Genesys Skills Assessor 8.1.127

Manager Guide

About Genesys

Genesys is the world's leading provider of customer service and contact software - with more than 4,000 customers in 80 countries. Drawing on its more than 20 years of customer service innovation and experience, Genesys is uniquely positioned to help companies bring their people, insights and customer channels together to effectively drive today's customer conversation. Genesys software directs more than 100 million interactions every day, maximizing the value of customer engagement and differentiating the experience by driving personalization and multi-channel customer service - and extending customer service across the enterprise to optimize processes and the performance of customer-facing employees. Go to www.genesys.com for more information.

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.

Notice

Although reasonable effort is made to ensure that the information in this document is complete and accurate at the time of release, Genesys Telecommunications Laboratories, Inc. cannot assume responsibility for any existing errors. Changes and/or corrections to the information contained in this document may be incorporated in future versions.

Your Responsibility for Your System's Security

You are responsible for the security of your system. Product administration to prevent unauthorized use is your responsibility. Your system administrator should read all documents provided with this product to fully understand the features available that reduce your risk of incurring charges for unlicensed use of Genesys products.

Trademarks

Technical Support from VARs

If you have purchased support from a value-added reseller (VAR), please contact the VAR for technical support.

Ordering and Licensing Information

Complete information on ordering and licensing Genesys products can be found in the ***Genesys Licensing Guide*****.**

Released by: Genesys Telecommunications Laboratories, Inc. http://www.genesys.com/

Document Version: 81skillsassessor_manager_03-2014_v8.1.103.00

Table of Contents

Preface

Preface

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

This document is valid only for the 8.1.127 releases of this product.

Note: For versions of this document created for other releases of this product, visit the [Genesys documentation website]

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 center. 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 and Learning Management System courses.

Centralizing agent skills information allows contact centers to build a “DNA profile” of skills 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 center?
- Who has what skills and skill levels?
- Who requires what type of training, and when?

Skillsroute enables companies to create and manage multiple agents, skills, and skill levels 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 manager who use the Skills Assessor system.

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@genesys.com.

Related Documentation Resources

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

- The Release Notes, Product Advisories, and all technical documentation for this product, which are available on the Genesys Documentation website at http://docs.genesys.com.

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:

```
81skillsassessor_user_08-2013_v8.1.101.00
```

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

Chapter

1 Manager Guide

Overview

This *Manager User Guide* has been designed to walk the user through the use and navigation of the Skills Assessor application.

Logging In

Skills Assessor is accessed either from the Internet or over the company intranet. After you select the application, a screen similar to the one shown in Figure 1 may be displayed. (The application can be customized so that your company logo is displayed in the left corner of the screen and a color that better suits your company is used.)

The application may be accessible directly from the company intranet, and therefore it may not require users to enter their login details. This will, however, depend on the company's security requirements.

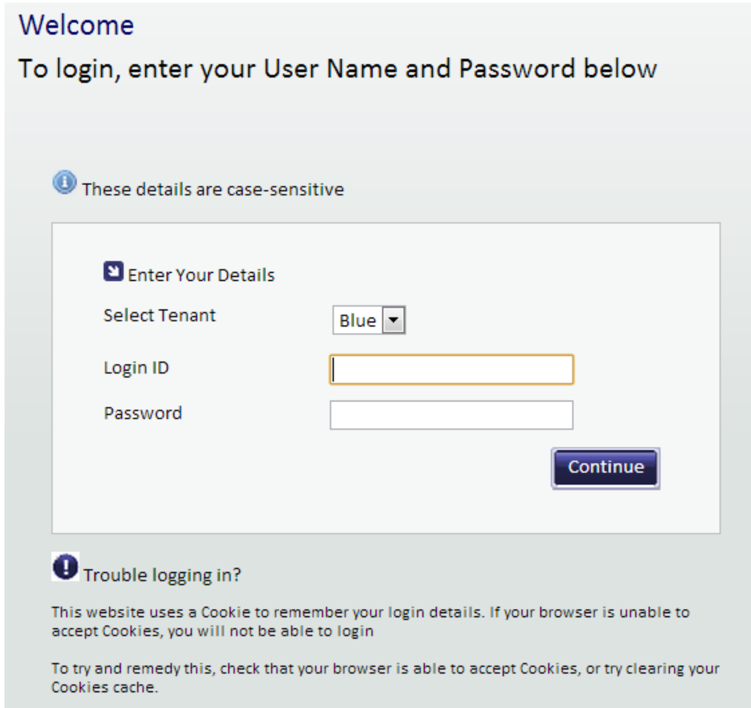


Figure 1: Welcome Screen

After entering your unique user name and password, click `Continue`. The `My Development` screen will be displayed, containing any assessments that have been assigned.

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

Taking an Assessment

Any assessments that have been assigned will be visible under `My Development` page as shown below.

Under `Group Name` will be a list of 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, click the `Group Name` bar.

Any assessments that have to be completed by a certain date will have a date in the `Date By` column.

The `%Complete` column indicates how close to completion the assessment is.

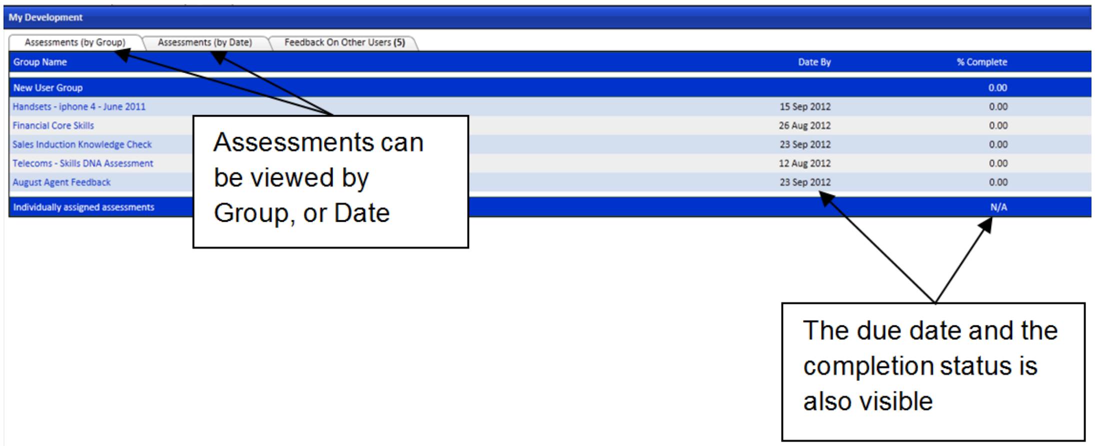


Figure 2: Assessments on the My Development Screen

Types of Assessments

There are three types of assessments:

- Timed – This type of assessment has to be completed in one session, and a clock in the top-right corner of the window will indicate the time available to complete the assessment.
- Not Timed – This type of assessment can be accessed more than once, allowing completion at any time before the completion date.
- Feedback – For this type of assessment, individuals rate themselves against specific criteria. Feedback assessments can be set to different deployment modes which control who the assessment is assigned to, e.g. ‘self only’ or ‘self and manager’. If an assessment is set to the ‘self and manager’ deployment mode, both users will be required to complete a combined feedback assessment together and for this assessment to be signed (via user password) before it is recorded in the system. If a ‘self and manager’ assessment has been set to only require user feedback before a combined test, the manager will have the option of initiating a combined feedback test without having previously completed their individual feedback assessment.

Timed and Untimed Assessments

To start taking an assessment, click the name, as shown in below.
If the assessment is timed, the time allowed will be displayed in the top-left corner of the window.

Assessments (by Group) | Assessments (by Date) | Feedback On Other Users (5)

Group Name	Date By	% Complete	%Average
New User Group		0.00	0.00
Handsets - iphone 4 - June 2011	15 Sep 2012	0.00	
Financial Core Skills	26 Aug 2012	0.00	
Sales Induction Knowledge Check	23 Sep 2012	0.00	
Telecoms - Skills DNA Assessment	12 Aug 2012	0.00	
August Agent Feedback	23 Sep 2012	0.00	
Individually assigned assessments		N/A	0.00

Figure 3: List of assessments

This will display a screen similar to the one shown in the following image.
At the bottom of the screen is an option to check that any audio can be heard. Click the `Play` button to check this.
When you are ready to take the assessment, click `Start`. To close the assessment and take it later, click `Close`.

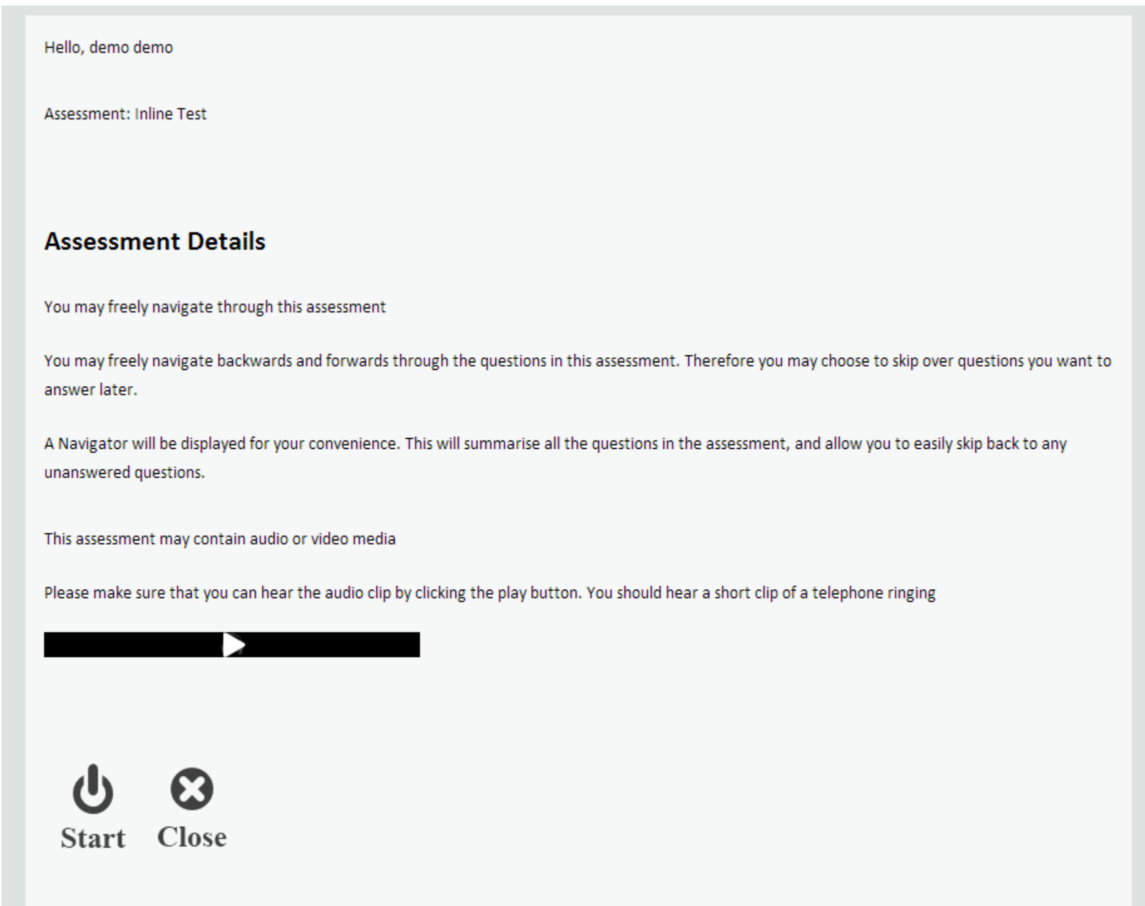


Figure 4: Starting an Assessment

Question Examples

There are several ways that a question can be presented, but the format will stay the same. The Navigator and question number will be displayed on the left side, and the actual question content will be in the main pane on the right side, as shown below. If the question is timed, the time allowed will be displayed in the top-left corner of the window.

