Genesys

Genesys Skills Assessor 8.1.127

User 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

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Your Responsibility for Your System's Security

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Document Version: 81skillsassessor_user_03-2014_v8.1.103.00

Table of Contents

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 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 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 `Techpubs.webadmin@genesys.com`.

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If you have purchased support directly from Genesys, see the Contact Information on the Customer Care website. Before contacting technical support, refer to the *Genesys Care Program Guide* 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.

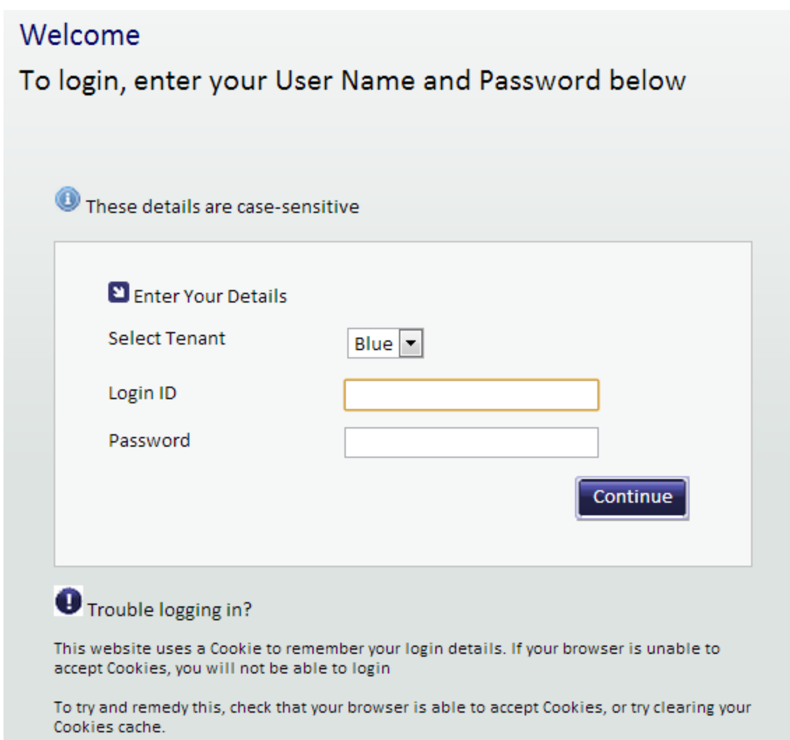


Figure 1: Welcome Screen

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.

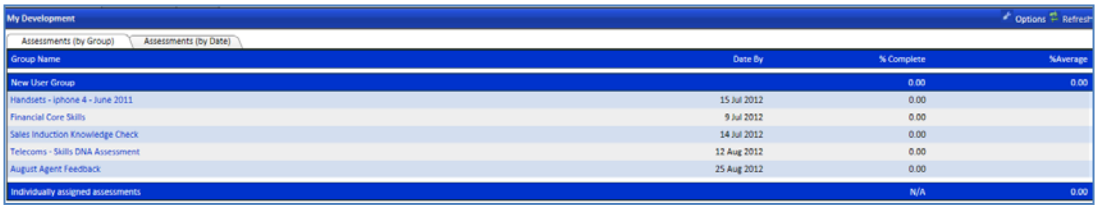


Figure 2: My Development Screen

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.

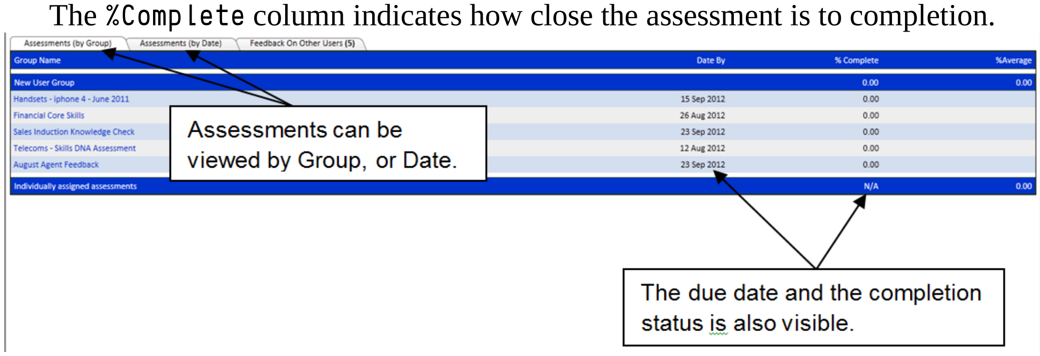
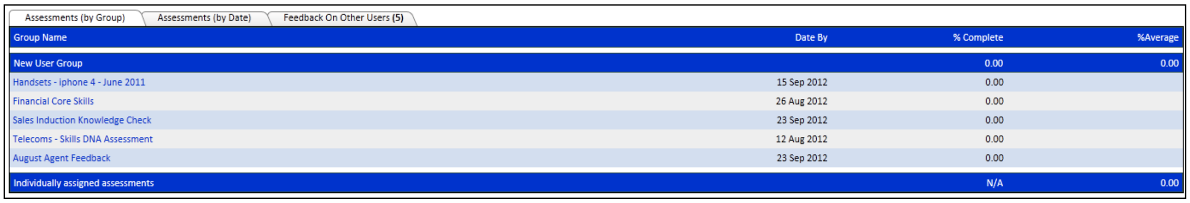


Figure 3: Assessments on the My Development Screen

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



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`.

