Genesys Quality Management 8.1

Quality Manager User Guide: CC Manager

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Document Version: 81gqm_us_ccmanager_10-2012_v8.1.501.00

Genesys

Table of Contents

Chapter

1 Introduction

This chapter provides an overview of this document, identifies the primary audience, introduces document conventions, and lists related reference information.

This chapter contains the following sections:

Document Purpose

This document describes the tasks necessary for a Call Center Manager (CC Manager) to use and administer Quality Manager.

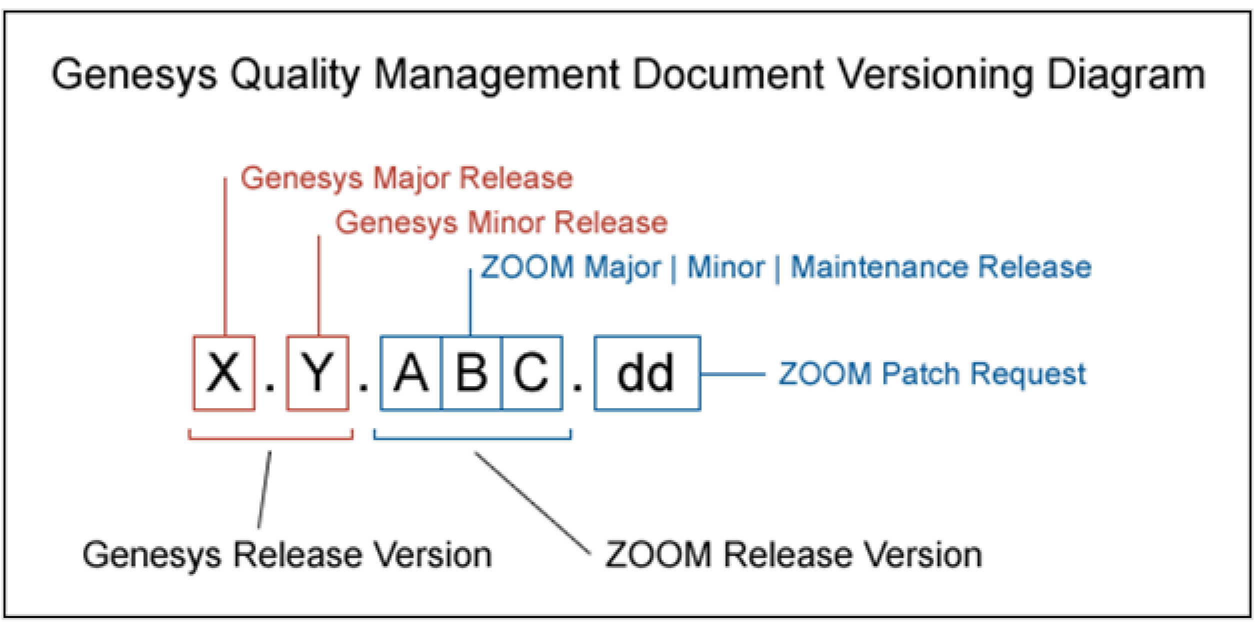
Audience

This document is intended for Call center managers.

Document Version

The Genesys Quality Management products are provided by a partnership between Genesys and ZOOM International. The Genesys Quality Management products use a versioning format that represents a combination/joining of the versions used by these two separate entities. Although the Genesys Quality Management products and documentation use this combined versioning format, in much of the software and logs you will see the ZOOM versioning alone. You need to be aware of this, for example, when communicating with Technical Support.

The version for this document is based on the structure shown in the following diagram:



Typographical Conventions

Names of functions and buttons are in bold. For example: **Upload**.

File names, file paths, command parameters and scripts launched from the command line are in `non-proportional font`.

