



Genesys Skills Assessor 8.0

Manager Guide

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Each product has its own documentation for online viewing at the Genesys Technical Support website or on the Documentation Library DVD, which is available from Genesys upon request. For more information, contact your sales representative.

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Chapter

1 Preface

Welcome to the *Genesys Skills Assessor Manager Guide*. This Manager Guide has been designed to walk the user through how to use and navigate the Skills Assessor application.

This document is valid only for the 8.0.1 releases of this product.

Note: For versions of this document created for other releases of this product, visit the Genesys Technical Support website, or request the Documentation Library DVD, which you can order by e-mail from Genesys Order Management at orderman@genesyslab.com.

For information about related resources and about the conventions that are used in this document, see the supplementary material starting on [page 9](#).

About Genesys Skills Assessor

Genesys Skills Assessor allows companies to use a combination of online tests, self assessment, and observational feedback to assess the level of agent skills across their contact centre. Agent skill levels are stored in a central skills database and can be combined with performance data from legacy systems, for example, CRM sales data, Learning Management System courses and so on.

Centralizing agent skills information allows contact centers to build a skills DNA profile for each agent to identify:

- What are the must have and nice to have skills for each job type.
- Who really knows what across the contact centre?
- Who has what skill and skill levels?

- Who requires what type of training and when.

Skillsroute enables companies to create and manage multiple agents, skills, and skill level in Configuration Manager. Skill assessment results exported directly from Skills Assessor can be used to optimize multi-skilling and call routing, to ensure that the customer is always presented to the most knowledgeable agent available.

Intended Audience

This document is primarily intended for system administrators or other individuals who install the Genesys Skills Assessor.

Making Comments on This Document

If you especially like or dislike anything about this document, feel free to e-mail your comments to Techpubs.webadmin@genesyslab.com.

You can comment on what you regard as specific errors or omissions, and on the accuracy, organization, subject matter, or completeness of this document. Please limit your comments to the scope of this document only and to the way in which the information is presented. Contact your Genesys Account Representative or Genesys Technical Support if you have suggestions about the product itself.

When you send us comments, you grant Genesys a nonexclusive right to use or distribute your comments in any way it believes appropriate, without incurring any obligation to you.

Contacting Genesys Technical Support

If you have purchased support directly from Genesys, contact Genesys Technical Support at the following regional numbers:

Region	Telephone	E-Mail
North America and Latin America	+888-369-5555 (toll-free) +506-674-6767	support@genesyslab.com
Europe, Middle East, and Africa	+44-(0)-1276-45-7002	support@genesyslab.co.uk
Asia Pacific	+61-7-3368-6868 (International)	support@genesyslab.com.au
Malaysia	1-800-814-472 (toll-free) +61-7-3368-6868 (International)	support@genesyslab.com.au
India	1-800-407-436379 (toll-free) +61-7-3368-6868 (International)	support@genesyslab.com.au
Japan	+81-3-6361-8950	support@genesyslab.co.jp
Before contacting technical support, refer to the <i>Genesys Technical Support Guide</i> for complete contact information and procedures.		

Related Documentation Resources

The following resources provide additional information that is relevant to this software. Consult these additional resources as necessary.

- The *Framework 8.0 Configuration Manager Help*, which will help when using Configuration Manager.

Genesys

Consult these additional resources as necessary:

- The *Genesys Technical Publications Glossary*, which ships on the Genesys Documentation Library CD and which provides a comprehensive list of the Genesys and CTI terminology and acronyms used in this document.
- The Release Notes and Product Advisories for this product, which are available on the Genesys Technical Support website at <http://genesyslab.com/support>.

Genesys product documentation is available on the:

- Genesys Technical Support website at <http://genesyslab.com/support>.

Document Conventions

This document uses certain stylistic and typographical conventions—introduced here—that serve as shorthand for particular kinds of information.

Document Version Number

A version number appears at the bottom of the inside front cover of this document. Version numbers change as new information is added to this document. Here is a sample version number:

42gp_icg_aspect-wfm_08-2010_v4.2.001.01

You will need this number when you are talking with Genesys Technical Support about this product.

Screen Captures Used in This Document

Screen captures from the Configuration Manager graphical user interface (GUI), as used in this document, may sometimes contain minor spelling, capitalization, or grammatical errors. The text accompanying and explaining the screen captures corrects such errors *except* when such a correction would prevent you from installing, configuring, or successfully using the product. For example, if the name of an option contains a usage error, the name would be presented exactly as it appears in the GUI; the error would not be corrected in any accompanying text.

Type Styles

The Type Styles table describes and illustrates the type conventions that are used in this document.

Type Styles

Type Style	Used For	Examples
Italic	<ul style="list-style-type: none"> Document titles Emphasis Definitions of (or first references to) unfamiliar terms Mathematical variables <p>Also used to indicate placeholder text within code samples or commands, in the special case where angle brackets are a required part of the syntax (see the note about angle brackets below).</p>	<p>Please consult the <i>Genesys Migration Guide</i> for more information.</p> <p>Do <i>not</i> use this value for this option.</p> <p>A <i>customary and usual</i> practice is one that is widely accepted and used within a particular industry or profession.</p> <p>The formula, $x + 1 = 7$ where x stands for . . .</p>
Monospace font (Looks like teletype or typewriter text)	<p>All programming identifiers and GUI elements. This convention includes:</p> <ul style="list-style-type: none"> The <i>names</i> of directories, files, folders, configuration objects, paths, scripts, dialog boxes, options, fields, text and list boxes, operational modes, all buttons (including radio buttons), check boxes, commands, tabs, CTI events, and error messages. The values of options. Logical arguments and command syntax. Code samples. <p>Also used for any text that users must manually enter during a configuration or installation</p>	<p>Select the Show variables on screen check box.</p> <p>In the Operand text box, enter your formula.</p> <p>Click OK to exit the Properties dialog box.</p> <p>T-Server distributes the error messages in EventError events.</p> <p>If you select true for the inbound-bsns-calls option, all established inbound calls on a local agent are considered business calls.</p> <p>Enter exit on the command line.</p>

	procedure, or on a command line.	
Angle brackets (<>)	<p>A placeholder for a value that the user must specify. This might be a DN or a port number specific to your enterprise.</p> <p>Note: In some cases, angle brackets are required characters in code syntax (for example, in XML schemas). In these cases, italic text is used for placeholder values.</p>	<pre>smcp_server -host <confighost></pre>