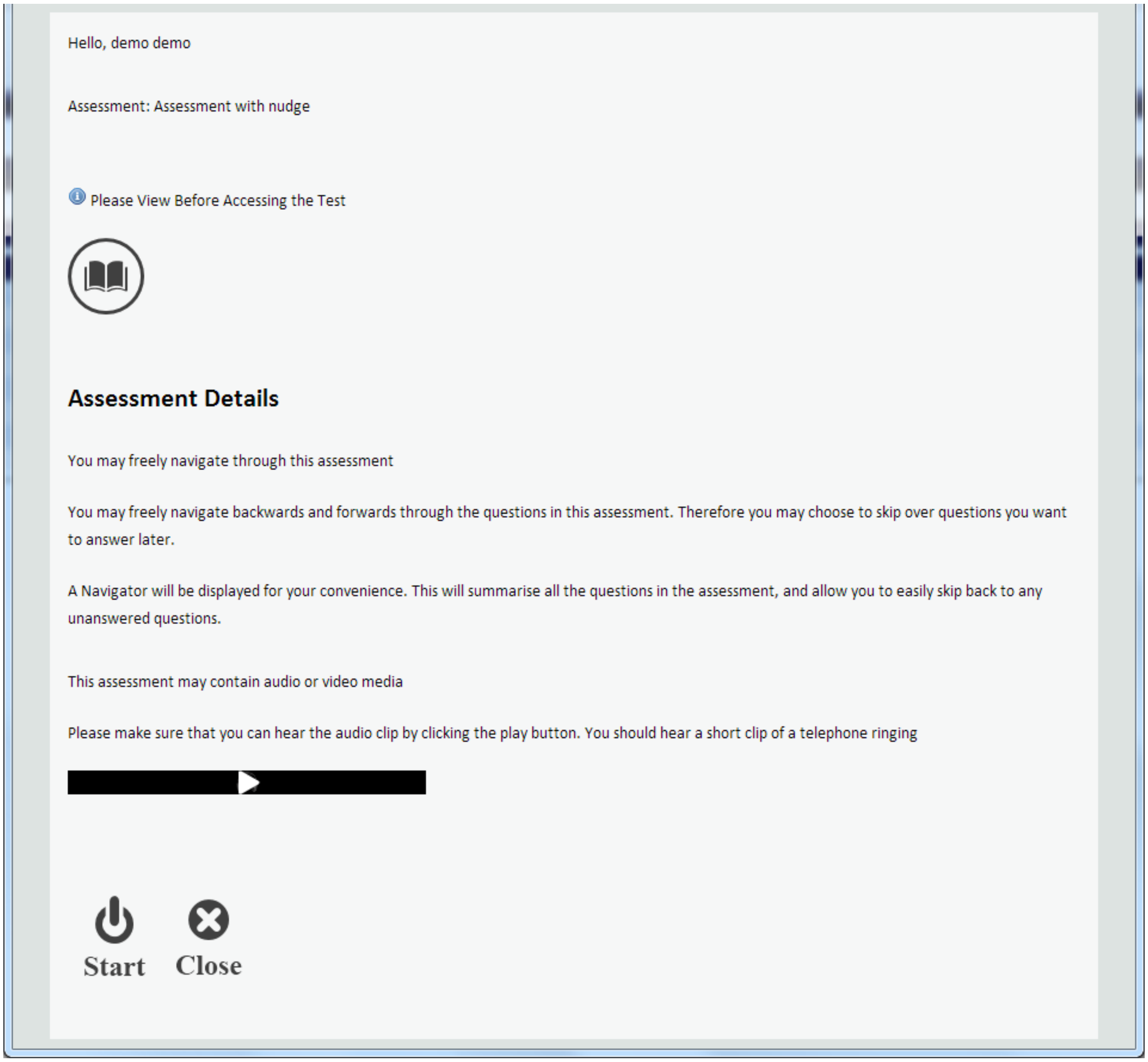


Figure 5: Starting an assessment

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.

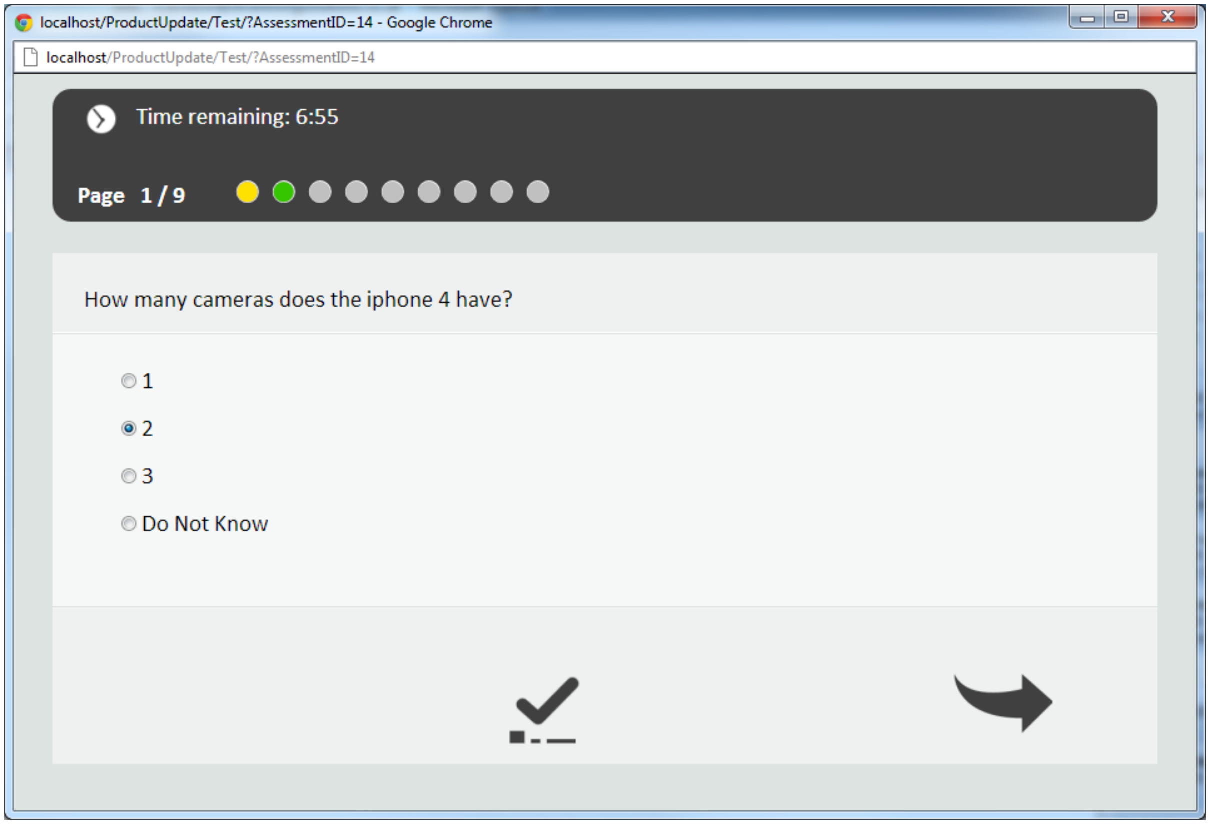


Figure 6: The Navigator

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

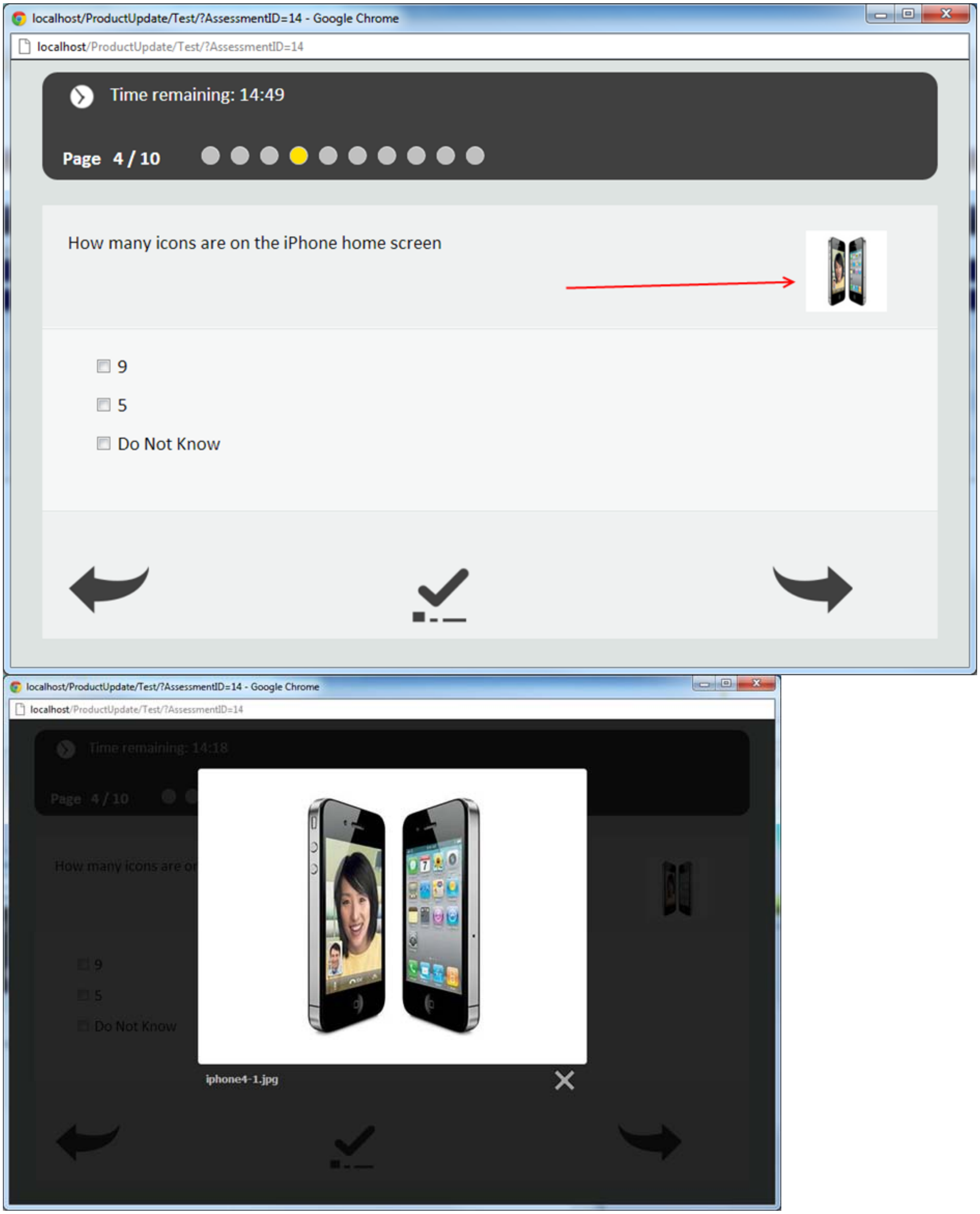


Figure 7: Viewing attached images in full screen mode.