Referred documents are in italics. For example: see the document *This is a Document* for more information.

```
Code is placed on a gray background and bordered
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Hyperlinks are shown in blue and underlined: http://genesyslab.com/support/contact.

Expected Knowledge

Readers of this document are expected to have the following skills or knowledge:

- Basic internet browser knowledge.
- Basic IPT terminology knowledge is recommended.

Browser Recommendations and Technical Requirements

A minimum screen resolution of 1024 x 768 is necessary to use the GQM applications comfortably.

The following supported browsers are recommended for the Web GUI. The Windows Media Player is needed for Call Recording. The Java plugin is required for Universal Player in Quality Manager.

Important:

Use Java 6 with *Internet Explorer* or use another Browser. There is a known issue with Java 7 which causes *Internet Explorer* to freeze.

The browsers for PCs are shown in order of preference. The fastest performing browsers are first:

1. *Google Chrome:* Please download the latest version. Check issues using the latest browser version before reporting them.You must install the *Windows Media Player* plugin below:

http://www.google.com/support/chrome/bin/answer.py?hl=en&answer=95697

2. *Internet Explorer 9*
3. *Internet Explorer 8* with *Google Chrome Frame* plugin. The *Google Chrome Frame* plugin can be obtained here:

http://code.google.com/chrome/chromeframe/

4. *Internet Explorer 7* with *Google Chrome Frame* plugin.This version of IE should be upgraded to IE9 as soon as possible.
5. *Firefox 3.6.16+* Admin rights required for installation. You must install the *Windows Media Player* plugin below:

http://www.interoperabilitybridges.com/windows-media-player-firefox-plugin-download

6. *Opera 9+*
7. *Safari 5*
8. *Internet Explorer 8* without the *Google Chrome Frame* plugin.The performance is slow.

The following browsers are not recommended:

Internet Explorer 7 without the *Google Chrome Frame* plugin runs too slowly.

Internet Explorer 6 is not supported.

Important:

Use Safari or Firefox with Mac OS 10. There is a known issue with Chrome that causes problems with Universal player.

Web browsers require a media player plug-in (*Windows Media Player* 9+ for Windows PCs, *VLC* for Macs and Linux) for audio and video media review, and at least *Adobe Flash Player* 9.x runtime installed for viewing reports.

Internet Explorer Security Settings:

Windows XP

The following recommendations are encouraged for the Web GUI running on Windows XP:

- Check that the Call Recording URL is included in the "Trusted sites". If not, include it there. If the user doesn't have administrator privileges, contact the system administrator or set security level of the zone that contains the server to Low.
- Check that there is no proxy enabled in the web browser. If there is, try to disable it. The proxy can affect the functionality.
- Set the security level of trusted sites to Low.

Windows 7

The following recommendations are encouraged for the Web GUI running on Windows 7:

- Check that the Call Recording URL is included in "Trusted sites". If not, include it there. If the user doesn't have administrator privileges, contact the system administrator or set security level of the zone that contains the server to Low.
- Check that there is no proxy enabled in the web browser. If there is, try to disable it.
- Set the security level of trusted sites to Low.
- Disable protected mode for all zones. If protected mode is Enabled for the internet zone, it will affect the functionality, even if the server is in trusted sites (Internet Explorer only).

Technical Requirements for Playing Audio and Video Media

The following media players are recommended for successful video and audio playback. Please see the Screen Capture Administration Guide for more information about media player configuration.

The media players are listed in order of preference, for the reasons supplied below:

1. *Microsoft Windows Media Player*: Plays all audio and video media on the Windows 7 OS. Previous versions of Windows, for example,Vista and XP, need additional codecs to play video media.
   Download the K-Lite Codec Pack (BASIC or BASIC Mirror versions) from: http://www.free-codecs.com/K_Lite_Codec_Pack_download.htm.
2. *VLC*: Plays combined video and audio recordings, including dual-screen recordings of 1920x1080 or larger. It is not integrated into browsers, for example, *Internet Explorer* and *Firefox*, for audio playback. *VLC* is recommended for Macs and Linux-based systems for combined audio and video reviewing. *VLC* can be downloaded at: http://www.videolan.org/vlc/.
3. *QuickTime*: Plays audio and is integrated into *Internet Explorer*, but does not support playing mp3 audio and H.264 format video together for combined audio and video playback.

Chapter

2 Getting Started with Quality Manager

A brief introduction to Quality Manager, including how to:

- Access Genesys Quality Manager 8.1.50x
- Update your user profile
- View system messages sent automatically to or from a user profile

This chapter contains the following sections:

Logging in to Quality Manager

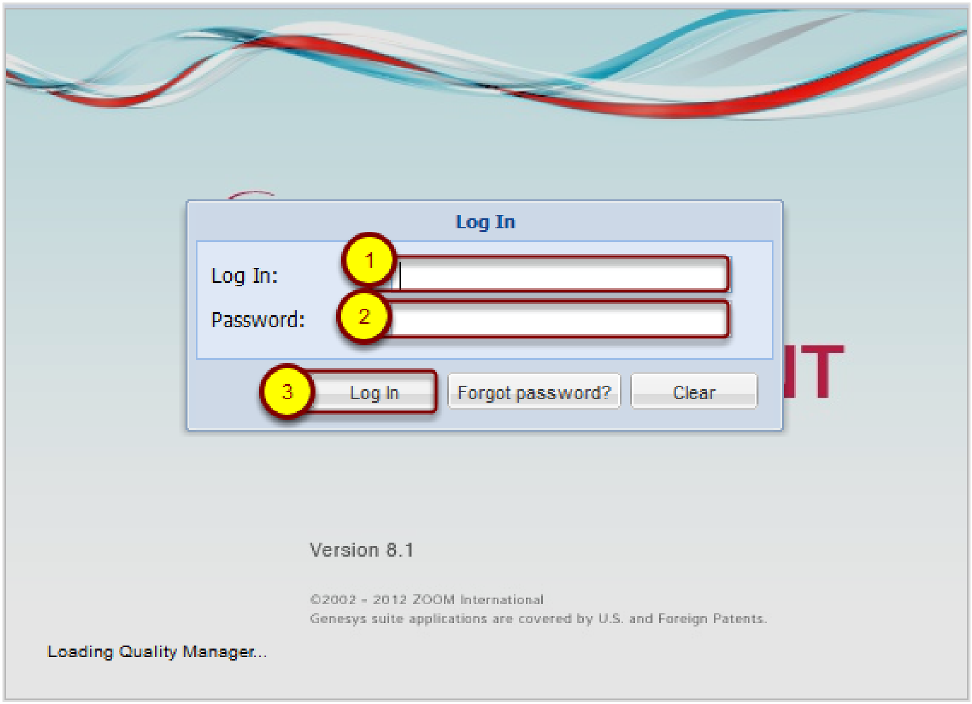


Figure 1: Log In To Quality Manager

To Log in, navigate to the Quality Manager application URL in your browser:

1. Type your username in the **Log In**: field.
2. Type your password in the **Password**: field.
3. Click **Log In**.

If your password is not accepted, click **Clear** and type the password in the **Password** field again.

Important:

If you log in with an incorrect password twice, you receive the message "Warning: The next incorrect entry will lead to the account being locked." After the third attempt with the wrong password the account will be blocked. Please contact your administrator to unblock your account.

Prompt to change your password

If you have logged in using a default password or your password has passed its expiration date, you will be prompted to change your password. Choose a new password by typing the password in the **New Password** and **Repeat Password** fields. You will never be able to use the default password again.

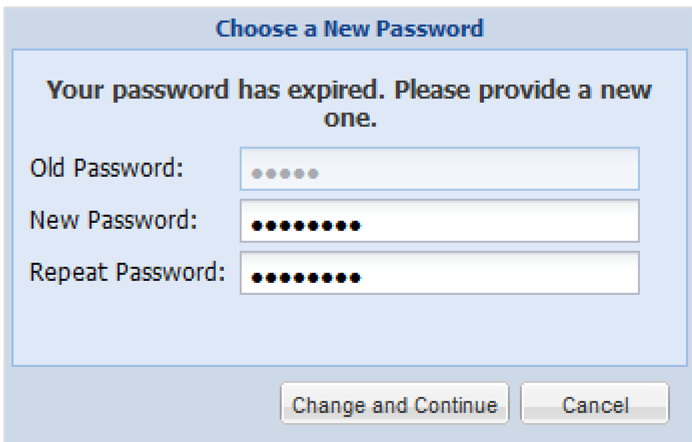


Figure 2: Choosing a New Password

Retrieving a Forgotten Password

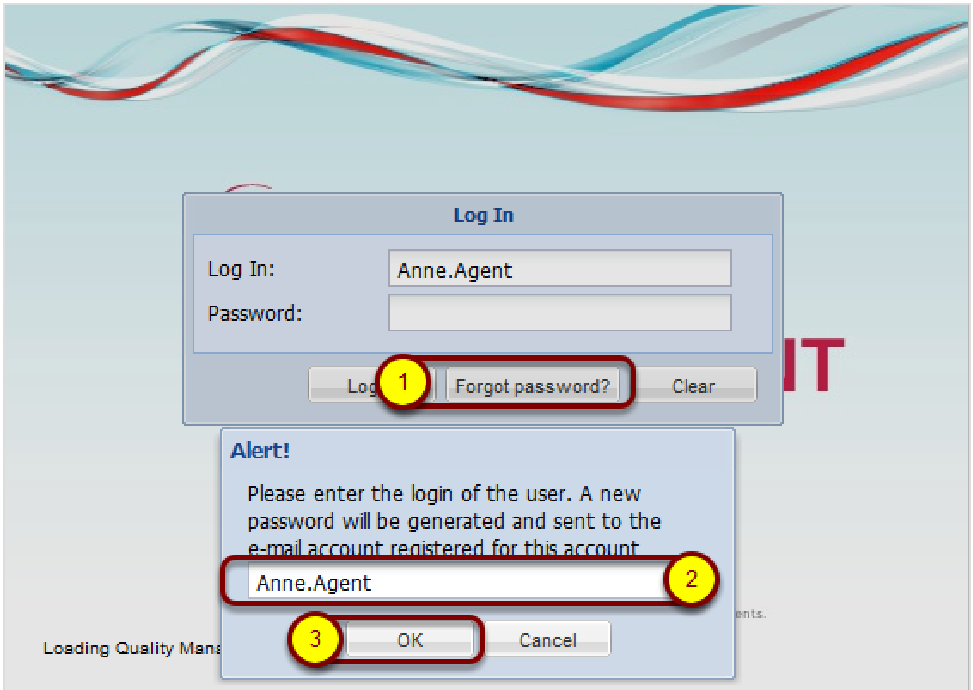


Figure 3: Retrieving a Forgotten Password

1. To retrieve a forgotten password click **Forgot Password?**. The **Alert!** dialog displays.
2. Type your Quality Manager username in the field provided (if you have you entered the user name in the first box on the previous step then this will be filled for you).
3. Click **OK**.

Quality Manager will send a new password to your registered (for example, company) email account.

Important:
After requesting a new password, refresh your browser window before attempting to log in again.

Quality Manager User Interface

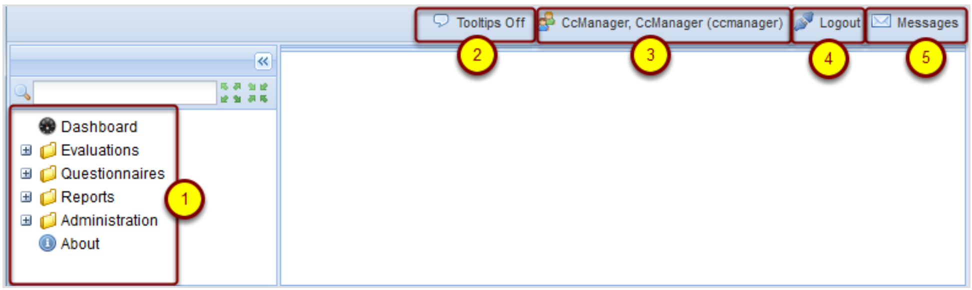


Figure 4: Quality Manager User Interface

The figure shows the main user interface.

1. Clicking a folder (for example. **Evaluations**) from the left-hand menu displays the contents of that folder in the main window.
2. Tooltips are enabled by default, and show information boxes when the cursor hovers over certain Quality Manager features. To disable Tool tips, click **Tooltips off** at the top right of the screen.
3. To view your user profile, click your user name.
4. To exit (log out of) the application click **Logout**.
5. To view all Quality Manager system messages sent to you, click **Messages**.

Editing Your User Profile

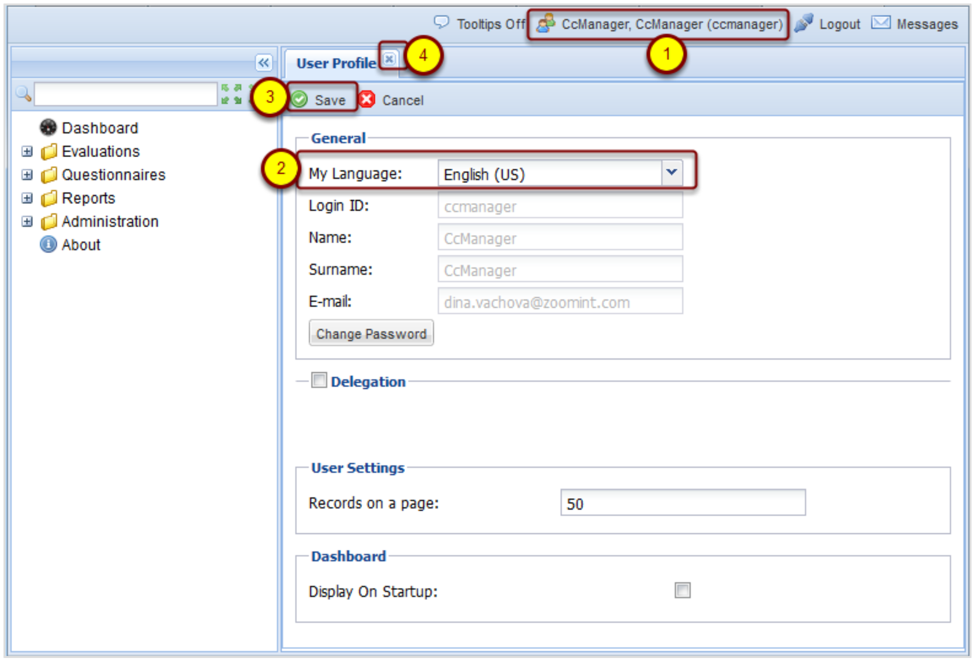


Figure 5: Editing Your User Profile

To view and edit your user profile:

1. Click the button with your user name to open the **User Profile** tab.
2. Select the language settings of the application from the **My Language** dropdown.
3. Click **Save** to save the changes.
4. Click to the close icon on the **User Profile**tab to close the window.

You must log out of the application and log back in again to view the language changes.

Important:

Note - Languages

If your browser is not set to use the same language in menus and system messages, you may get occasional mixed-language alert messages when, for example, you refresh the browser page.

Changing Your Password

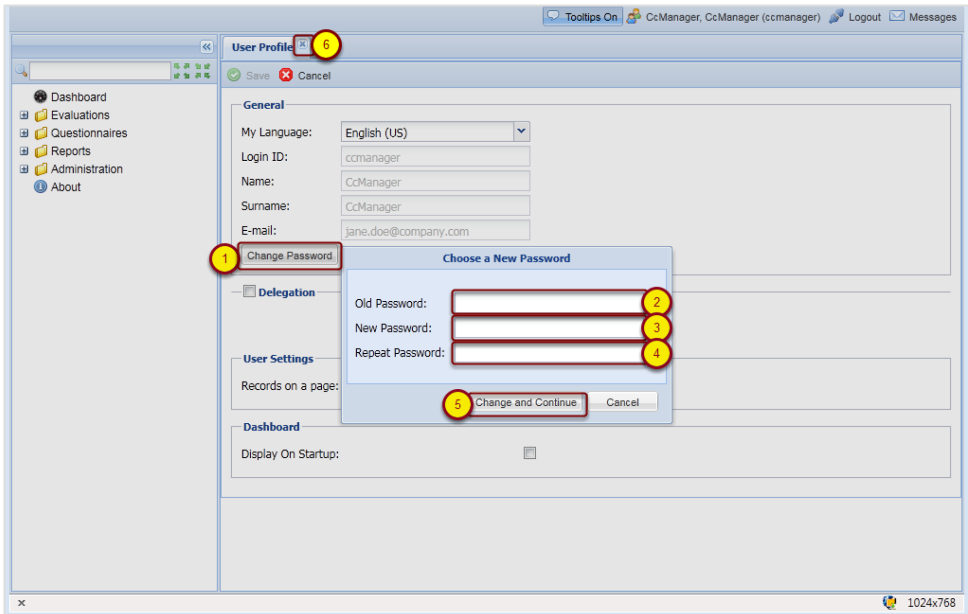


Figure 6: Changing Your password

1. Click **Change Password** to open the **Choose a New Password** dialog.
2. Type your original password in the **Old Password** field.
3. Type the new password in the **New Password** field.
4. Type the new password in the **Repeat Password** field.
5. Click **Change and Continue** to save the changes.
6. Click exit on the **User Profile** tab label to closer the User Profile tab.

Important:

Your new password cannot be a password that you have used in the last four password changes.

Strong passwords must have:

- at least 8 characters,
- with at least one character a number (0-9),
- at least one character a lowercase letter (a-z),
- at least one character an upper case letter (A-Z).

Where integration with external systems is used, the external system dictates password settings for external users.

Please contact your administrator for details of settings.

User Settings in the User Profile

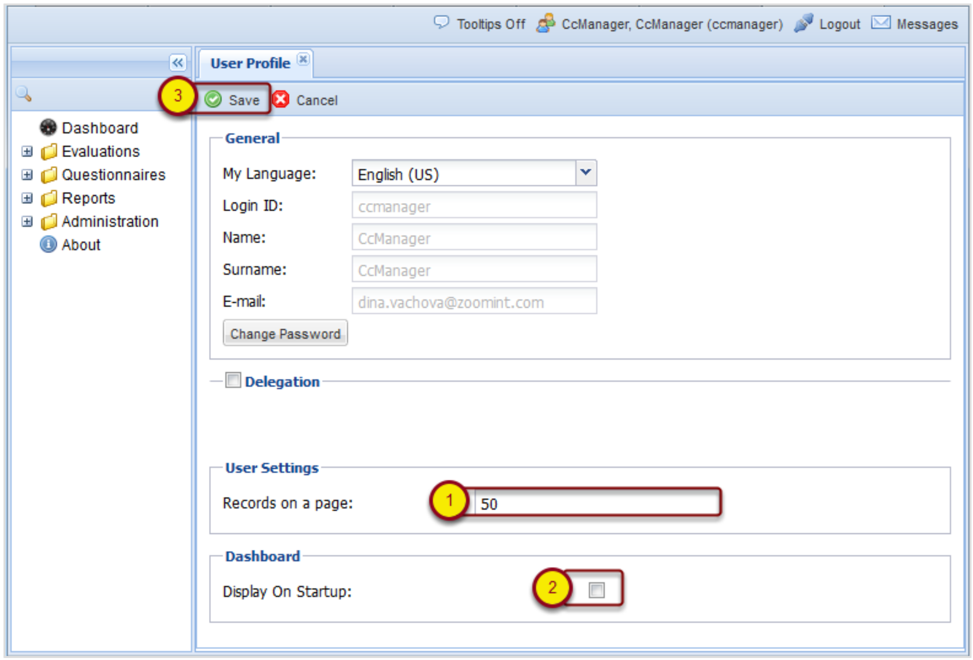


Figure 7: User settings in the User Profile

1. Type the number of rows to display on list screens, for example, the Evaluation List and User Manager screens. Entering a larger number here (greater than 20) is useful for larger PC displays and will result in fewer pages, but may take longer to scroll or display.
2. Check **Display on Startup** if you have defined one or more Dashboard widgets, and would like the Dashboard to be displayed immediately after logging in.
3. Click **Save** to update your user profile, or **Cancel** to close the tab without saving.

Viewing System Messages

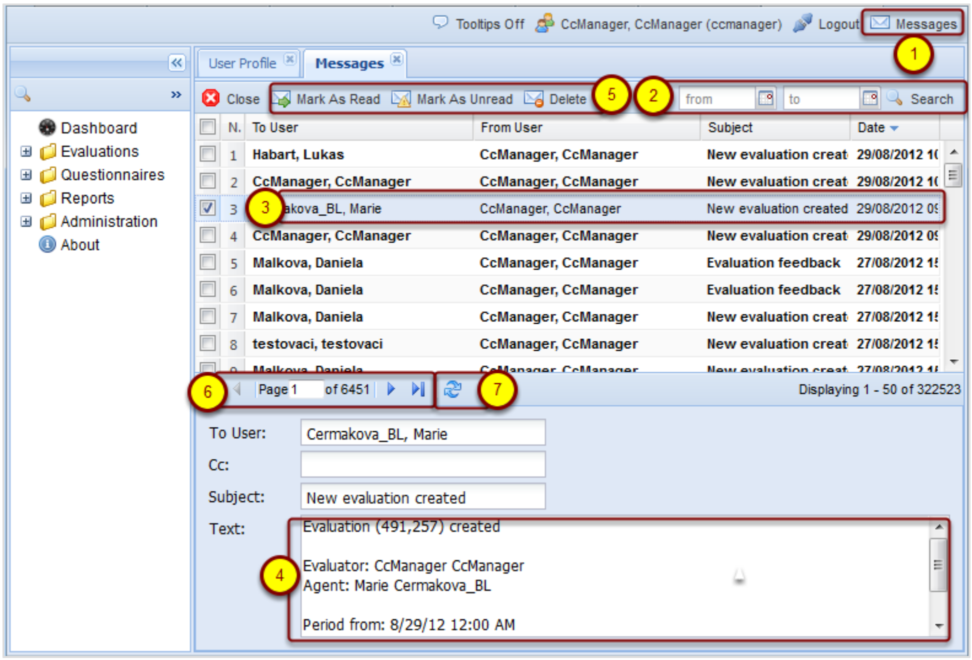


Figure 8: Viewing System Messages

1. Click **Messages** at the top right of the application window to open the messages tab.
2. To search for messages in a particular date range, select or type a date range in the **From** and **To** fields then click **Search**.
3. Select a Message.
4. When certain events, such as scheduling or completing an evaluation take place, the system generates system messages. You can view the messages that are to or from your user profile here. Click an item to view the message details in the text fields at the bottom of the tab.
5. To manage your messages in the tab, you can select one or multiple items, then click **Mark as read**, **Mark as unread** or **Delete**.
6. To view results by page, add a page number to jump to, or tab through the pages using the arrow buttons.
7. To refresh the results, click the **Refresh** button.

Delegating Evaluations

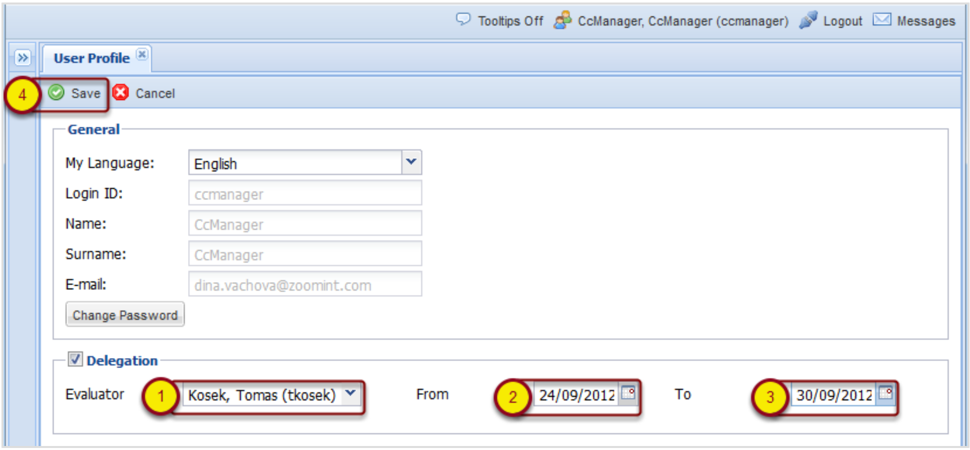


Figure 9: Delegating Evaluations

The **Delegation** checkbox option allows you to delegate your evaluation activities to another user with evaluation permissions –this is typically used if you will be unavailable to perform evaluations for a period of time. Checking this option opens the Delegation section of the User Profile.

To delegate evaluations:

1. Select an evaluator from the **Evaluator** drop down list.
2. Select the delegation period **From**.
3. Select the delegation period **To**.
4. Click **Save**.

During this delegation period, the evaluator will then be able to plan and perform evaluations on agents to whom you are assigned as the evaluator.

Important:

Evaluator delegation can also be defined for specific users within the Adding another User Type section.

Chapter

3 Questionnaires

The following Chapter describes Questionnaires. Questionnaires help Managers and Team Leaders assess the skills of their teams. The questionnaires allow Managers and Team Leaders to grade the performance of staff over the whole of the call making process, from the initial greeting through closing the call.

This chapter contains the following sections:

Setting up a Questionnaire

A brief introduction that includes how to create, configure and manage Questionnaires in Genesys Quality Manager 8.1.50x.

Creating A New Questionnaire

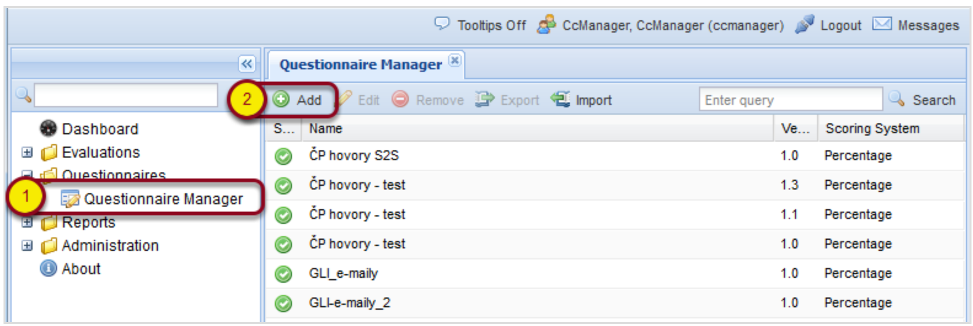


Figure 10: Creating A New Questionnaire

To create a new questionnaire:

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

Specifying a Name and Version

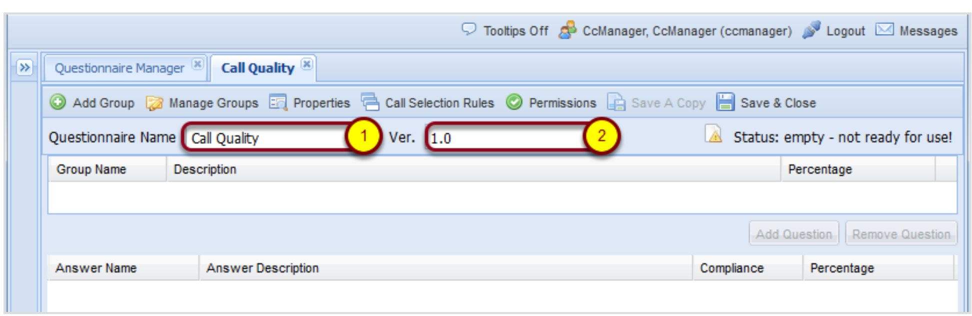


Figure 11: Specifying a Name And Version

1. Type a suitable name for the questionnaire in the Questionnaire Name field.
2. Type an initial **Ver.** (version) number (for example. 1.0). The name and version combination must be unique in Quality Manager.

Setting the Questionnaire Properties

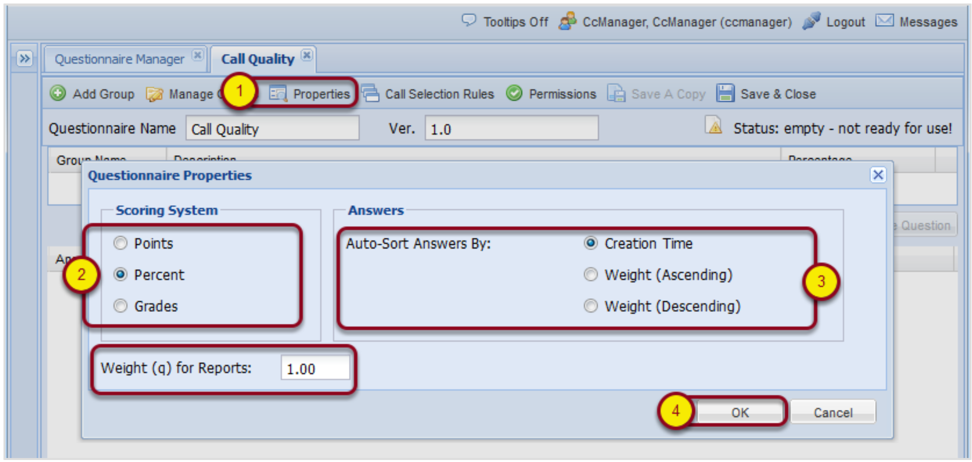


Figure 12: Setting the Questionnaire Properties