Chapter

2 Manager Guide

Overview

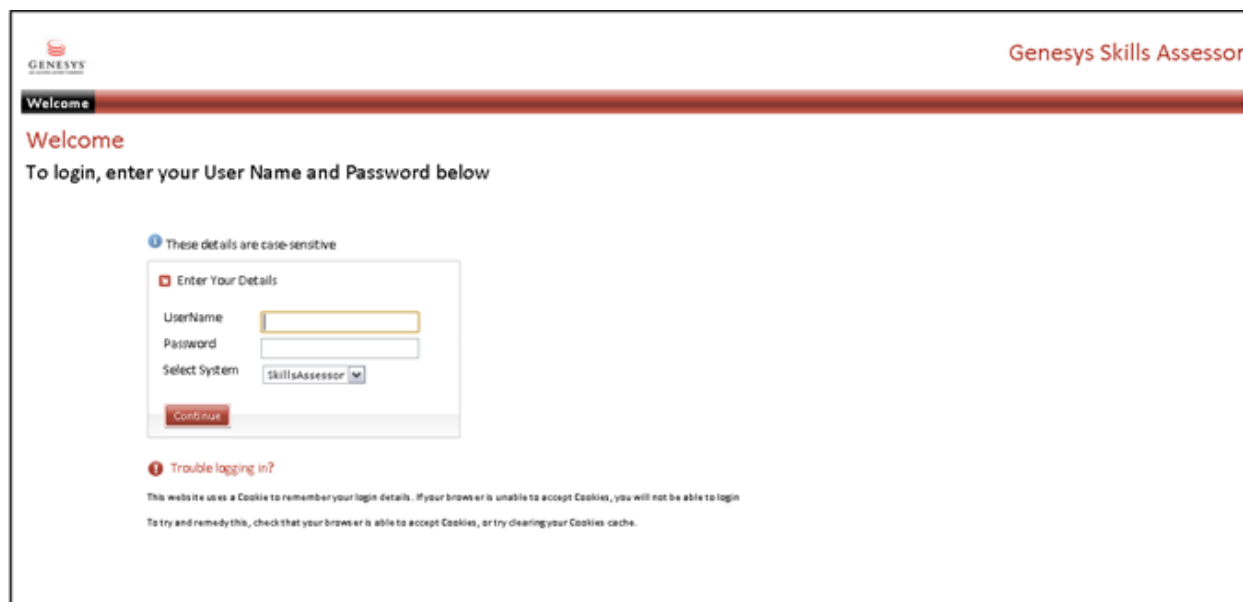
This User Guide has been designed to walk the user through how to use and navigate the Skills Assessor application.

Logging On

The Assessment Module is accessed from either the internet or over the company intranet.

After selecting the application, a screen similar to Figure 1 may be displayed (the application may be customized with the company logo displayed in the left hand corner of the screen and a more corporate color displayed).

The application may be accessed directly from the intranet and it may not require the user to enter their log in details. This will however depend on the business security requirements.



GENESYS

Genesys Skills Assessor

Welcome

Welcome

To login, enter your User Name and Password below

These details are case-sensitive

Enter Your Details

UserName

Password

Select System SkillsAssessor

Continue

Trouble logging in?

This website uses a Cookie to remember your login details. If your browser is unable to accept Cookies, you will not be able to login. To try and remedy this, check that your browser is able to accept Cookies, or try clearing your Cookies cache.

Figure 1: Welcome Dialog Box

The Administrator will select Administration while all other Users will select Log In. After entering the unique username and password click on Continue and a My Development screen will appear containing any assessments that have been assigned.

If any of the assessments have been given a completion date, the date will be listed against the assessment in the Date By column.

Managing Your 'Home Page'

Your Home page has been developed to allow each individual user to customize their view based on the Widgets or information views available for their role as shown in Figure 2.

There may already be tabs created when the home page is opened and it will not be possible to delete these tabs; however Widgets associated can be deleted and moved if required.

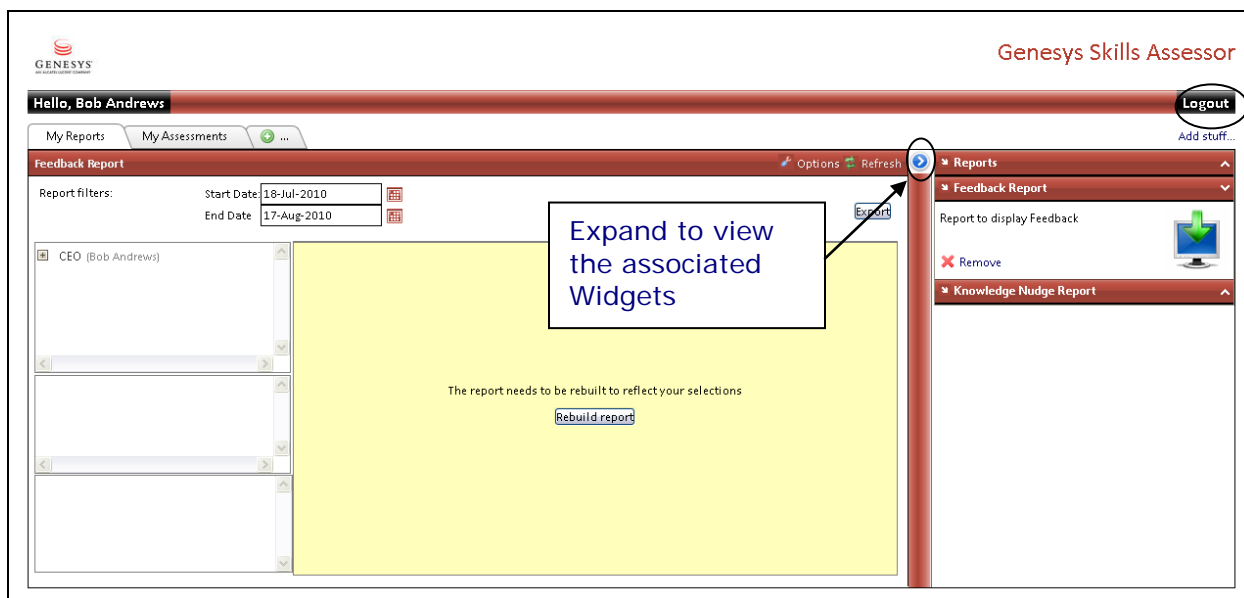


Figure 2: Associated Widgets

After selecting the required tab, use the expand option to view the associated Widgets.

Additional tabs can be created by clicking on the new tab option and entering a name and then Ok to save as shown in Figure 3.

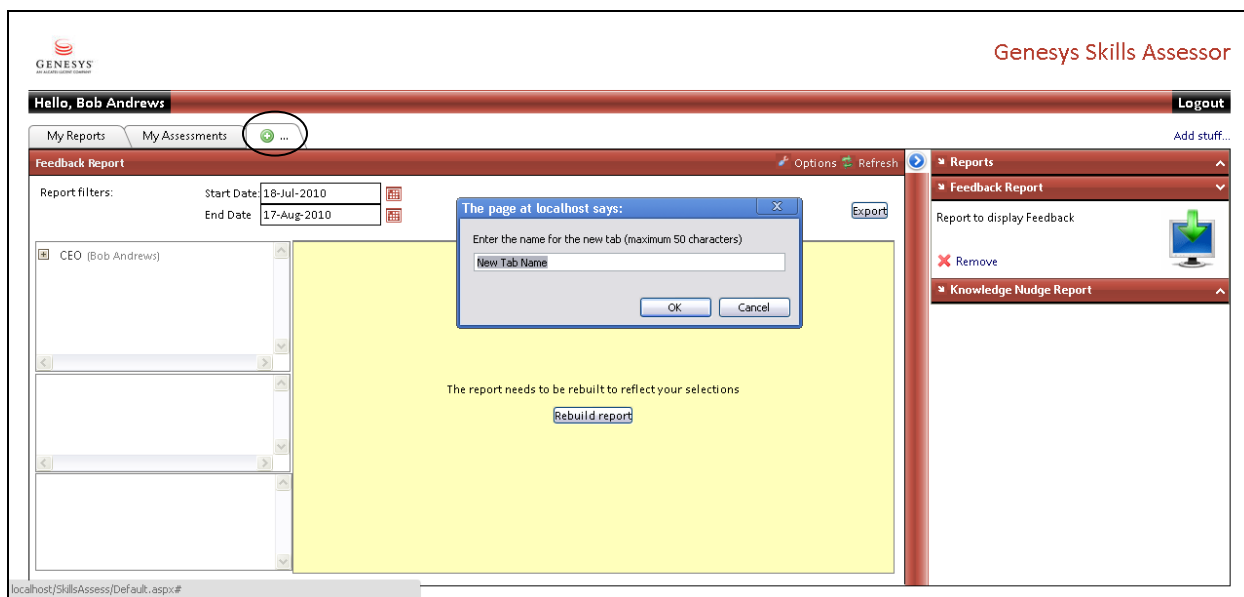


Figure 3: Additional Tabs

By clicking on Add stuff this will present a window similar to the example below, displaying all of the widgets available for the role. Widgets are associated to the tab by clicking on Add. Close the window after selecting the widget by clicking on the x in the top right hand corner as shown in Figure 4.