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

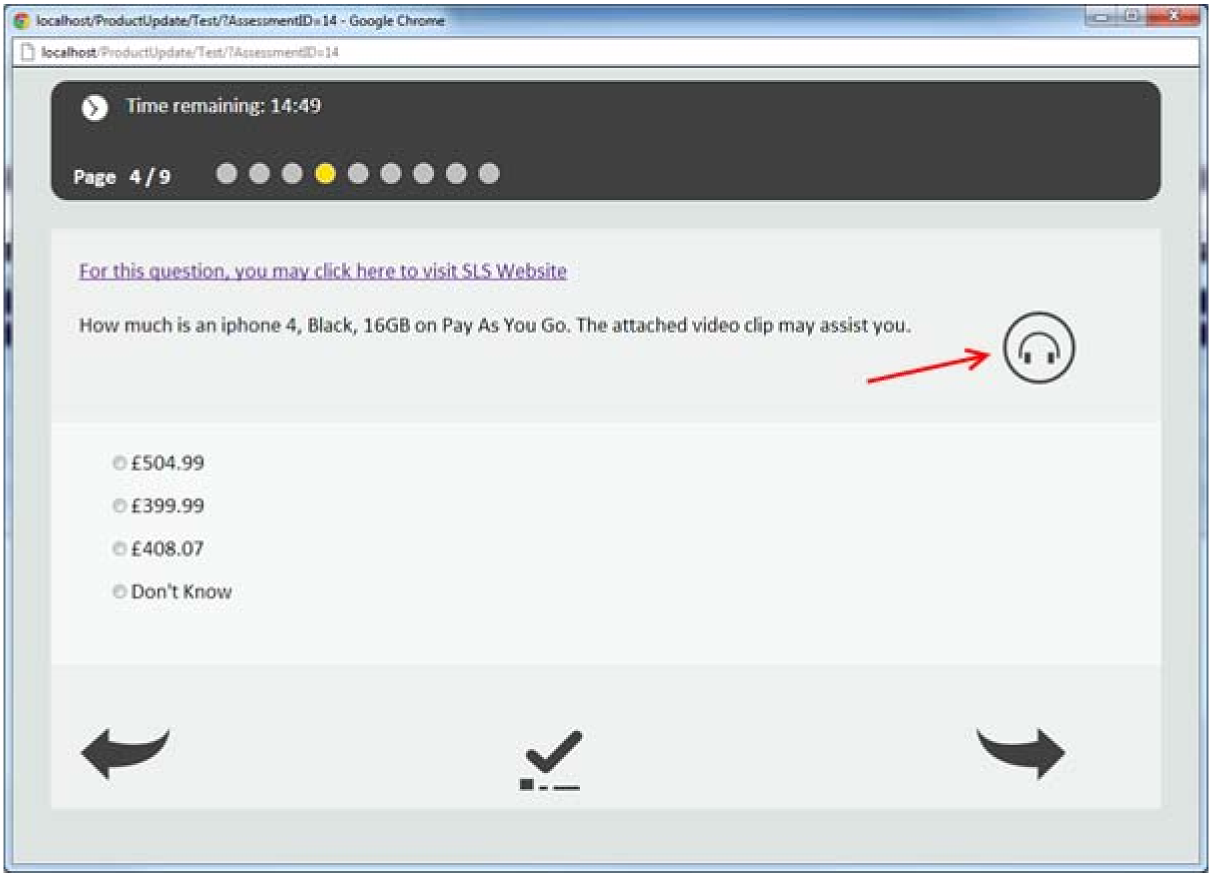


Figure 8: Assessment with Media Attached

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

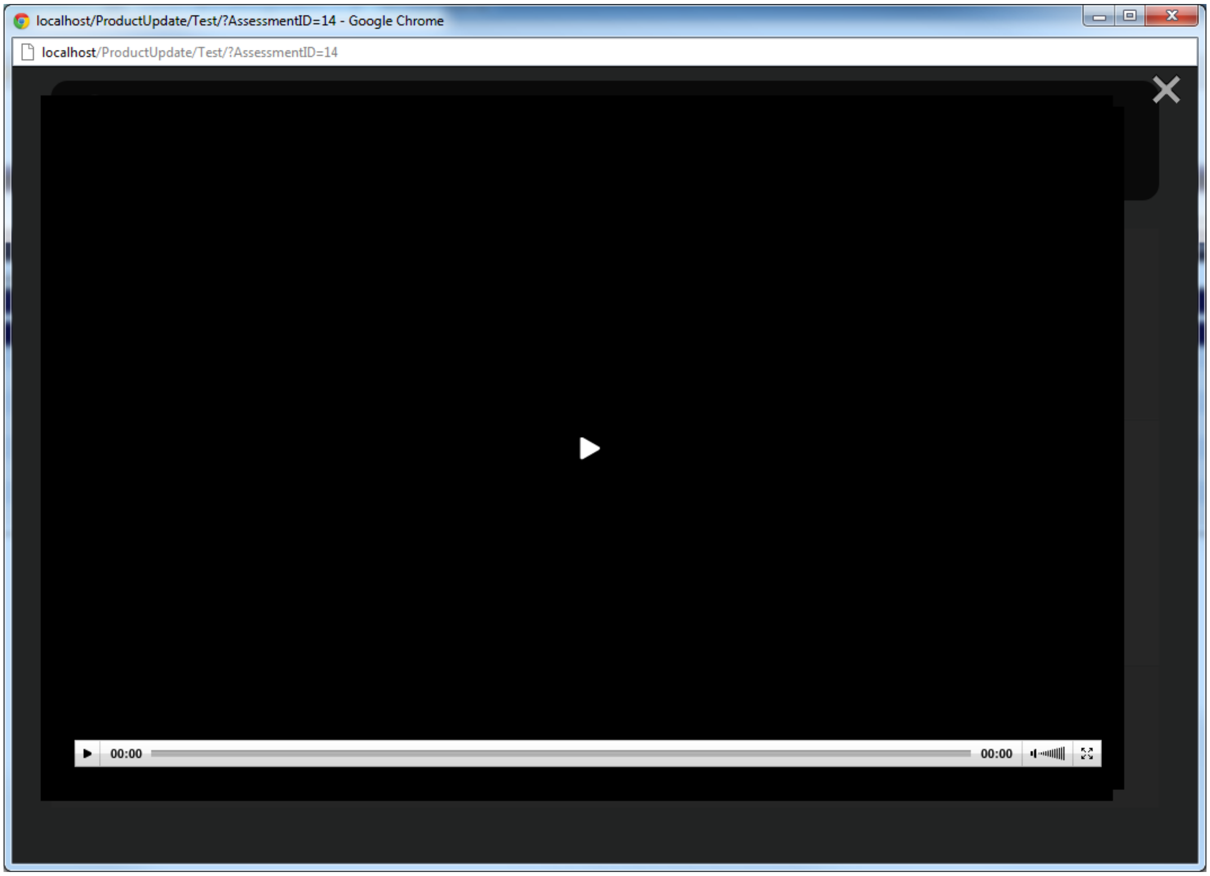


Figure 9: Listening to the attachment

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.