1. Click **Properties** on the Questionnaire toolbar to view the current settings for this questionnaire.
2. From the Questionnaires Properties dialog box, you can select the scoring system used and how answers should be sorted and displayed in reports.
3. **Scoring Systems**
   The following scoring systems are available:
   - **Points:** Each answer(only) can be assigned a point value or "weight" (for example 10), with the questionnaire score being the sum of all selected answer points. Answers can use a negative point value (for example. -10), and must have a value of between -2,147,483,648 and 2,147,483,647.
   - **Percent:** Each question and answer group must be assigned a percentage value or "weight" (minimum: 1, maximum: 100). The final questionnaire percentage score is calculated by finding the weighted average of the selected answers.
   - **Grades:** Each answer must be assigned a grade value or "weight" (minimum: 0.001 equals "best", maximum: 5 equals "worst"), whereas each question and question group must be assigned a percentage weight (minimum: 1, maximum: 100). The final questionnaire score grade is calculated using the same algorithm as for percentages; i.e. the weighted average of the selected answers.
   - The **Auto-Sort Answers By** options apply to all answer listings when viewing/editing questionnaires, during evaluations and in reports for evaluations using this questionnaire. Answers can be listed by the time

they were added (**Creation Time**), or by **Weight** (by point, percent or grade value depending on the scoring system used in the questionnaire).

- The **Weight for Reports** ("q") option assigns a global weight for this questionnaire when included in a report with multiple questionnaire scores. The allowed weight range is 0.00 to 1.00 (double digit fractions), with the default weight set to 1.00. In all reports, the total score will be calculated as a weighted average of the final scores from each questionnaire.

4. Modify these properties as required and click **OK**.

Important:

The scoring system for a questionnaire can be changed after question groups or questions and answers are added, but this will often lead to automatic rounding of the weight values.

For example, if an answer is assigned a weight of 500 under a points scoring system, the system will change this to a weight of 5 (that is "worst") when switching to a grade system, which may not be expected or required.

Therefore check all weight values in the questionnaire for accuracy after changing the scoring system used.

Adding a Question Group

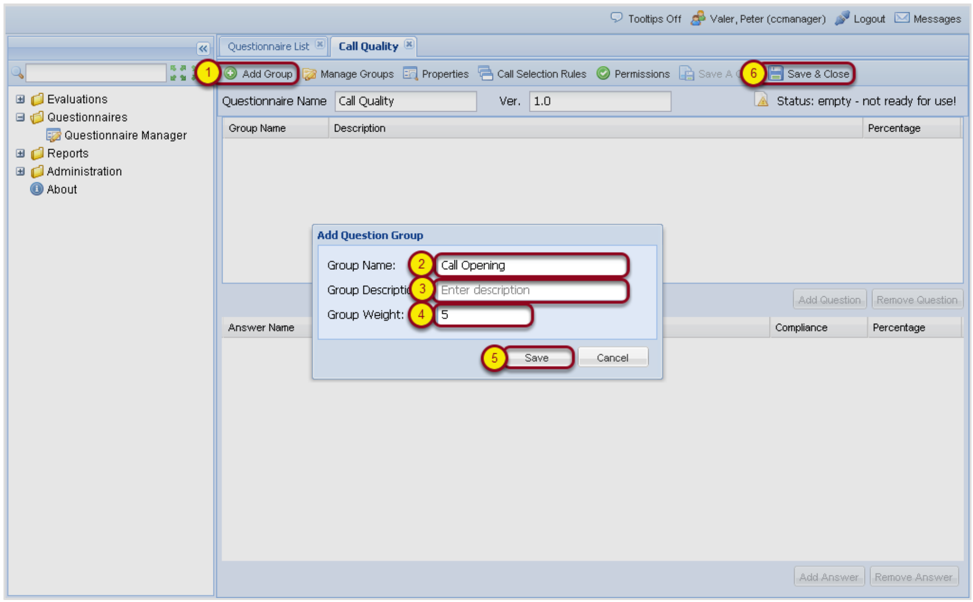


Figure 13: Adding a Question Group

1. Click **Add Group** to add a new question group.
2. Type a suitable Group Name in the **Group Name** field.
3. Type an optional Group Description in the **Group Description** field for this group of questions.
4. Type a **Group Weight** for this group (if required).

Important:

If a percentage or points scoring system is being used, you will also be required to add a percentage Weight value (the level of influence that this question group has on the final questionnaire score).

The sum of the weight values for all question groups must add up to 100 before a questionnaire can be marked complete.

5. Click **Save** to save the Question Group.
6. It is advised to save regularly while creating or editing a questionnaire. Click **Save&Close** (which saves and returns you to the questionnaire list), then double-click on the questionnaire's name (or click **Edit**) to re-open the questionnaire for further editing.

Adding a Question

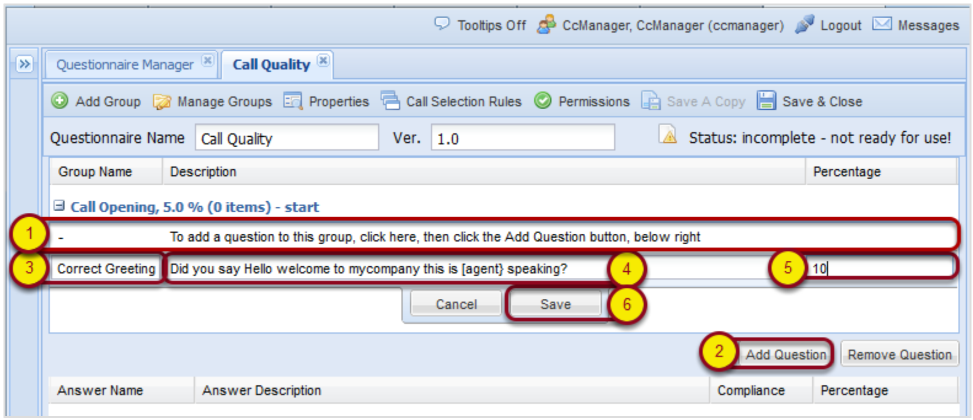


Figure 14: Adding A Question

1. Select the question group.
2. Click **Add Question** at the bottom right of the middle list pane to add a new question.
3. Type a question name (this is the text that the user will see).
4. Type an optional description.
5. Type a question weight for this group (if required).
6. Click **Save** below the description field to add this question to the current group.

Important:

If a percentage or grading score system is being used, enter the percentage weight value that the question will have in this question group.

Adding Additional Questions and Groups

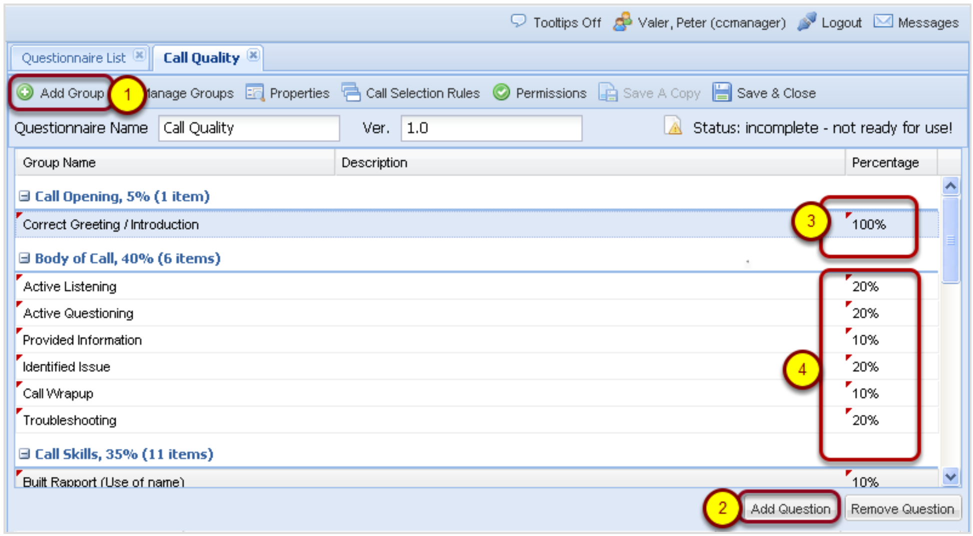


Figure 15: Adding Additional Questions and Groups

Create additional question groups and questions in a similar way.

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

Important:

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

Adding Answers to a Question

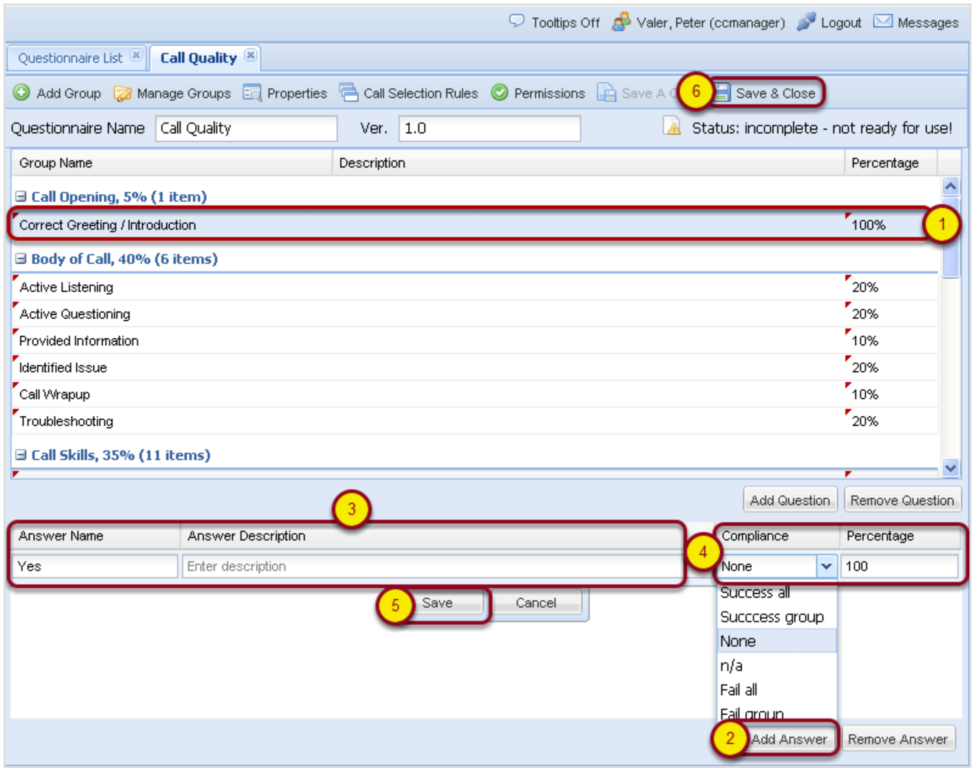


Figure 16: Adding Answers to a Question

1. Click to select a question.
2. With an existing question selected, click **Add Answer** at the bottom right of the screen.
3. **Answer Name** is the text that the user views (and should be unique for this question).Type an optional **Answer Description**.
4. Select a **Compliance** and type the answer's **Percentage** (influence) for this question's scoring.
5. Click **Save** to save the answer.
6. Click **Save & Close** to save the questionnaire and close it.

The Compliance field determines the influence that this answer can have on the whole question group or questionnaire. By selecting an answer that contains the appropriate compliance setting, the evaluator can mark a question group or an entire questionnaire as a complete success or a complete failure.

The Compliance values have the following meanings:

- **Success all**: If this answer is selected, every question in the current questionnaire gets the value of the answer with the highest weight (having a compliance value of None).
- **Success group**: As above, but every question in the current question group gets the value of the answer with the highest weight (having a compliance value of None).
- **None**: No overall effect. This is the default compliance setting, and is used for most answers (or all if compliance settings are not required).
- **n/a**: Not applicable. The influence of which (on the final score) is specified in Quality Manager Application Options (see the section about Administrative Options).
- **Fail all**: If this answer is selected, every question in the current questionnaire gets the value of the answer with the lowest weight (having a compliance value of **None**);
- **Fail group**: As above, but every question in the current question group gets the value of the answer with the lowest weight (having a compliance value of **None**).

Adding Additional Answers

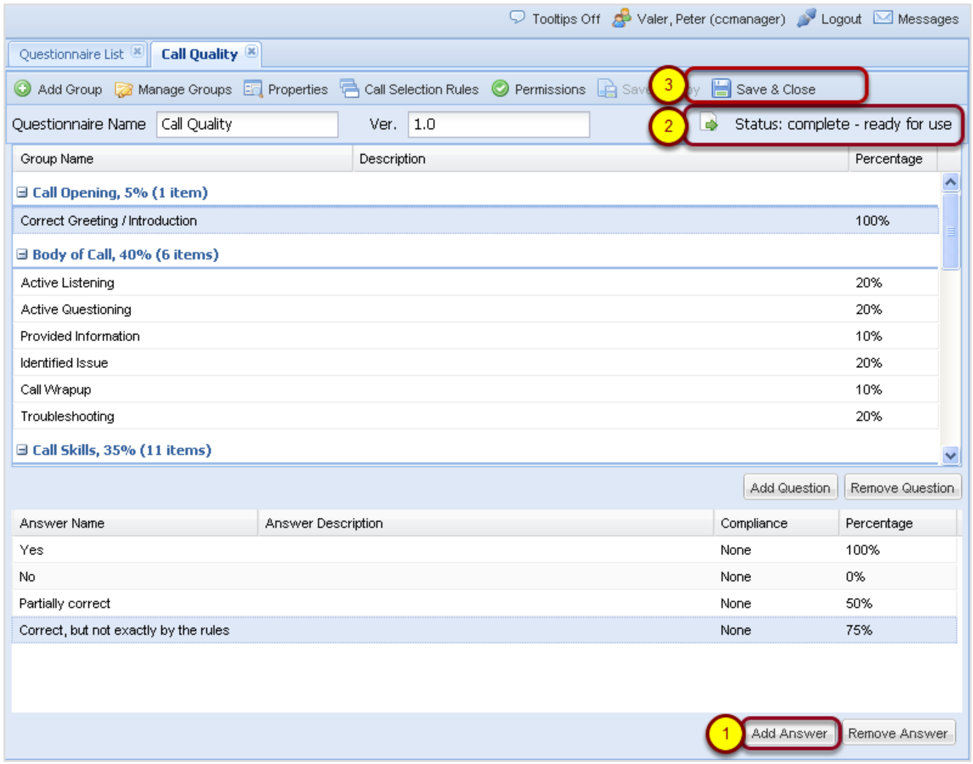


Figure 17: Adding Additional Answers

1. Add answers to the other questions in each group by selecting them in turn and adding answers.
2. When the questionnaire is complete (contains a valid balance of question groups, questions and answers), the message at the top right of the questionnaire tab updates.
3. Save your progress regularly using the **Save & Close**.

Specifying Call Selection Rules

This is an optional feature of the questionnaire, and is only necessary when you wish to filter specific calls to be available for evaluation.

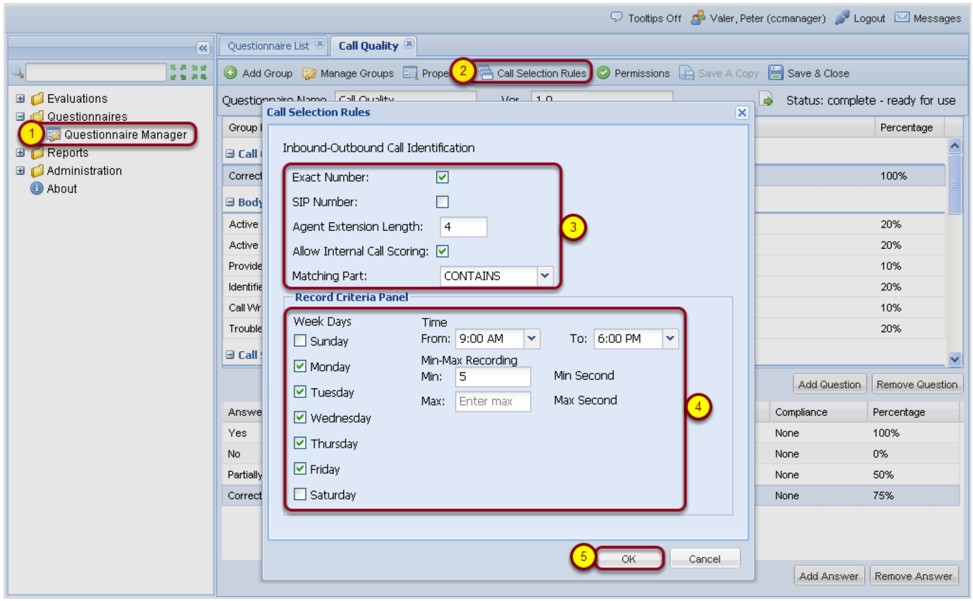


Figure 18: Specifying Call Selection Rules

Specify a filter for the calls that can be selected for evaluation with this questionnaire. This might be necessary if the questionnaire is only relevant for one specific agent, team, or individual.

1. Click the **Questionnaires** link in the left menu, then click **Questionnaire Manager** to display the current list of questionnaires in Quality Manager.
2. To edit the call selection rules click **Call Selection Rules** on the main questionnaire toolbar to open the **Call Selection Rules** dialog box.
3. **Call Selection Options**
   The options available are:
   - **Exact Number**: Use this checkbox to select calls to or from phone numbers that exactly match the agent's number (for example, 1234). Otherwise any number that contains the agent's number (in a position specified by Matching Part) is recognized (for example, 1234 is matched in 22331234).
   - **SIP Number**: Use this checkbox to use the SIP number. The agent number must contain the character '@' for recognition of SIP formatted numbers. For example, 1234@example.com.
   - **Agent Extension Length**: Use this field to set the length of the Agent ID. Quality Manageridentifies whether `callingnr or originalcallednr` is the external call because, the external call number is longer than the extension length.

Important:

Note that if SIP is being used (and SIP Number is enabled), this number must be the complete length of the agent's extension. For example, the SIP number 1234@example.com requires an **Agent Extension Length** of 16 (that is one for each character including periods and @signs).

- **Allow Internal Call Scoring**: Use this checkbox to allow the selection of calls between agents that are defined in the Quality Manager users list.
- **Matching Part**: If **Exact Number** is not enabled, this dropdown will show the part of a call's phone number to search for a known agent extension. Options are: Starts With (extension at beginning of phone number), Ends With (at end of phone number) or Contains (extension can be anywhere within the phone number).

4. The **Record Criteria Panel** allows the timing of the calls to be specified. Options are:
   - **Week Days**: Select one or more days of the week that are valid.
   - Time **From/To**: Select a time period within which the call must have occurred.
     Where Call Recording and the client PC are in a different time zones, then the Time intervals will display different values than those originally saved in the Questionnaire.
   - **Min-Max Recording**: Select the minimum or maximum length of the call recording in seconds.
5. These settings are optional, and apply only to the current questionnaire. Click **OK** to save any changes, or **Cancel** to exit the dialog.

Specifying Access Permissions

This is an optional feature of the questionnaire. This controls who can select the questionnaire when planning evaluations. Evaluators and agents can be assigned a questionnaire that they do not have permissions to select.

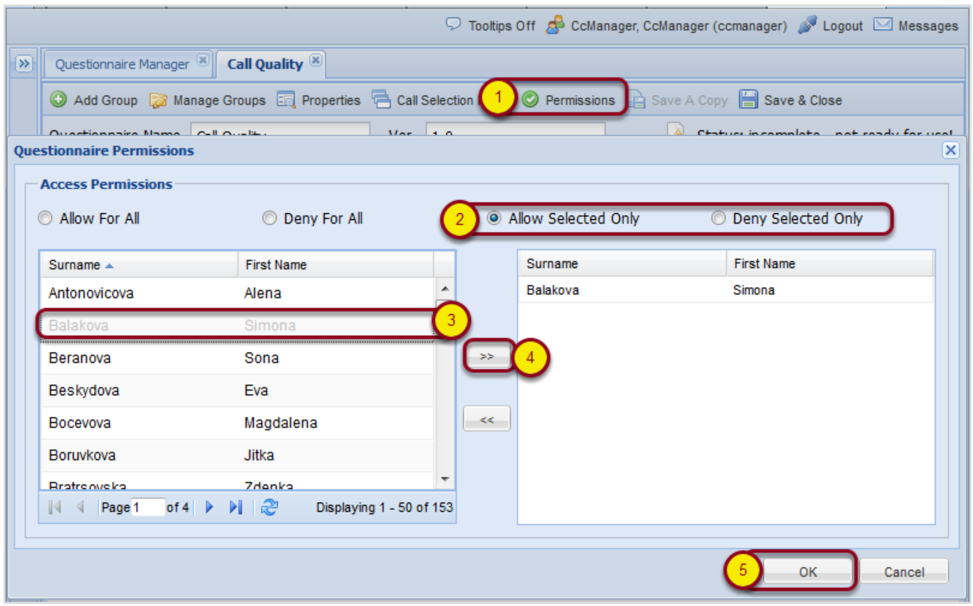


Figure 19: Specifying Access Permissions (OPTIONAL)

1. To limit or customize access to a questionnaire, click **Permissions** on the questionnaire toolbar. The Access Permissions dialog box will open.
2. Access can be granted or blocked for all users, or a subset of users. To create a filtered subset of users, select either the **Allow Selected Only** or **Deny Selected Only** permissions option, which activates the user selection window.
3. Select the appropriate users in the dialog's left panel (using **CTRL** click on Windows or **CMD** click on the Mac, for multiple selections).
4. Click **>>** (Send To Right) to add users to the subset.

Existing users with permissions can similarly be removed from the right panel (when **Allow Selected Only** or **Deny Selected Only** are activated) by selecting users in the right panel and clicking **<<** (Send To Left).

5. Click **OK** to save your permissions preferences, or **Cancel** to exit the dialog without saving.

Managing Question Groups

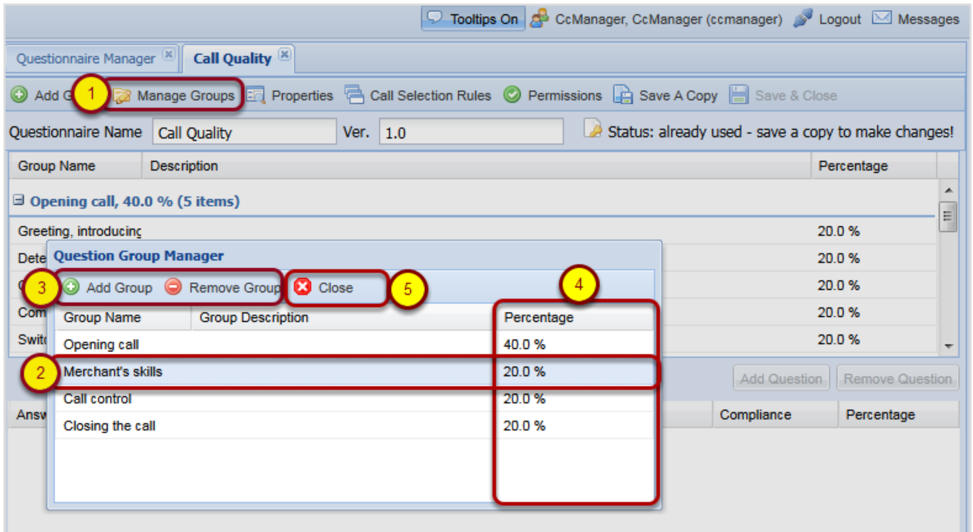


Figure 20: Managing Question Groups

1. Click **Manage Groups** on the questionnaire toolbar to manage question groups
2. Select a question group.
3. Click **Add Group** to add a question group or **Remove Group** to remove a question group (removal of question groups is only possible via this dialog box).
4. The sum of the weights must add up to 100%
5. Click **Close** to close the **Question Group Manager**.

Double-clicking on a question group listed in this dialog will allow you to modify the Name, Description, and Weight parameters.

Important:

If a percentage or points scoring system is used, the sum of the weight values for all question groups must add up to 100 before a questionnaire can be marked complete.

Importing and Exporting Questionnaires

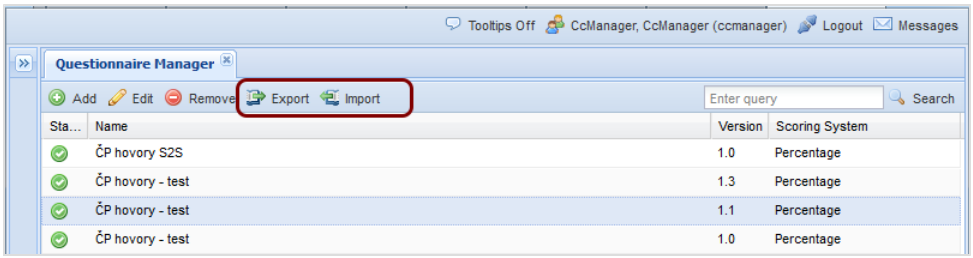


Figure 21: Importing and Exporting Questionnaires

The **Questionnaire Manager** features import and export functionality, enabling powerful manipulation of questionnaires and their content.

Some typical uses can include:

- Backing up questionnaires and templates
- Fast set up of questionnaires on a new system
- Automated or advanced creation, editing, and sharing of questionnaires using external text editors and tools

Exporting a Questionnaire

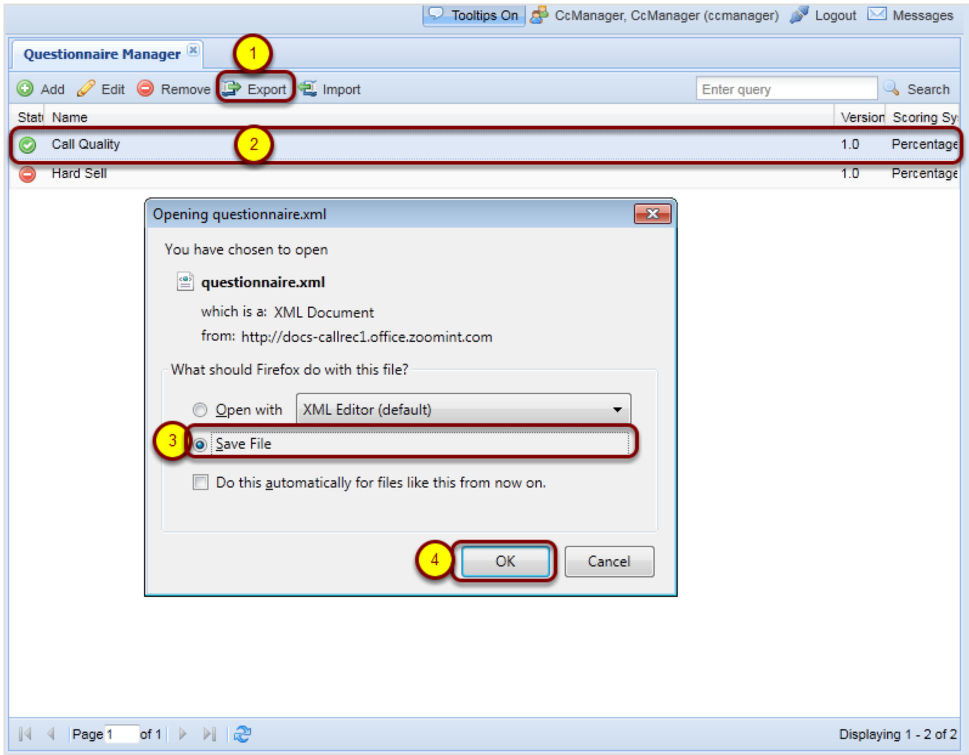
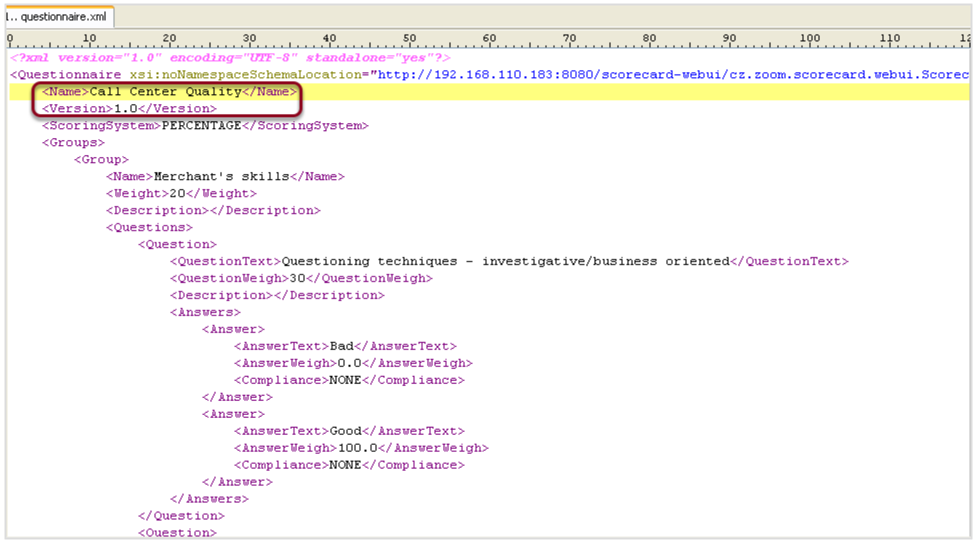


Figure 22: Exporting a Questionnaire

To export an existing questionnaire

1. Select a questionnaire in the Questionnaire Manager.
2. Click **Export**.
3. Click **Save File**.
4. Save the resulting XML file to your computer, ideally giving it a more descriptive filename than the default `questionnaire.xml`.

Modifying an Exported Questionnaire