Figure 4: Closing the Window

Any additional Widgets will then appear in the right hand window to select when required as shown in Figure 5.

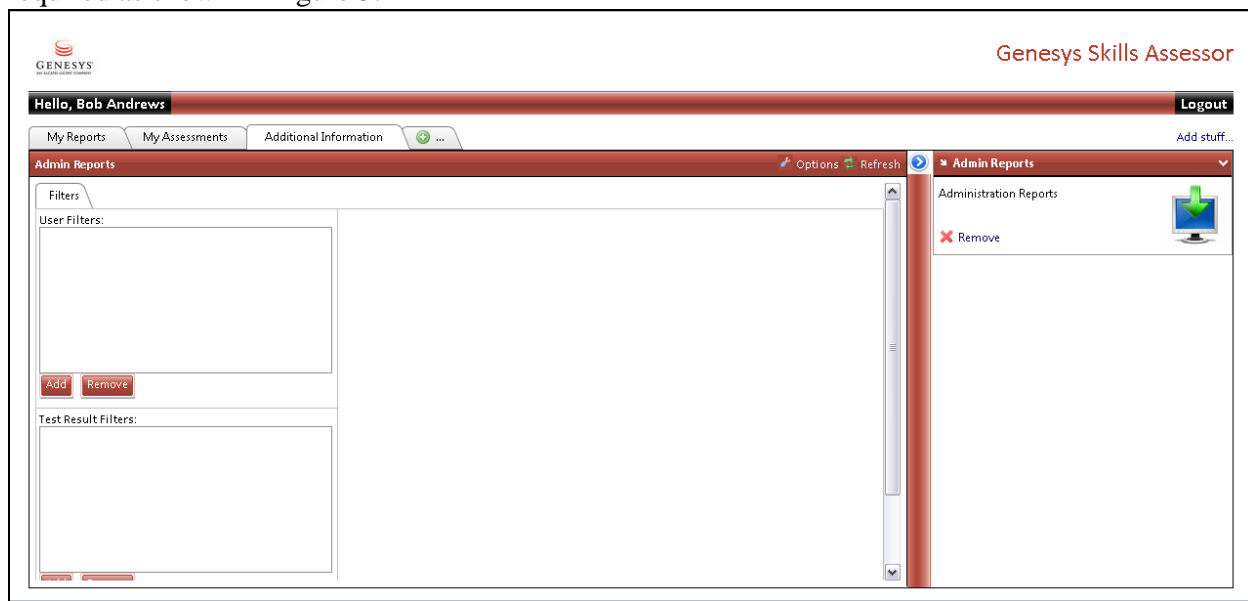


Figure 5: Additional Widgets

Taking an Assessment

Any assessments that have been assigned will be visible in My Development in the User tab as shown in Figure 6.

Under the Group Name will be a list of assigned assessments that have been assigned to the Group and the Group name may refer to a Job Role or a specific assessment. If the assessments are not visible, then click on the Group Name bar.

Any assessments which have to be completed by a certain date will have a date under the Date By column.

The % Complete column will indicate how close to completion the assessment is.