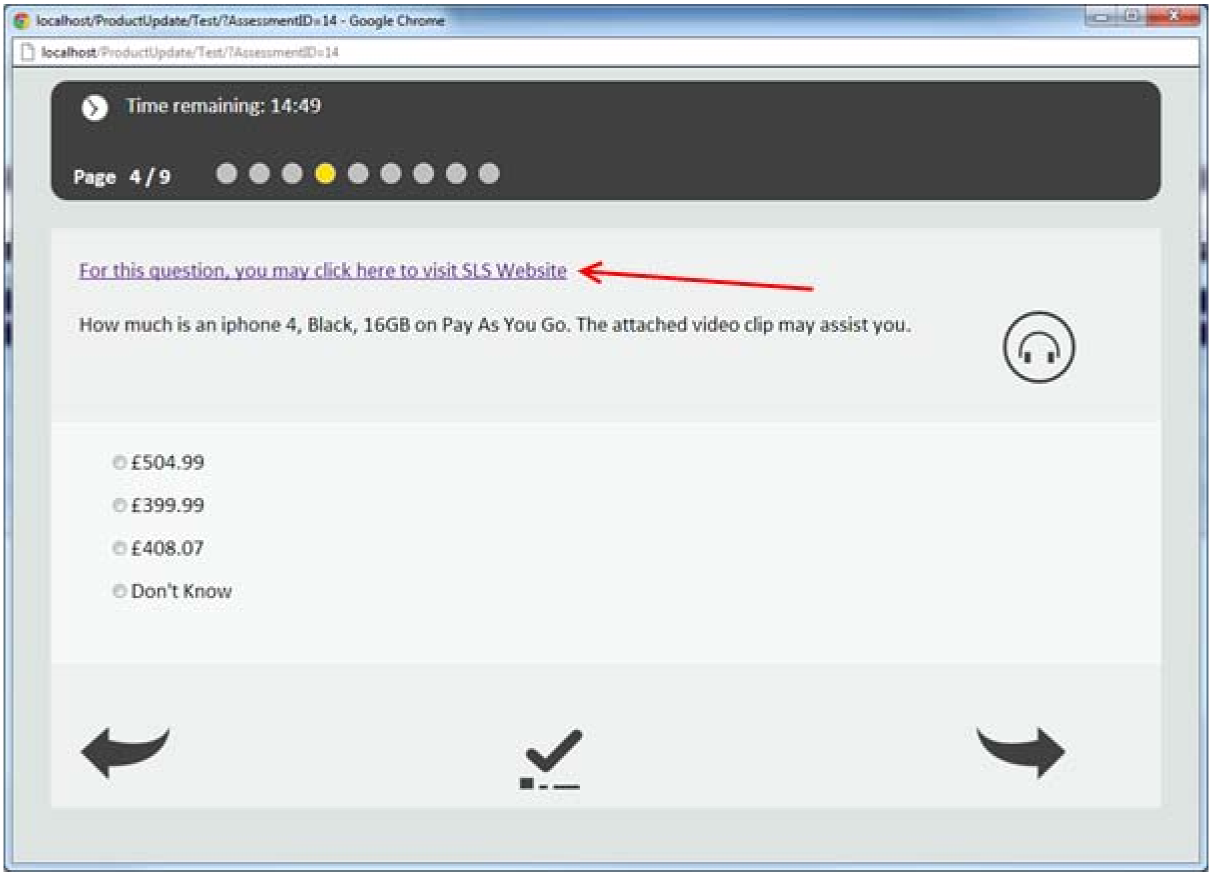


Figure 10: Navigator with website link

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.

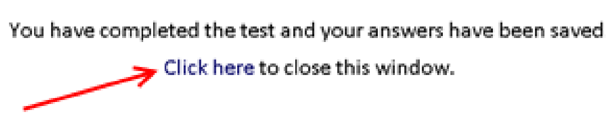


Figure 11: Assessment Completed

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.

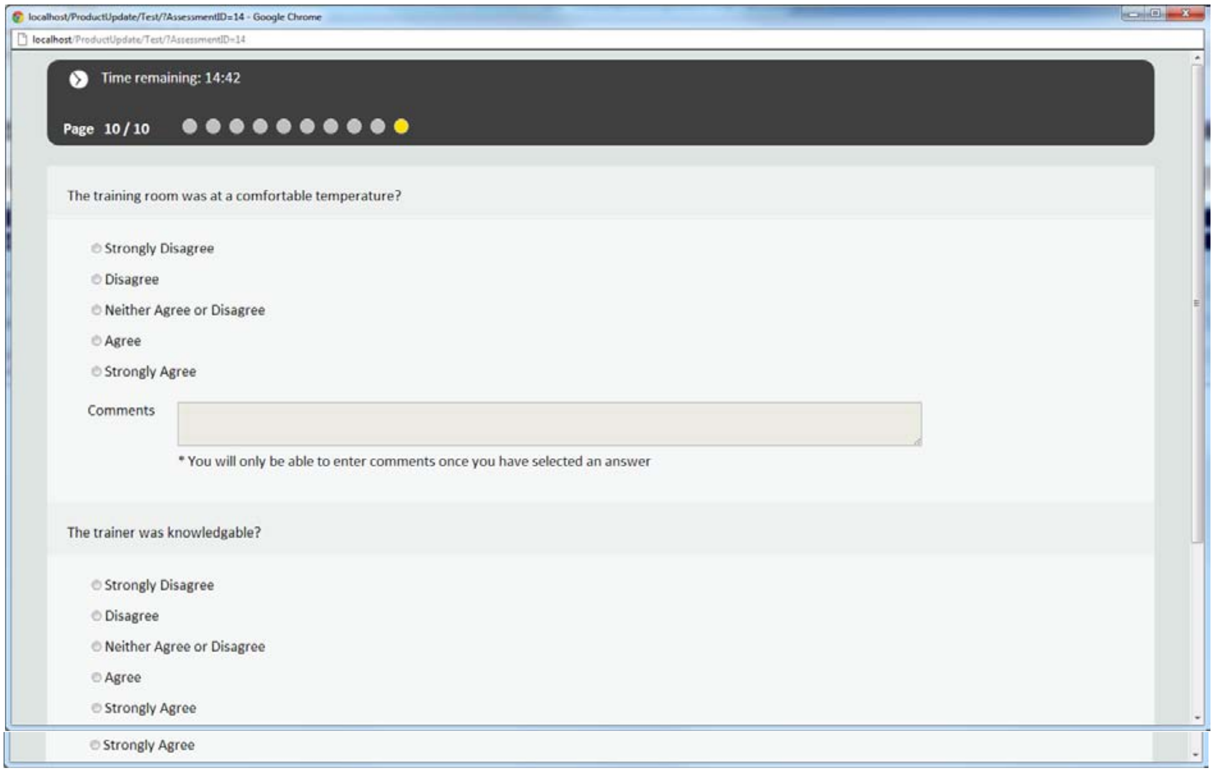


Figure 12: An Example of a feedback question

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.