```
<?xml version="1.0" encoding="UTF-8" standalone="yes"?>
<Questionnaire xsi:noNamespaceSchemaLocation="http://192.168.110.183:8080/scorecard-webui/cz.zoom.scorecard.webui.Scorec
    <Name>Call Center Quality</Name>
    <Version>1.0</Version>
    <ScoringSystem>PERCENTAGE</ScoringSystem>
    <Groups>
        <Group>
            <Name>Merchant's skills</Name>
            <Weight>20</Weight>
            <Description></Description>
            <Questions>
                <Question>
                    <QuestionText>Questioning techniques - investigative/business oriented</QuestionText>
                    <QuestionWeigh>30</QuestionWeigh>
                    <Description></Description>
                    <Answers>
                        <Answer>
                            <AnswerText>Bad</AnswerText>
                            <AnswerWeigh>0.0</AnswerWeigh>
                            <Compliance>NONE</Compliance>
                        </Answer>
                        <Answer>
                            <AnswerText>Good</AnswerText>
                            <AnswerWeigh>100.0</AnswerWeigh>
                            <Compliance>NONE</Compliance>
                        </Answer>
                    </Answers>
                </Question>
                <Question>
```


Figure 23: Modifying an Exported Questionnaire

You can view and edit exported questionnaire files in any XML-compatible text editor, including the default text editor provided with your computer's operating system.

One of the most useful edits can be to the name and version values (See Modifying an Exported Questionnaire; the original name has been changed in the example). This enables you to import a duplicate of the exported questionnaire, which can be the basis of a simple questionnaire template system.

Importing a Questionnaire - 1

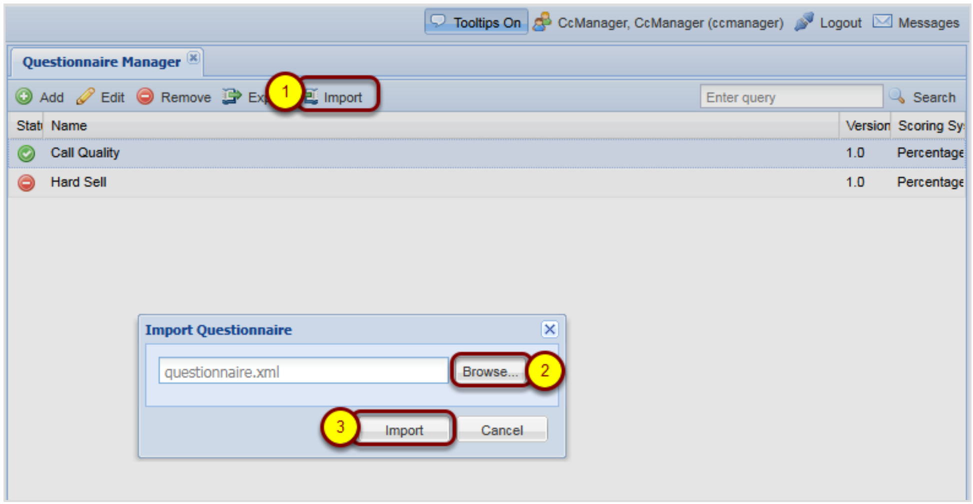


Figure 24: Importing a Questionnaire

To import a questionnaire

1. Click **Import** on the **Questionnaire Manager** screen.
2. Click **Browse** in the import dialog to locate the questionnaire file on your computer.
3. Click **Import** to start the import.

Important:

Only valid Quality Manager questionnaire files in XML format can be imported; you will receive an error message if the system does not recognize or cannot validate the imported file.

Tip:

If your import browser is Chrome, then the file path may display incorrectly. For example: `C:\fakepath\questionnaire_percent.xml`, this does not affect the import and is a known issue with the Chrome browser.

Importing a Questionnaire - 2

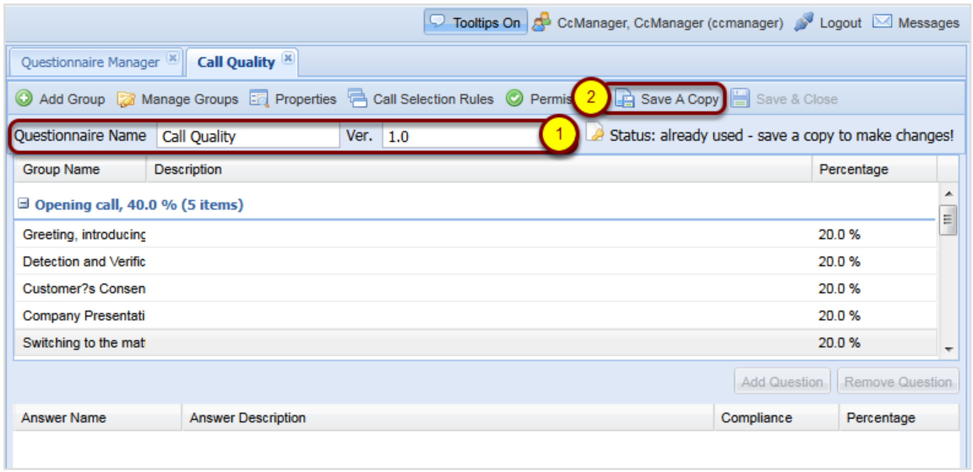


Figure 25: The Imported Questionnaire

When a questionnaire imports successfully, the application will open it for editing.

1. Ensure that the name and version are correct.
2. Click **Save & Close** to save the questionnaire after completing any modifications.

Chapter

4 Evaluations

This chapter describes how to plan and use Evaluations.

This chapter contains the following sections:

Planning an Evaluation

This is a short tutorial to show how to plan a new agent evaluation in Genesys Quality Manager 8.1.50x

Opening the Evaluation Planner

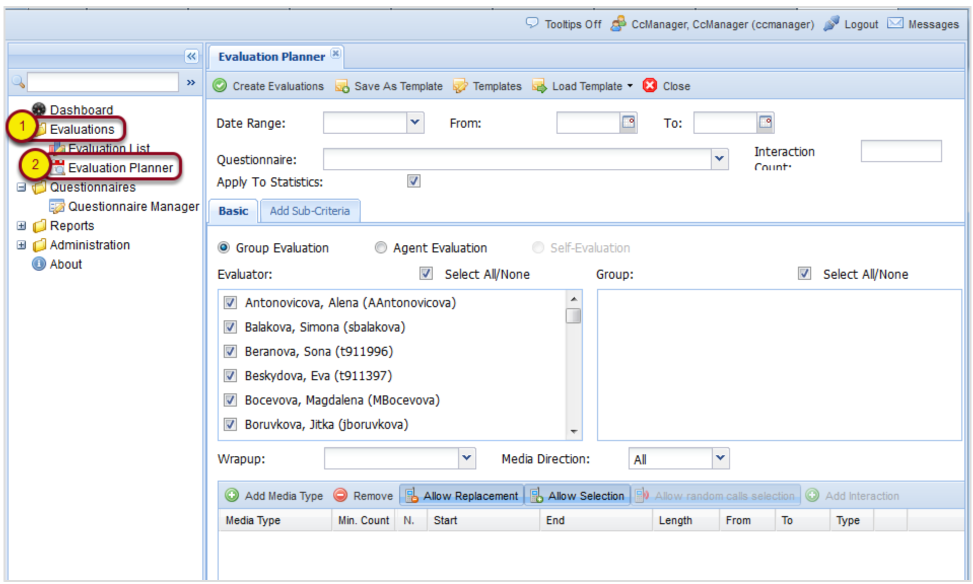


Figure 26: Opening the Evaluation Planner

To schedule a new evaluation:

1. Click **Evaluations** in the left hand menu.
2. Click **Evaluation Planner** to open the **Evaluation Planner** tab.

Important:

Click **Close** or click the tab close icon, to close the planner without saving.

Specifying an Evaluation Period and Questionnaire

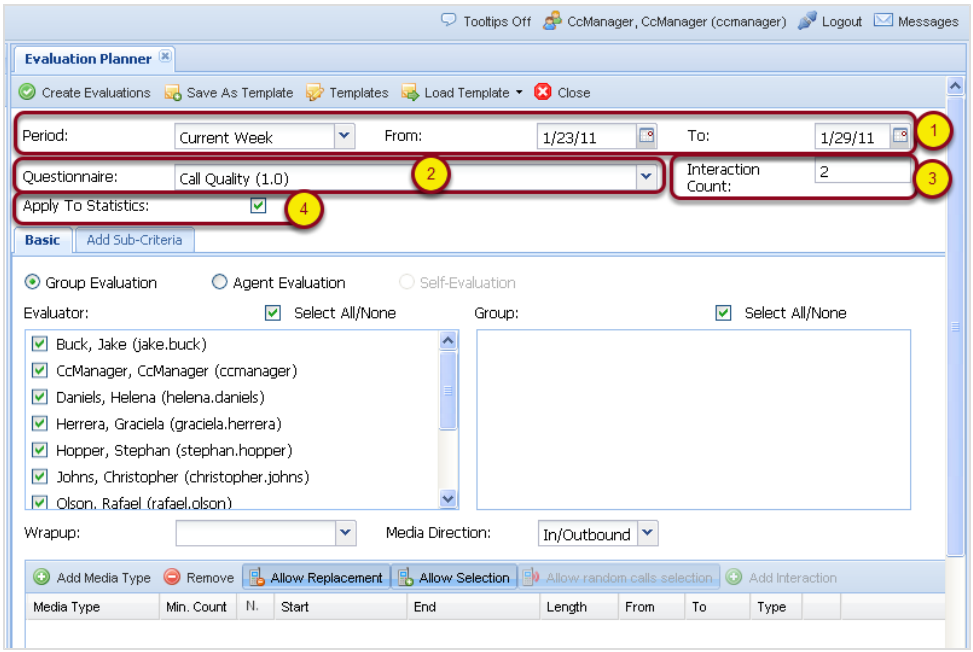


Figure 27: Specifying an Evaluation Period and Questionnaire

1. Specify the evaluation **Period:** using the **Period:** drop down list (for instance, select **Current Week**) and the **From** and **To** dates will appear. Alternatively, select specific dates using the Calendars for **From** and **To** or by typing dates into the **From** and **To** fields (Use the format MM/DD/YY).
2. The **Questionnaire** drop down list enables you to pick an available questionnaire to use for the evaluation. If the questionnaire you wish to use is not visible, ensure that it is marked as completed in the Questionnaire Manager (See Questionnaires).
3. Set the **Interaction Count** . This specifies the minimum number of interactions (calls, messages or other media) to be used for this evaluation. This number should equal the sum of all the media type counts specified in the **Basic** and **Sub-Criteria** tabs.
4. Select the **Apply to Statistics** checkbox to include the results of this evaluation in reports linked to the selected group or agents. De-selecting this option is useful if the evaluation is for testing or internal purposes only and should not affect the agent results.

Next select a target user, group or self-evaluation.

Selecting a Target User, Group or Self-Evaluation Option

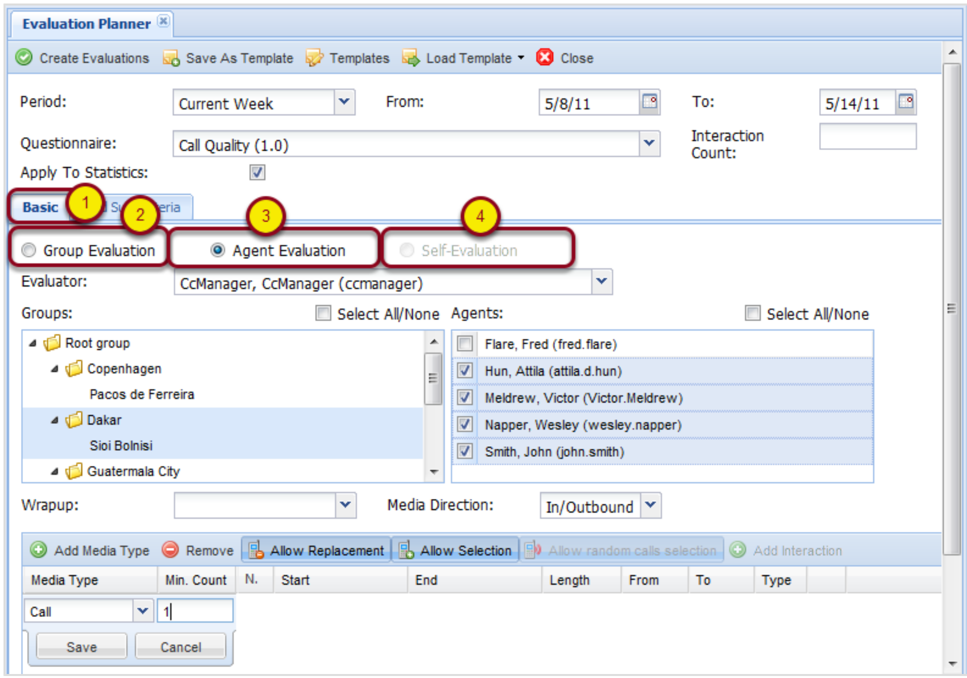


Figure 28: Selecting a Target User or Group

1. On the **Basic** tab you can choose to evaluate:
2. An agent group by selecting **Group Evaluation**.
3. Individual agents by selecting **Agent Evaluation**.
4. Self Evaluation by selecting **Self Evaluation**. This is only available if the user currently logged-in has been assigned the self-evaluate role in their user profile (see Enabling Agent Self-Evaluation), If selected, this automatically sets the Evaluator and Evaluated Agent to the currently logged-in user. This enables agents to plan and perform their own performance evaluations. See the Quality Manager Agent User Guide for more details.

Selecting a Target User

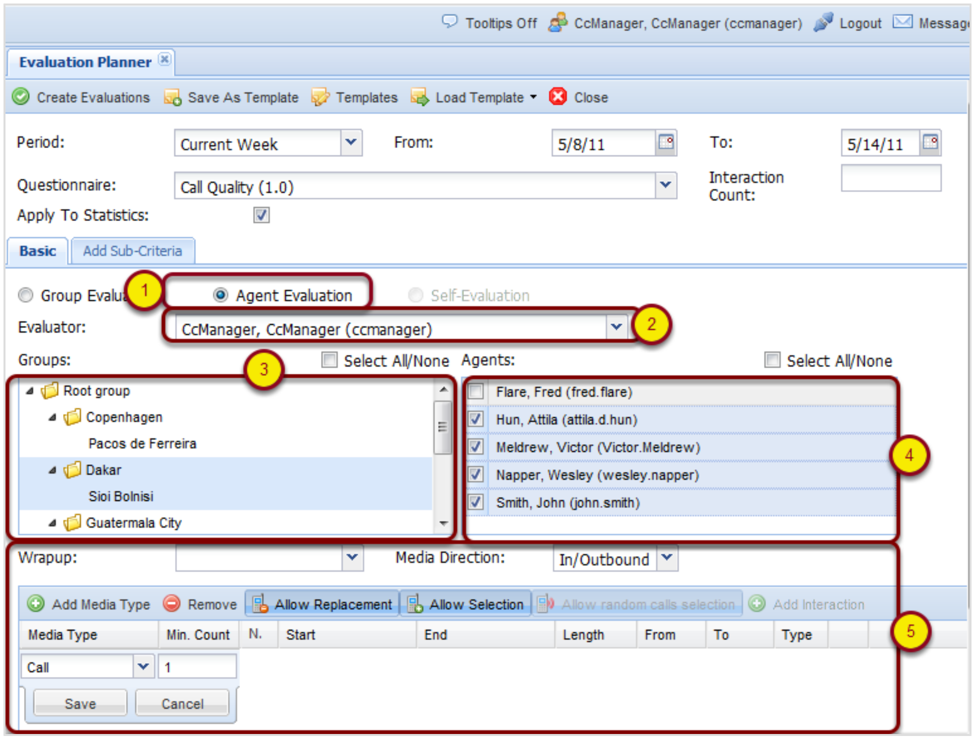


Figure 29: Selecting Agents for Evaluation

Select Agents for Evaluation

The example above shows an Agent Evaluation.

1. Select **Agent Evaluation**.
2. Select an **Evaluator**. The Evaluator must be a Quality Manager Team Leader, CC Manager, or Supervisor type of user.
3. The groups for which the evaluator is responsible are shown in the Groups list. Click on one or more groups. Clicking on a group displays the group's agents in the Agent list on the right.
4. Select the checkboxes of the agents to be evaluated.
5. Agent interactions (for example calls) can be filtered by selecting a **Wrapup** value (if one is available) and a limitation on the Media Direction (inbound and/or outbound). The Media Direction drop down also enables you to specify whether the evaluation should use internal interactions (**INTERNAL**) only or all interactions to that agent (**ALL**). The default is **BOTH**, meaning

both inbound and outbound internal and external interactions will be sampled.

Important:

If agent usernames or phone extensions are re-allocated (re-used) within your organization, please be aware that an evaluation period starting in the past may include unwanted calls, made by another agent who was earlier allocated the same username / extension. Ensure the evaluation starting date is not earlier than that of the agent to be evaluated.

Adding Evaluation Media Types

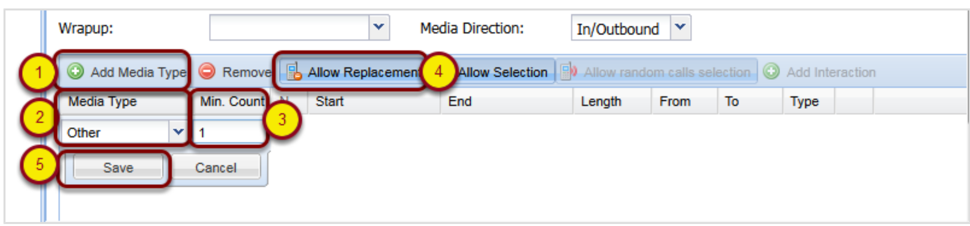


Figure 30: Adding Evaluation Media Types

On the **Basic** tab, specify the types of media to be evaluated.

1. Click **Add Media Type** to add a new Media Type.
2. The media types created within GQM are:
   - **Call** : Selects media only from interactions containing call recordings (this includes screen captures that also include call recordings).
   - **Call+Screen** : Selects only from interactions that contain both a call recording and a screen capture.
   - **Screen** : Selects only from interactions containing screen captures (this includes call recordings that also include screen captures).
   - External media may also be specified (**Chat logs** or **Email**). In the latter case, the media must be accessed outside of Quality Manager.
3. **The Min. Count** field is the minimum number of media records that should be sampled for this type. Unless **Sub-Criteria** are specified, the sum of all **Media Type** record counts on this tab must equal the **Interaction Count** value at the top of the Planner screen.
4. The **Allow Selection** and **Allow Replacement** buttons enable sampled calls to be selected or replaced by the evaluator during an evaluation. By

default these features are enabled, but clicking either button will disable (restrict) the functionality available during an evaluation.

5. To save click **Save**.

Adding Media for Evaluation

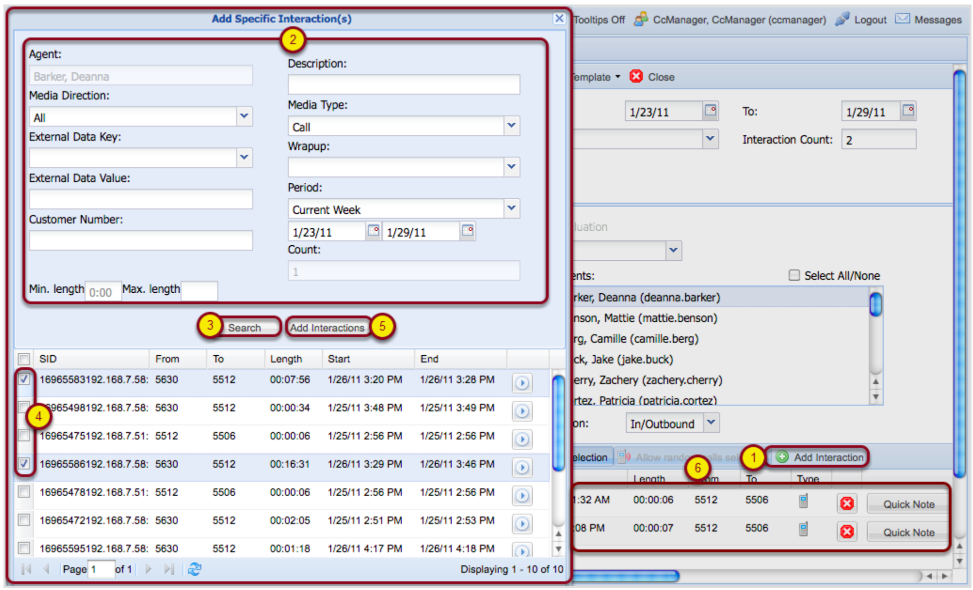


Figure 31: Adding Media for Evaluation

When scheduling an evaluation, you may already know which existing interactions should be used. Quality Manager enables one or more Call or Screen (video) interactions to be selected for use with the evaluation.

To add specific interactions:

1. Click **Add Interaction**. A selection dialog box opens that allows the evaluator to filter results by specific parameters.
2. Select an Interaction.
3. Click **Search** to display a list of matching interactions.
4. Click the checkbox for each record you wish to add to the evaluation.
5. Click **Add Interactions**.