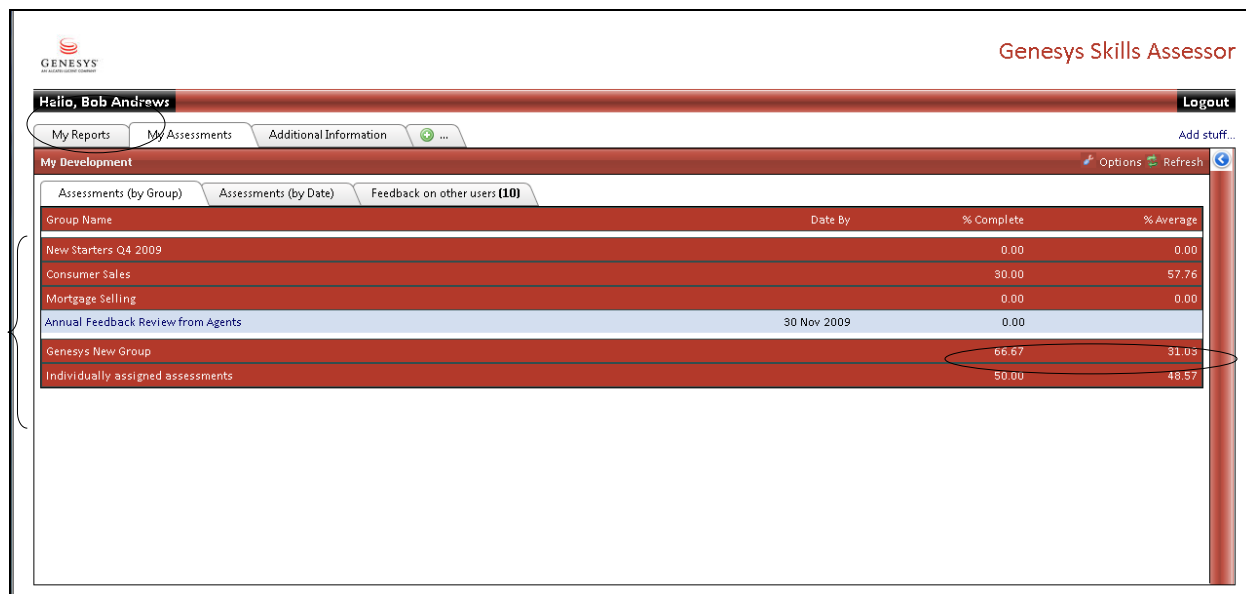


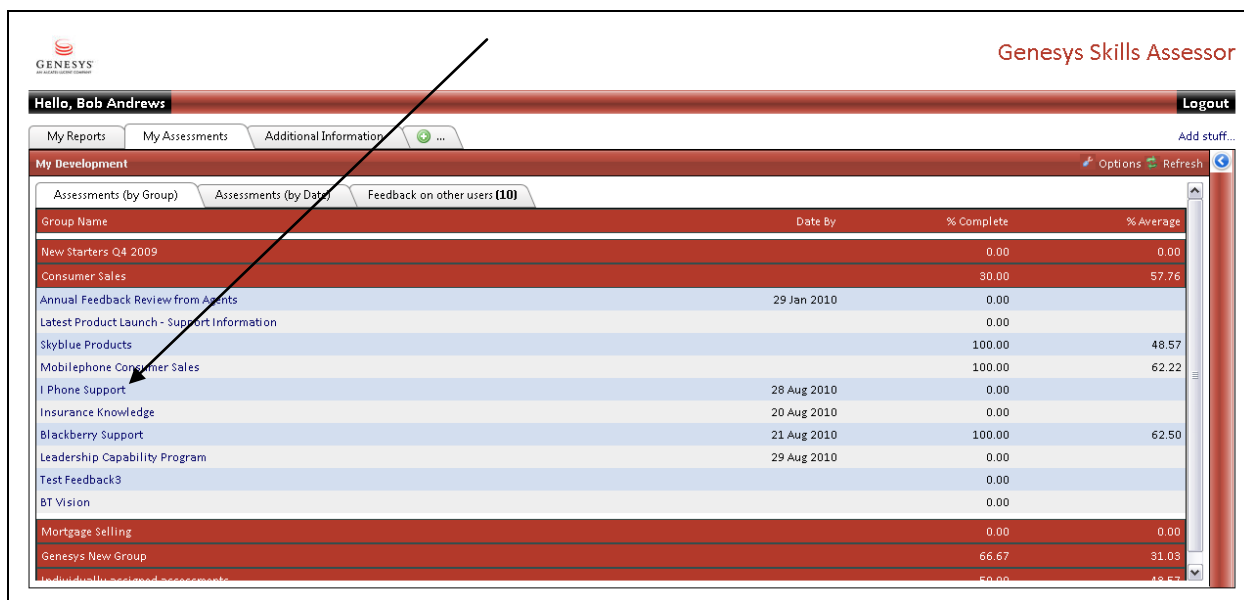
Figure 6: My Development Screen Assessment

Types of Assessments

There are three types of assessments:-

- **Timed** – this type of assessment has to be completed in one go and will have a clock in the top right hand corner of the window indicating the time available to complete the assessment in.
- **Not Timed** – this type of assessment can be accessed more than once allowing completion at any time before the completion date.
- **Feedback** - this is where individuals rate themselves against specific criteria.

To start taking an assessment, click on the name as shown in Figure 7.



GENESYS
AN ACADIA COMPANY

Genesys Skills Assessor

Hello, Bob Andrews Logout

My Reports My Assessments Additional Information ... Add stuff...

My Development Options Refresh

Assessments (by Group) Assessments (by Date) Feedback on other users (10)

Group Name	Date By	% Complete	% Average
New Starters Q4 2009		0.00	0.00
Consumer Sales		30.00	57.76
Annual Feedback Review from Agents	29 Jan 2010	0.00	
Latest Product Launch - Support Information		0.00	
Skyblue Products		100.00	48.57
Mobilephone Consumer Sales		100.00	62.22
I Phone Support	28 Aug 2010	0.00	
Insurance Knowledge	20 Aug 2010	0.00	
Blackberry Support	21 Aug 2010	100.00	62.50
Leadership Capability Program	29 Aug 2010	0.00	
Test Feedback3		0.00	
BT Vision		0.00	
Mortgage Selling		0.00	0.00
Genesys New Group		66.67	31.03
Individual Unassigned Assessments		50.00	15.57

Figure 7: Assessment Name

This will present a screen similar to the example below, as shown in Figure 8. At the bottom is the option to check that any audio can be heard. Click on the button to check.

When ready to take the assessment click on 'Start'. The option to close the assessment to take it later is available by clicking on 'Close'.

Insurance Knowledge

Welcome

Hello, **Bob Andrews**.

This is required for xyz

You may freely navigate through this assessment

You may freely navigate backwards and forwards through the questions in this assessment. Therefore you may choose to skip over questions you want to answer later.

A Navigator will be displayed for your convenience to the left of your screen. This will summarise all the questions in the assessment, and allow you to easily skip back to any unanswered questions.

This assessment may contain audio or video media

Please make sure that you can hear the audio clip by clicking the play button. You should hear a short clip of a telephone ringing.

00:00 00:00

Starting this assessment

Once you click the **Start** button you will be asked the first question.

Click the **Close** button if you do not wish to start this assessment.

You can still come back to start it later.

Figure 8: An Example of an Assessment

Question Examples

There are a number of ways that a question can be presented, but the format will stay the same with the Navigator and question number down the left hand side and the actual question content in the main right hand side window. If the question is timed then the time allowed will be displayed in the top right hand side of the window.

Follow the instructions for each of the questions and after an answer has been selected click on 'Next' to move to the next question, as shown in Figure 9.

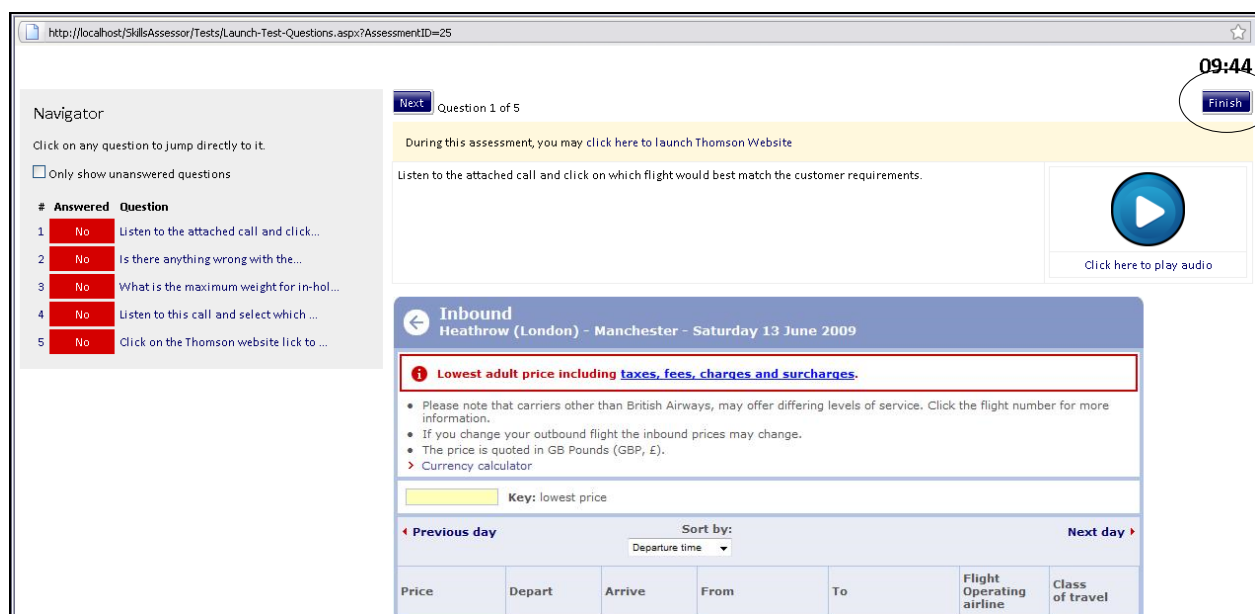


Figure 9: The Navigator Screen

After each question has been completed, the Navigator will update to indicate which questions have been completed, as shown in Figure 10.