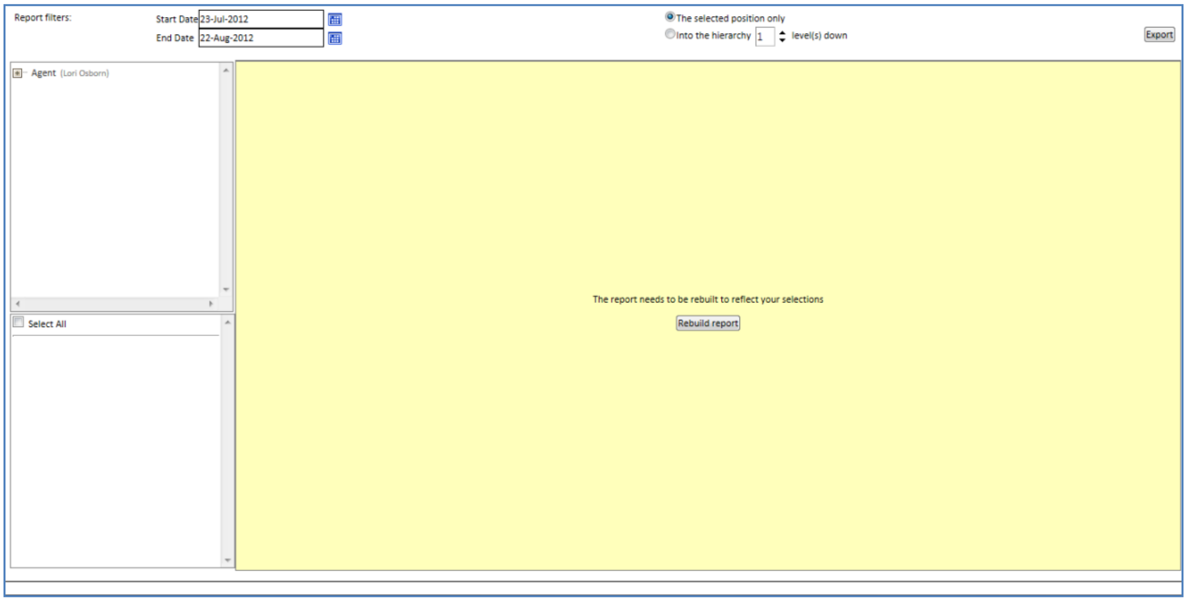


Figure 14: Results of Completed Assessment

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.

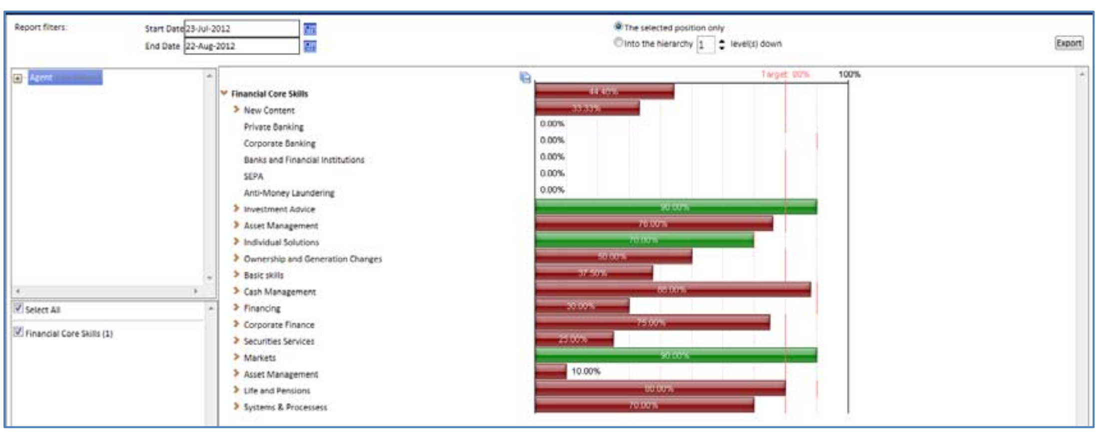


Figure 15: Detailed Results

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.