6. The chosen interactions appear in the media window and the selection window closes.
7. Interactions can also be removed from the evaluation by clicking the appropriate removal button (See Adding Media for Evaluation (Optional)), or a quick note can be added for evaluators to reference.

Important:

If the currently selected agent does not have an ID (for example extension number) specified in their ScoreCARD profile, the error message “The agent identifier is set to NONE. Search results will contain results for all agents” appears in the Add Interaction selection dialog window. This results in interactions for all agents being displayed in the dialog box.

Adding Sub-Criteria

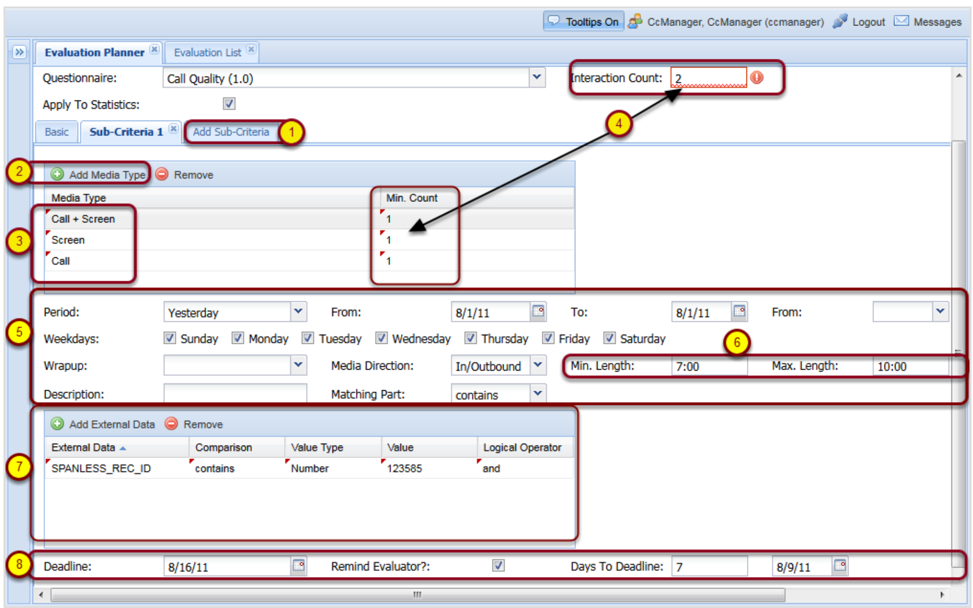


Figure 32: Adding Sub-Criteria

1. Click the **Add Sub-Criteria** tab.
2. Click **Add Media**
3. The Media Type dialog box opens. Select a **Media Type** from the dropdown list. Specify a **Min. count** click **Save**. Repeat this step until all required media types have been added. The media types available are:
   - Call
   - Call + Screen
   - Screen
   - Chat

- Email
- Other

Tip:

Quality Manager creates rows for **Chat**, **Email**, or **Other** media in the grading, allowing these interactions to be evaluated. **Chat**, **Email**, and **Other** may require different questionnaires, however, because they are written media and may have different standards for evaluation than **Call**, **Call + Screen**, or **Screen** media.

4. The **Interaction Count** must be the sum of all of the **Basic** and **Min. Counts** from all **Sub-Criteria** media types. If the **Interaction Count** box is highlighted with red edges, the **Interaction Count** must be changed to equal the sum.
5. In addition to the options available on the **Basic** tab, a subset of sampled calls can be required to match a different specific time period to that specified on the Basic tab.
6. You can specify a minimum call length (**Min. Length**) to filter out short or aborted calls, and a Maximum length **Max. Length** to filter out excessively long calls.

Tip:

This feature allows the evaluator to compare similar skill levels and bring agents that are almost up to target on track. Then for further evaluations, setting the **Max. length** at higher than accepted norms identifies where more in depth training may be required for those agents whose calls are excessively long.

7. **External Data** shows calls that have been flagged with specific information associated with them. For example, the External Data can be configured to flag high value, new, returning, or other customers, allowing the evaluator to select calls from various customer types.
8. The **Deadline** field allows a date to specified by which the evaluation must be completed. A reminder message can be set to notify the evaluator (**Remind Evaluator)** a specified number of days before the evaluation deadline (**Days to Deadline**).

9. Click **Create Evaluations**. The evaluations are created and a message box states how many evaluations were created. Click **OK** to close the message box.
10. Select **Evaluation List** to view the created evaluations.

Important:

If there are no calls that satisfy the sub-criteria available then, calls that satisfy the Basic criteria will be added.

Important:

Further Sub-Criteria can be added as required, but as mentioned earlier, the sum of the Min. Count fields for all media records from all Basic and Sub-Criteria tabs must be the same as the Interaction Count value at the top of the Planner.

Enabling a Selection of Random Calls

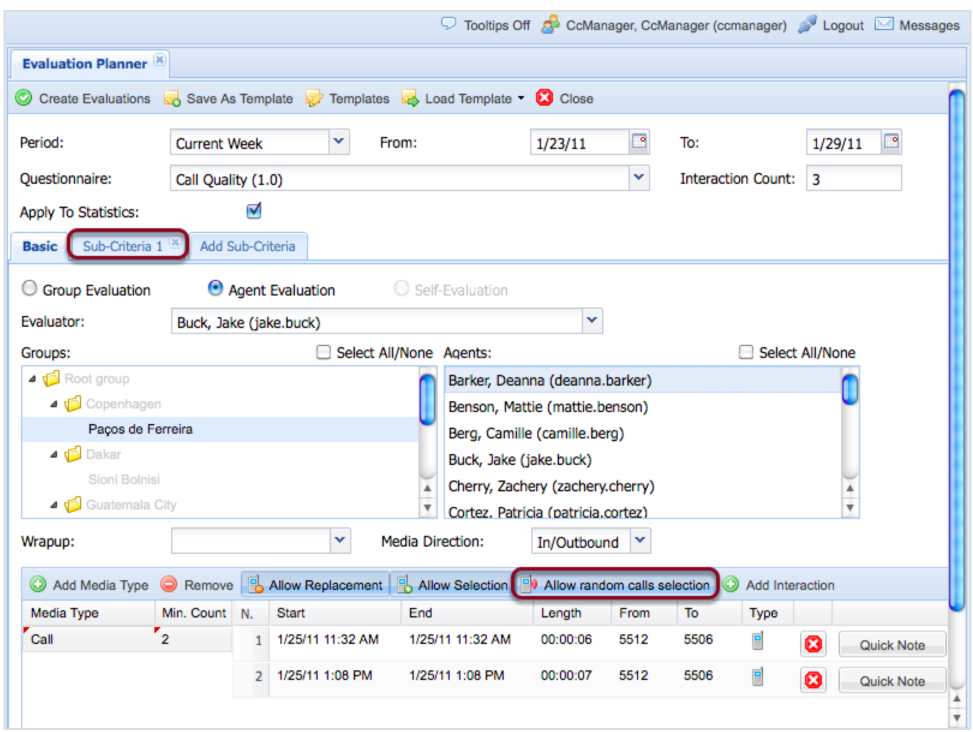


Figure 33: Selection of Random Calls

A powerful method of performing evaluations is to automatically select the minimum number of calls required for evaluation at random.

Important:

The **Allow random calls selection** option is enabled by default in the **Evaluation Planner**, but this setting cannot be changed unless evaluation sub-criteria have been defined, as shown in the Figure: Selection of Random Calls.

Important:

When using the **Get Random Interactions** function while performing an evaluation, Quality Manager only selects interactions that have not yet been used for evaluation.

Using Evaluation Templates

1. Click **Save As Template** to save the evaluation settings for re-use.
2. Enter a unique name for this template.
3. Specify if the template will be for your use only by selecting **Private**, or shared with other evaluation creators by selecting **Shared**.
4. Click **Save** to save the changes.

Loading a Saved Template

To load a saved template:

1. Click **Load Template** in the menu bar.
2. Select an existing template name from the drop-down list that appears.

Evaluation templates that you have permissions to load can be permanently deleted by clicking the **Templates** button in the menu bar of the Evaluation Planner, and clicking **Remove** on the appropriate template in the Templates dialog box .

Important:

Loading an evaluation template will overwrite any existing settings in the Evaluation Planner. Removal of an evaluation template is permanent and cannot be undone!

Creating the Evaluation

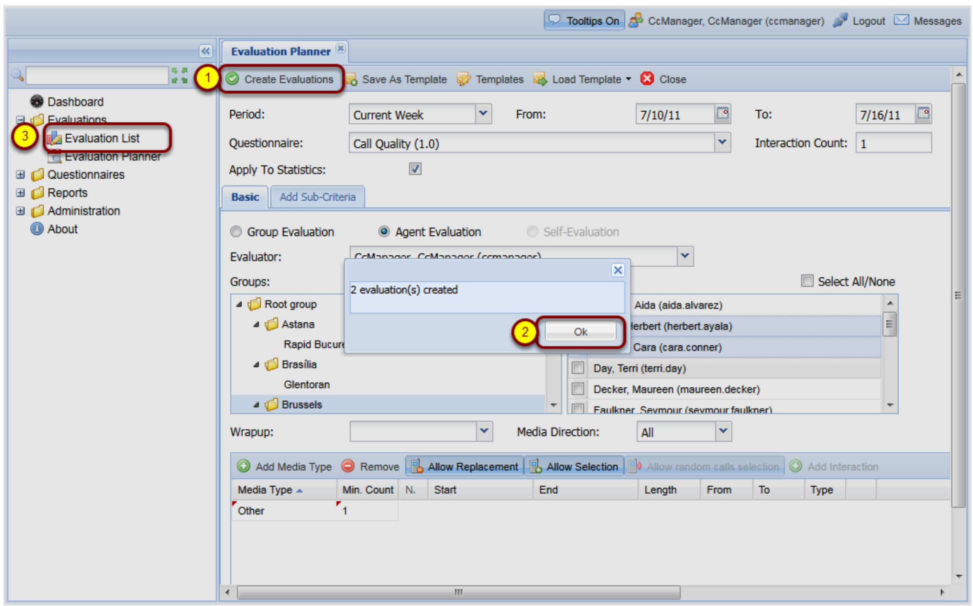
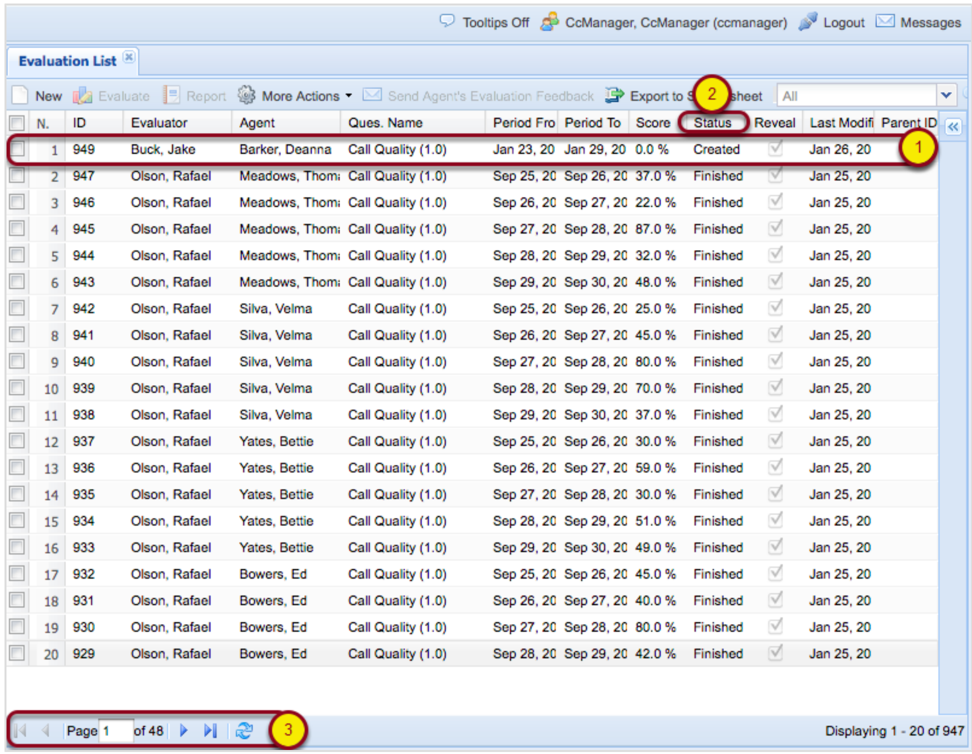


Figure 34: Creating the Evaluation

To Schedule the evaluation after specifying the criteria for determining agent calls for evaluation:

1. Click **Create Evaluation** at the top of the Evaluation Planner page to schedule (create) the evaluation. If any parameters or options are not correct during creation, a validation error dialog box will help you identify the cause of the issue; otherwise a confirmation dialog box will confirm that the evaluation has been scheduled.
2. Click **OK** to close the dialog box. A confirmation message is sent to the evaluator.
3. Click **Evaluation List** from the menu on the left to view the updated list of evaluations.

Viewing Created Evaluations



N.	ID	Evaluator	Agent	Ques. Name	Period Fro	Period To	Score	Status	Reveal	Last Modifi	Parent ID
1	949	Buck, Jake	Barker, Deanna	Call Quality (1.0)	Jan 23, 20	Jan 29, 20	0.0 %	Created		Jan 26, 20	
2	947	Olson, Rafael	Meadows, Thom:	Call Quality (1.0)	Sep 25, 20	Sep 26, 20	37.0 %	Finished		Jan 25, 20	
3	946	Olson, Rafael	Meadows, Thom:	Call Quality (1.0)	Sep 26, 20	Sep 27, 20	22.0 %	Finished		Jan 25, 20	
4	945	Olson, Rafael	Meadows, Thom:	Call Quality (1.0)	Sep 27, 20	Sep 28, 20	87.0 %	Finished		Jan 25, 20	
5	944	Olson, Rafael	Meadows, Thom:	Call Quality (1.0)	Sep 28, 20	Sep 29, 20	32.0 %	Finished		Jan 25, 20	
6	943	Olson, Rafael	Meadows, Thom:	Call Quality (1.0)	Sep 29, 20	Sep 30, 20	48.0 %	Finished		Jan 25, 20	
7	942	Olson, Rafael	Silva, Velma	Call Quality (1.0)	Sep 25, 20	Sep 26, 20	25.0 %	Finished		Jan 25, 20	
8	941	Olson, Rafael	Silva, Velma	Call Quality (1.0)	Sep 26, 20	Sep 27, 20	45.0 %	Finished		Jan 25, 20	
9	940	Olson, Rafael	Silva, Velma	Call Quality (1.0)	Sep 27, 20	Sep 28, 20	80.0 %	Finished		Jan 25, 20	
10	939	Olson, Rafael	Silva, Velma	Call Quality (1.0)	Sep 28, 20	Sep 29, 20	70.0 %	Finished		Jan 25, 20	
11	938	Olson, Rafael	Silva, Velma	Call Quality (1.0)	Sep 29, 20	Sep 30, 20	37.0 %	Finished		Jan 25, 20	
12	937	Olson, Rafael	Yates, Bettie	Call Quality (1.0)	Sep 25, 20	Sep 26, 20	30.0 %	Finished		Jan 25, 20	
13	936	Olson, Rafael	Yates, Bettie	Call Quality (1.0)	Sep 26, 20	Sep 27, 20	59.0 %	Finished		Jan 25, 20	
14	935	Olson, Rafael	Yates, Bettie	Call Quality (1.0)	Sep 27, 20	Sep 28, 20	30.0 %	Finished		Jan 25, 20	
15	934	Olson, Rafael	Yates, Bettie	Call Quality (1.0)	Sep 28, 20	Sep 29, 20	51.0 %	Finished		Jan 25, 20	
16	933	Olson, Rafael	Yates, Bettie	Call Quality (1.0)	Sep 29, 20	Sep 30, 20	49.0 %	Finished		Jan 25, 20	
17	932	Olson, Rafael	Bowers, Ed	Call Quality (1.0)	Sep 25, 20	Sep 26, 20	45.0 %	Finished		Jan 25, 20	
18	931	Olson, Rafael	Bowers, Ed	Call Quality (1.0)	Sep 26, 20	Sep 27, 20	40.0 %	Finished		Jan 25, 20	
19	930	Olson, Rafael	Bowers, Ed	Call Quality (1.0)	Sep 27, 20	Sep 28, 20	80.0 %	Finished		Jan 25, 20	
20	929	Olson, Rafael	Bowers, Ed	Call Quality (1.0)	Sep 28, 20	Sep 29, 20	42.0 %	Finished		Jan 25, 20	

Figure 35: Viewing Created Evaluations

Existing evaluations display in the **Evaluation List**.

1. The newly created evaluation should be visible at the top of the list by default.
2. Evaluations can be arranged by status by clicking Status.
3. Use the forward, back, and shuffle controls to navigate through the pages of results.

This list screen enables you to also permanently remove (**Delete**) evaluations and create **New evaluations**. Click **New evaluations**.

Important:

After an evaluation has been scheduled, it is currently no longer possible to modify the interaction (call) selection parameters for that interaction.

The status of a newly scheduled evaluation is **Created**, but this will change to **In Progress** or **Finished** during the life cycle of the evaluation -See Performing an Evaluation for more information.

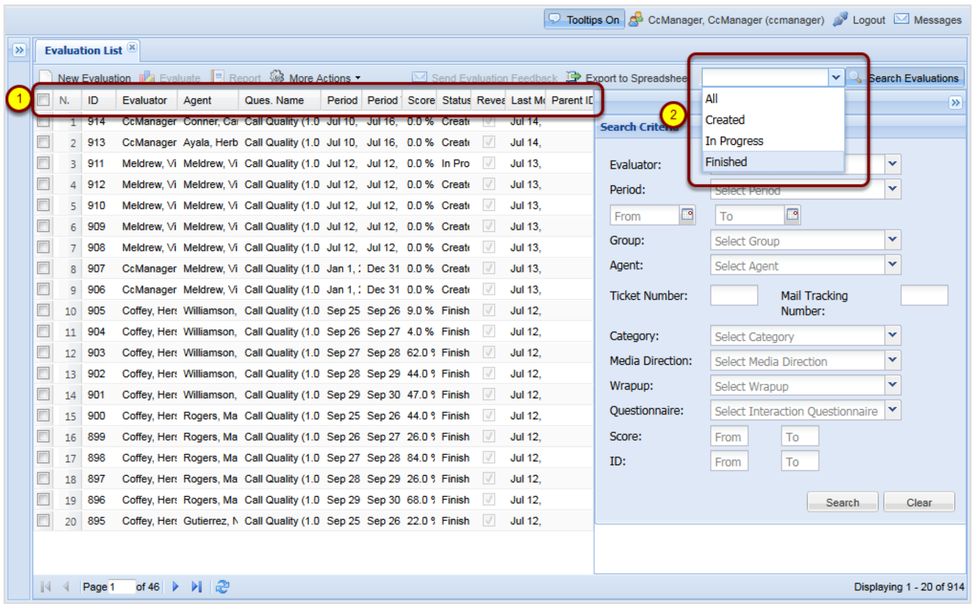


Figure 36: Show evaluations that have a specific status with the drop down list