Follow the instructions for each of the questions, and after selecting an answer, click `Next` to move to the next question.

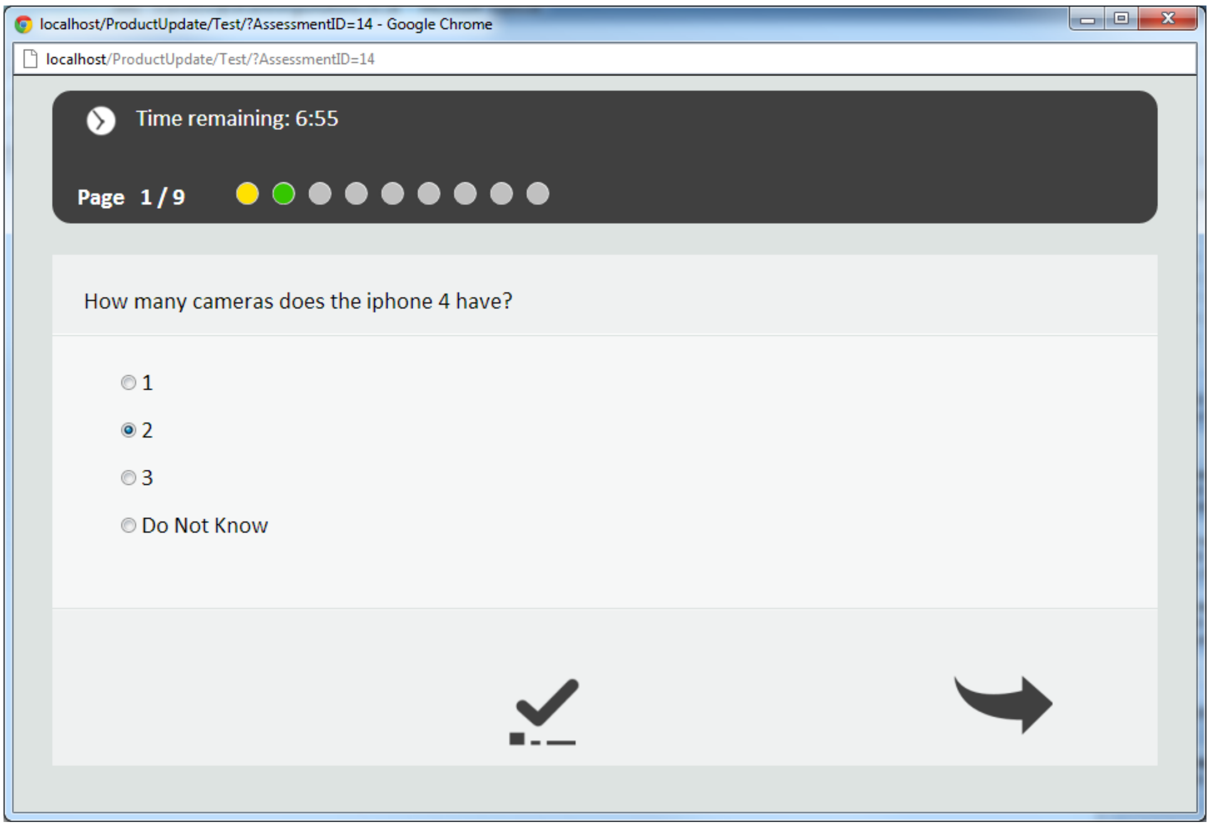


Figure 5: The Navigator

After each question has been completed, the Navigator will be updated to indicate which questions have been completed, as shown below (yellow indicates the current question, grey indicates unanswered questions, green indicates answered questions).

In the example shown below, the question has an image attached. Click the image in the top right corner of the screen to view the image in full-screen mode.

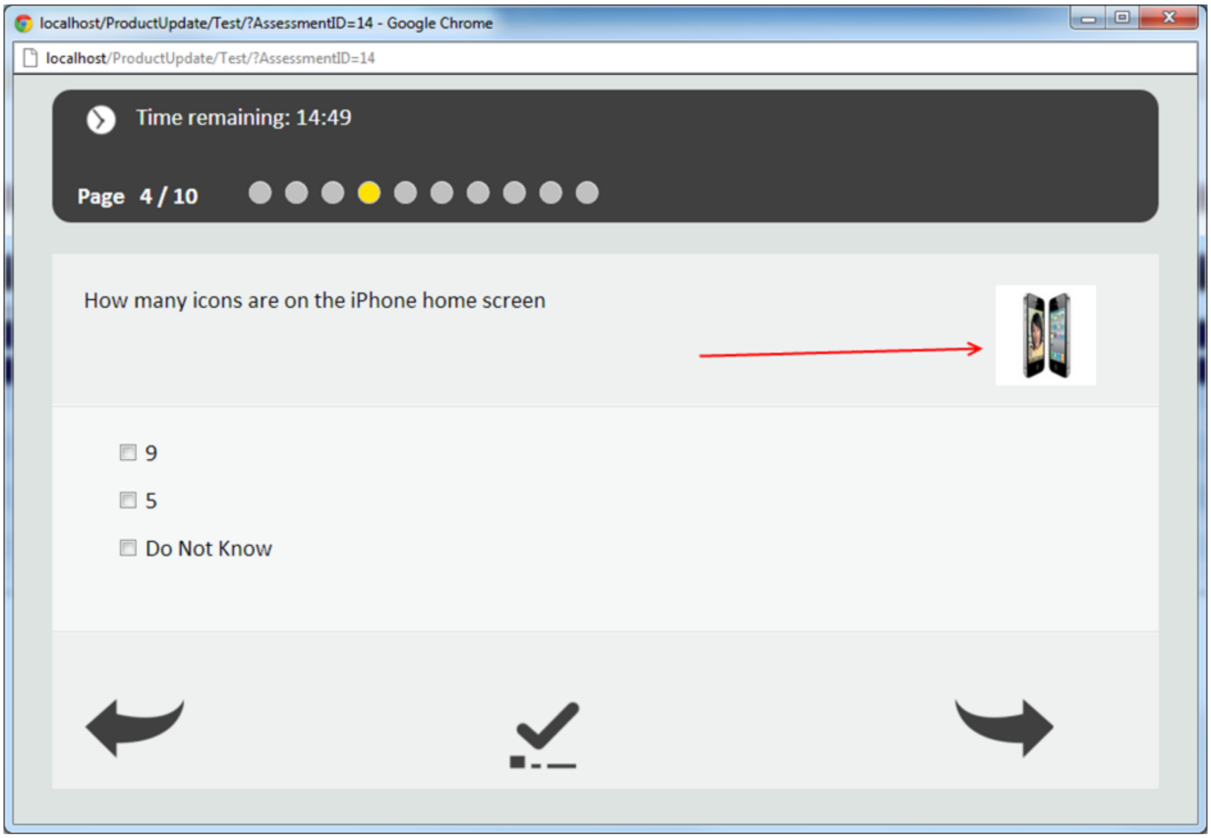


Figure 6: Question with an Attached Image

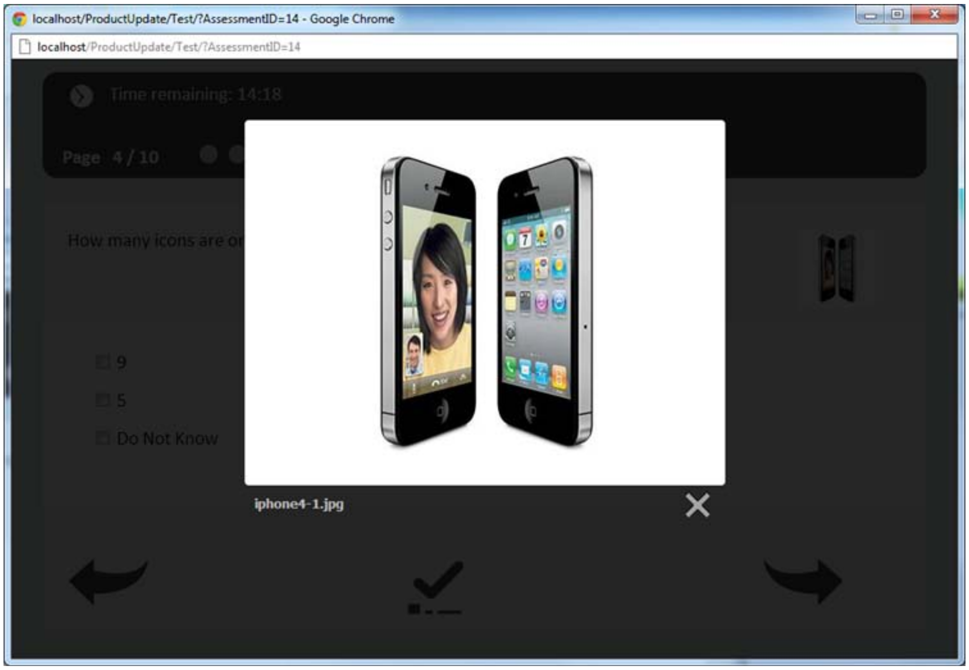


Figure 7: Question with an Attached Image

In the example shown below there is a media file attached. To listen to it, click the `Play` button.