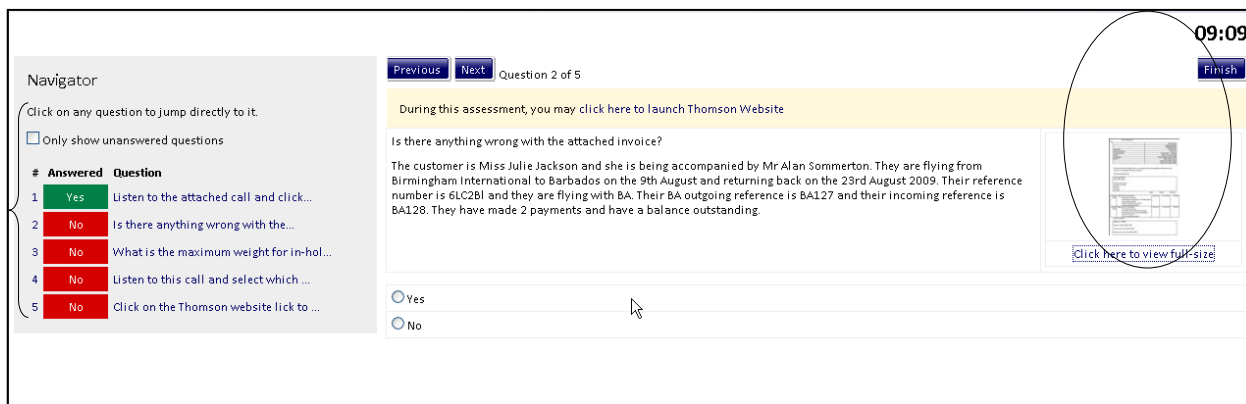




Figure 10: Completed Questions in The Navigator

In the example on the previous page this question has an image attached. Click on [click here](#) to view the full image and the image will be presented in full screen, as shown in Figure 11.


Preview Image


Jolly Holidays.Com

	Sales Office
	Waterside Close
	18 Bridge Close
Customer:	Manchester
Miss Julie Jackson	M22 1JV
12 Broad Street	Booking Ref: AJ62PR
Hayton	Date: 12 January 2009
Birmingham	Booking Date: 10 April 2008
B1 2JY	Sales Advisor: John
	Sales Advisor Ref: 12345
	Telephone: 0161 222 444

Please check that the details shown in your passport match the passenger names shown here.
Contact us immediately if this is not the case.

TRAVEL CONFIRMATION

Passenger Details:
Miss Julie Jackson.

Mr Alan Sommerton
26 Jackson Terrace
Littleton
Coventry
Cv1 7TW

		Class	Status	Vouchers	
09 Aug 2009	Flight	Miss Julie Jackson Mr Alan Sommerton Birmingham International – Grantley Adams International Airport BA127 Dep: 08:15 Arr: 20:15 Airline reference: 6LC2BI	Economy	Confirmed	E-Ticket
23 Aug 2009	Flights	Miss Julie Jackson Mr Alan Sommerton Grantley Adams International Airport – Birmingham International – BA128 Dep: 20:15 Arr: 08:15 Airline reference: 6LC2BI	Economy	Confirmed	E-Ticket

Payment Details

Flight Cost - £1850

Deposit 10 April 2008 - £350

Payment 20 January 2009 - £600

Figure 11: The Navigator with Image Attached

In the example below there is media attached as shown in Figure 12. To listen to the attachment, click on the play button.

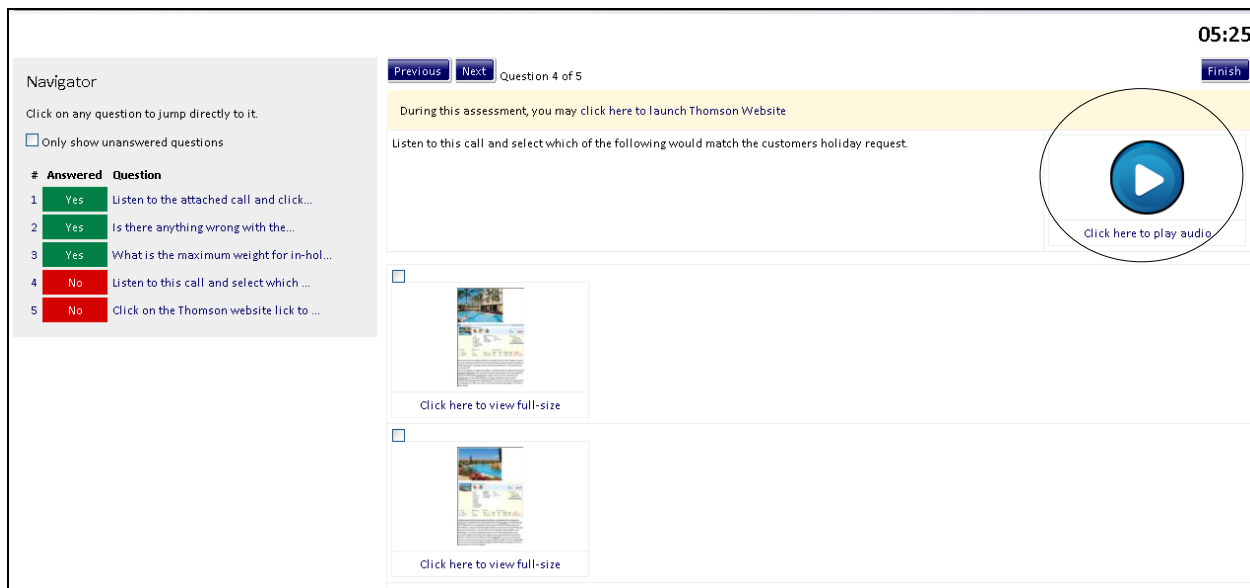


Figure 12: Navigator with Media Attached

This will present an image below. Click on the play button in the middle of the headphones to listen, as shown in Figure 13.

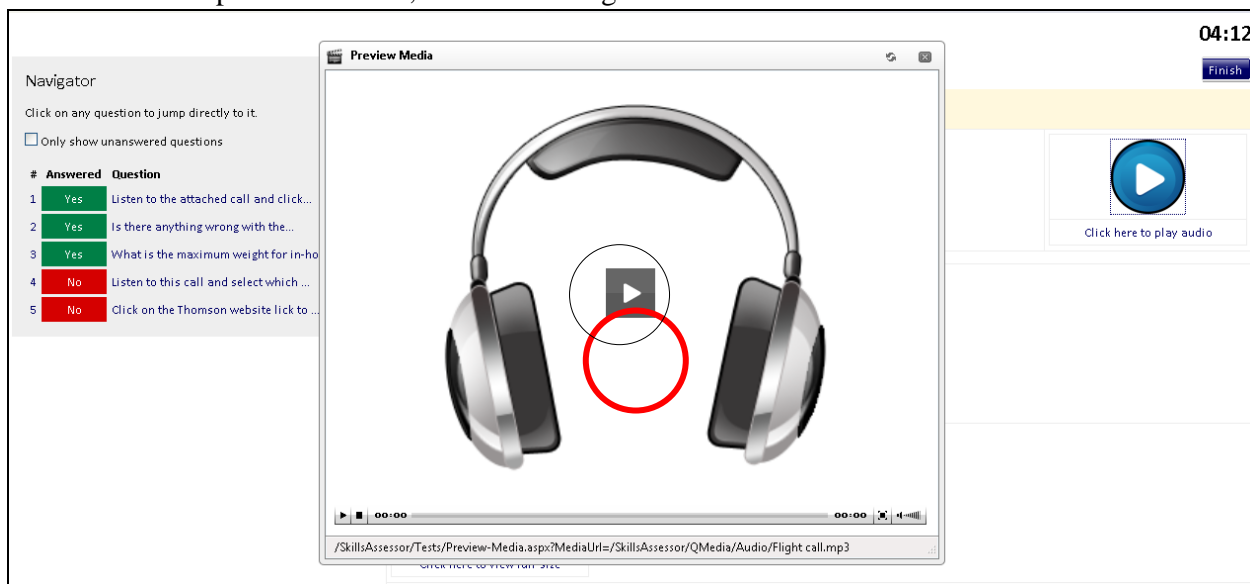


Figure 13: Listening to the Attachment

Select the appropriate answers and then move on to the next question.

