

Genesys Skills Assessor 8.1.127

# **User Guide**

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# Preface

Welcome to the *Genesys Skills Assessor 8.1.127 User Guide*. This *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 <u>Genesys documentation website</u>

## **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 end users of 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 <u>Techpubs.webadmin@genesys.com</u>.

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If you have purchased support directly from Genesys, see the <u>Contact Information</u> on the Customer Care website. Before contacting technical support, refer to the <u>Genesys Care</u> <u>Program Guide</u> for complete contact information and procedures.

### **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 User Guide

## Logging In

The Assessment module is accessed either from the Internet or over the company intranet.

After you access the application, a screen similar to the one shown in Figure 1 if your system is set to use Form-based authentication, otherwise you may be logged in automatically via your Active Directory credentials.

Welcome	
To login, enter your User	Name and Password below
Ihese details are case-sensiti	ve
Enter Your Details	
Select Tenant	Blue 💌
Login ID	
Password	
	Continue
Trouble logging in?	
This website uses a Cookie to remem accept Cookies, you will not be able to	ber your login details. If your browser is unable to o login
To try and remedy this, check that you Cookies cache.	r browser is able to accept Cookies, or try clearing your

Figure 1: Welcome Screen

After entering your unique user name and password, click Continue. The My Development screen will be displayed, as shown below. This screen contains any assessments and learning items that have been assigned. Learning items may include useful website links, text, knowledge nudges or other assessments developed by trainers or managers.

My Development			🖌 Options 🛱 Refrest
Assessments (by Group) Assessments (by Date)			
Group Name	Date By	% Complete	%Average
New User Group		0.00	0.00
Handsets - Iphone 4 - June 2011	15 Jul 2012	0.00	
Financial Core Skills	9 Jul 2012	0.00	
Sales Induction Knowledge Check	14 Jul 2012	0.00	
Telecoms - Skills DNA Assessment	12 Aug 2012	0.00	
August Agent Feedback	25 Aug 2012	0.00	
Individually assigned assessments		N/A	0.00

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 on the User tab, as shown below.

Under Group Name will be a list of any assigned assessments.

If the assessments are not visible, click the Group Name bar, which will then expand to reveal whether there are any assessments.

If an assessment has to be completed by a certain date, there will be a date in the Date By column.

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



Figure 3: Assessments on the My Development Screen

To start taking an assessment, click the name, as shown in Figure 4.

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 4: List of assessments

This will display a screen similar to the one shown in Figure 5.

At the bottom of the screen is an option to check that any audio can be heard. Click the Play button to test this.

In this example, there is a document that must be read before the assessment can be taken. Click the icon below the Please View Before Accessing the Test link. The application will not allow the assessment to be taken until the document has been viewed.

After clicking the link, the document will be displayed. After you have read the document, close it by clicking the X in the top-right corner. The screen for the assessment will then be displayed again, as shown below.

When you are ready to take the assessment, click Start.

To close the assessment at this time, click CLose.

Hello, demo demo
Assessment: Assessment with nudge
I Please View Before Accessing the Test
Assessment Details
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.
to answer later.
A Navigator will be displayed for your convenience. 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
Start Close

#### Figure 5: Starting an assessment

## **Question Examples**

There are different types of assessments and questions. If the Navigator appears on the left side of the window, you can click a question to answer it.

If the assessment 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 the answer, click Next to move to the next question. If the Navigator is available, you can click the circles above the question to move between different questions/pages instead of clicking Next as shown below.

💿 localhost/ProductUpdate/Test/?AssessmentID=14 - Google Chrome
Image: Incalhost/ProductUpdate/Test/?AssessmentID=14
S Time remaining: 6:55
Page 1/9 • • • • • • •
How many cameras does the iphone 4 have?
01
© 2
◎ 3
© Do Not Know

Figure 6: The Navigator

After each question has been completed, the Navigator will be updated (if available) to indicate which questions have been completed, as shown above.



Figure 7: Viewing attached images in full screen mode.