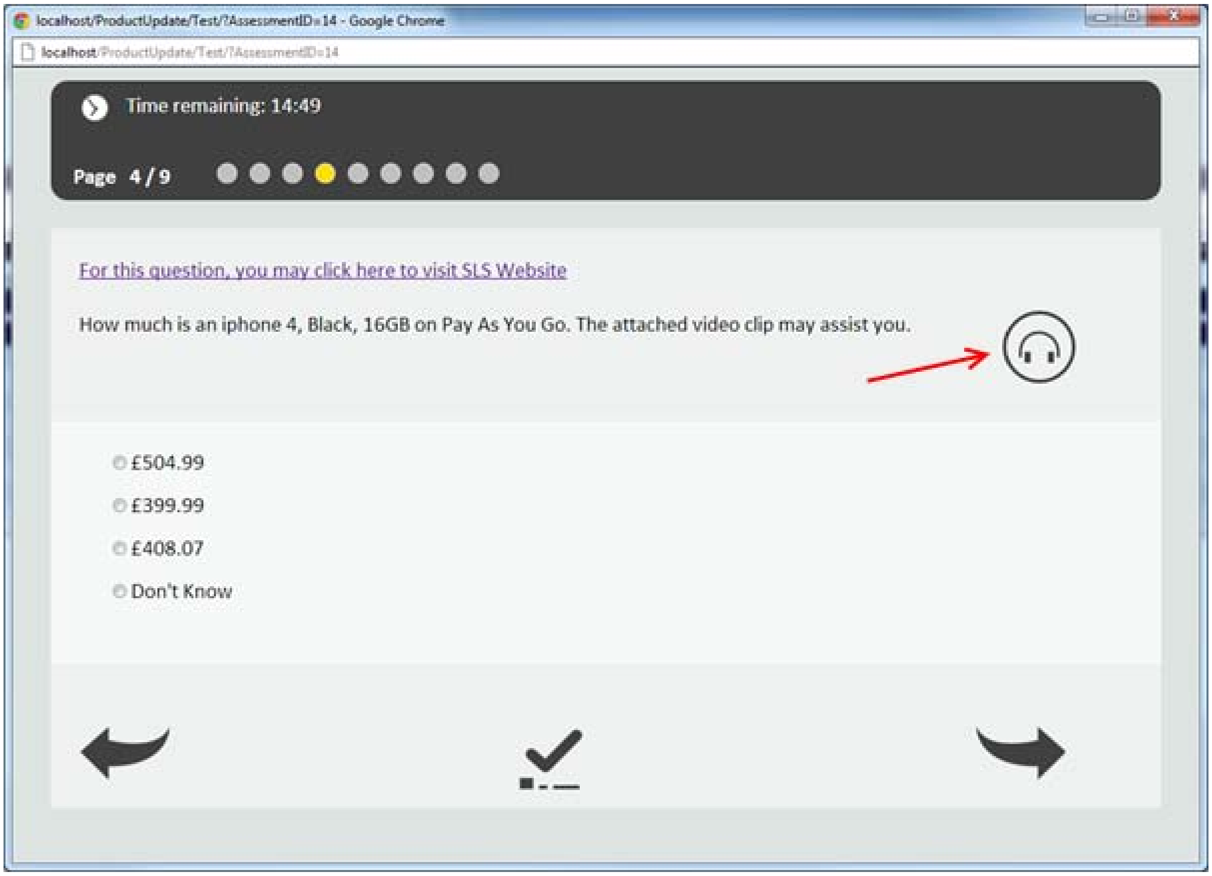


Figure 8: Question with Media Attached

This will open a window, as shown below. Click the `Play` button to listen to the attachment.

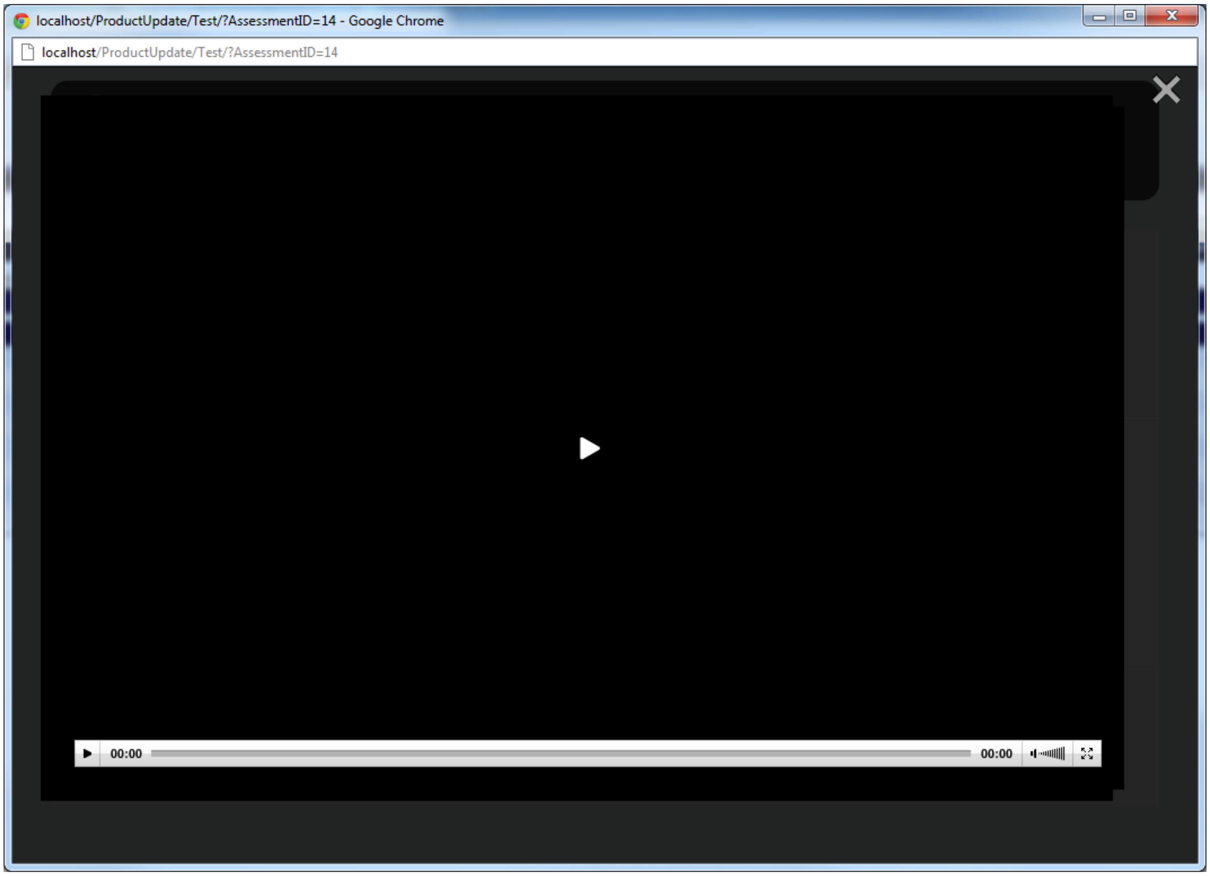


Figure 9: Playing the Attachment

Once you have finished listening to the attachment click the ‘X’ in the top right corner of the window to return to the assessment. Select the appropriate answer, and then click ‘Next’ to move on to the next question.

In the example shown below, the question is linked to a website. Clicking the link will open the website.

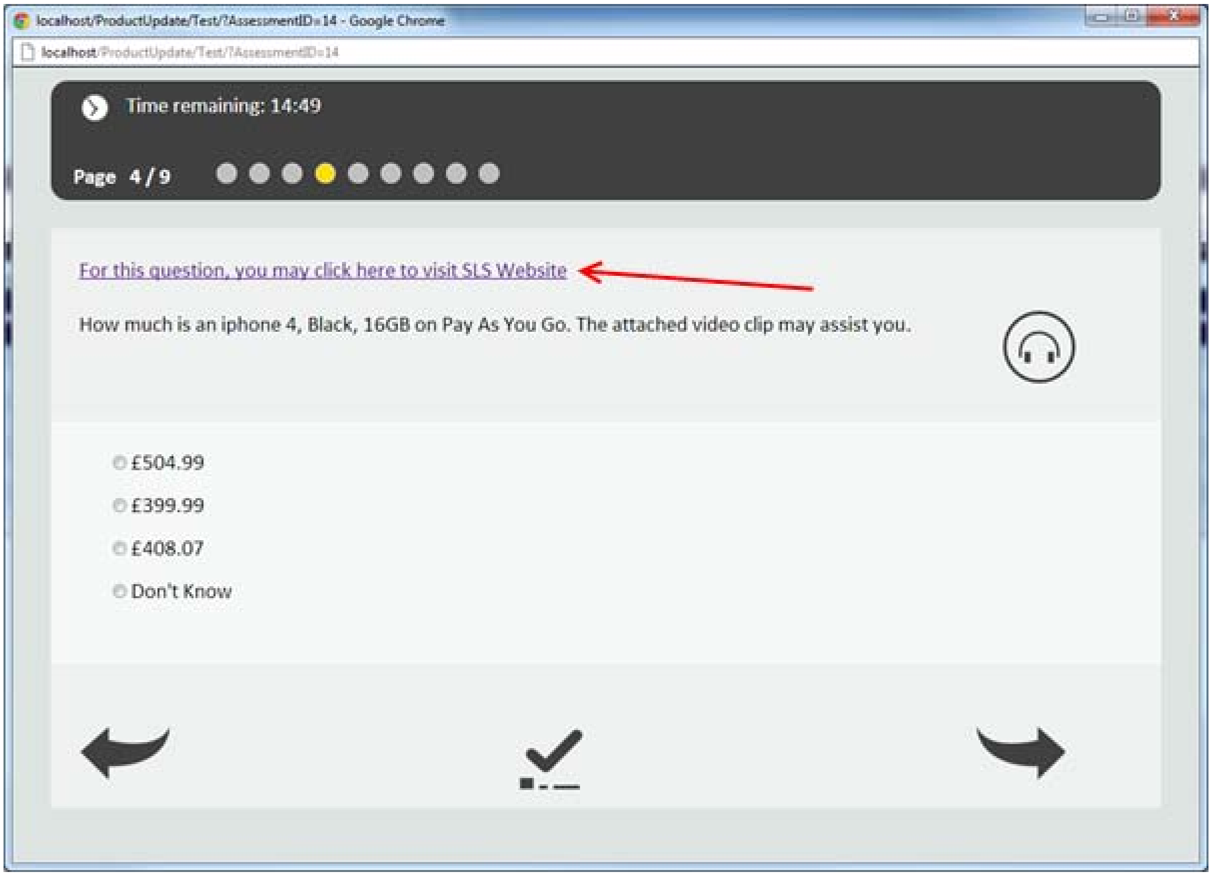


Figure 10: Question with an Attached Website Link

When the assessment has been completed, click `Finish` to close the assessment.

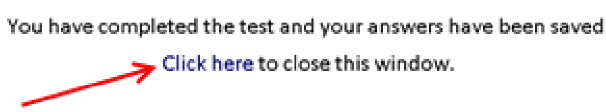


Figure 11: Assessment Completed

Feedback questions similar to the one shown below may also be used. When this type of question is presented, select the relevant rating by clicking the appropriate radio button and adding a comment.