The columns can be sorted by clicking on a column heading, or show evaluations with a specific status with the drop down list.

1. The statuses are:
   - **All**
   - **Created**
   - **In progress**
   - **Finished**

Searching for Evaluations

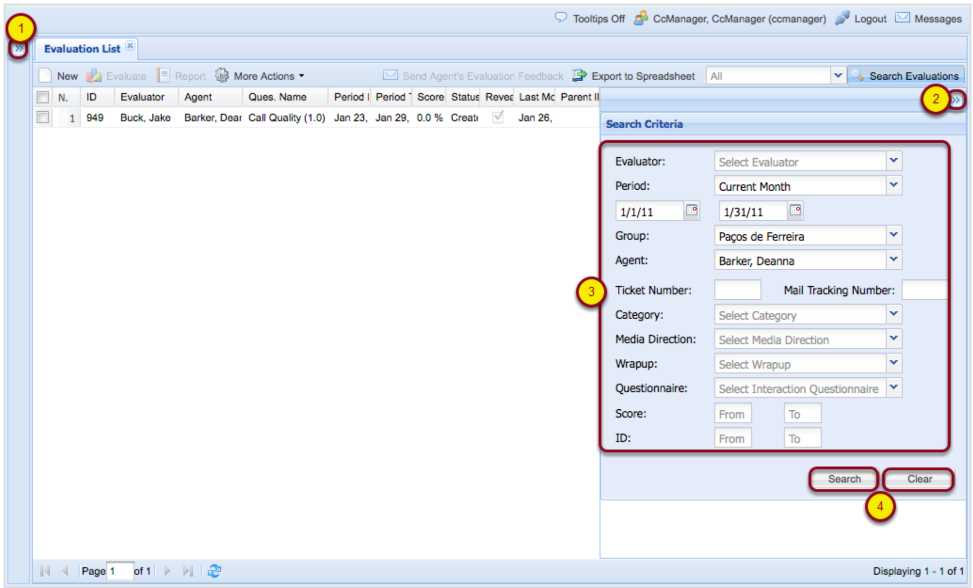


Figure 37: Searching for Evaluations

Evaluations can be filtered using the search dialog.

To search for an evaluation:

1. Click **>>** on the left hand side to hide the menu bar in order to get the maximum possible display width for the list.
2. Click **>>** at the top right of the Evaluation List tab (see screenshot) to reveal the search dialog box.
3. Set as few or many search fields as required.
4. Click **Search** to apply the filter, or **Clear** to reset the search fields.

Practical Examples of Evaluations

This section gives practical examples of how to:

- Plan the evaluation of specific calls for specific agents. This could be as the result of a complaint, or a good or bad call discovered by live monitoring.
- Create all of the required evaluations for a period as a batch .
- Improve the quality of the calls by comparing the evaluations of different evaluators.

Planning the Evaluation of Specific Calls

To evaluate a specific call, access the call:

1. Open the **Evaluation Planner**.
2. Select a **Period** and the **Questionnaire** to be used to evaluate the call from the dropdown. Type the **Interaction Count**. See Specifying an Evaluation Period and Questionnaire.
3. On the Basic tab Select **Agent Evaluation**. See Select a Target User.
4. Select the **Evaluator** that deals with the group that the agent belongs to. The groups that the evaluator deals with will appear in bold in the **Groups** field. If necessary scroll down in that field to see the full list.
5. Select the group that the agent belongs to and the agents in that group will appear in the **Agents** field. If necessary scroll down in that field to see the full list.
6. Select the checkbox for the agent. This activates the **Add Interaction** button.
7. Click **Add Interaction**, the **Add Specific Interactions** dialog opens. Most fields on the form are optional but the more information that is entered on the dialog the more specific the search will be for the call required.
8. Select the **Media Direction**, type, or copy and paste the **Customer number** (if known) and the **Min. length** and **Max. Length** of the call.
9. Type, or copy and paste a **Description** (this must match the note made in the description field of the call).
10. Select a **Media Type** and a **Wrapup**, select a Period and click **Search**.The calls that correspond to the search will appear. You may then play the call to confirm that you have the correct one.

11. Once the correct call is selected, click the checkbox for that call and ensure that all other calls are unchecked. Click **Add Interactions**. The **Add Specific Interactions** dialog closes and the call will be added to the evaluation.
12. Click **Create Evaluations** to create the evaluation. The evaluation is created and a message box states how many evaluations were created. Click **OK** to close the message box.
13. Select **Evaluation List** to view the created evaluation.

Important:

After an evaluation has been scheduled, it is then no longer possible to modify the interaction (call) selection parameters for it.

Creating Multiple Evaluations

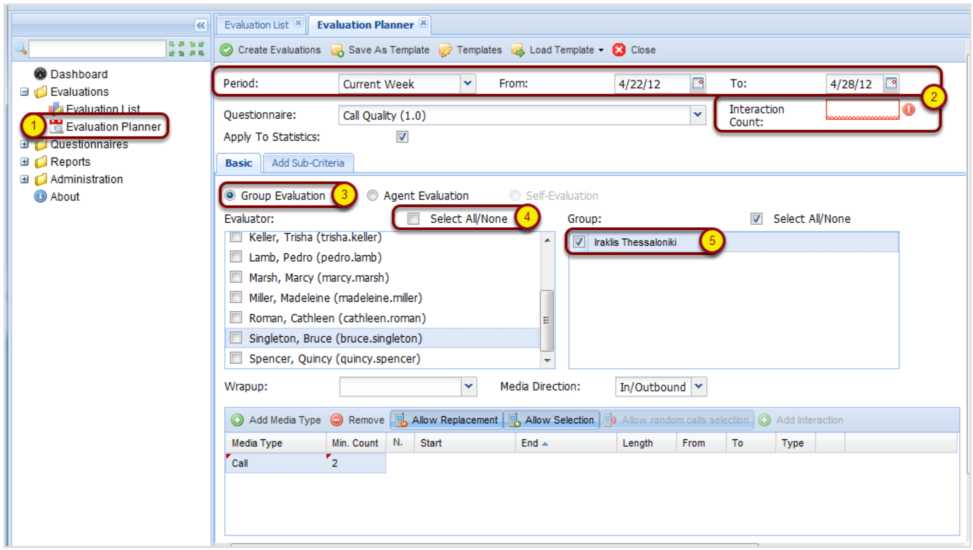


Figure 38: Creating Multiple Evaluations

To create all of the required evaluations for a period as a batch:

1. Open the **Evaluation Planner**.
2. Select a **Period** and the **Questionnaire** to be used to evaluate the calls from the dropdown. Type the **Interaction Count**. See Specifying an Evaluation Period and Questionnaire.
3. On the Basic tab select **Group Evaluation**
4. The **Evaluator** list appears and by default every evaluator is selected. The select Evaluator: **All/None** checkbox will select all or none of the evaluators. Select or de-select checkboxes to choose which evaluators are included.
5. To select the groups which are assigned to an evaluator, without actually selecting the evaluator, click on the evaluator’s name without selecting the checkbox. The groups that the evaluator is responsible for will appear in the evaluator’s box on the right hand side.

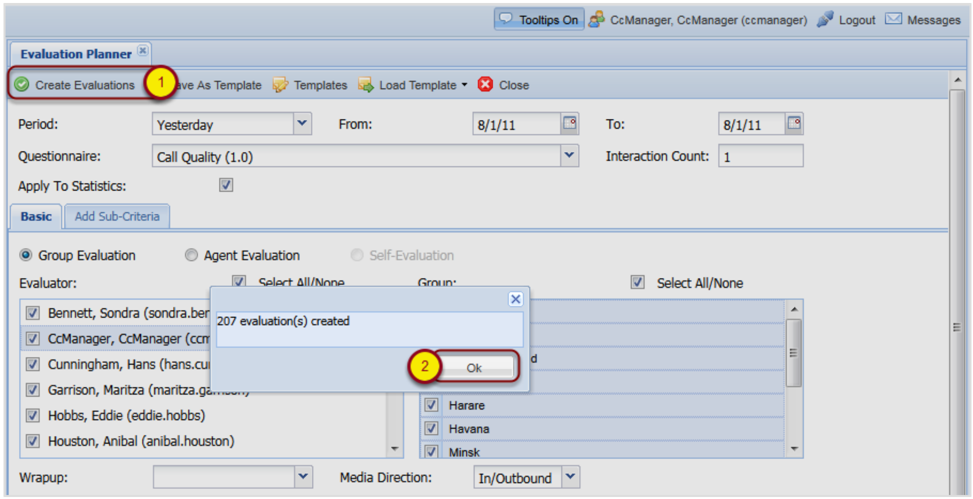


Figure 39: Created Evaluations

1. Click **Create Evaluations**. The evaluations are created and a message box states how many evaluations were created. Click **OK** to close the message box.
2. Select **Evaluation List** to view the created evaluations.

Chapter

5 Performing an Evaluation

This chapter is a brief tutorial on how to complete a scheduled agent evaluation in Genesys Quality Manager 8.1.50x. The same basic procedure applies to Self evaluations if appropriate. For further details on Self evaluations see the Quality Manager User Guide Agent document.

Evaluations contain one or more media records, each of which must be graded by answering all questions shown in the evaluation's questionnaire. This tutorial describes how to accomplish this.

Opening the Scheduled Evaluation

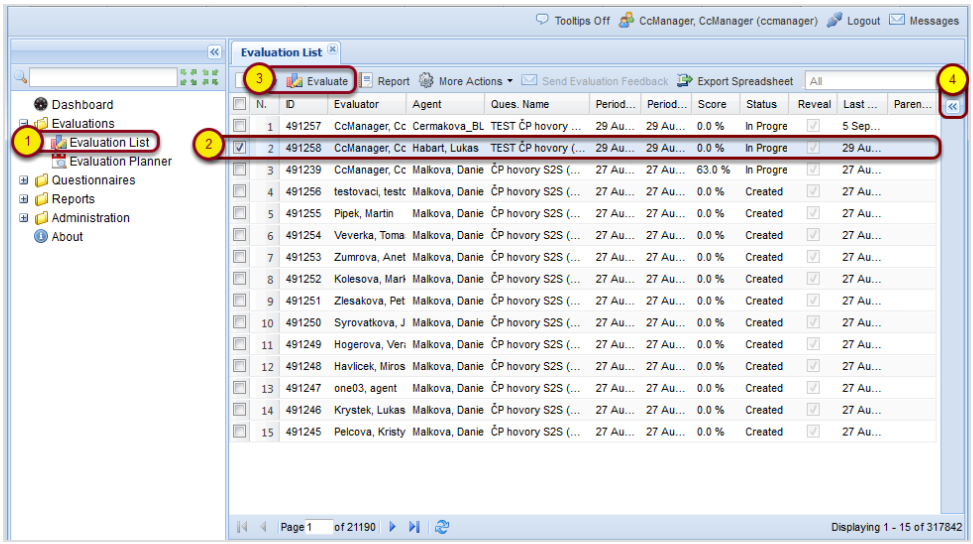


Figure 40: Opening the Scheduled Evaluation

To perform an evaluation:

1. Click **Evaluation List**.
2. Select the check box for the appropriate evaluation or click on the evaluation.
3. Click **Evaluate**.
4. Click to reveal the search dialog if the list is long.

It is only possible to evaluate evaluations that have been **Created** or **In Progress** but not those in the **Finished** status.

To re-use a completed evaluation, see the Re-Using the Evaluation - 1 (Optional) steps at the end of this tutorial.

The Evaluator Screen

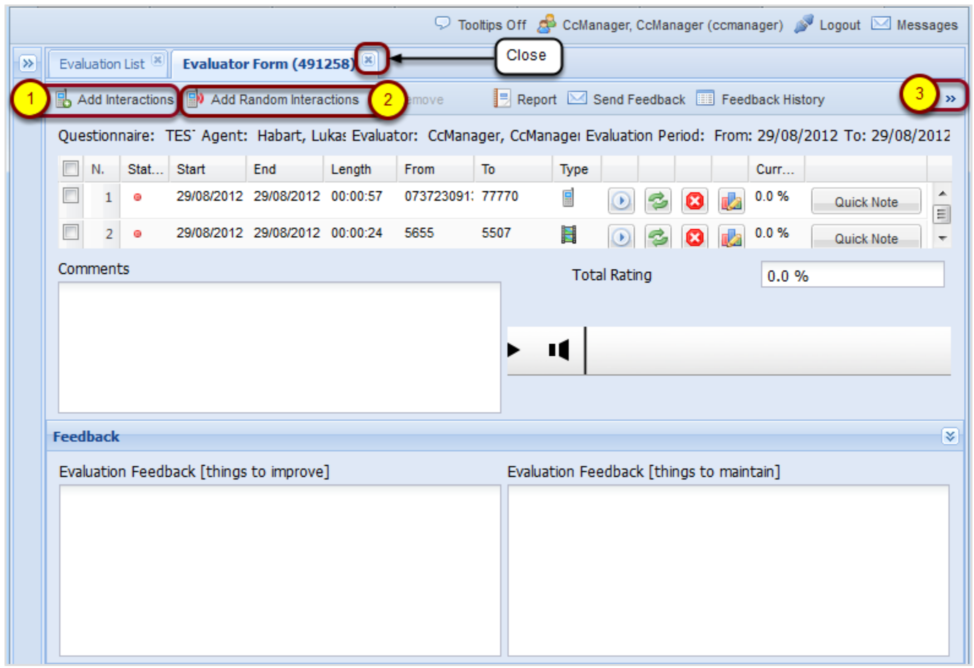


Figure 41: The Evaluator Screen

After starting an evaluation, the evaluator form opens

1. You can **Add Specific Interactions**.
2. You can **Add Random interactions**.
3. Some buttons mentioned in this tutorial may not be visible on smaller displays and can only be accessed via the expansion symbol on the right-hand side.

   If no existing interactions were specified during the scheduling of the evaluation, the new evaluation will not have any interactions (media records) associated with it.
4. To close the form without saving changes click **Close** on the toolbar or tab.

Adding Random Media for Evaluation

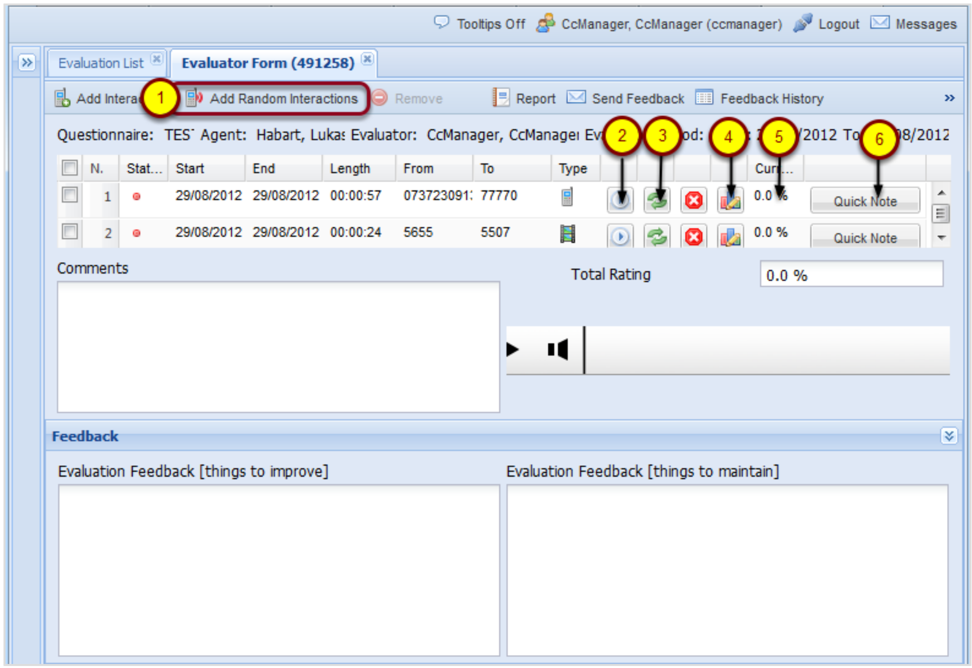


Figure 42: Adding Random Media for Evaluation

To add random media for evaluation

1. Click **Add Random Interactions** to add media records for the evaluation.This will retrieve the minimum number of appropriate agent calls specified when the evaluation was scheduled.
2. The Play Media button will play the call or video on the integrated media player.
3. The Replace Media button allows the evaluator to replace or remove the media record.
4. The Grade button allows the evaluator to evaluate the media record.
5. The Current Rating column displays the sum of questionnaire answers for each media record, while the **Total Rating** field displays the average of all **Current Rating** values.
6. Clicking **Quick Note** enables the evaluator to draw attention to some short text written for each media record without having to open the grading form. This can be used for quickly marking exceptional records for later study. It

can also be used by the person scheduling the evaluation to draw the evaluator's attention to something in the interaction that should be evaluated.

The Comments and Evaluation Feedback text fields visible on this screen display the text added in these fields for all media evaluations.

Important:

When using the Add Random Interactions function when performing an evaluation, Quality Manager only selects interactions that have not yet been used for evaluation.

Adding Specific Media for Evaluation

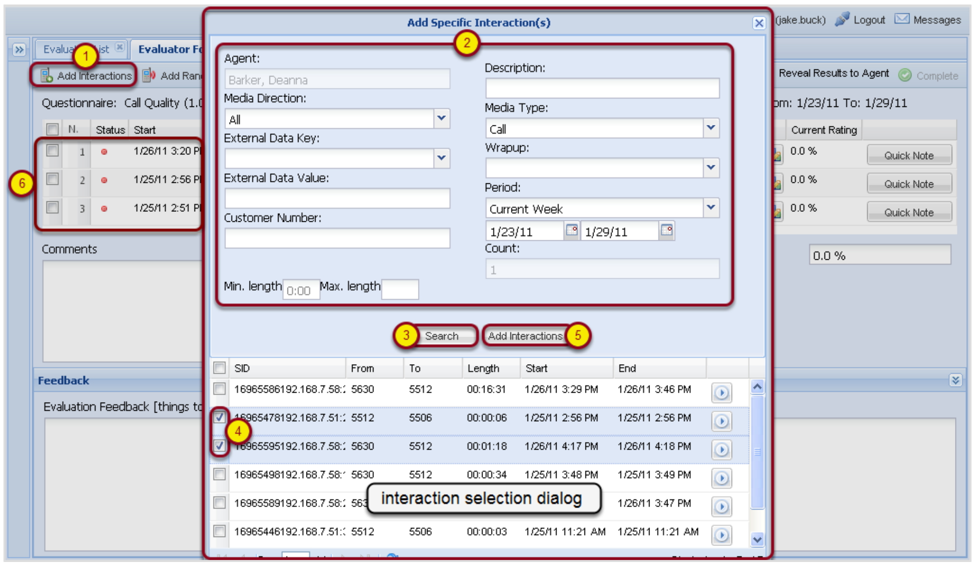


Figure 43: Adding Specific Media for Evaluation

1. Click **Add Interactions** to select one or more specific interactions to add for evaluation.
2. After the interaction selection dialog box opens, specify filters (period, media type etc.) as necessary.
3. Click **Search**.
4. Ensure the required interactions are checked for inclusion.
5. Click **Add Interactions**.
6. These interactions will appear in the main evaluation window, ready for use.

Replacing Media for Evaluation

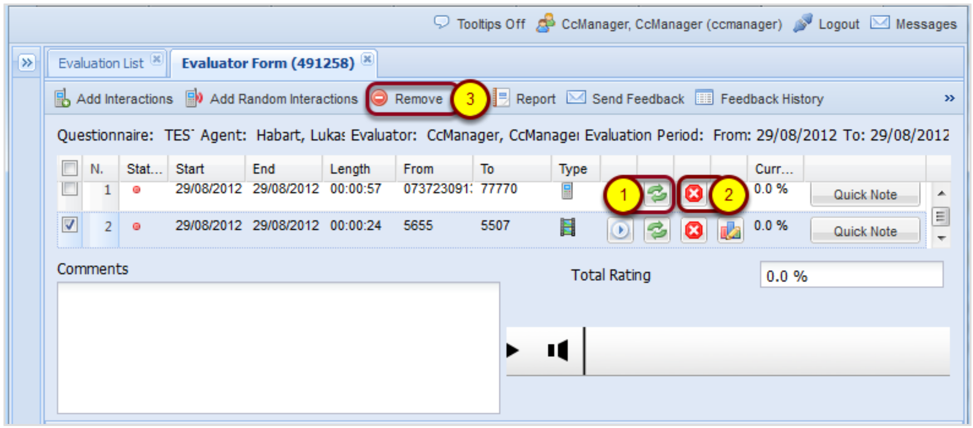


Figure 44: Replacing Media for Evaluation

To change or update the list of media records available for evaluation, the **Allow Call Replacement** option must be enabled when scheduling an evaluation.

If **Allow Call Replacement** is permitted:

1. Click the green arrows to replace the evaluation.
2. Click the X to remove evaluations.
3. Click **Remove** to remove evaluations.

This may be useful if the calls are of an inferior quality, and not suitable for use in the evaluation. If replaced, an alternative call will be offered, which fulfills the evaluation's interaction parameters.

Important:

In order to complete an evaluation, every media record listed in an evaluation must be graded.

Grading a Media Record