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

😨 localhost/ProductUpdate/Test/7AssessmentID=14 - Google Chrome	*
D localhost/ProductUpdate/Test//AssessmentD=14	
▶ Time remaining: 14:49         Page 4/9       ● ● ● ● ● ● ● ● ● ● ●	
For this question, you may click here to visit SLS Website How much is an iphone 4, Black, 16GB on Pay As You Go. The attached video clip may assist you.	
● £504.99 ● £399.99 ● £408.07 ● Don't Know	
← ✓ →	

Figure 8: Assessment with Media Attached

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



**Figure 9: Listening to the attachment** 

Once you've finished listening to the attachment, click the 'X' icon in the top right of the window to return to the assessment. An answer then needs to be selected from the available answers. Click one of the buttons on the left side to select the correct answer. In the example shown in Figure 11, there is the option to access a website. Clicking the link will open the website.

Figure 10: Navigator with website link

Continue with the assessment until you have answered all questions. When the assessment has been completed, click Finish to close the assessment.

Notification that the assessment has been completed will be displayed, as shown in Figure 11. Follow the instructions to close the window.





Feedback questions similar to the ones shown in Figure 13 may also be included. When this type of question is presented, select the relevant rating by clicking the radio button, as shown in below. If you have been assigned a 'combined feedback assessment', you will be required to complete the feedback assessment twice; once by yourself and the second time in a collaborative fashion with your manager. You will be required to provide your user password when completing the combined feedback assessment in order to show that you agree with the provided answers.

localhost/ProductUpdate/Test/?	AssessmentID=14 - Google Chrome	<b> X</b>
localhost/ProductUpdate/Test/	AssessmentD=14	
🕥 Time rema	ining: 14:42	
Page 10/10	••••••	
The training roo	m was at a comfortable temperature?	
© Strongly D	lisagree	
Disagree		
🗢 Neither Ag	gree or Disagree	
© Agree		
C Strongly A	gree	
Comments		
	* You will only be able to enter comments once you have selected an answer	
The trainer was	knowledgable?	
© Strongly D	Disagree	
O Disagree		
Neither Age	gree or Disagree	
Agree		
Strongly A	gree	
© Strongly A	gree	

#### Figure 12: An Example of a feedback 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: Assessment 100% Completed

## **Viewing Results**

To view the results of any completed assessments, click the Admin Reports tab. A screen similar to the one shown below will be displayed. Click the required user in the left pane.

Report filters:	Start Date 23-Jul-2012 End Date 22-Aug-2012	Image: Construction only     Image: Construction only       Image: Construction only     Image: Construction only       Image: Construction only     Image: Construction only	Export
Agent (Lori Obborn)     Select All	A V D	The report needs to be rebuilt to reflect your selections (Rebuild report)	

Figure 14: Results of Completed Assessment

This will reveal a list of assessments that have been completed. These can be filtered by date range using the date picker filter at the top of the page.

After you click Rebuild report, the information will be displayed. Click the assessment name to expand and view any lower-level results, as shown below.



Figure 15: Detailed Results

To view the individual question results, click the module name, as shown below.



Figure 16: Individual Question Results

If the option to view the question detail is available right-click the question, then select View Detail, as shown below. The question detail will then allow you to see the answer that you selected, together with the correct answer.

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.



After you click View Detail, the information will be displayed, as shown below.

	te 29-Jul-2012 28-Aug-2012				ted position only ierarchy 2 🗘 tevel(s) down	
e manager (Socialis)	> F	dsets - iphone 4 - June 2011 Iardware Doerating System	6		module nar he question	ne to expand level.
		phone 4 contracts How much does the lphone What would be the cheapes leatures		0.00% 0.00% 0.00% 0.075%		
		<b>•</b>	Numeric Answer		Result	<b>×</b>
			How much does the iphone 4 16Gb black h month, 21.50/month contract?	andset cost on a 24	HILDON'L	
Select All	~	Correct A.	399			
Handsets - Iphone 4 - June 2011 (2)		Eduardo Garcia	1 [Did not match any valid answer]	9	Vitron	
		Ann Larson	1 [Did not match any valid answer]	()	100.00% (2)	

Figure 18: Individual Question Results

## **Viewing Feedback Results**

If you have been completing any feedback assessments, you may have access to the Feedback Results Report page.