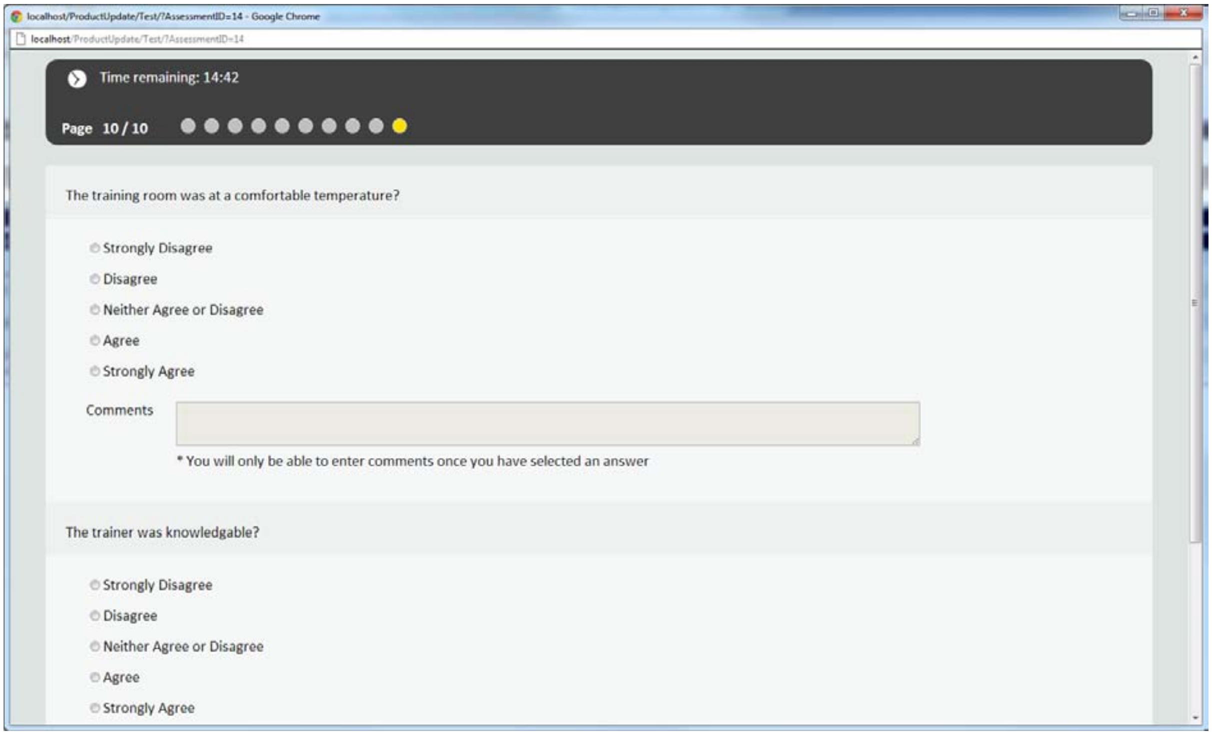
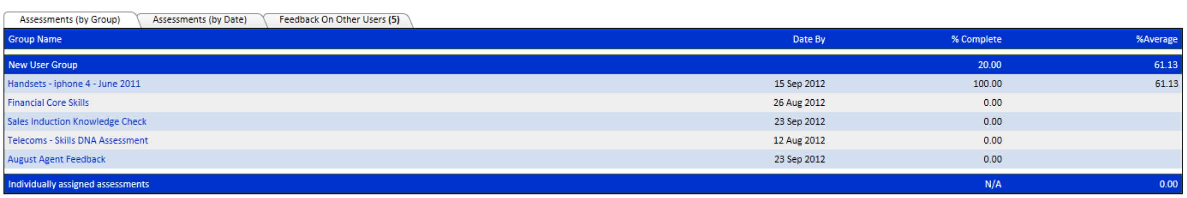


Figure 12: Example of a feedback assessment question

After the assessment has been completed, the `My Development` screen will be updated to show that the assessment has been 100% completed, and the assessment results will appear on the right side under `%Average`, as shown below.



Assessments (by Group) | Assessments (by Date) | Feedback On Other Users (5)

Group Name	Date By	% Complete	%Average
New User Group		20.00	61.13
Handsets - iphone 4 - June 2011	15 Sep 2012	100.00	61.13
Financial Core Skills	26 Aug 2012	0.00	
Sales Induction Knowledge Check	23 Sep 2012	0.00	
Telecoms - Skills DNA Assessment	12 Aug 2012	0.00	
August Agent Feedback	23 Sep 2012	0.00	
Individually assigned assessments		N/A	0.00

Figure 13: My Development Page

Feedback Assessments

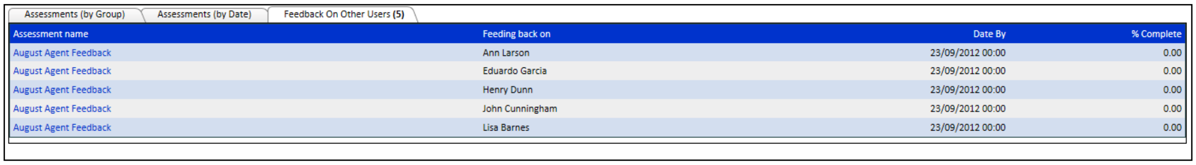
If a feedback assessment has been assigned to you to complete for one of your team members, this will appear in the `Feedback on Other Users` tab.

Assessments (by Group) | Assessments (by Date) | Feedback On Other Users (5)

Group Name	Date By	% Complete	%Average
New User Group		0.00	0.00
Handsets - Iphone 4 - June 2011	15 Sep 2012	0.00	
Financial Core Skills	26 Aug 2012	0.00	
Sales Induction Knowledge Check	23 Sep 2012	0.00	
Telecoms - Skills DNA Assessment	12 Aug 2012	0.00	
August Agent Feedback	23 Sep 2012	0.00	
Individually assigned assessments		N/A	0.00

Figure 14: Feedback on other users

Selecting the tab will reveal the users that you are required to complete feedback for.



Assessments (by Group) | Assessments (by Date) | Feedback On Other Users (5)

Assessment name	Feeding back on	Date By	% Complete
August Agent Feedback	Ann Larson	23/09/2012 00:00	0.00
August Agent Feedback	Eduardo Garcia	23/09/2012 00:00	0.00
August Agent Feedback	Henry Dunn	23/09/2012 00:00	0.00
August Agent Feedback	John Cunningham	23/09/2012 00:00	0.00
August Agent Feedback	Lisa Barnes	23/09/2012 00:00	0.00

Figure 15: List of users to complete feedback on

Click on the individuals name to select the assessment to complete.

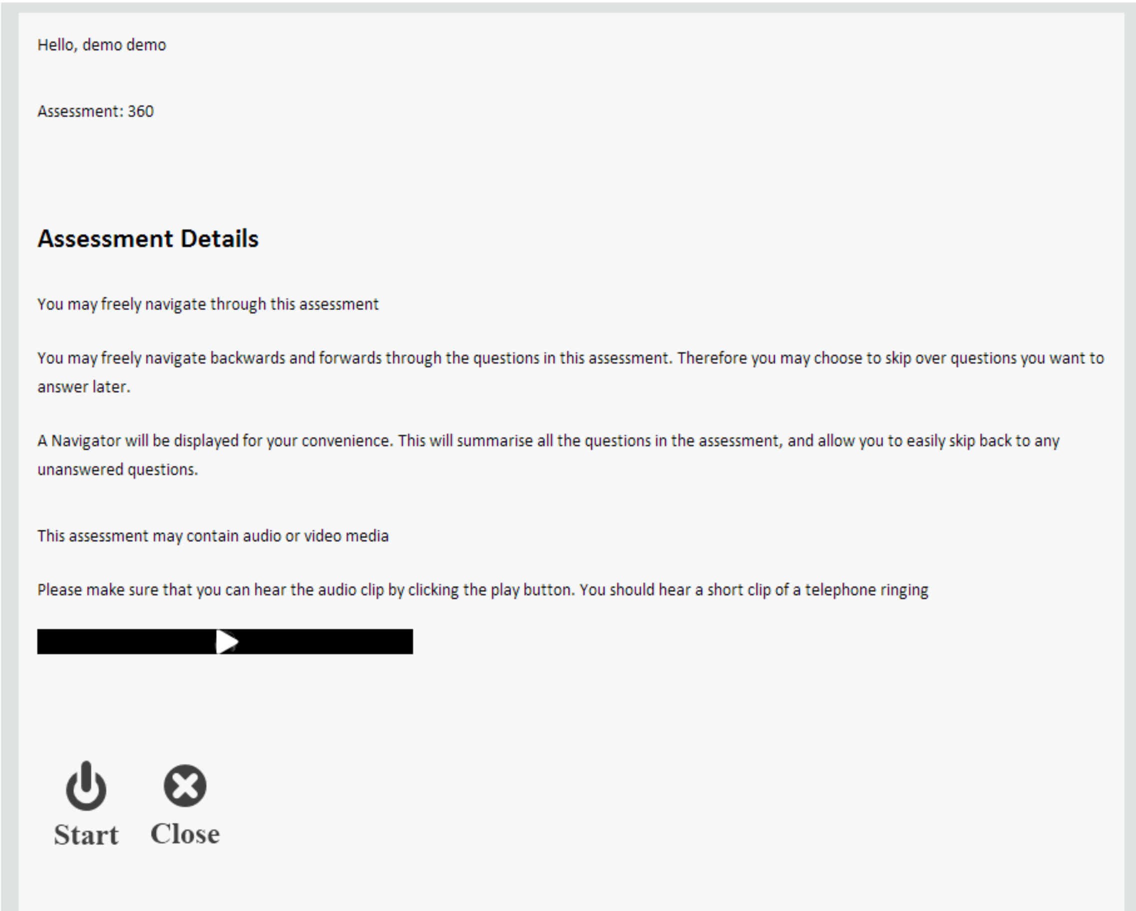


Figure 16: Starting a feedback assessment on another user

Work through the assessment selecting the relevant answer.