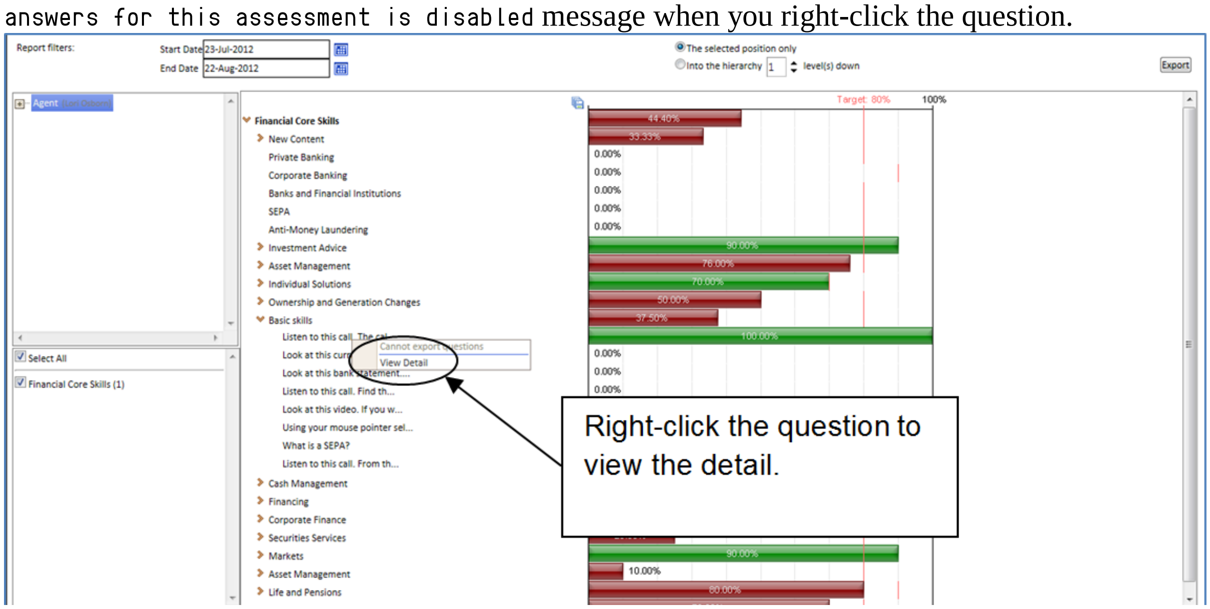


Figure 17: View Detail

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

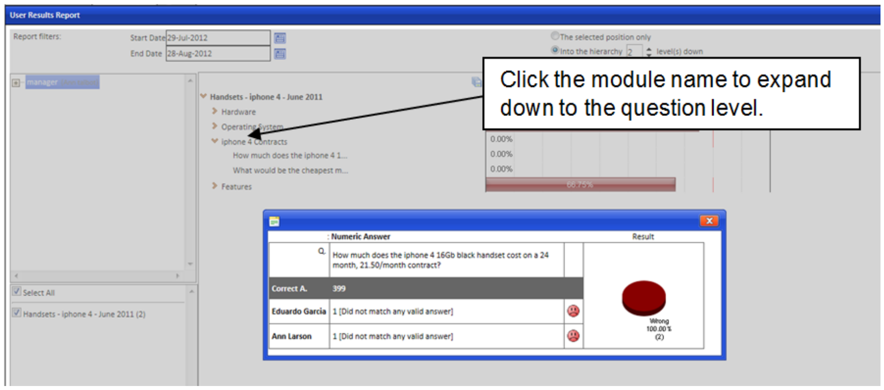


Figure 18: Individual Question Results

Viewing Feedback Results

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

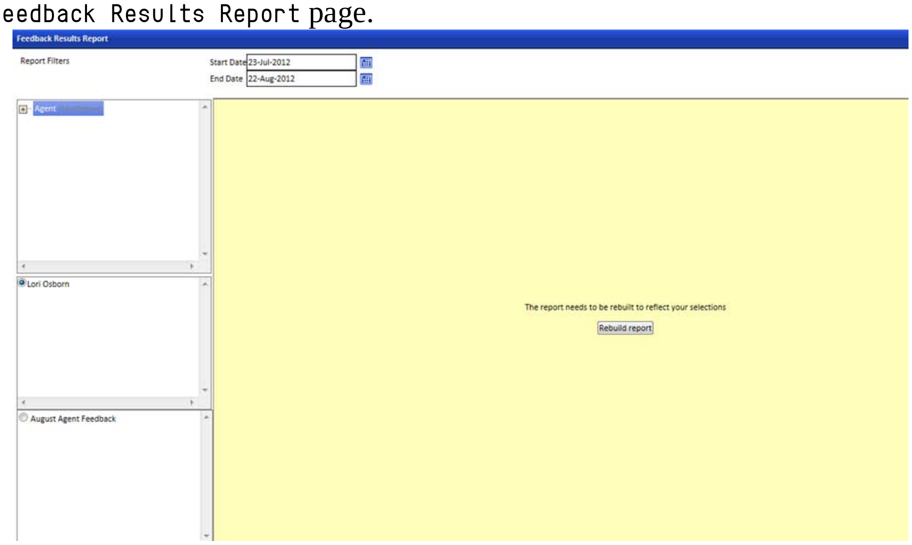


Figure 19: Feedback Results Report Page

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.

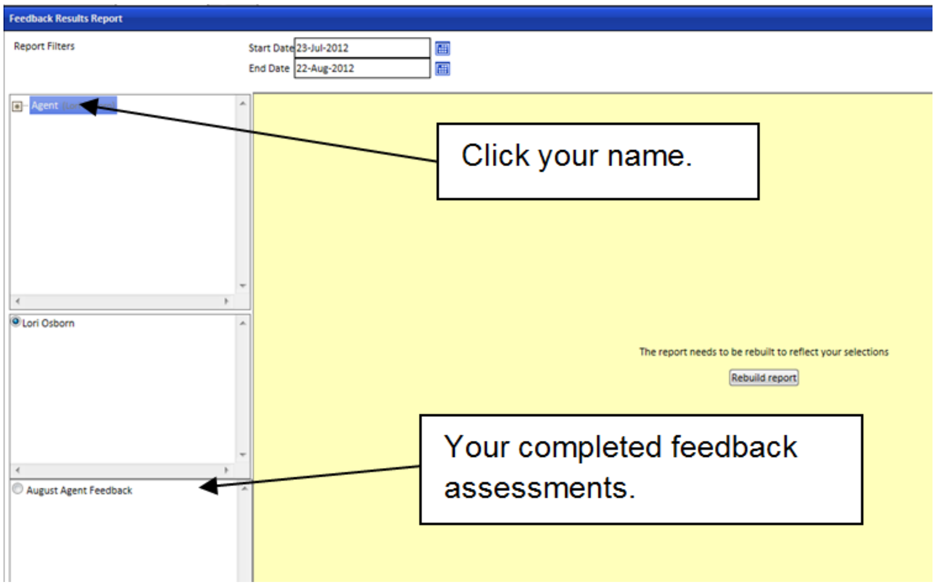


Figure 20: Completed Feedback Assessments

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

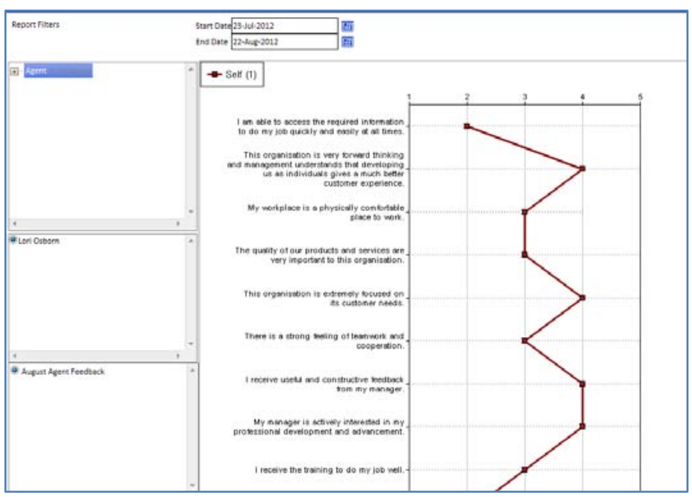


Figure 21: Line Graph Showing Feedback Results

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.

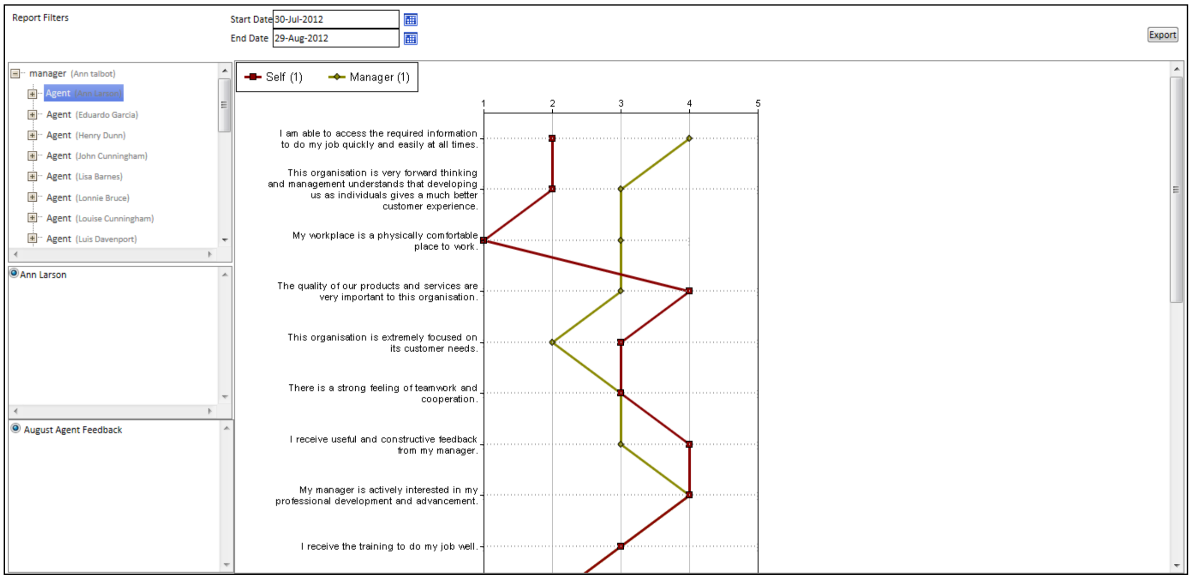


Figure 22: Assessments on the My Development Screen

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.