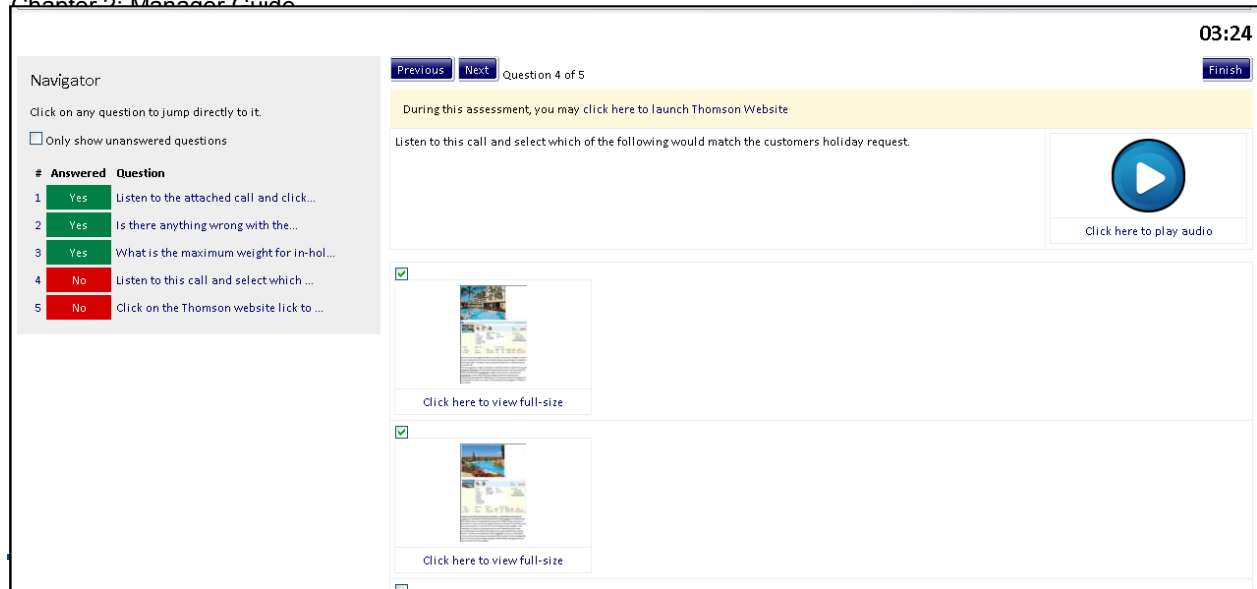


Figure 14: Navigator with Website Link

In the question example below, this question is linked to a web site. By clicking on the link this will present the web site to search for the answer. Enter the answer in the box provided before clicking on 'Finish' to close the assessment.

Notification that the assessment has been completed will be presented as per the example below, as shown in Figure 15. Follow the instructions to close the window.

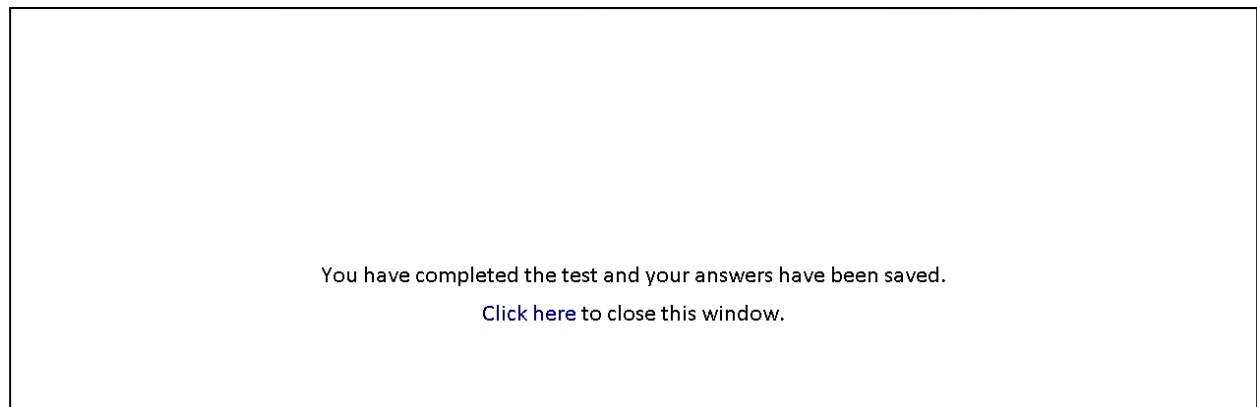


Figure 15: Assessment Finished

Feedback questions will also be used similar to the example below, as shown in Figure 16. Where this type of question is presented, select the relevant rating by clicking in the radio button, as shown in Figure 17.

The screenshot shows a web browser window with the URL `http://localhost/SkillsAssessor/Tests/Launch-Test-Questions.aspx?AssessmentID=26`. The interface includes a Navigator on the left and a main content area with three questions. Each question has a 'Comments/Evidence' text box and a rating scale with four radio buttons: 'Never', 'Sometimes', 'Most of the Time', and 'Always'. The 'Finish' button is in the top right corner.

Questions 1-3 of 3		During this assessment, you may															
Navigator Click on any question to jump directly to it. <input type="checkbox"/> Only show unanswered questions <table border="1"> <thead> <tr> <th>#</th> <th>Answered</th> <th>Question</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>No</td> <td>You assess your skills and identify y...</td> </tr> <tr> <td>2</td> <td>No</td> <td>Your assessment takes account of the ...</td> </tr> <tr> <td>3</td> <td>No</td> <td>Your plans for developing your skills...</td> </tr> </tbody> </table>	#	Answered	Question	1	No	You assess your skills and identify y...	2	No	Your assessment takes account of the ...	3	No	Your plans for developing your skills...	You assess your skills and identify your development needs at appropriate intervals Comments/Evidence	Never	Sometimes	Most of the Time	Always
	#	Answered	Question														
	1	No	You assess your skills and identify y...														
	2	No	Your assessment takes account of the ...														
3	No	Your plans for developing your skills...															
Your assessment takes account of the skills you need to work effectively with other team members Comments/Evidence	Never	Sometimes	Most of the time	Always													
Your plans for developing your skills contain specific, measurable and realistic objectives Comments/Evidence	Never	Sometimes	Most of the time	Always													

Figure 16: An Example of the Type of Questions Asked

This screenshot is identical to Figure 16, but the 'Sometimes' radio button for the first question, 'You assess your skills and identify your development needs at appropriate intervals', is now selected and highlighted with a green circle.