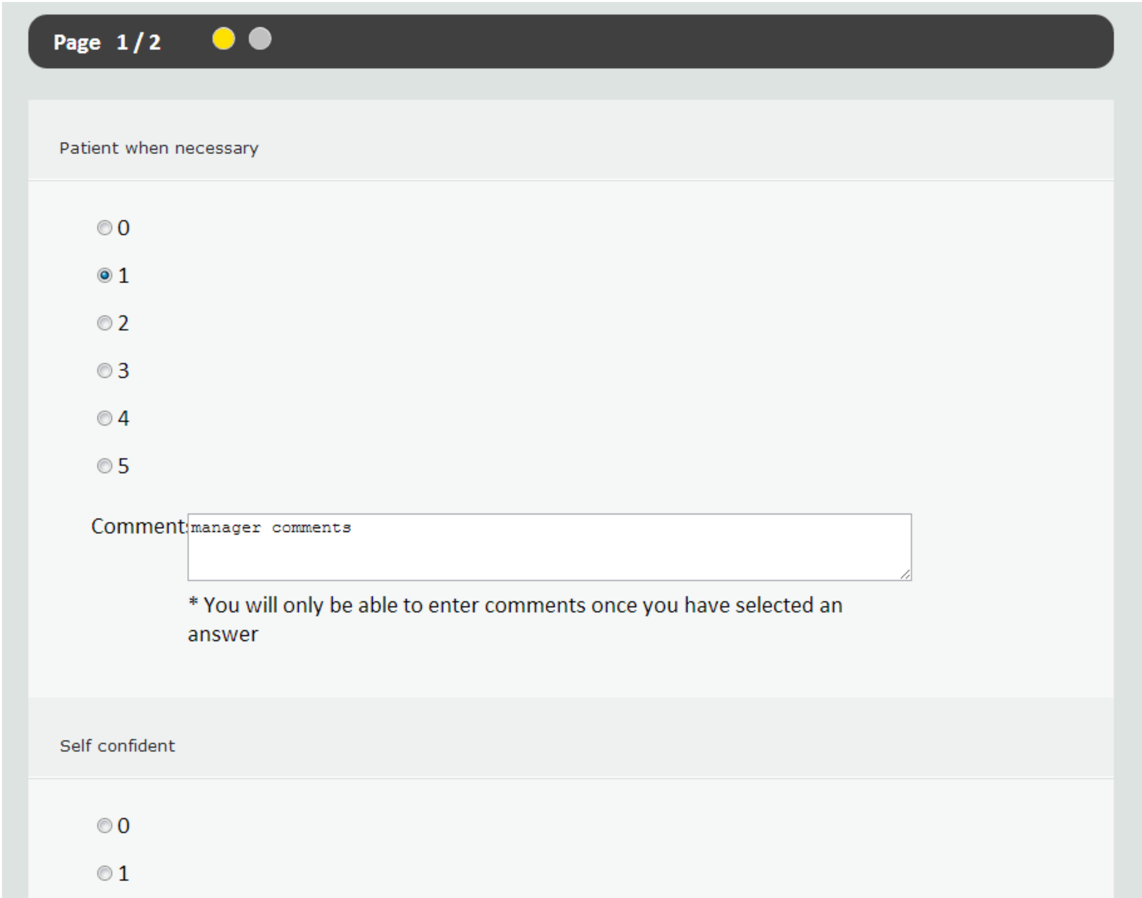


Figure 17: Completing the Feedback assessment

You can also have the option of completing `combined feedback assessments`. These assessments allow you to see the employee's results, your own feedback results and then enter the agreed combined results. Figure 21 shows an example of this.

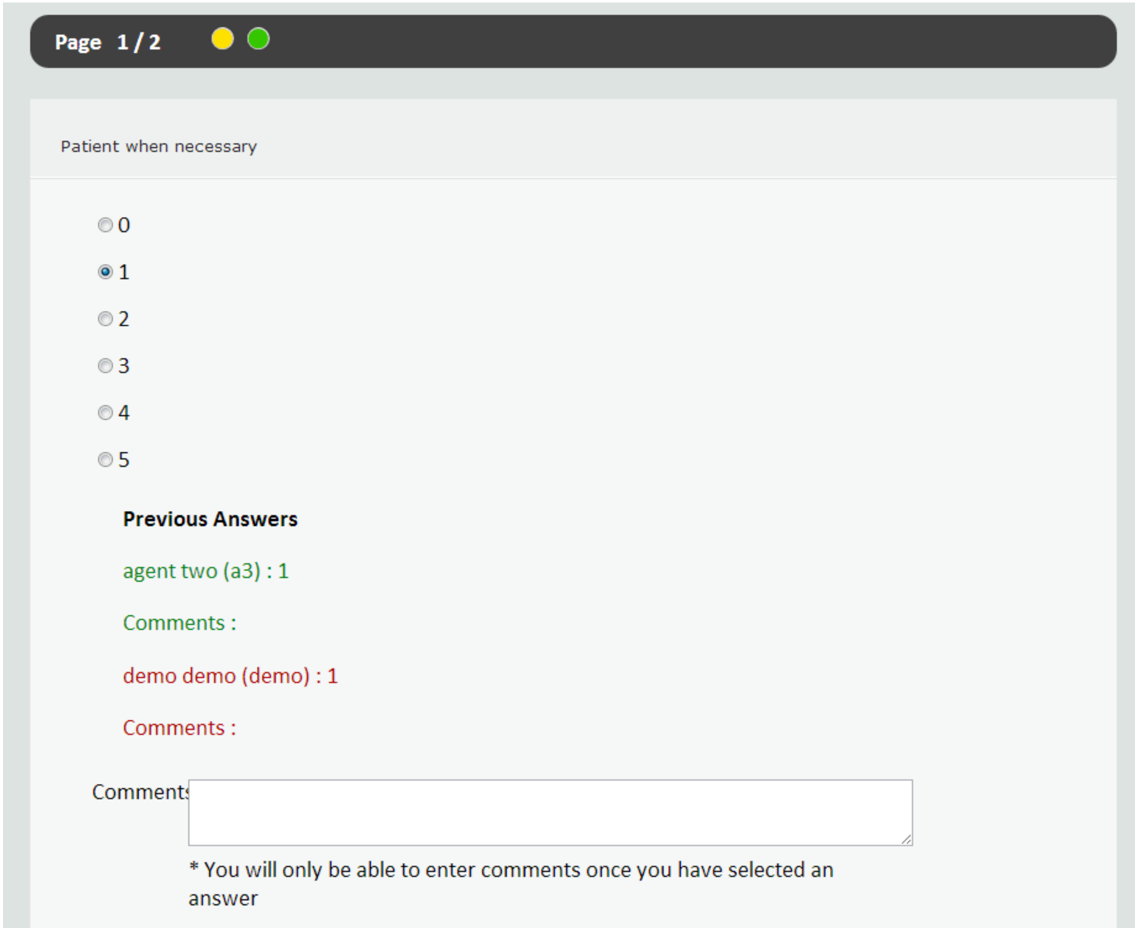


Figure 18: Combined Assessment

Viewing Results

To view the results of any completed assessments, click the **User Results Reports** tab.

A screen similar to the one shown below will be displayed. To view a specific users results, expand the hierarchy at the left hand side and select the required user name. This will reveal any completed assessment for that user in the bottom left hand window.

A manager can drill down to view the results of any subordinates who have completed assessments, by expanding the hierarchy and selecting an individual.

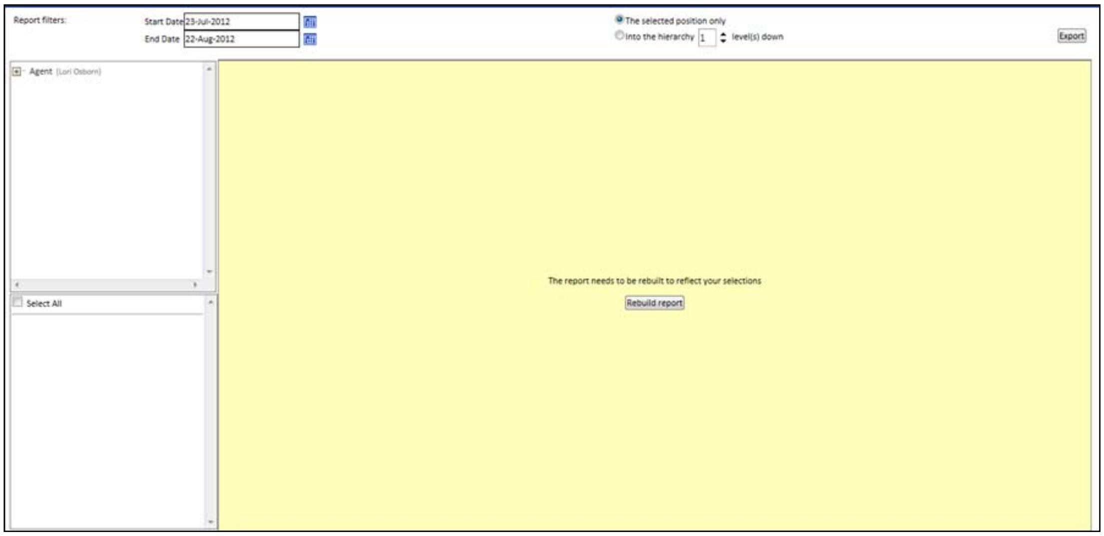


Figure 19: Results of Completed Assessment

Assessment results can also be viewed at team level by first highlighting the user and then drilling down into the hierarchy as per the example below.

In the bottom left hand window any assessments that have been completed will be displayed together with the number of users that have completed it in brackets.

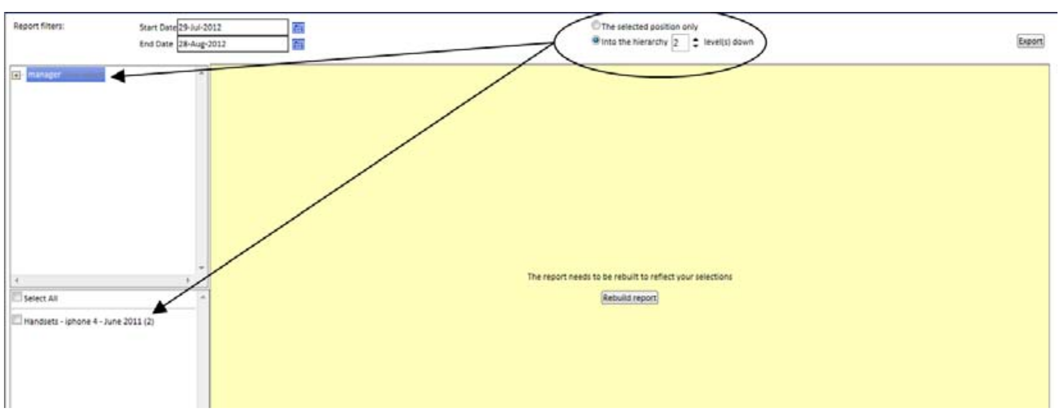


Figure 20: User Results Report Screen

After selecting the required assessment click on `Rebuild report`, the information will then be displayed.

In the example below, the results are displayed as an average. To view the results for an individual you must select the individual by name.

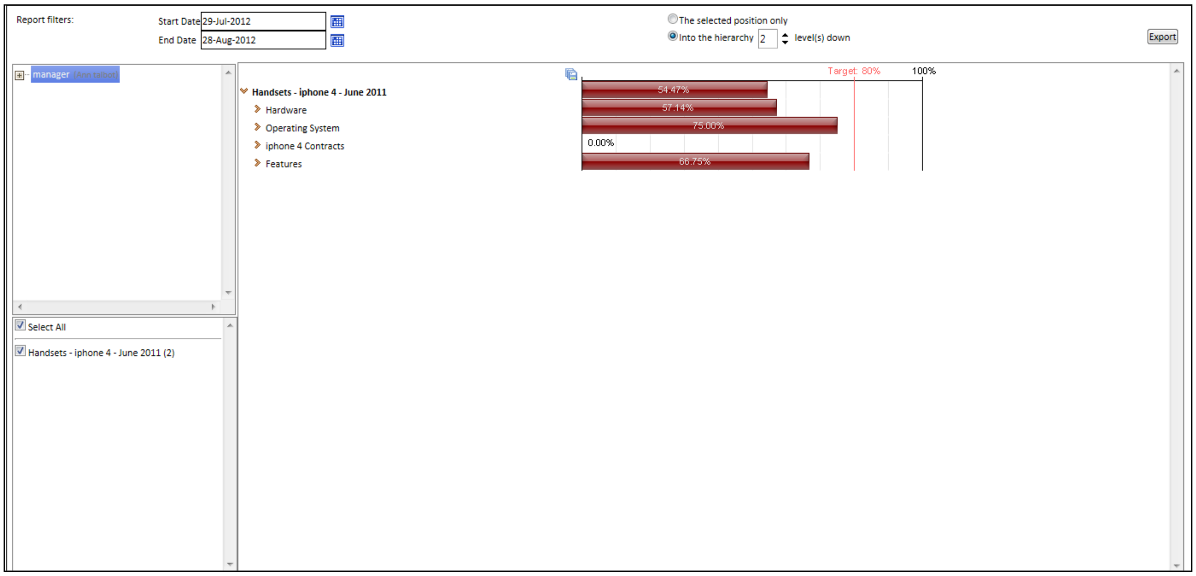


Figure 21: Detailed Results

To view the individual question results, expand into the questions by clicking on the module. If the option to view the question details is available right-click the question and select `View Detail`.