Feedback Results Report	
	Start Dark 23-Jul-2012 En
C Acres -	
e Lori Osborn	The report needs to be rebuilt to reflect your selections Rebuils report
< h	

Figure 19: Feedback Results Report Page

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 21.

Click **Rebuild** report to view the information.



Figure 20: Completed Feedback Assessments

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



Figure 21: 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 obviously depend if the usera has also completed their feedback assessment). Expand the hierarchy to select the required user.



Figure 22: Assessments on the My Development Screen

## 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.

ssessments:	Certificates:
xample Iphone Assessment	Insurance Complaince Certificate - 05/08/2011 11:43:25
	Insurance Complaince Certificate - 05/08/2011 11:56:00

Figure 23: 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 expectations.

There may also be the opportunity for self-learning by assigning learning items to enhance performance based on the results achieved. Your manager will also have visibility of these performance results and assign learning items if required.

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

earch Navigation	View Filtered DNA		
User	$DNA \rightarrow View FitteredDNA$		
My Development My Certificates	Celculate By: Current		Total No of employees green: 0 Total No of employees amber 1 Total No of employees red: 0
Reporting	1919		Total No of employees 1
DNA	and the second se		
Van Phared DNA	S My Company	North West	
		Acter 100 ors.	

Figure 24: View Filtered DNA

Expand the hierarchy at the left hand side to view your results. In this example Amber is the color displayed; therefore expand down to Amber to view yourself and your performance.

Search Navigation	View Filtered DNA		
User	$DNA \to ViewFilteredDNA$		3
My Development My Certificates Reporting	Carcoline By: Current:		Total No of employees preen: 0 Total No of employees anider 1 Total No of employees: 1 Total No of employees: 1
DNA	My Company		
View Filtered DNA	Manchester Tran 1 Tran 2 Transformer Common Mathew Wetts	Telesales Advisor	

Figure 25: Viewing your DNA Data

Click on yourself. The Alerts can be expanded in the right hand window to give a high level of which key performance data needs attention.



Figure 26: View Filtered DNA Alerts

Search Navigation	View Filtered DNA	
User	DNA → View Filtered DNA	
My Development My Certificates	id: MyCompany	^
Reporting	Korth West     User: Matthew Watts     Job tole     Marchester     Job tole	
DNA	Team 1	
View Filmed Disk	Compare Nide DNA/Show DNA Magi	
	Image: State	Ţ

Figure 27: View Filtered DNA Alerts

Clicking **Show DNA** will give a full breakdown 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.

A → View Filtered DNA SkillsAssessor - [DNA Map]	Close the si	de window if		> 1
Joint Control         Attitude           Joint Control         Doi           Joint Control         State	required.			Maximize the window view if needed. Close his window view using he x after viewing.
International State	Product Encodedge     (7)	B) Selection Conservation (1) (2) (3) (3) (3) (4) (4) (5) (4) (5) (5) (5) (5) (5) (5) (5) (5	(2) Merrithy Problem 8: Solid (3) (2) (2) (2) (2) (2) (2) (2) (2) (2) (2	Image: State
Attitude	Be Prepared	Performance	Customer First	Operational Targets

Figure 28: DNA Map

You will now be able to see exactly which areas need attention.

Close the window using the  $\mathbf{x}$  in the top right hand corner.

To view any associated learning items that might be available for you to select to support your training click on **Assign Learning Items**.



Figure 29: 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 you. In the example below Objection Handling has been selected.

User	DNA -> View Filtered DNA															
My Development My Certificanes	Carcorate By															Total No of employees green 0 Total No of employees amber 1
Reporting	Contra (1)	a 54	illsAsses	sor - (Assign Learning Iten	6]											Total No of employees reit 0 Tetal No of employees 1
DNA				Improving My Customer Technique	E-Learning URL	Identify Problem & Solution	5	0-6	2			111		-	^	
View Fittered DNA	My Company North West			Identify My Issue and How to Resolve	E-Learning URL	Identify Problem & Solution	5	0-6		24		1				
	il: Manchester il: Team 1		2	Objectionshandling	Knowledge Nudge	Identify Problem & Solution	5	0 - 100				-	<u> </u>	10		
	Televales Advisor	v	Core													
	st Green			How to Deal With an Angry Customer	E-Learning URL	Agent Attitude	7	0.6	(*)			1				
	Antar Milmon W			Understand My Customer	E-Learning URL	Customer Info & Fit	30	0 - 6	$\sim$	3		-				
	1 (B) (B)			Increase Sales	Free text	FCR	9	0-6			-	100	1	100		
				Call Ownership	E-Learning URL	FOR		0-6				10	t	-		
				Questioning Techniques for Selling	E-Learning URL	Revenue	7	0-6		- 14		10	0	1		
				How to Retain Customers	E-Learning URL	Retention	30	0-6	8	10		-		-		
				Real Time Adherence Targets	E-Learning URL	Call Transfers	7	0.6				-		1		
		A	sign and	View User's Report											~	