Questions 1-3 of 3		During this assessment, you may															
Navigator Click on any question to jump directly to it. <input type="checkbox"/> Only show unanswered questions <table border="1"> <thead> <tr> <th>#</th> <th>Answered</th> <th>Question</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>No</td> <td>You assess your skills and identify y...</td> </tr> <tr> <td>2</td> <td>No</td> <td>Your assessment takes account of the ...</td> </tr> <tr> <td>3</td> <td>No</td> <td>Your plans for developing your skills...</td> </tr> </tbody> </table>	#	Answered	Question	1	No	You assess your skills and identify y...	2	No	Your assessment takes account of the ...	3	No	Your plans for developing your skills...	You assess your skills and identify your development needs at appropriate intervals Comments/Evidence	Never	Sometimes	Most of the Time	Always
	#	Answered	Question														
	1	No	You assess your skills and identify y...														
	2	No	Your assessment takes account of the ...														
3	No	Your plans for developing your skills...															
Your assessment takes account of the skills you need to work effectively with other team members Comments/Evidence	Never	Sometimes	Most of the time	Always													
Your plans for developing your skills contain specific, measurable and realistic objectives Comments/Evidence	Never	Sometimes	Most of the time	Always													

Figure 17: An Example of the Radio Button

Once the assessment has been completed the My Development window will be updated to show that the assessment has been 100% completed as shown in Figure 18.



Figure 18: Assessment 100% Completed

Viewing Results

To view the results of any assessments that have been completed select the Widget which contains the 'My Reports' information. If this isn't visible as a tab in your Home screen then look in the 'Add stuff' option to add it into your profile.

A window similar to the example below, as shown in Figure 19, will be displayed. Click on the required user in the left hand window and by selecting the individual this will present in the bottom left hand window what assessments have been taken within the date range.

As a Manager there is the option to drill down to view the results of any subordinates that have completed assessments by expanding the hierarchy and again selecting the individual.

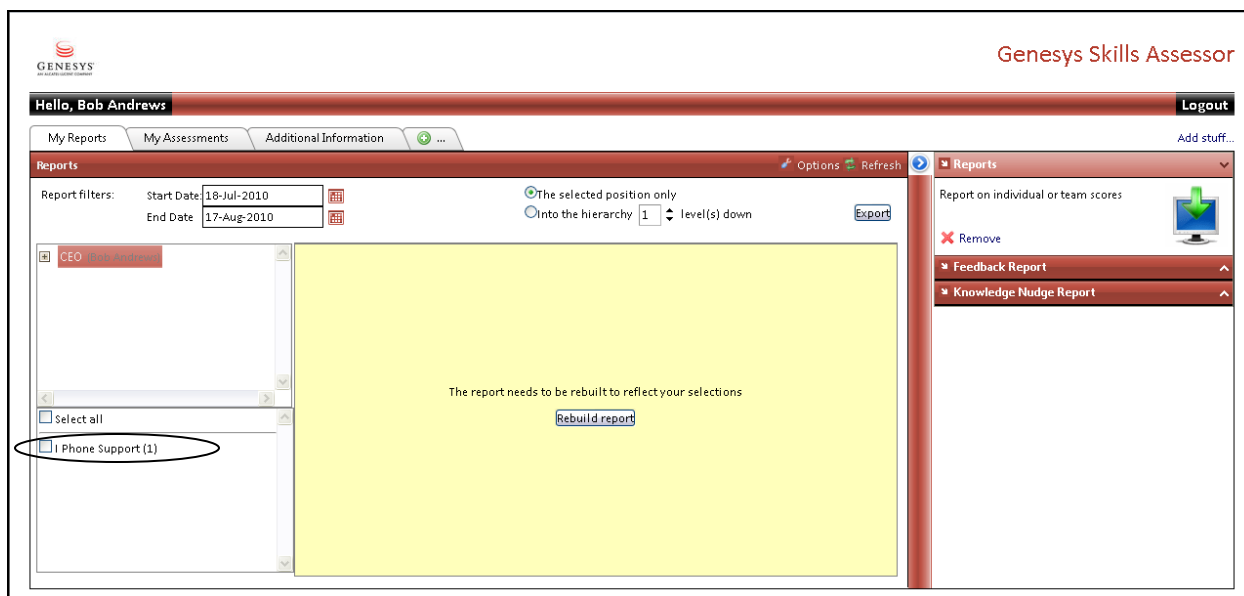


Figure 19: Results of Completed Assessment

By expanding the hierarchy view at the left hand side this will reveal the name and positions of the users who are beneath the manager position in the hierarchy, as shown in Figure 20.

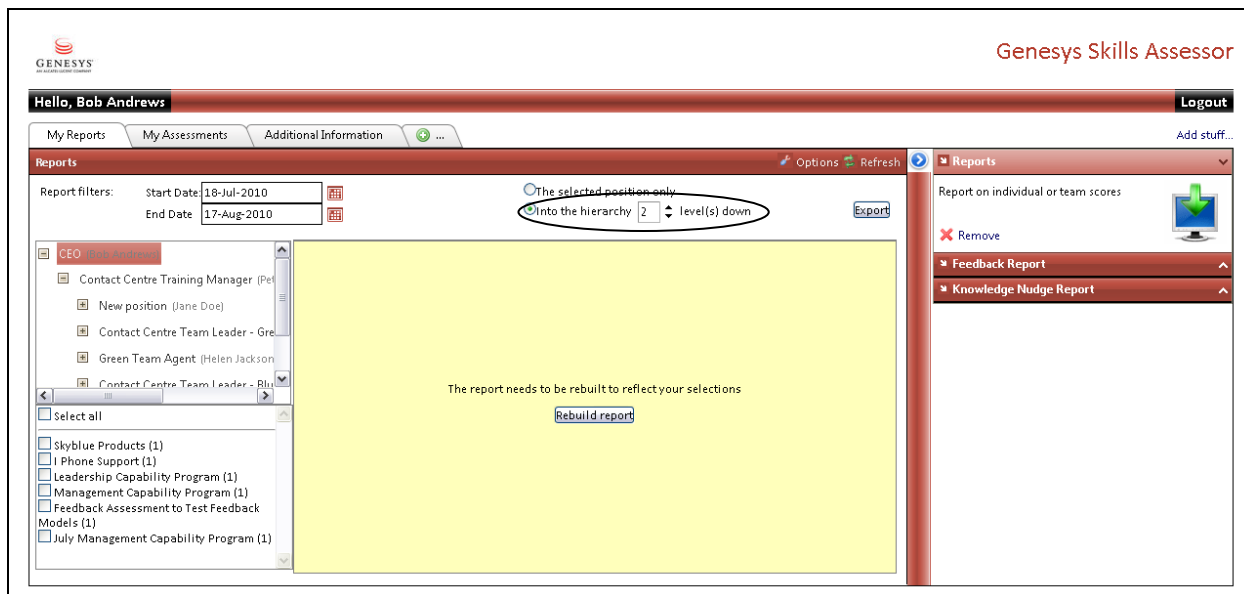


Figure 20: Expanded Hierarchy

Select the relevant assessment to view the results and click on 'Rebuild Report' as shown in Figure 21.