If the option to view the question details is not available, you will receive a `Viewing answers for this assessment is disabled` message when you right-click the question.

As this example is for an average team results, viewing the individual questions will reveal each individual user together with their selected answer for that question.

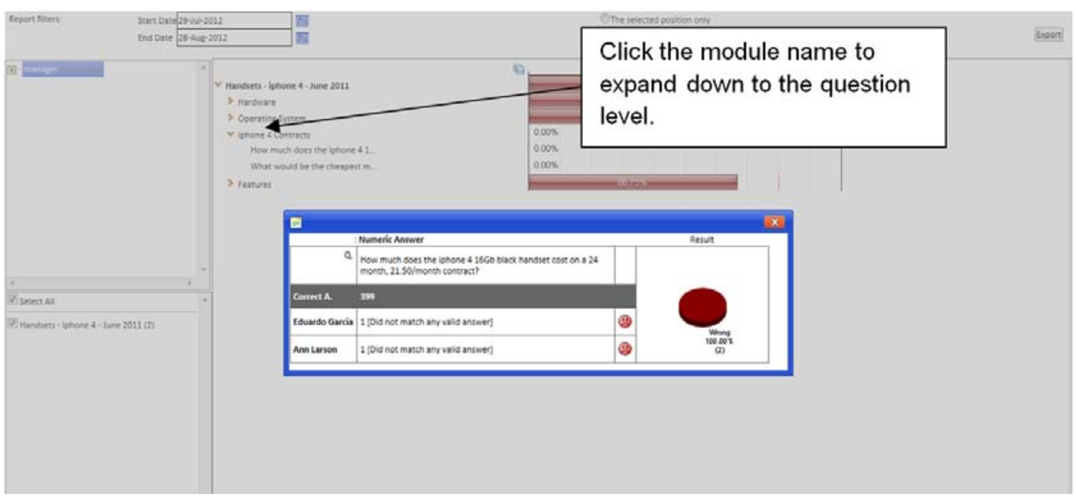


Figure 22: Individual Question Results

Viewing Feedback Results

If you have been completing feedback assessments, you may have access to the Reports pages. These include:

- **User Results Report** – View your assessment results.
- **Feedback Results Report** – View your selected feedback ratings.

Figure 23: Report Generator

The report view will be similar to the assessment report view.

Click your position in the left pane (making sure that the date range that you want to view your feedback ratings for is correct).

When you click your position, your name will appear in the center-left pane, and the names of any completed assessments will appear in the bottom-left pane, as shown in Figure 27.

Click `Rebuild report` to view the information.

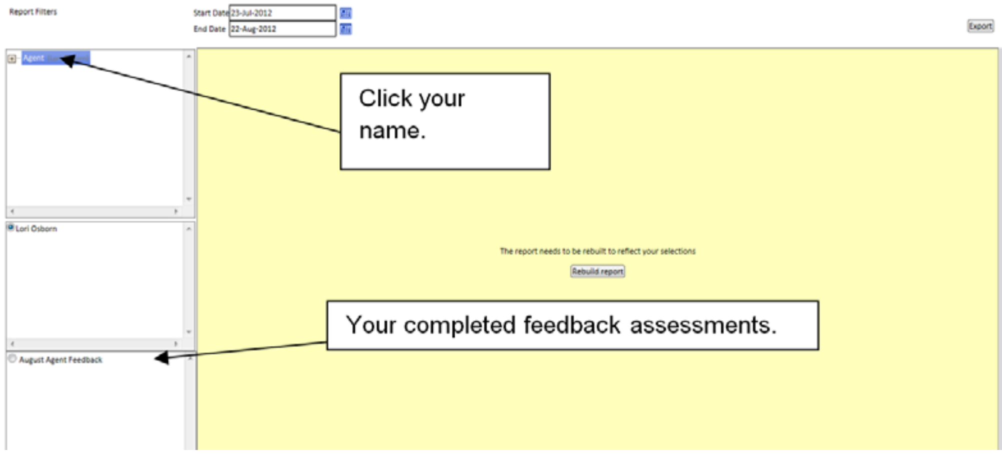


Figure 24: Generating a Report

The information will be presented as a line graph showing how you rated yourself against the specific criteria, as shown below.

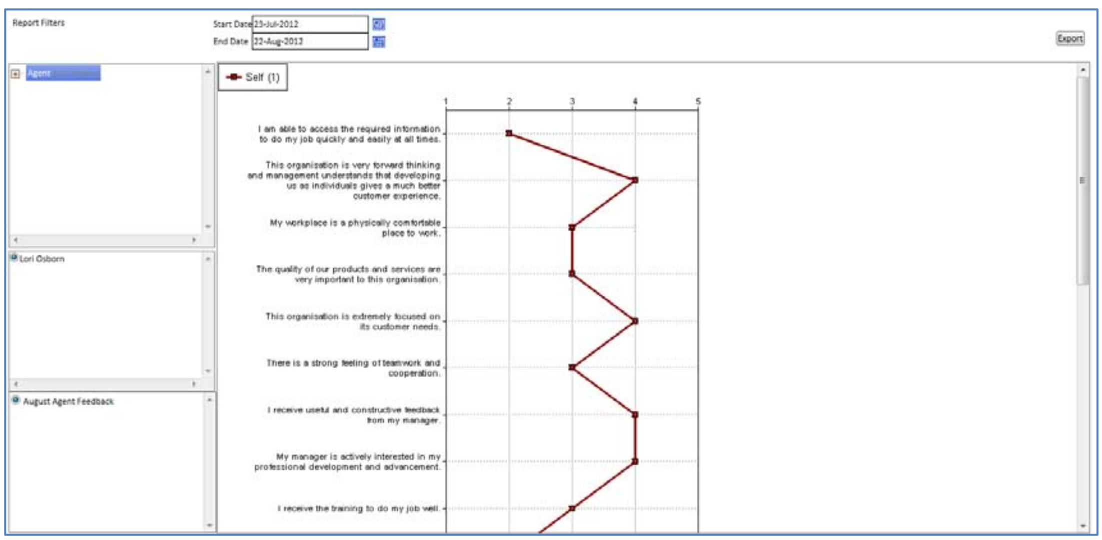


Figure 25: Line Graph Showing Feedback Results

If you have completed a feedback assessment for a team member, this information will be shown in the same line graph as per the example below (this will depend if the user has also completed their feedback assessment).

Expand the hierarchy to select the required user.

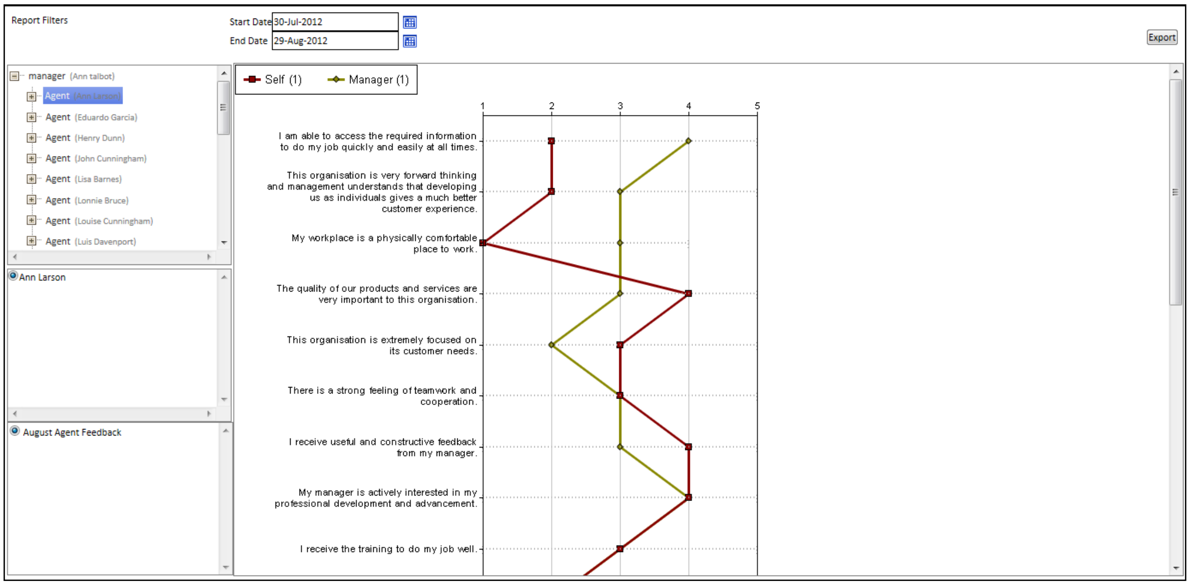


Figure 26: Viewing feedback results for another user

Managing and Viewing Crystal Reports

Skills Assessor supports the importing and viewing of custom-designed Crystal Reports. The features associated with Crystal Reports are located in the Manage Reports, Manage Reports and View Reports pages.

Managing Report Settings

The Manage Report Settings page allows users to create, edit, delete and re-arrange report categories. Reports can then be associated with specific categories.
To create a new category, first select the parent category (i.e. the one that you want the new category to be under in the hierarchy), then click the green '+' icon.
Clicking on the new category twice will allow you to rename it. It is also possible to move categories to different locations by dragging them into other categories.
To delete a category, select it from the hierarchy and click the red 'X' icon. If the delete icon is disabled (if it is grey instead of red) then the selected category cannot be deleted. A category can be deleted only if it does not contain any other categories or reports.

Managing Reports

The manage reports page allows the user to view, add, edit, delete and archive reports. The main controls in this page are displayed in a screenshot below.

Figure 27: Manage Reports page

To upload a report, click the ‘Add New Report’ link. A pop-up form will appear. Set the report’s name and category. The ‘Admin Report’ checkbox allows administrators to limit who has access, which allows them to run the report against all users in the system. Reports that are not set as admin reports will only provide information about the logged in user’s subordinates. Click the ‘select’ button to choose a Crystal Report .rpt file to upload.

Once the upload has completed the two additional settings will need to be defined. The connection type checkboxes should be used to set which users you want the report to run against. It is possible for a report to run against Skills Assessor and/or Training Manager users. The second option should be used to map the report database to the name of the database used for your system. After entering these settings click the ‘Add’ button to complete the report upload.

