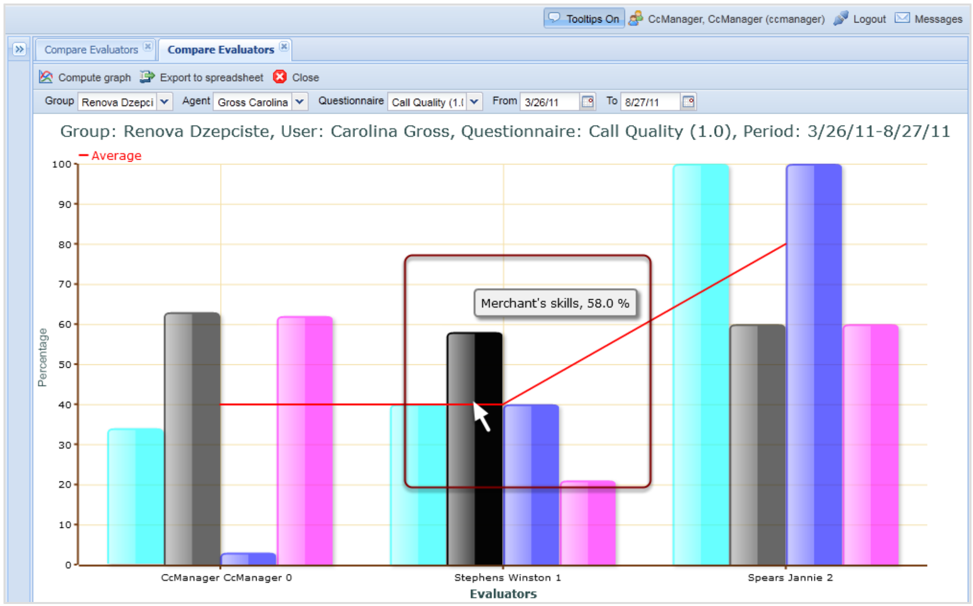


Figure 189: Compare Evaluators Chart

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:

The Quality Manager Dashboard

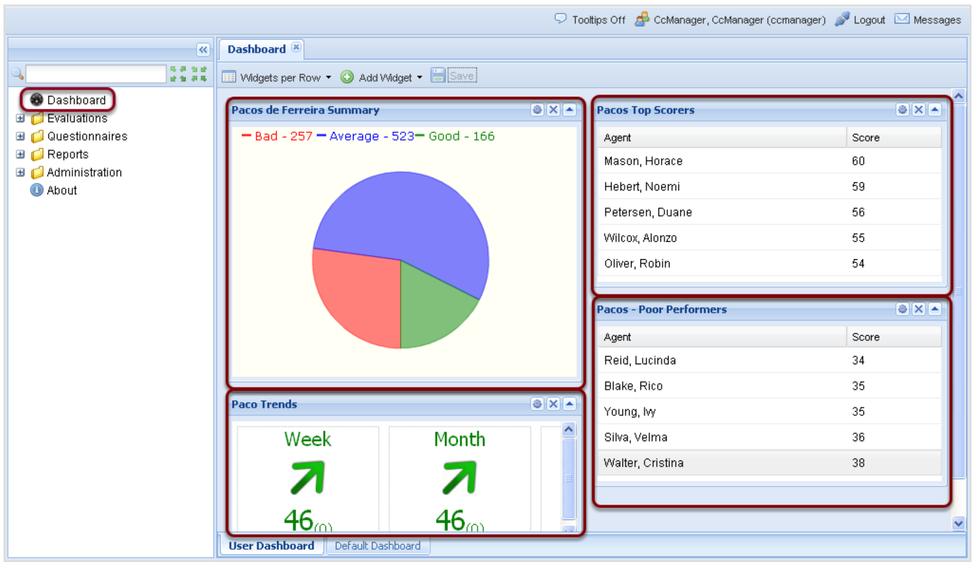


Figure 190: The Quality Manager Dashboard

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

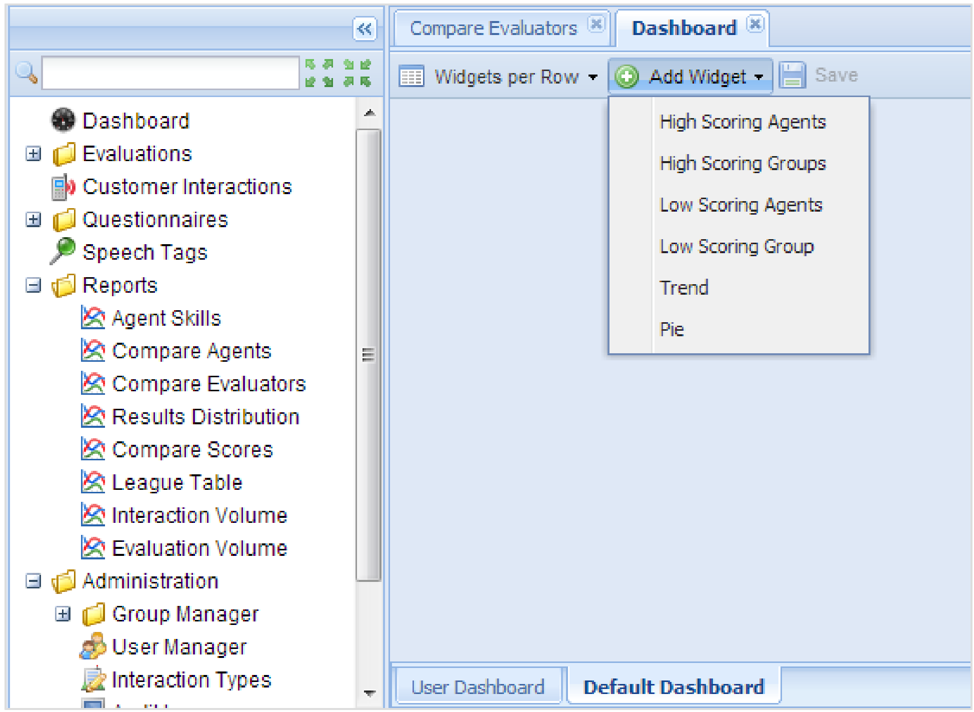


Figure 191: Setting Up a Dashboard – 1

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 Setting Up a Dashboard - 2.

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

Setting Up a Dashboard - 2

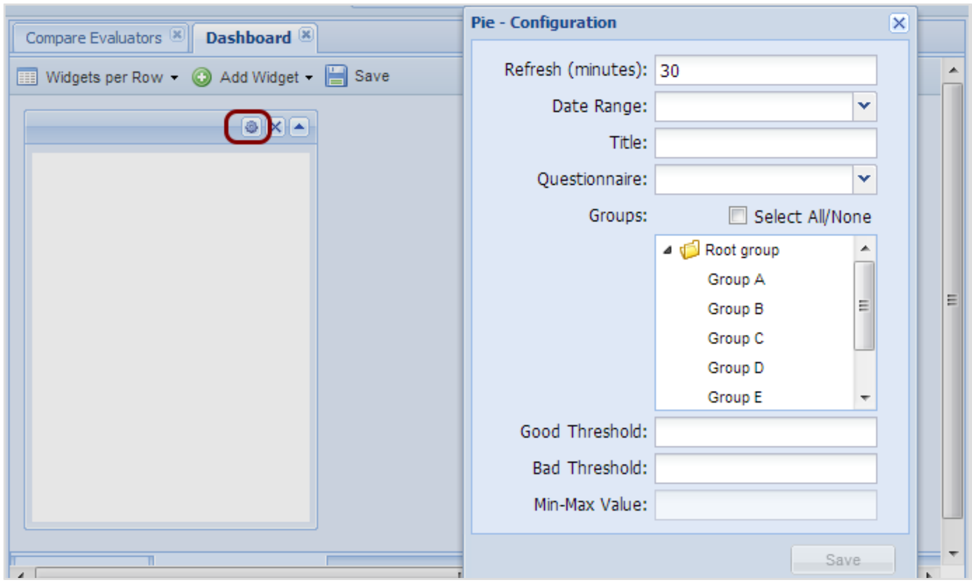


Figure 192: Setting Up a Dashboard – 2

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:

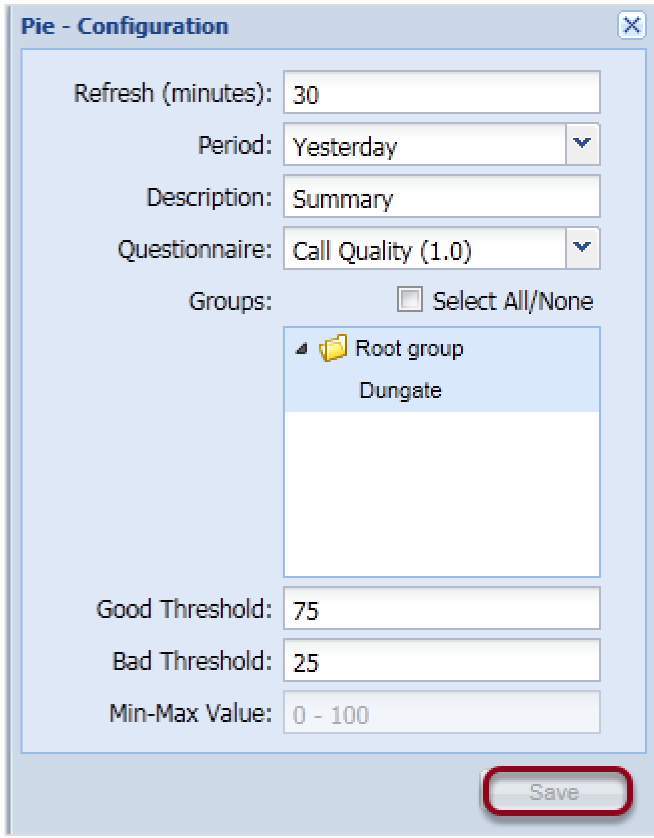


Figure 193: Pie Widget Configuration

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.
2. Select a **Period:** from which the data is collected, from the **Period:** drop-down. 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.
5. The threshold values can be modified if required. Select a target agent **Group:**. Use the checkbox to **Select All/None** of the groups and use **CTRL**

, 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

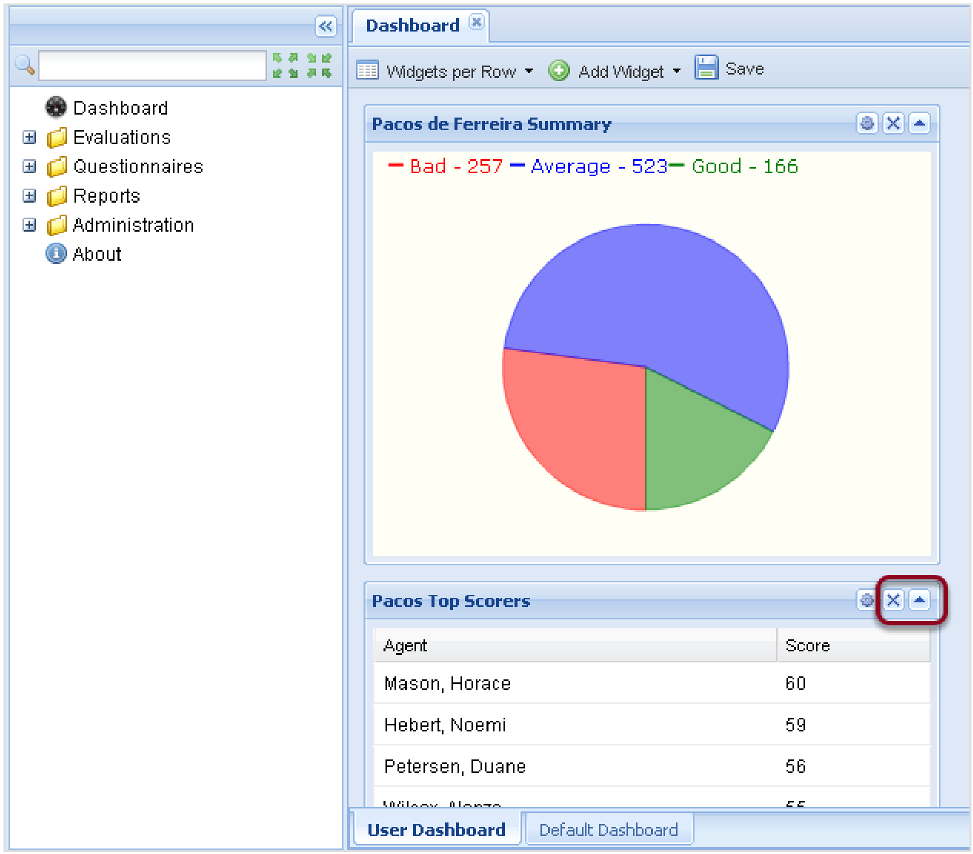


Figure 194: Setting Up a Dashboard – 3

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.