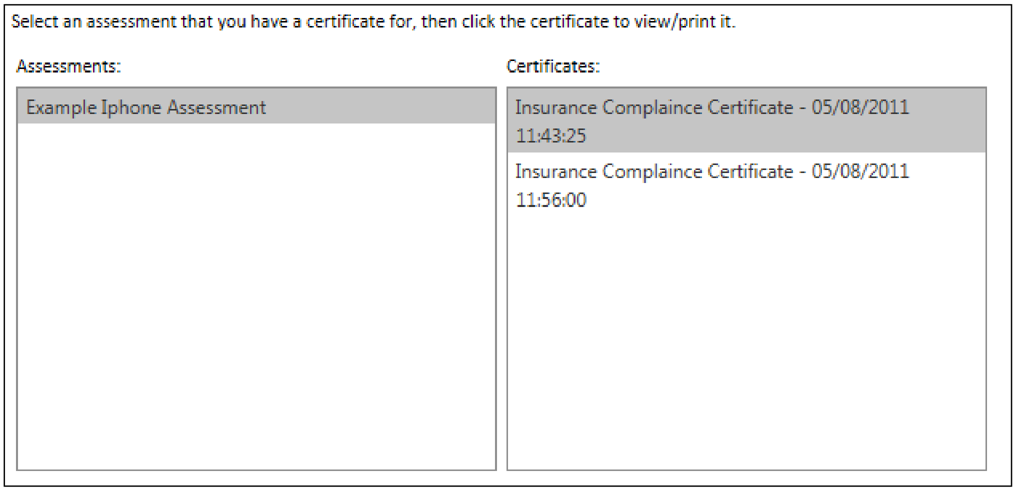


Figure 23: An Assessment with Certificates

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.**

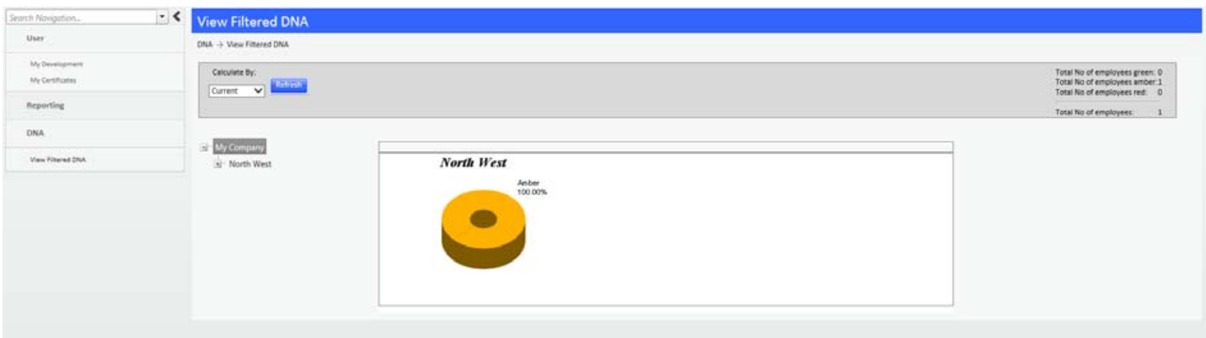


Figure 24: View Filtered DNA

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.

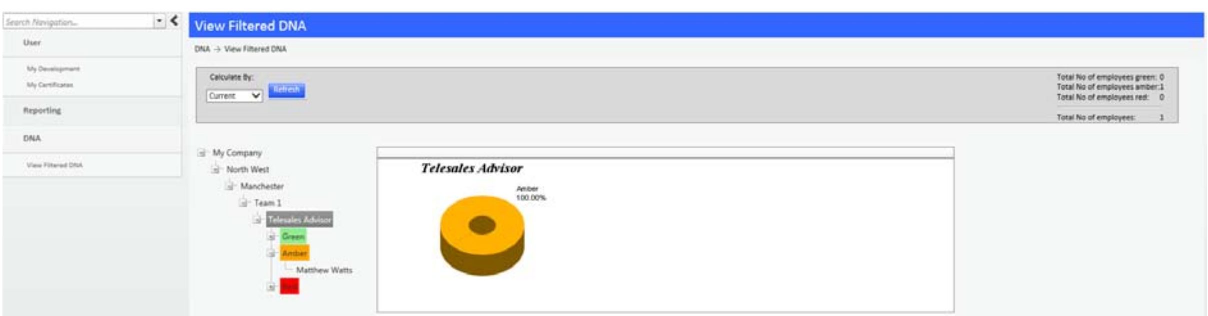


Figure 25: Viewing your DNA Data

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

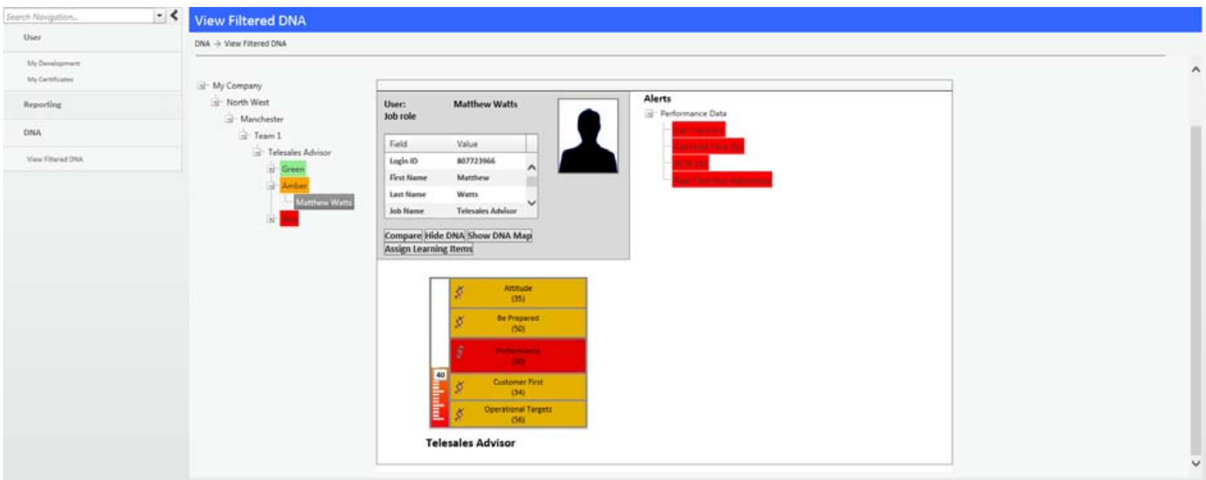


Figure 27: View Filtered DNA Alerts

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.

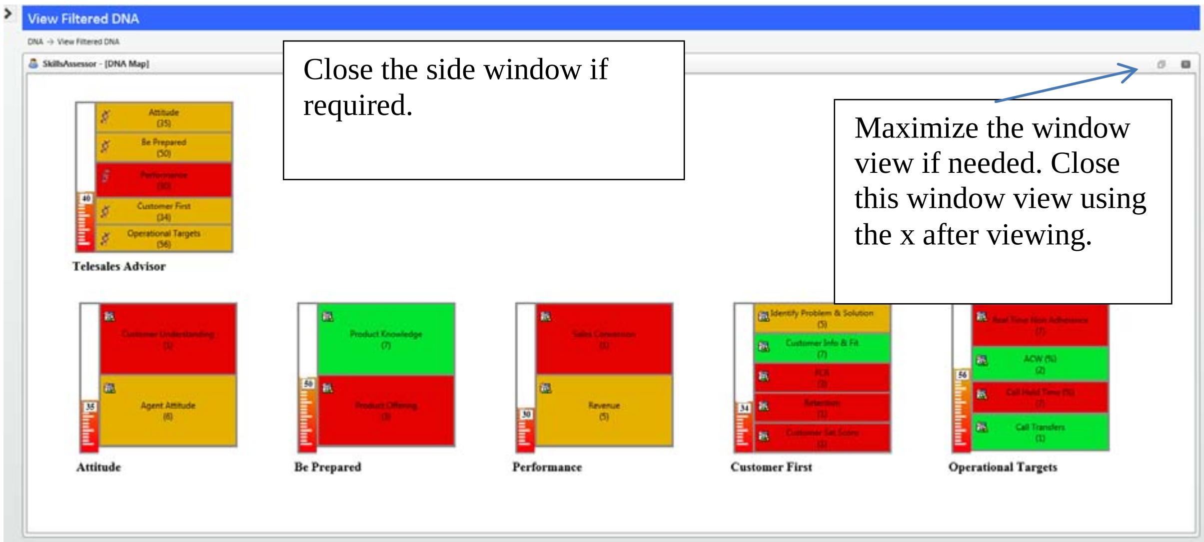


Figure 28: DNA Map

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 select to support your training click on **Assign Learning Items**.