To edit report settings, select a report from the table in the Manage reports page and click it’s associated ‘Edit link’. A popup window will appear allowing you to change the details of the report, including name, category, the Crystal Reports .rpt file and database connection details. Once you have finished editing the report click the ‘Update’ button to apply the changes.

To archive a report, click it’s associated ‘Archive’ link from the table in the Manage Reports page. An archived report can be unarchived in a similar manner. Reports that are archived will not be listed in the ‘View Reports’ page.

All uploaded reports can also be downloaded via the ‘download’ link from the Manage Reports page.

Viewing Reports

Reports can be generated from the ‘View Reports’ page. The page will initially display the category hierarchy, including the reports that have been allocated to each category. Browse the category hierarchy and select the report that you want to view. A Crystal Reports popup window will appear. Depending on how the report was developed, this window will either show the report immediately, or request additional information before displaying the report.

Certificates

If any assessments have certificates associated with them, these can be selected in the separate Widget, as shown below. The certificates can then be viewed or printed as required.

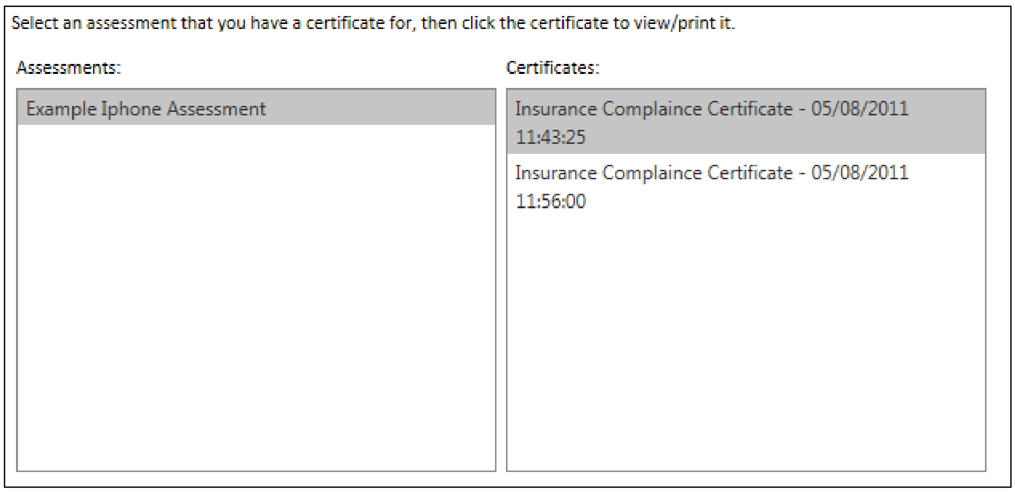


Figure 28: An Assessment with Certificates

DNA

DNA is where key business data, for example, quality monitoring, sales and revenue, customer satisfaction etc., has been used in creating a job role profile and the data is weighted in order of importance to the business.

This allows visibility of where there is a potential training requirement or where performance has exceeded expectation.

There may also be the opportunity for self-learning by assigning learning items to enhance performance based on the results achieved. As a manager you will have visibility of these performance results for your team and be able to assign learning items if required to individual team members.

If DNA has been configured then there will be a DNA menu option to select. Click on **DNA** to access **View Filtered DNA.**

The number of team members will be visible in the top right hand corner together with the number of team members who fall into each category i.e. Red – needing some urgent attention, Amber – needing some attention and Green – achieving.

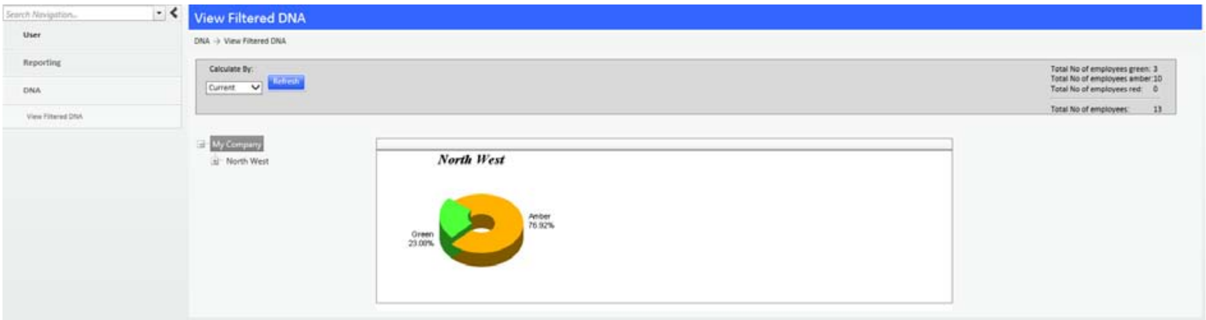


Figure 29: View Filtered DNA

Expand the hierarchy at the left hand side to your team results.

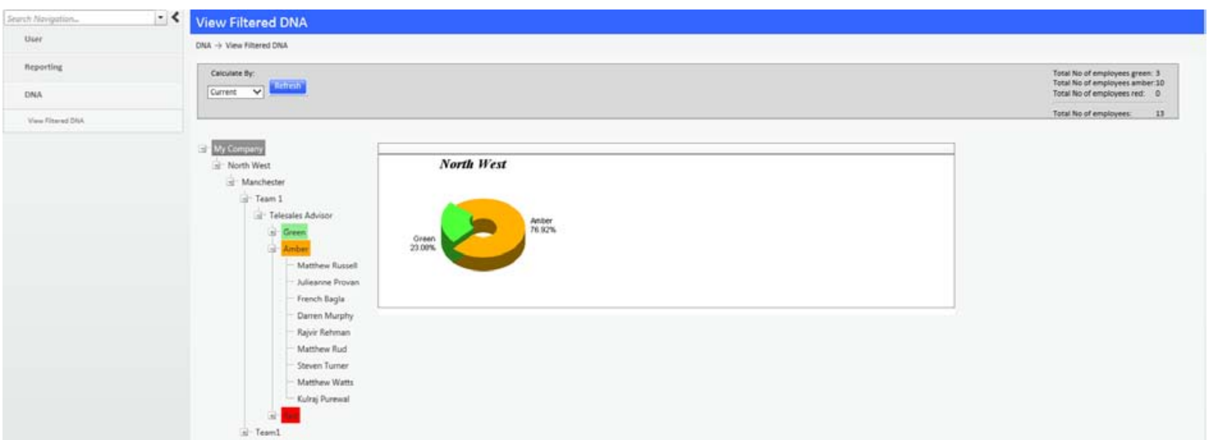


Figure 30: View Filtered DNA Hierarchy

Click on an individual team member to view their performance. The Alerts can be expanded in the right hand window to give a high level of which key performance data needs attention.

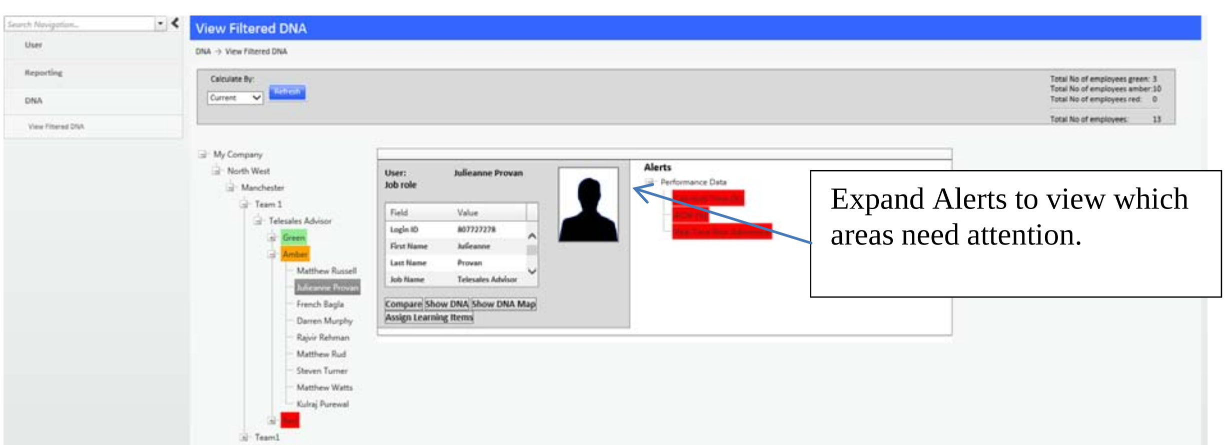


Figure 31: Viewing alerts

Click on **Show DNA** to give a high level view as per the example below.

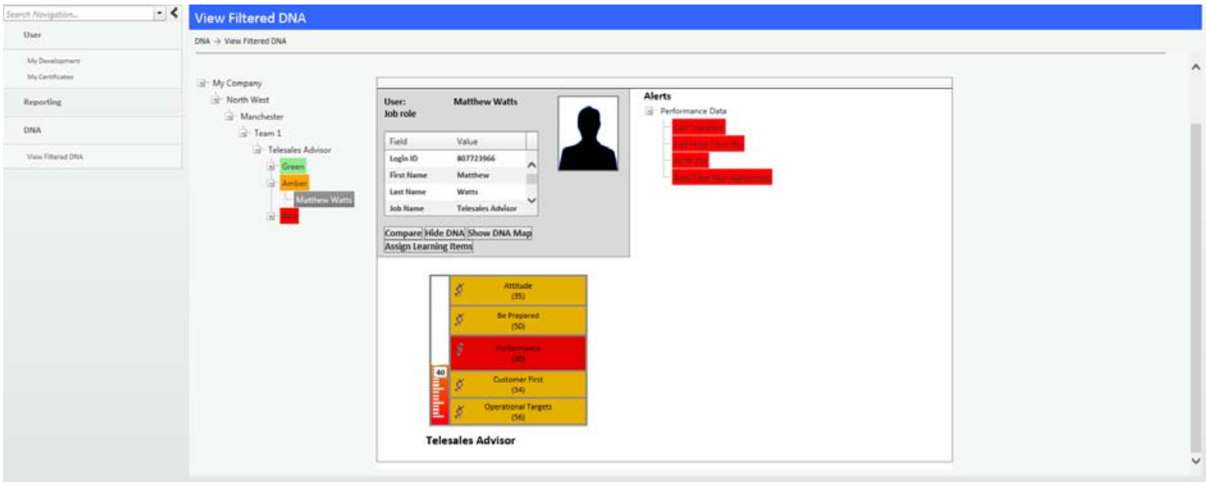


Figure 32: Viewing DNA Data

By clicking on **Show DNA Map** this will give a full break down of what key business data makes up the job role, with Red requiring immediate attention, Amber needing some attention and Green exceeding requirement.
To increase the size of the viewing window the side menu bar can be closed and the window can be maximized.