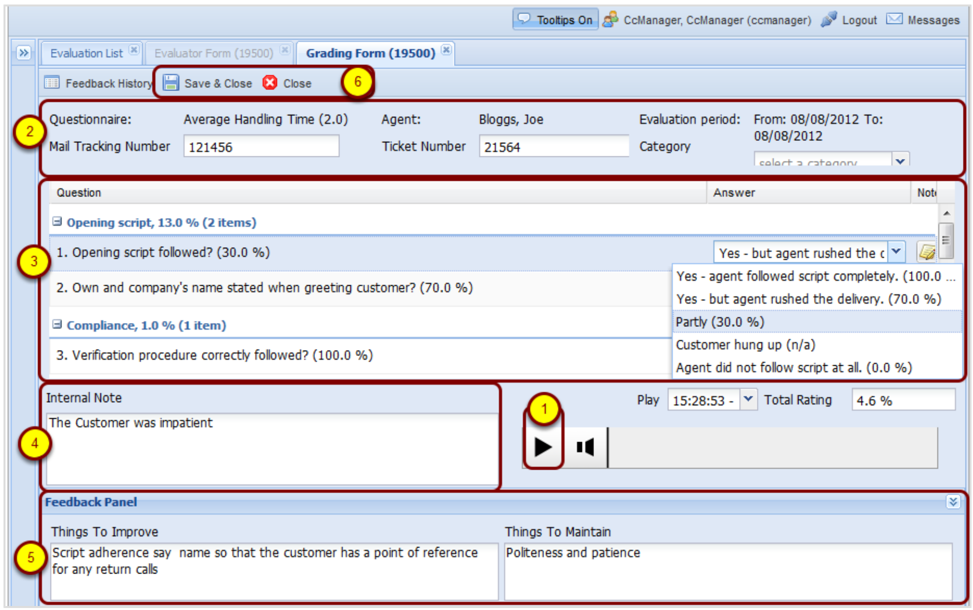


Figure 45: Grading a Media Record

To grade a media record, click the Evaluate icon for that record. A form will open with an integrated media player.

1. Click the **Play** button to begin media playback.

Important:

If a user requests a combination of mp3 and recd files, and mixing fails with a message **Loading Media Failed** then only the mp3 (audio) is made available and not the video.

2. The questionnaire associated with the evaluation will be displayed in a small window on the form. The Calling Number, Ticket Number, and Category can be updated as required. Scroll down in the window (if necessary) in order to view all the questions.
3. The questionnaire associated with the evaluation displays in a small window on the right of the form. Scroll down in the window if necessary in order to view all the questions.Select a suitable answer for each question, stopping and replaying the media as necessary. All questions must be answered for all

media records present in the evaluation before the evaluation can be marked as complete.

4. The **Internal Note** text field can be used for keeping notes about a media record that are only visible to evaluators (not to agents).
5. The **Feedback Panel** contains two text fields that can be seen by the evaluated agent. **Things To Maintain** can be used to keep a list of points illustrating areas of good performance by the agent, whereas any areas for improvement should be noted in the **Things To Improve** field.
6. Click **Save & Close** at the top of the grading form to keep all modifications made to the form fields. The grading session can therefore be saved and returned to at a later time. **Close** closes the grading form.

Completing the Evaluation

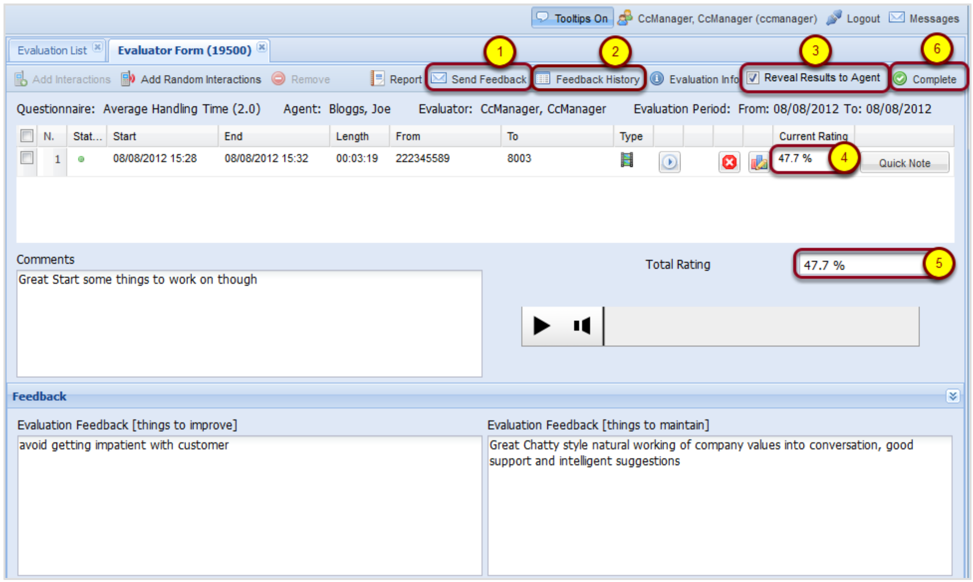


Figure 46: Completing the Evaluation

1. Before completion, feedback can be sent to the agent (text in the feedback fields on this tab) by clicking **Send Feedback**.
2. To view feedback from earlier evaluations for the same agent, click **Feedback History**.
3. Click **Reveal Results to Agent** to allow the agent to view the results.
4. View media rating in the Current Rating column.
5. View the average of all media in the evaluation in the **Total Rating** field.
6. Once the media records have been fully graded, the evaluation can be marked as **Complete**.To complete the evaluation and exit this tab, click **Complete** on the toolbar. If all media record questionnaires have been fully answered, Quality Manager marks the evaluation as complete by assigning it the **Finished** status in the Evaluation List.

Sending Feedback to an Agent

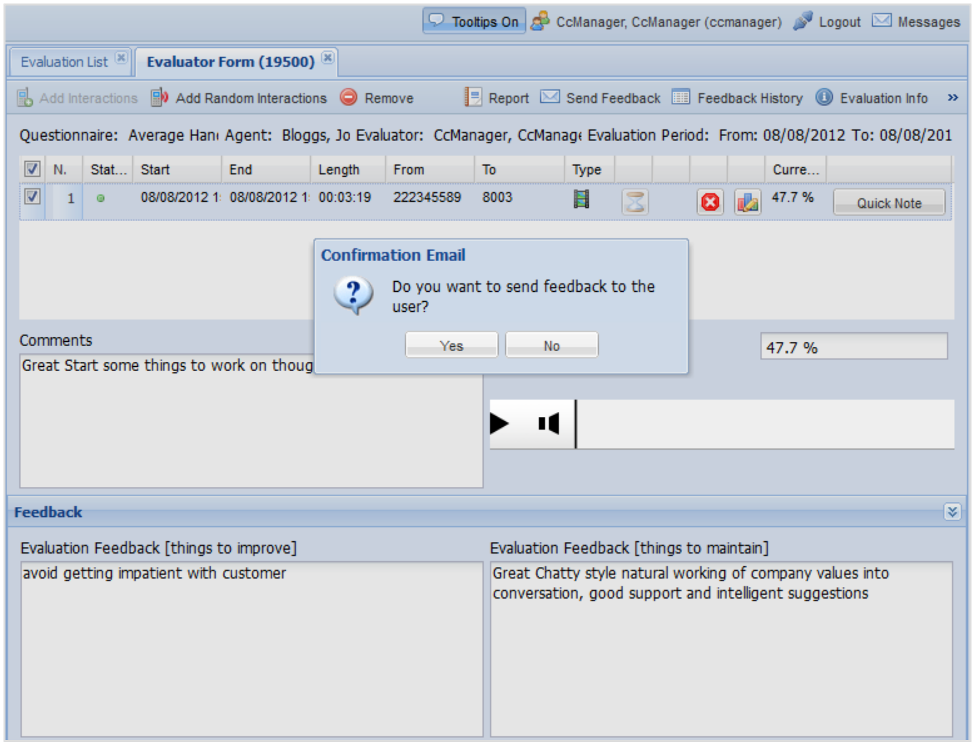


Figure 47: Sending Feedback to an Agent

After marking an evaluation as complete, the option to send feedback to the evaluated agent is available (from the information in the feedback text fields).

This invites the agent to log in to Quality Manager to view their evaluated performance. After selecting **Yes** or **No**, the evaluator form closes.

Important:

A completed evaluation (an evaluation with the status **Finished**) cannot be re-opened for editing unless the custom Reopen Evaluations role has been assigned to the user – see Re-Open An Evaluation. This would normally be an extraordinary occurrence.

Completed evaluations can be opened in read-only view, where they can be printed or used as a source for a report.

Deleting Evaluations

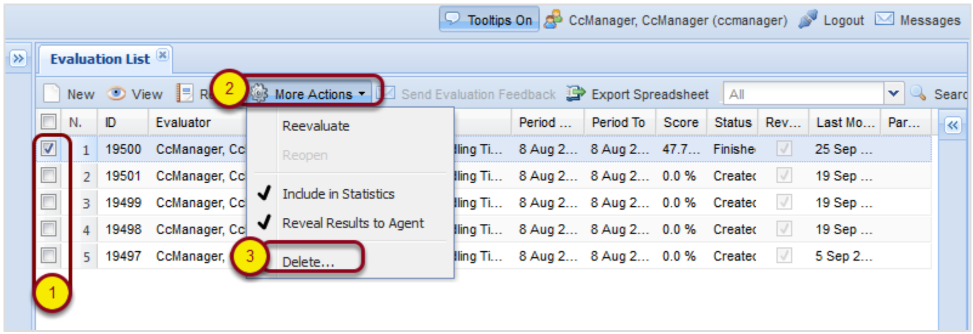


Figure 48: Deleting Evaluations

The evaluation list now shows the completed evaluation with a **Finished** status.

To delete an evaluation that you have created (having **Created**, **In Progress** or **Finished** status):

1. Select the evaluation.
2. Select **More Actions**.
3. Click **Delete** in the dropdown list. If this option cannot be clicked, the **Evaluate Agents** permission needs to be added to your role. This applies to any role that will need to delete (self) evaluations.

Important:

Only the original creator (not necessarily the evaluator) of an evaluation has the right to delete it. This limitation is important for self evaluations. The role creating self evaluations (for example Agent) must be assigned the **Evaluate Agents** permission, in addition to the **Self-Evaluate** permission, in order to be allowed to both create and delete evaluations. Without the agent being assigned the Evaluate Agents permission, no-one on the system will be able to delete the agent's self evaluations.

Re-Using the Evaluation - 1

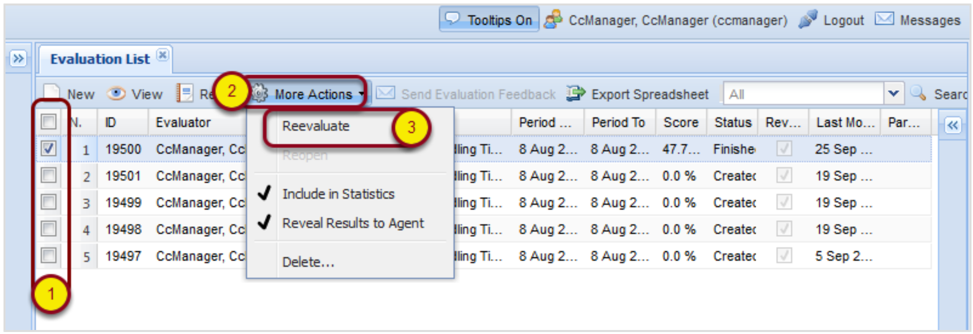


Figure 49: Re-Using the Evaluation - 1 (Optional)

An existing evaluation (with any evaluation status) can be re-used to quickly set up and perform additional evaluations with the same parameters.

Re-using an evaluation enables a user to re-assign a finished evaluation to another evaluator, whilst keeping the same media associated with it. The new evaluator can then evaluate the same call, which allows a first stage in a calibrations procedure that will be conducted entirely through Quality Manager, and which fully documents the calibration process. For more information on this topic please see Calibrating Evaluations.

To re-use an existing evaluation:

1. Select the evaluation by clicking it.
2. Select **More Actions**.
3. Click the Re-evaluate button from the **More Actions** dropdown.

Re-Using the Evaluation - 2

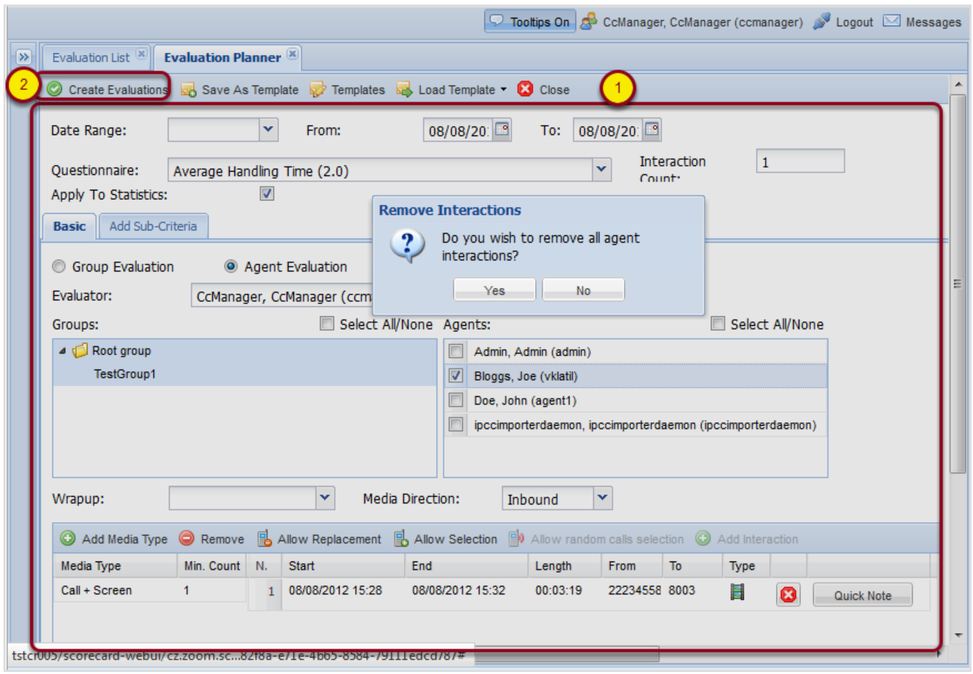


Figure 50: Re-Using the Evaluation - 2 (Optional)

1. Open the **Evaluation Planner**. The Remove Interactions dialog appears. Select **Yes** to remove all the agent interactions used in the initial evaluation or **No** to keep them. The criteria of the original evaluation will be set in the Evaluation Planner. Modify the evaluation as required.
2. Click **Create Evaluations**. A new evaluation is created and appears in the evaluation list.

Re-Opening an Evaluation

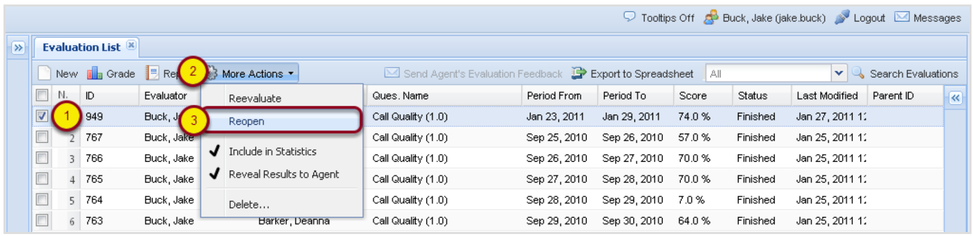


Figure 51: Re-Opening an Evaluation

After an evaluation is marked as complete, it is assigned the **Finished** status. **Finished** evaluations cannot be opened again to edit scores unless the custom **Reopen evaluations** permission has been assigned to the user's role (see Re-Defining User Roles).

To reopen an evaluation:

1. Select an evaluation with the **Finished** status.
2. Click **More actions**.
3. Click **Reopen** from the dropdown. The status of the evaluation becomes **In Progress**.

Important:

After re-opening an evaluation, only the assigned evaluator can view and modify the evaluation scores. There is currently no permission that will enable a user role to view/modify evaluations for which the user is not the assigned evaluator.

Sending Evaluation Feedback to the Evaluator

Agents can send feedback on their evaluations using the **Send Evaluation Feedback** button on the toolbar of the evaluation list. This feature is important when a contact center allows agents to review and appeal their evaluation results. Only the users that have been evaluated have access to this button.

To send evaluation feedback as an agent:

Navigate to the Evaluation list from the left hand navigation tree.

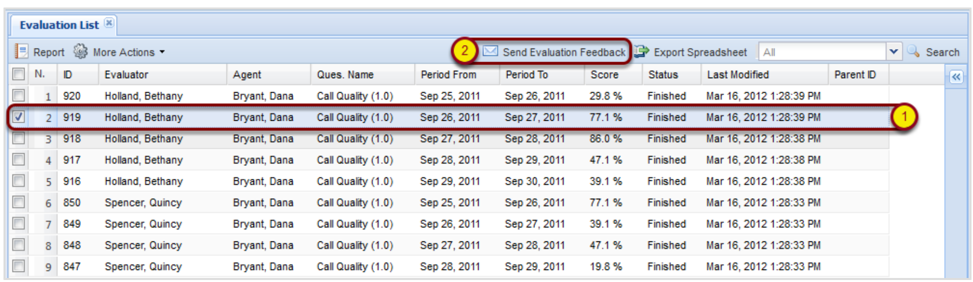


Figure 52: Sending Evaluation Feedback Button

1. Click on the evaluation that requires feedback (must be in **Finished** status).
2. Click the **Send Evaluation Feedback** button on the toolbar.

The message entry window opens.

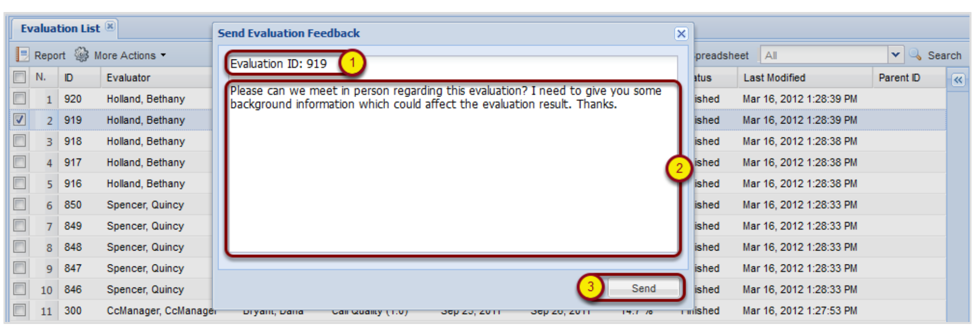


Figure 53: Send Evaluation Feedback Message

1. Add the evaluation ID number to clarify which evaluation the message is related to.
2. Add a message to the evaluator.
3. Click **Send**.

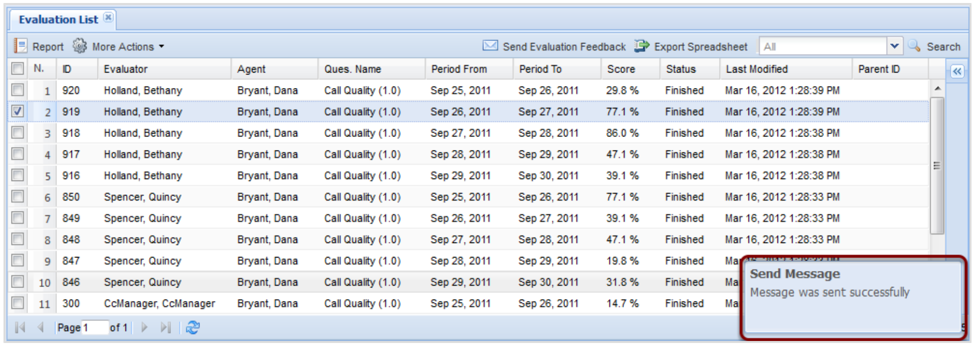


Figure 54: Send Evaluation Feedback Message Sent

A notification appears in the bottom right hand corner of the browser window to confirm that the message has been sent to the evaluator.

The message will now appear in the evaluator's system message inbox. For more information about how the evaluator retrieves the message please see Viewing System Messages.

Using the Evaluation Detail Report

The Evaluation Detail report is the main report that an evaluator will use when providing feedback to an evaluated agent. At the very minimum it will contain the questions on the grading form and the answers given. Evaluator notes will be shown at the bottom of the grading form.

The form also contains a link to a read-only version of the grading form where the user can listen to the call and view the screen capture if there is one.

When printed, the Evaluation Detail report contains signature lines for the evaluator and the agent to certify that the evaluation has been delivered (generally for HR purposes).

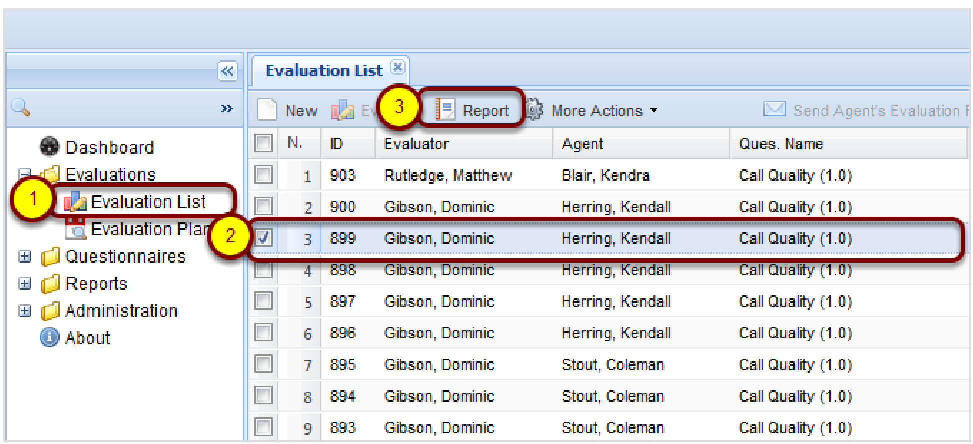


Figure 55: Evaluation List

To open the **Evaluation Detail Report:**

1. Navigate to **Evaluation list**.
2. Select a finished evaluation record from the list of evaluations.
3. Click **Report** from the tool bar in the **Evaluation List** tab.

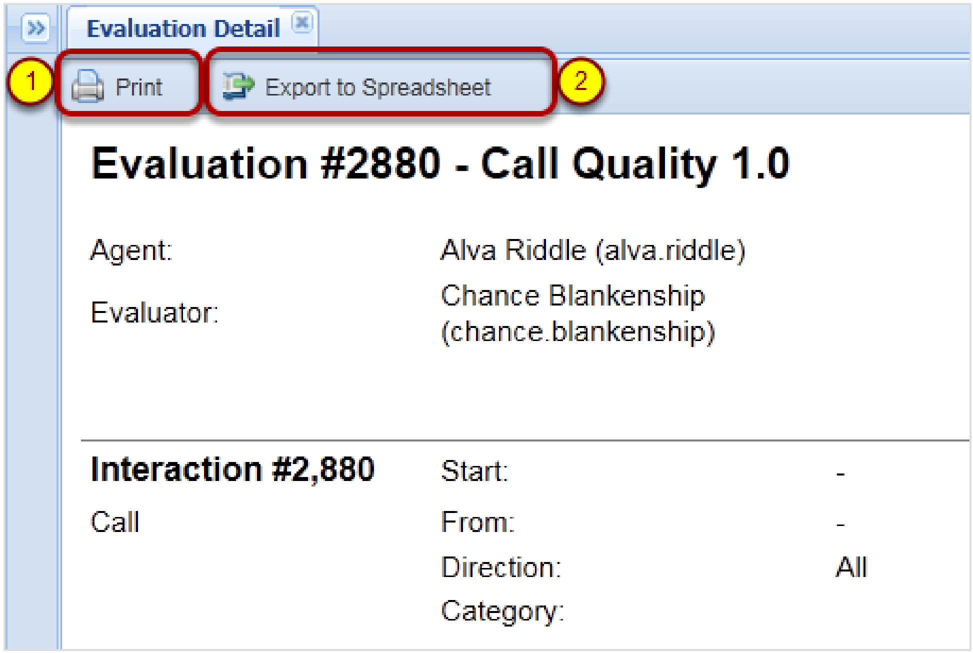


Figure 56: Evaluation Detail Report