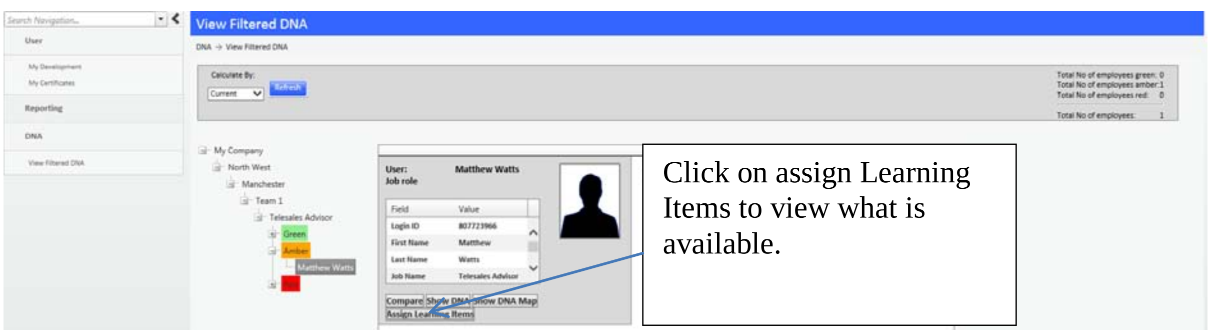


Figure 29: Assigning Learning Items

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.

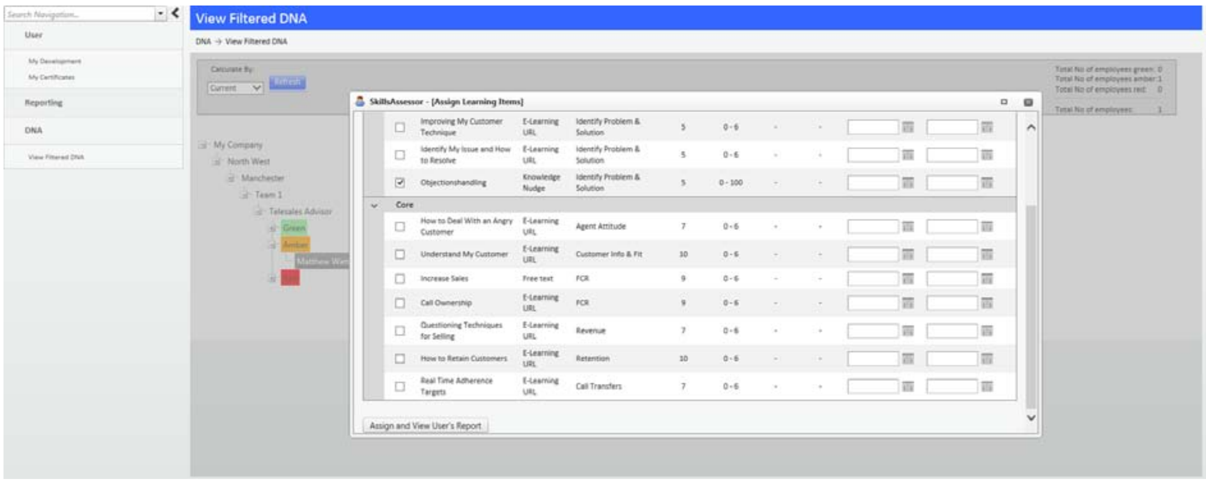


Figure 30: Assigning Learning Items

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

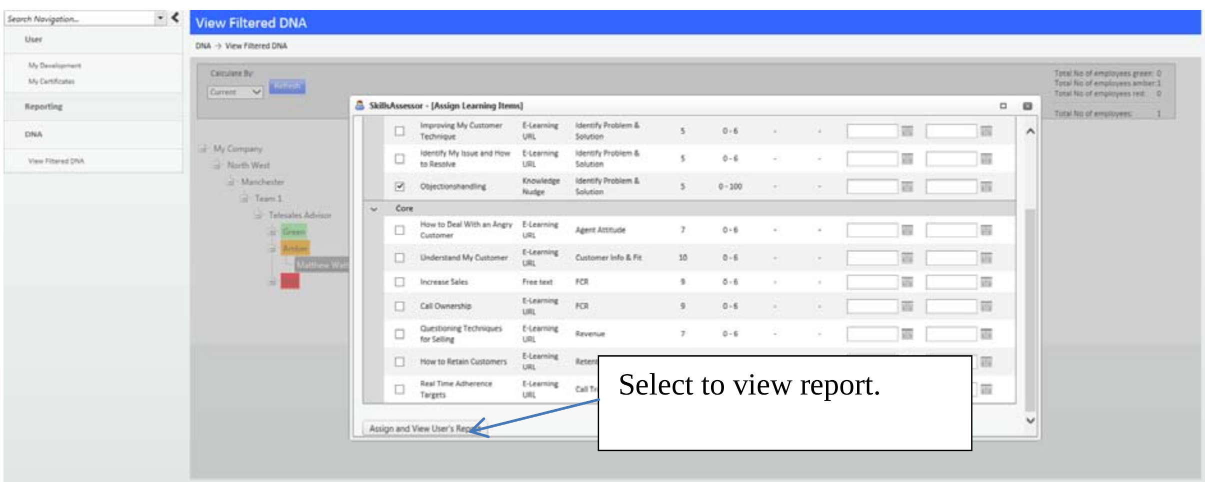


Figure 31: Assigning Learning Items

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

Figure 32: My Development

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

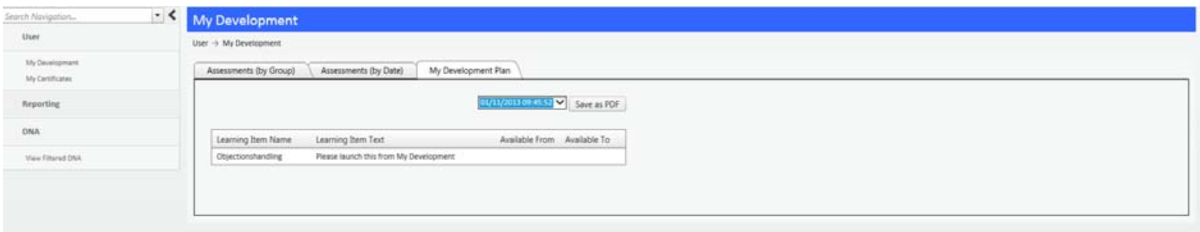


Figure 33: Saving the Development Plan

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.

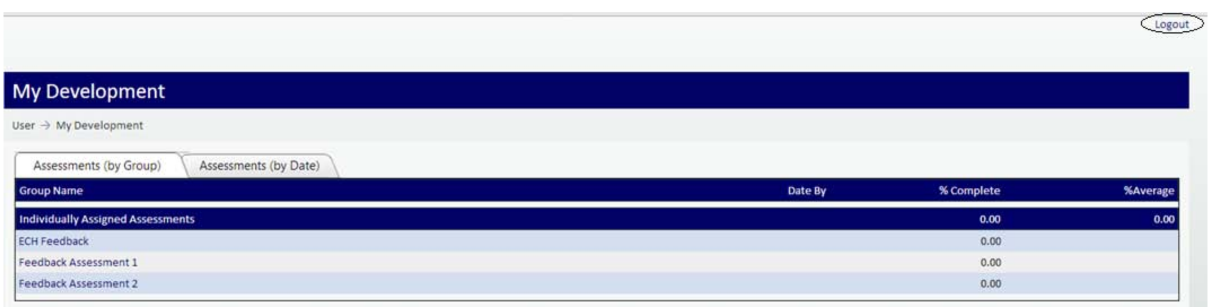


Figure 34: Logout