Figure 30: Assigning Learning Items

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

User	View Filtered DNA														
in the second se	DNA -> View Filtered DNA														
My Development My Certificates	Comient by														Total No of employees green: 0 Total No of employees amber 1 Total No of employees red: 0
Reporting		🚨 Sk	ilhAsses	sor - [Assign Learning Item	n)									.0	Total No of employees: 1
DNA		1		Improving My Customer Technique	E-Learning URL	Identify Problem & Solution	5	0 - 6	22	14				^	THE REAL PROPERTY AND A
View Ritered DNA	<ul> <li>My Company</li> <li>North West</li> </ul>			identify My Issue and How to Resolve	E-Learning URL	identify Problem & Solution	5	0-6	*		ĺ	二頁 [	-		
	i Manchester			Objectionshandling	Knowledge Nudge	Identify Problem & Solution	5	0-100		12			10		
	- Telesales Advisor	~	Core											1.00	
	it Green			How to Deal With an Angry Customer	E-Learning URL	Agent Attitude	7	0.6	10	9	[	38 [	100		
	- Arthree	2		Understand My Customer	E-Learning URL	Customer Info & Fit	10	0-6					- III		
	10 M			Increase Sales	Free text	FCR		0-6				100	979		
				Call Ownership	E-Learning LIFL	KR	9	0-6	- S		-		10		
				Questioning Techniques for Selling	E-Learning URL	Revenue	7	0-6	÷	12		1	10		
				How to Retain Customers	E-Learning URL	Reten						1997			
				Real Time Adherence Targets	E-Learning UIL	sen Sel	ect	to vi	ew	rep	oort.		100		
		As	sign and	View User's Report										~	

Figure 31: Assigning Learning Items

A Development Plan will be created for you and available for selection as a tab in your My Development window.

earch Navigation	My Development			
User	User $\rightarrow$ My Development			
My Development	Assessments (by Group) Assessments (by Date) My Development Plan			
My Certificates	Group Name	Date By	N Complete	SAvera
Reporting	Teletion		16.67	58
DNA	Handsets - phone 4		100.00	58
	Landine (50N20		0.00	
View Filtered DNA	Sales Induction Encodedge Check		0.00	
	Telecoms - Skills DNA Assessment		0.00	
	Same Value Resigns1		0.00	
	Telecoms - Skills DNA Assessment		0.00	
	Friendal		51.29	41
	Vattenfall			
	Individually Assigned Assessments			

Figure 32: My Development

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

rch Navigation	My Development
User	User + My Development
My Development My Certificates	Assessments (by Group) Assessments (by Date) My Development Plan
Reporting	01(2)(2013 09:05 53 💙 Save as FOF
DNA	Learning Item Name Learning Item Text Available From Available To
Vew Fittered DNA	Objectionshandling Please launch this from My Development

Figure 33: Saving the Development Plan

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

## **Logging Out**

After the assessments have been completed click the **Logout** link to close the application, as shown below.

/y Development			
ser $ ightarrow$ My Development			
Assessments (by Group) Assessments (by Date)			
	Date By	% Complete	%Average
Sroup Name	Date 8y	% Complete 0.00	%Average 0.00
Sroup Name Individually Assigned Assessments	Date By		
Assessments (by Group) Assessments (by Date) Group Name Individually Assigned Assessments ECH Feedback Feedback Feedback Assessment 1	Date By	0.00	

#### Figure 34: Logout