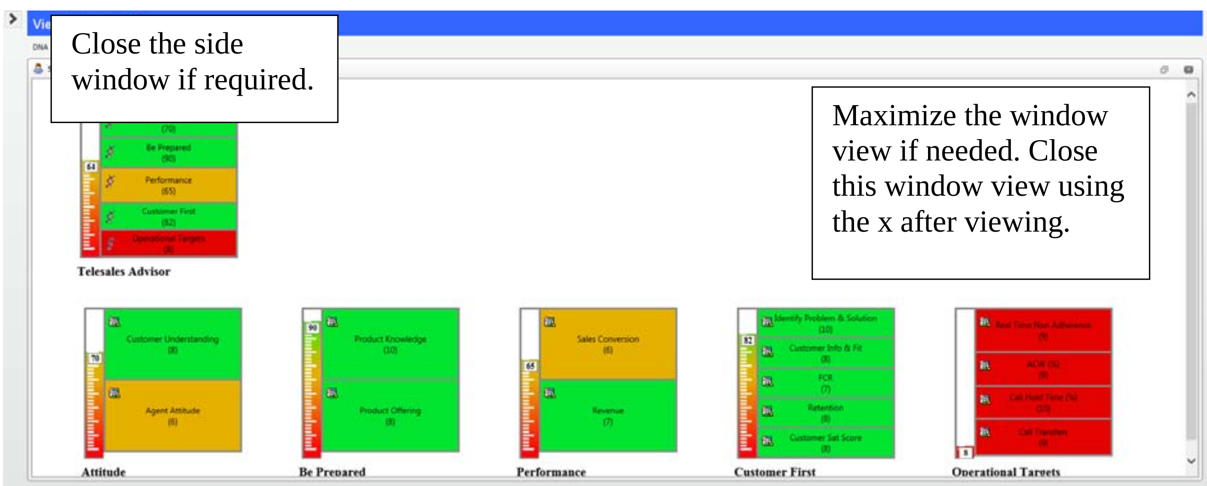


Figure 33: Viewing DNA Map

You will now be able to see exactly which areas need attention.
Close the window using the x in the top right hand corner.
To view any associated learning items that might be available for you to assign to an individual to support their development click on **Assign Learning Items**.

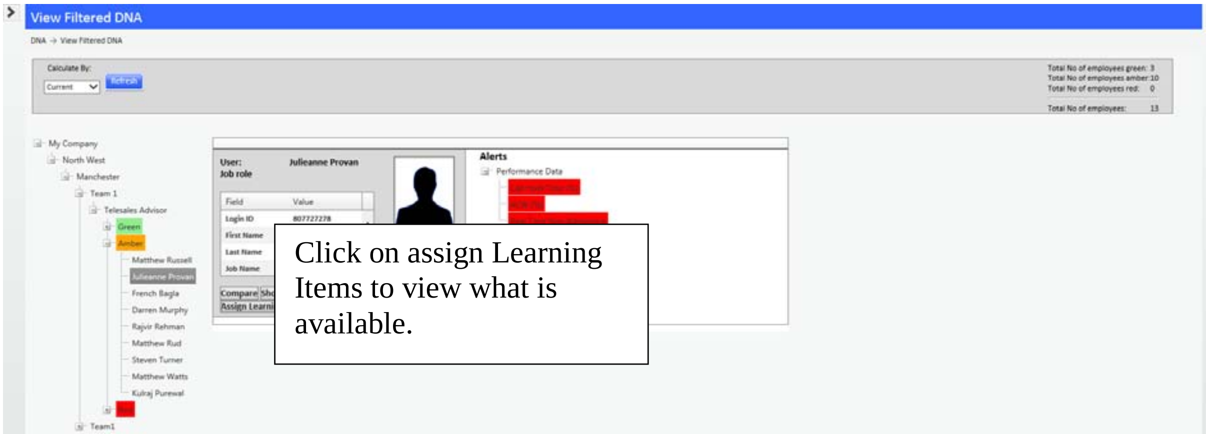


Figure 34: Assigning Learning Items

Recommended learning items will be presented as per the example below. Tick the box at the left hand side to select and assign them to the team member. In the example below Objection Handling has been selected.

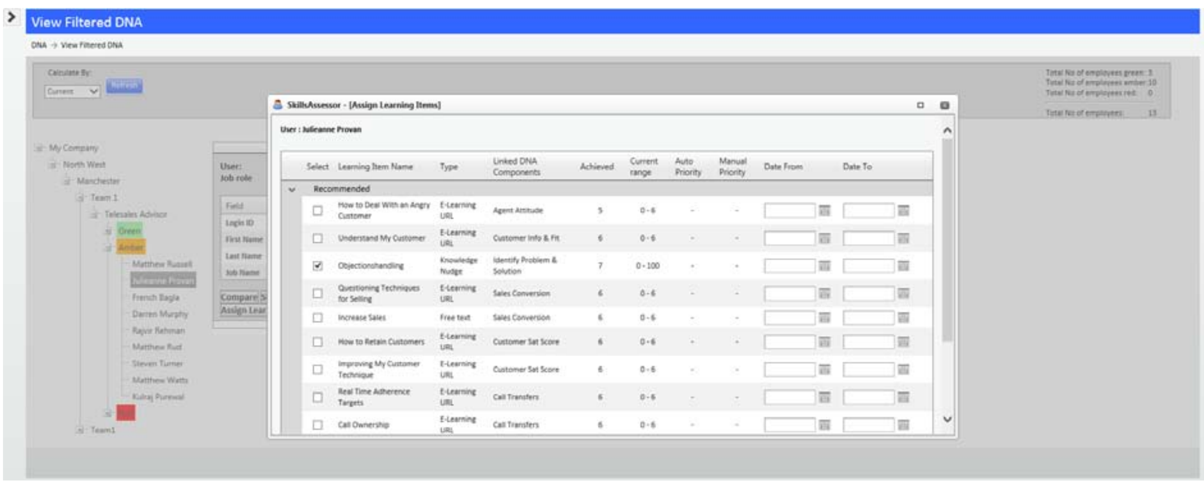


Figure 35: Assigning Learning Items

Scroll down to the bottom to select **Assign and View Users Report.**

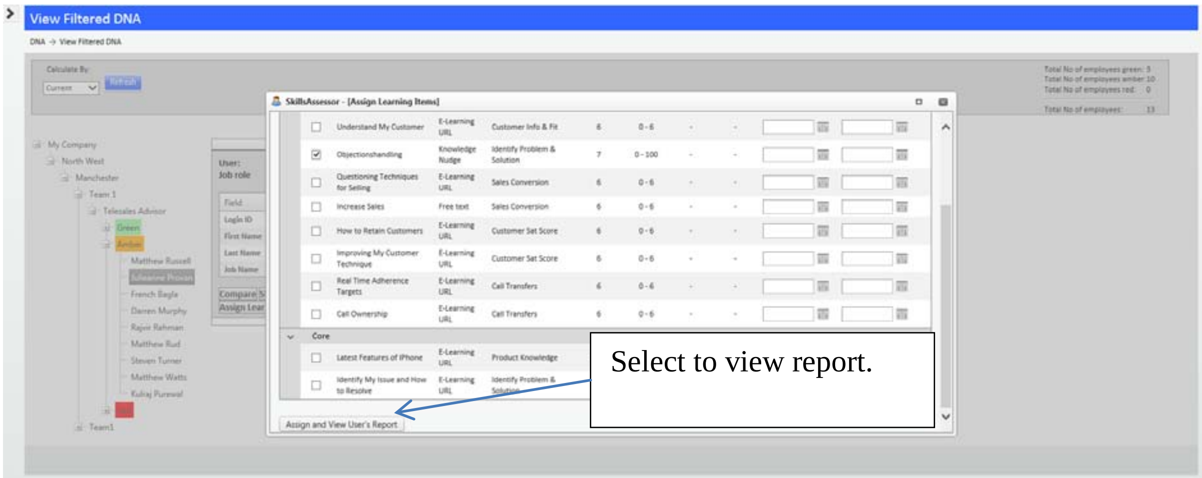


Figure 36: Assigning and Viewing User Report

A Development Plan will be created for the team member and available for selection as a tab in their My Development window.

Figure 37: My Development

By selecting the **My Development Plan** tab this will list all of the learning items assigned for them to take.

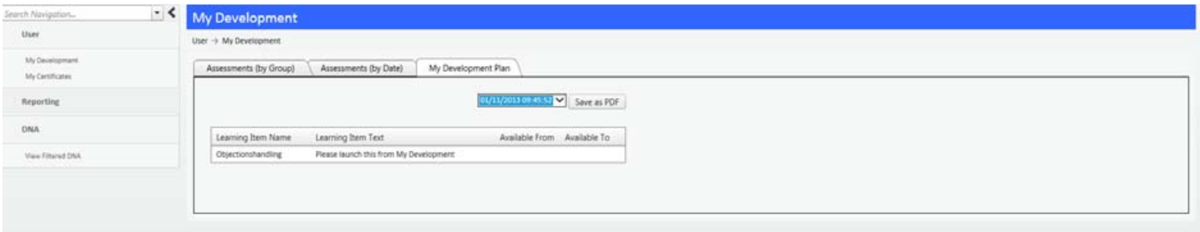


Figure 38: Saving the Development Plan

Under the Learning Item Text they can click the link to launch the learning content.

Changing Your Password

To change your account password select the `Change Password` link from the navigation menu. Enter your existing password and new password into the form, then click `Save` to confirm the change.

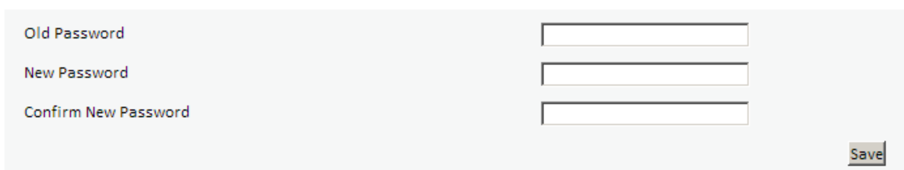


Figure 39: Changing your password

Logging Out

To logout ensure that you have no open assessments and click the click `Logout` link as shown below.

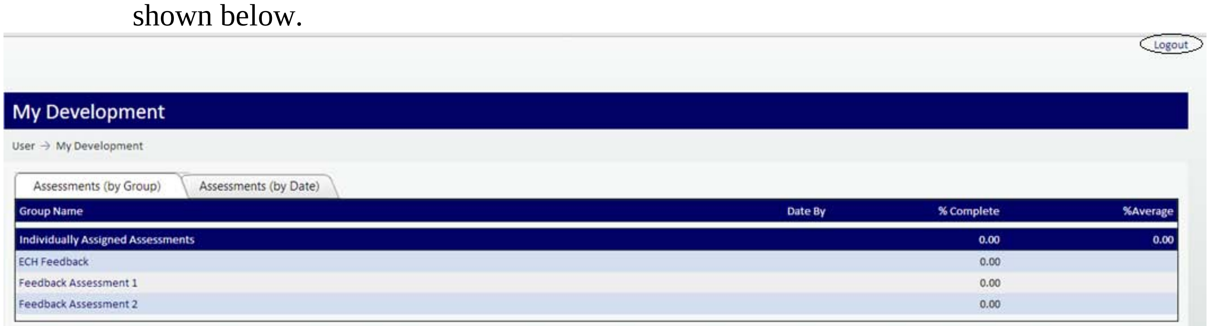


Figure 40: Logout