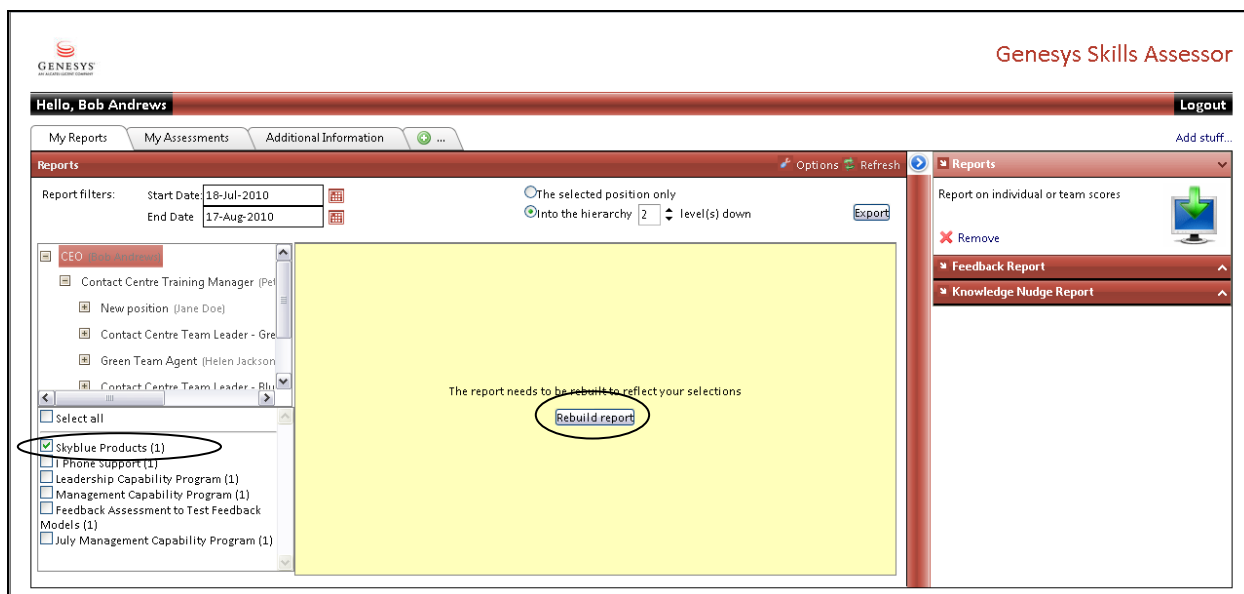


Figure 21: Build Report

The results are presented as per the example below. To view the answers from the individual agents, right click on the questions and select 'View Detail' as shown in Figure 21.

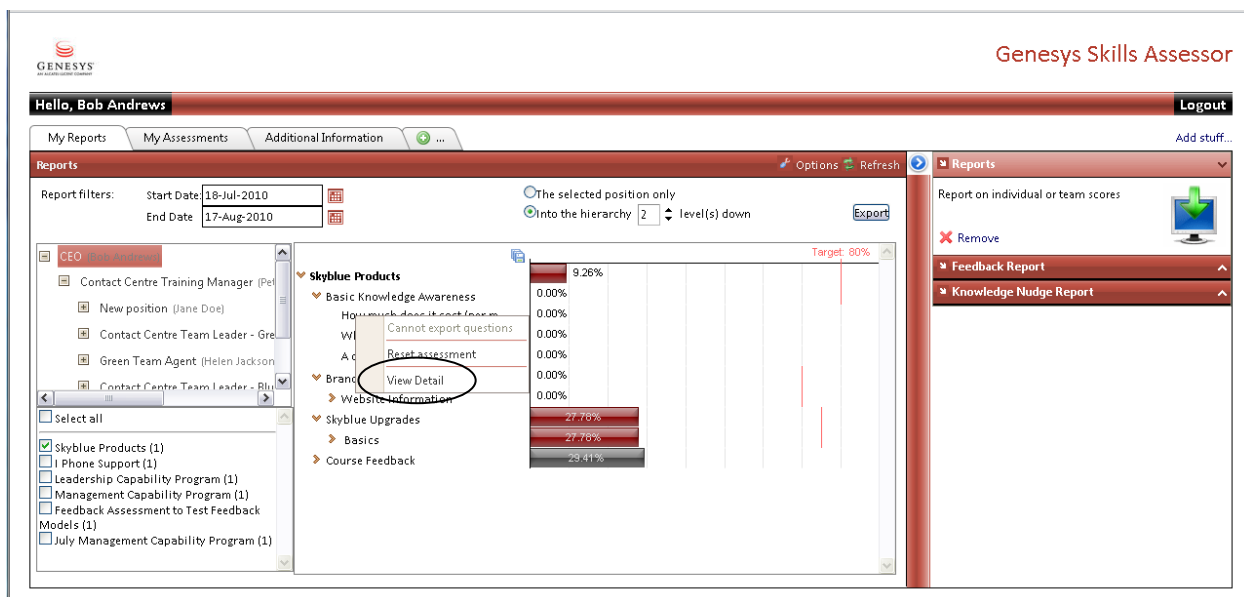


Figure 22: View Detail

Individual answers are then visible together with the correct answer, as shown in Figure 23.

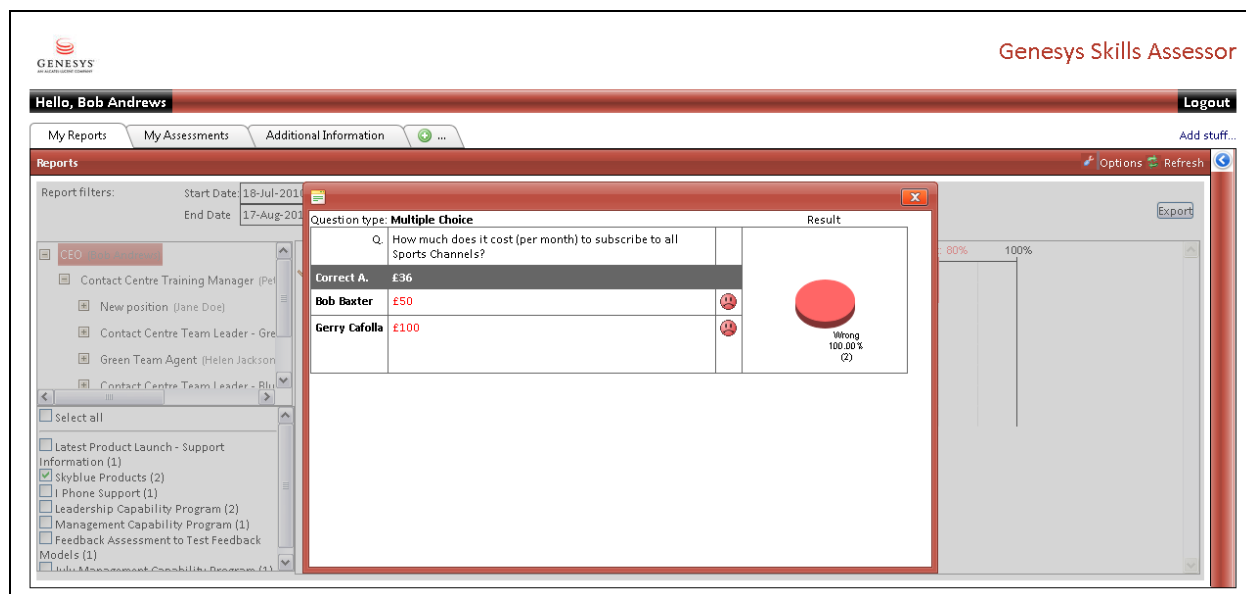


Figure 23: Individual Answers