1. Click **Print** to print the **Evaluation Detail**.
2. Click **Export to Spreadsheet** to export the Evaluation Detail to an Excel spreadsheet.

The **Include All Possible Answers** checkbox will display not only the answer that was selected, but all of the other possible answers as well (displayed in gray). This can be useful when providing feedback to an agent (knowing what other options the evaluator had to choose from can provide context for the evaluation).

The **Eco Printing** option will create a slightly compressed version of the evaluation detail report that can be printed on less paper using less ink. It is intended for large contact centers that will print a large number or reports.

Important:

The spreadsheet is in the .xls format used in Excel versions 97-2003.

During export, the following dialog box appears.

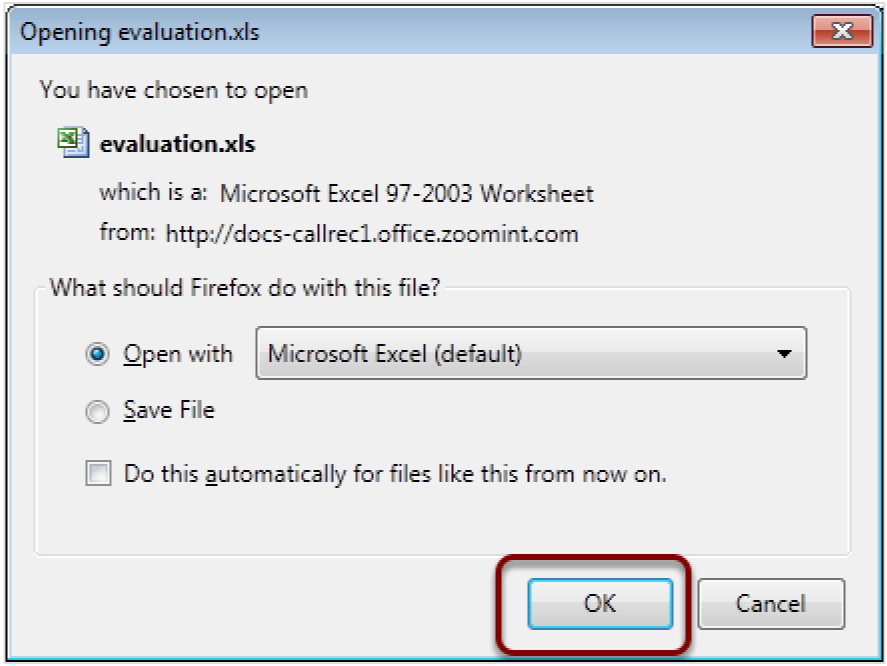


Figure 57: Open the Spreadsheet

Click **OK** to open the spreadsheet

The Evaluation Detail report is displayed.

Linking to a Read-only Grading Form

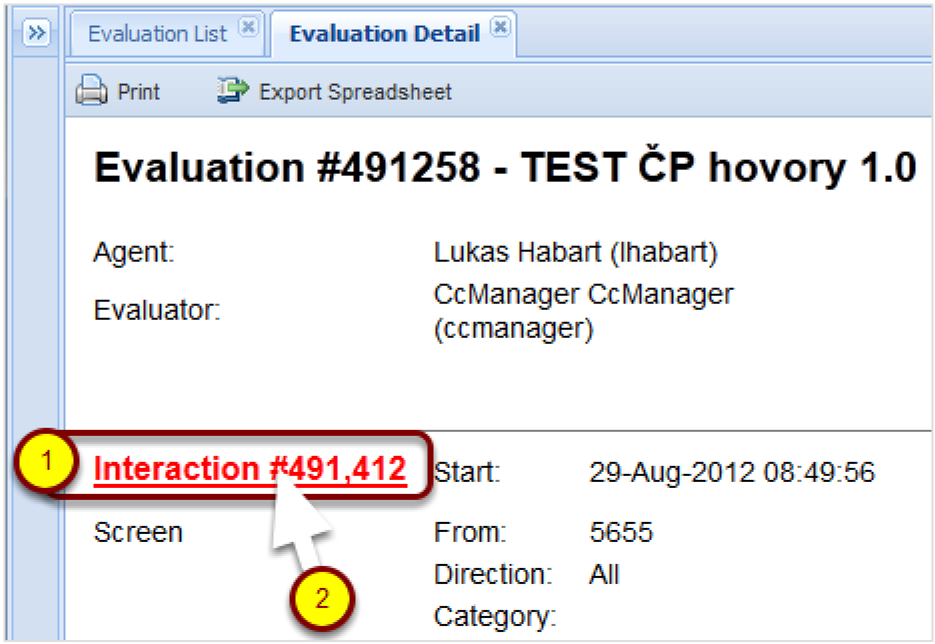


Figure 58: Detail Report Showing Interaction

The Evaluation Detail allows you to link to the grading form.

1. Mouse over the word and number **Interaction #xxx** (where xxx is the interaction number). The word and number will turn red to reveal that it is a link.
2. Click the link **Interaction #xxx**, the read-only access Grading Form will open.

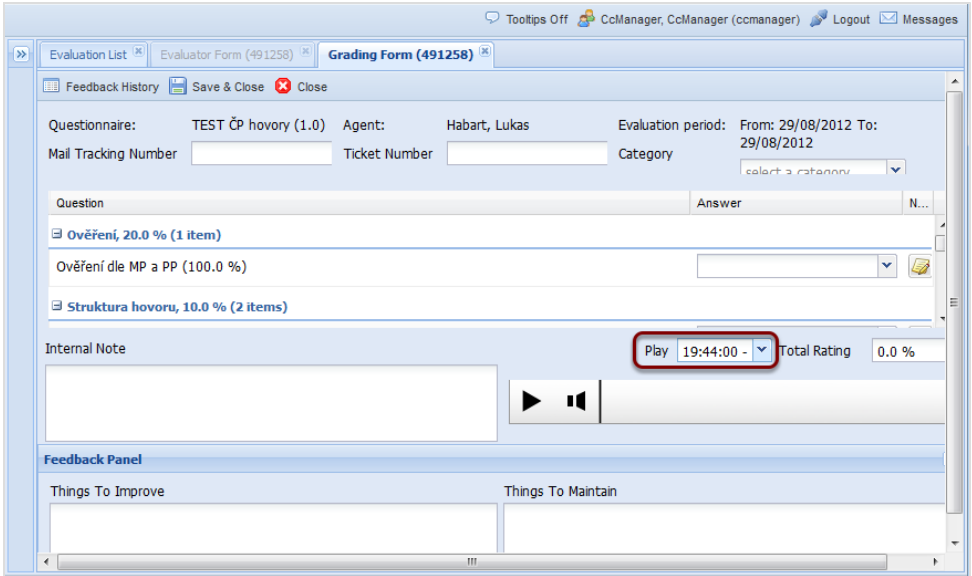


Figure 59: Grading Form

If there is a media interaction associated with the Grading Form, it appears in the **Play** drop down list, and can be selected to play in the Media player.

When there is more than one media interaction associated with the Grading Form (for instance if a call has been transferred or put on hold), each interaction will appears in the **Play** drop down list and can be selected to play in the Media player.

Chapter

6 Reporting

A short tutorial to show how to create and export evaluation charts and reports in Genesys Quality Manager 8.1.50x.

This chapter contains the following sections:

Types of Reports

The following types of reports (visual graphs) can be created:

- **Agent Skills:** select an agent, questionnaire, evaluation period question groups (skills) and questions to view an agent's skill profile
- **Compare Agents:** Select a questionnaire, evaluation period and question group ('skill') and questions to view a comparison between agents' skills
- **Compare Evaluators:** Select an agent, questionnaire and evaluation period to compare how different evaluators scored this agent
- **Results Distribution:** Displays a detailed view of agents, evaluations, and interactions volume (categorized using average scores into 'Good', 'Average' and 'Bad' rankings). Choose from displaying the **Number of agents**, **Number of interactions**, or **Number of evaluations**.
- **Compare Scores:** A report enabling the comparison of evaluators' performance, either for a single call or agent.
- **League Table:** Based on the 'Averages per Questionnaire for Agent' report, but sorted according to final score and permitting the selection of multiple questionnaires (aggregate average).
- **Interactions Volume:** Displays all interactions **Evaluated**, **Replaced**, and **Not Evaluated** over a specific time period.
- **Evaluations Volume:** Displays evaluation volume by status. Choose from **Planned**, **In Progress**, and **Finished** or all three, over a specific time period.

Each report is set up using the parameter fields, after which the Compute Graph button is clicked to generate the report graph. Parameters can still be modified after report creation, but each time the Computer Graph button must be clicked to generate the report and resulting graph.

Report graphs can either be printed using the standard browser print dialog (**CTRL + P** for Windows, **CMD + P** for Mac), or the graph itself can be saved as a static graphic image via right-click on the generated graph **> Save Image Locally**.

Alternatively, report data can be exported in Excel 2007+ (.xlsx) spreadsheet format – see the [Exporting Report Data](#) section.

Setting Up a Report

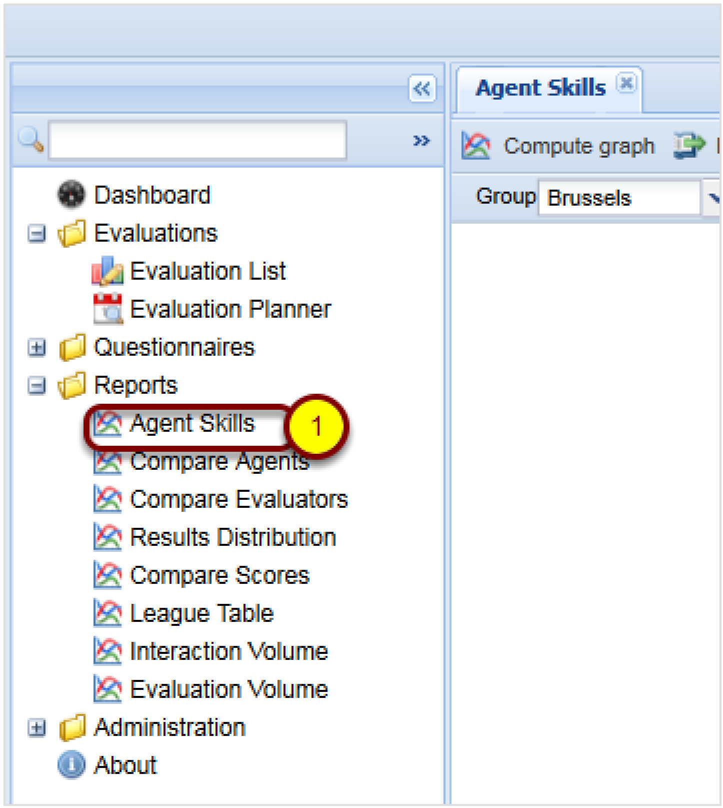


Figure 60: Selecting Agent Skills

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

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

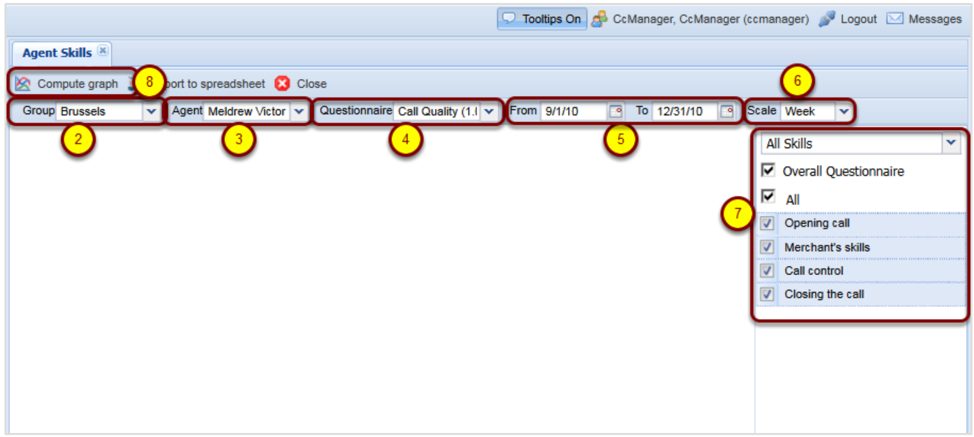


Figure 61: Setting Up a Report

2. Select an agent. group from the **Group** dropdown.
3. Select an agent from the **Agent** dropdown.
4. Select a questionnaire from the **Questionnaire** dropdown.
5. Select an evaluation start date in **From** and select an evaluation end date in **To**.
6. Select an initial report **Scale** from the dropdown (in the figure, this is a **Week**). The **Scale** affects how wide the time interval is between columns in the final graph. Any of these parameters can be changed again later if necessary.
7. Select which skills will be included in the report using the checkboxes or the dropdown. You can choose from **All skills** or select different sections of the questionnaire (these will vary according to the particular questionnaire).
8. When all required parameters have the appropriate values, click **Compute graph** to create the report, or the Export to spreadsheet button to export the report directly in an Excel 2007 spreadsheet format (.xlsx) (see Exporting Report Data).

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

Important:

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

Results Distribution Graph - 1

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

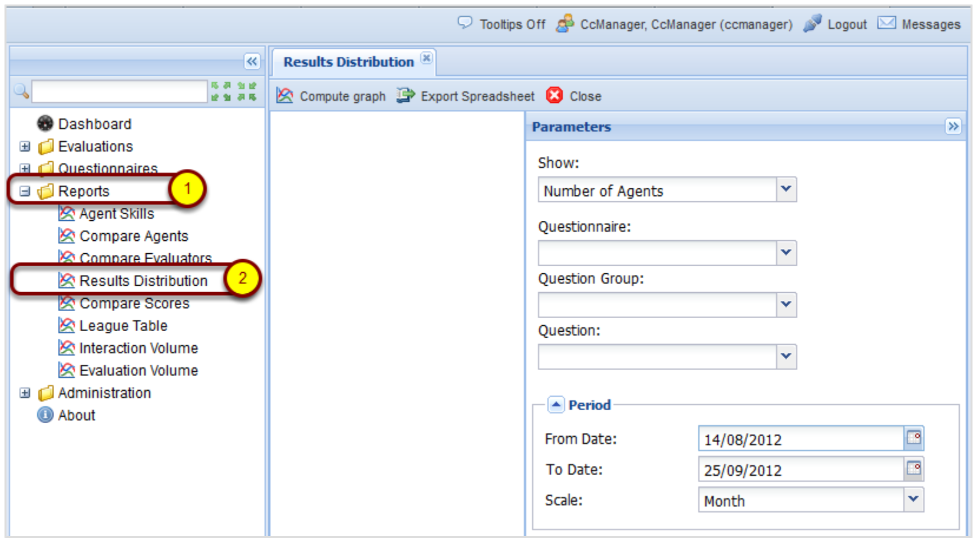


Figure 62: Opening the Results Distribution Tab

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

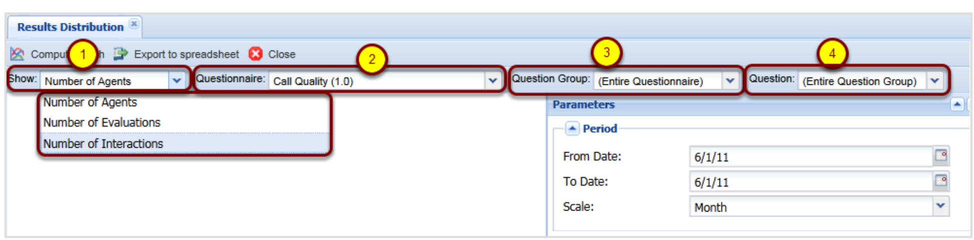


Figure 63: Results Distribution Tab

1. The **Show** drop down list has the alternatives **Number of Agents**, **Number of Evaluations**, and **Number of Interactions**. Click on one of these to select what is displayed in the chart.
2. Select a **Questionnaire** from the **Questionnaire** dropdown to base the analysis on.
3. Select a **Question Group** from the **Question Group** dropdown (Optional) to base the analysis on.

4. Select a **Question** (Optional) from the **Question** dropdown to base the analysis on.

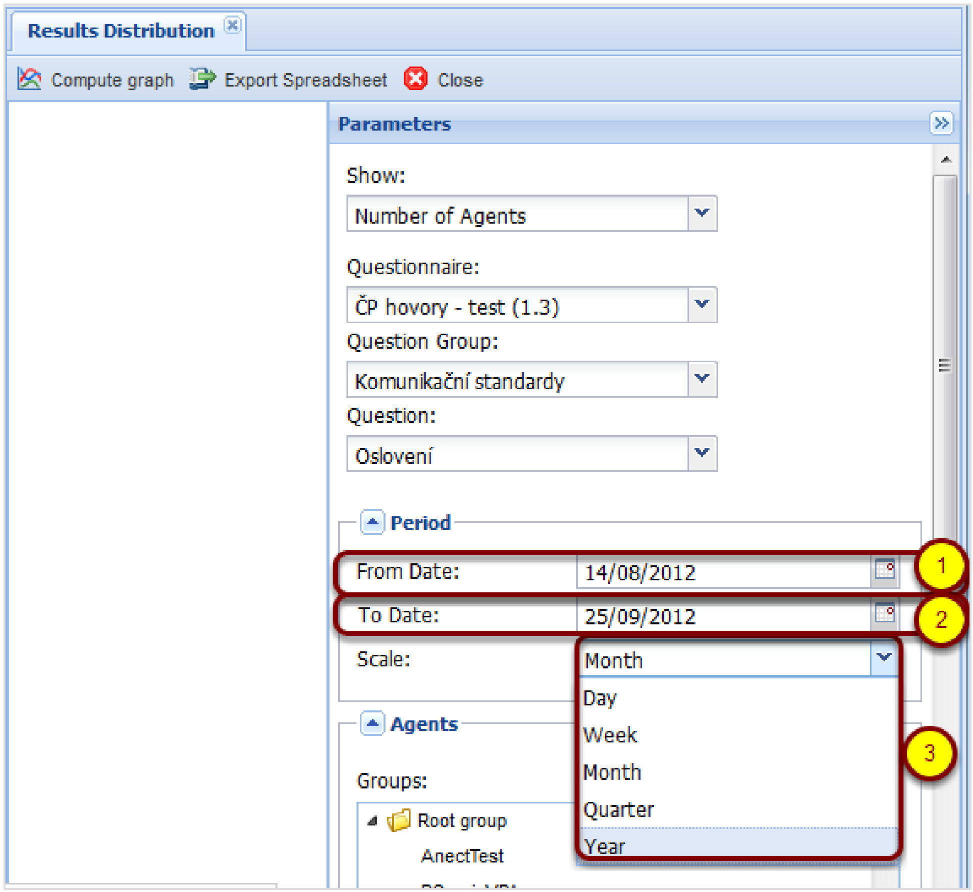


Figure 64: The Results Distribution Tab Parameters

1. Select or type a **From Date** for the graph to begin.
2. Select or type a **To Date** for the graph to end.
3. Select the **Scale** for the Graph from the drop down (this affects how wide the bars in the graph display).

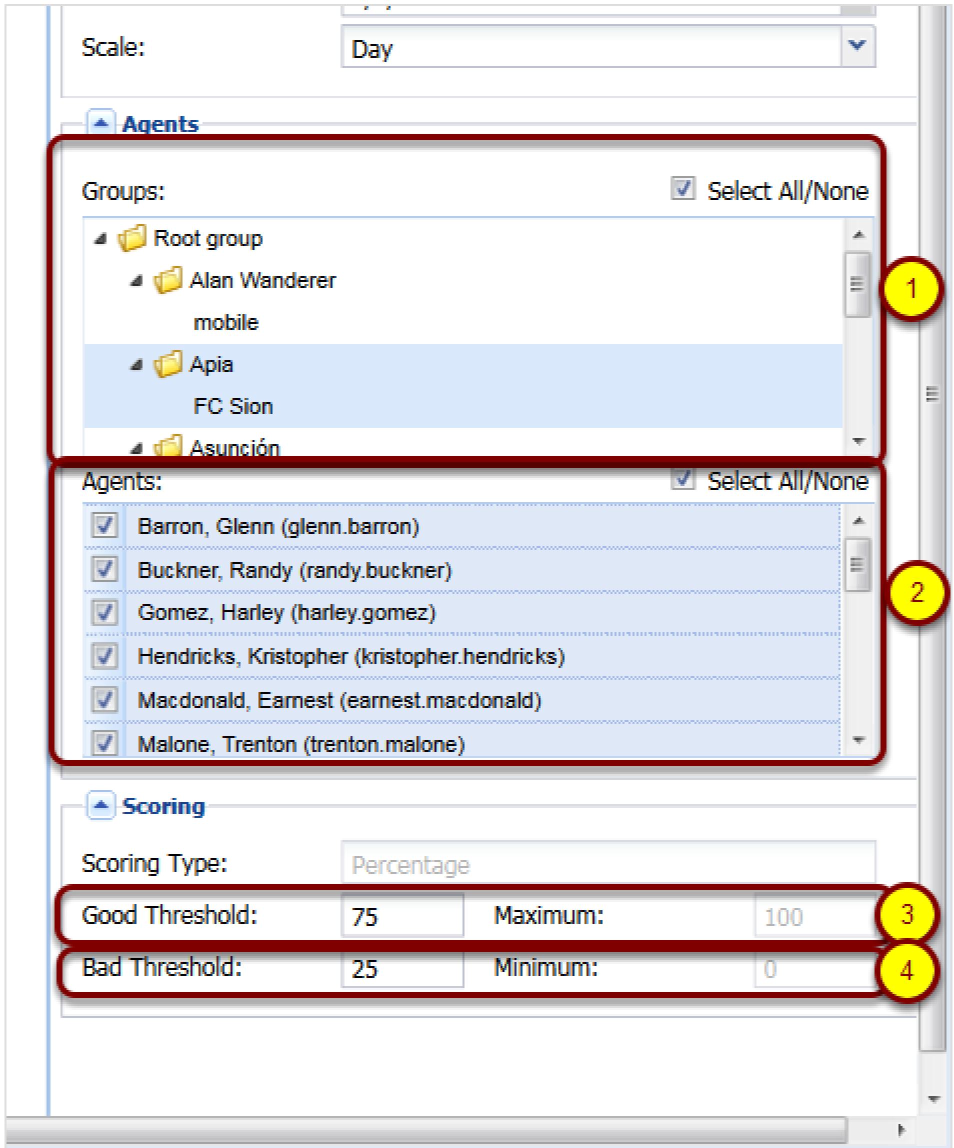


Figure 65: The Results Distribution Tab Parameters / Select Agents

1. Select one or more agent **Groups**. You can select all or none by checking or unchecking **Select All/None**. The agents in the groups will display in the **Agents** section. You can select more than one group by pressing and holding the **CTRL** key while clicking additional groups.
2. Select one or more **Agents** using their checkboxes. You can select all or none by checking or unchecking **Select All/None**.

The **Scoring** parameters enable you to determine the threshold (boundary) values for the report groupings.

3. Set the **Good Threshold** (this value must be lower than the **Maximum** value). The **Good Threshold** is the minimum value for an agent score to be included in the top rated group (the default is 75%).
4. Set the **Bad Threshold** (this value must be higher than the **Minimum** value). The **Bad Threshold** is the maximum value for an agent score to be included in the worst rated group (the default is 25%). All agent scores that fall between these two thresholds are included in the average group.

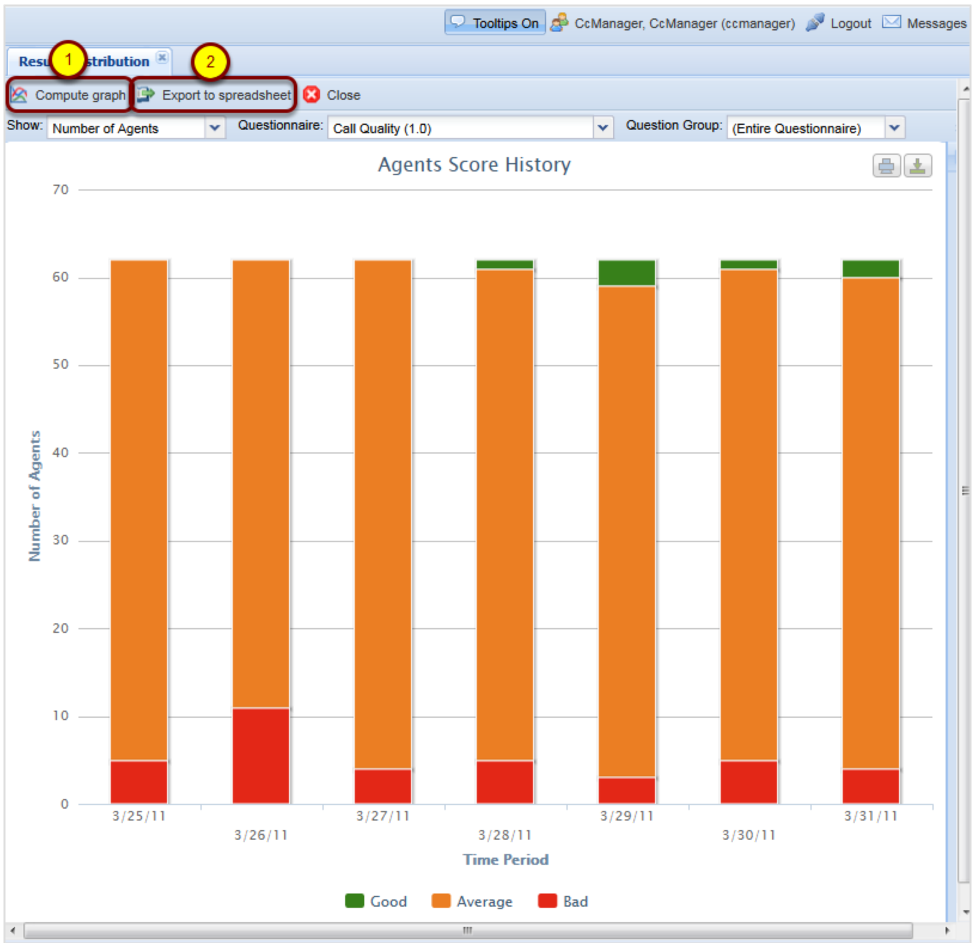


Figure 66: Compute Graph

1. Click **Compute Graph** to begin the chart creation process. A graph will display if there is data available. If you receive a message warning about no data being available for the specified parameters, you will need to modify your parameter values - for example, change the **From Date**, **To Date**, or questionnaire specified, then click **Compute Graph** again.
2. Click **Export to Spreadsheet** to create a tabular version in downloadable spreadsheet format (.xlsx).

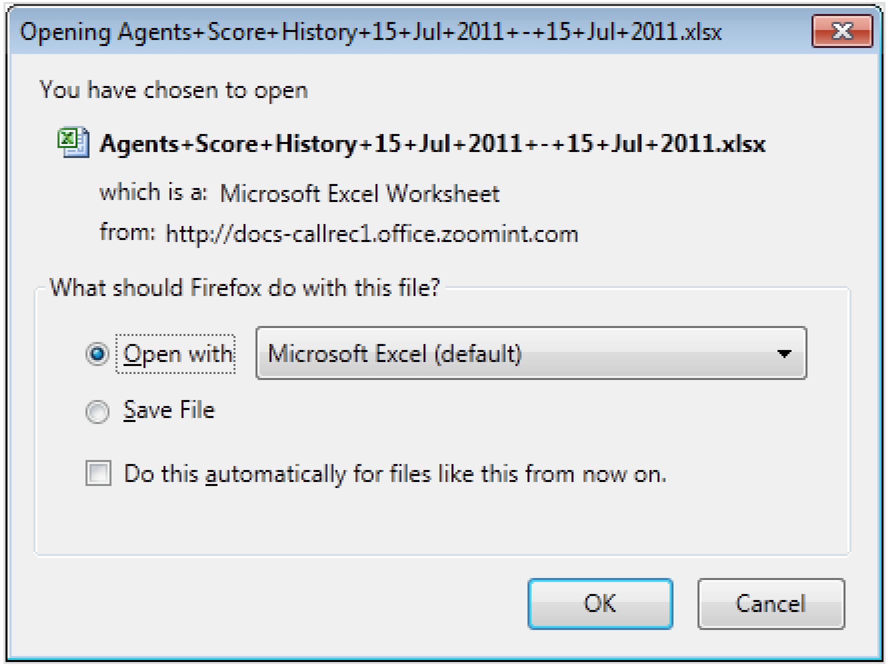


Figure 67: Export to Spreadsheet Dialog

Click **OK** to open the spreadsheet.

The exported Spreadsheet will open in MS Excel 2007-10 or compatible alternative.

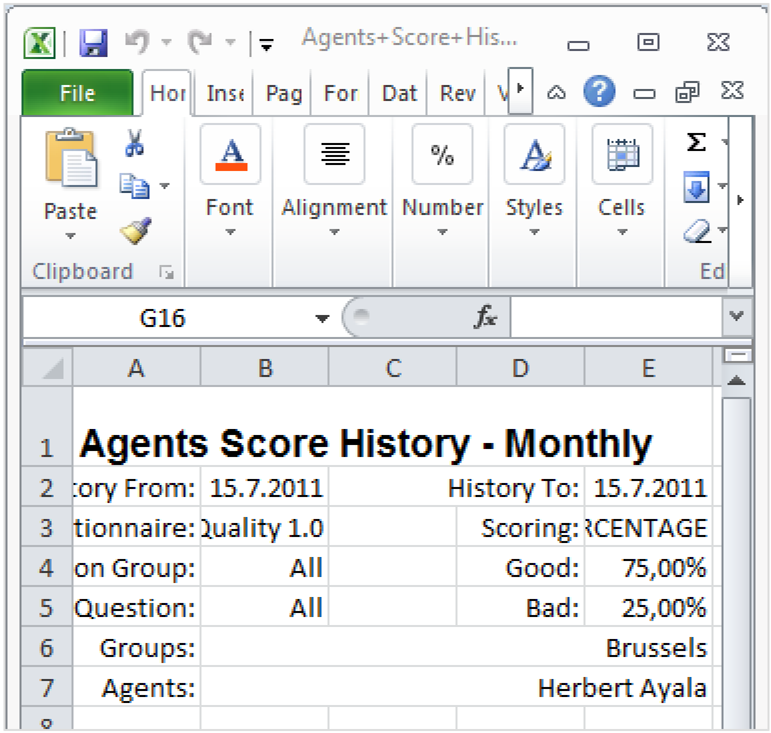


Figure 68: Example of Exported Spreadsheet

The cells can be resized as required.

Results Distribution Graph - 2

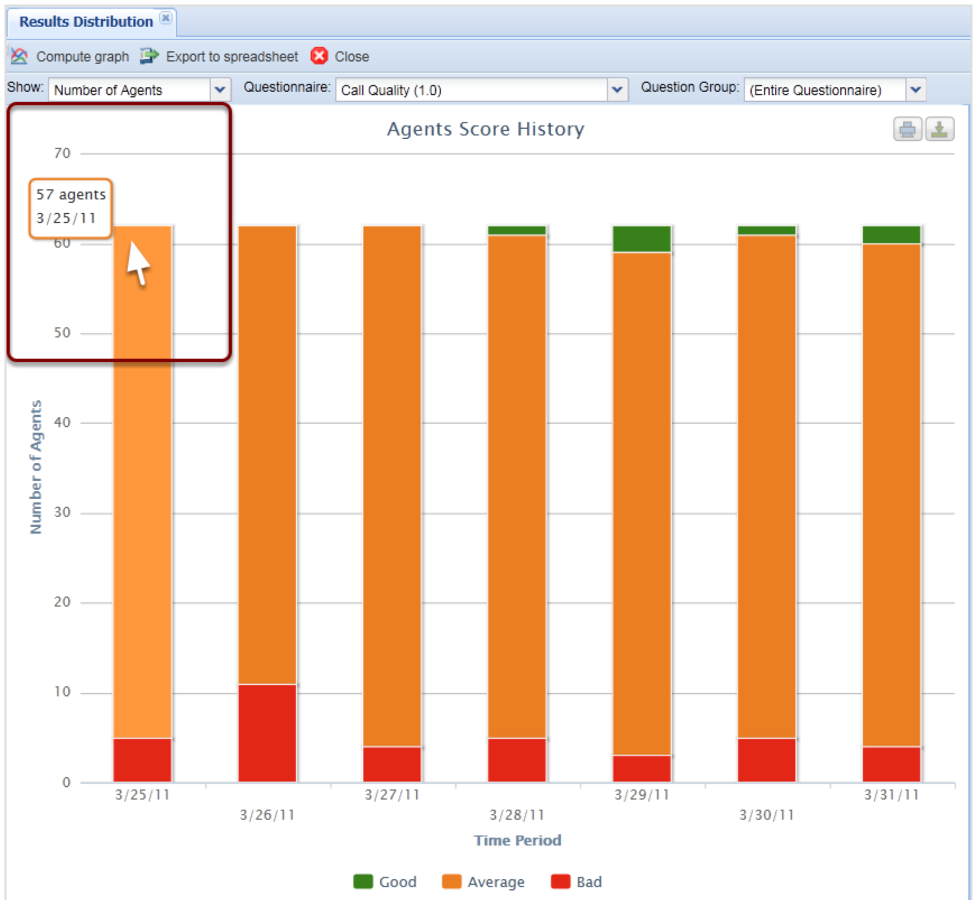


Figure 69: Results Distribution Graph 2

The graph bars display **Good** (green), **Average**(orange) and **Bad**(red) scores.

With the graph open, hover over a bar section to see information about the data calculated.

Clicking on a part of a bar opens the Evaluation Detail screen with all interactions included in that part of the chart.

Compare Scores Report - 1

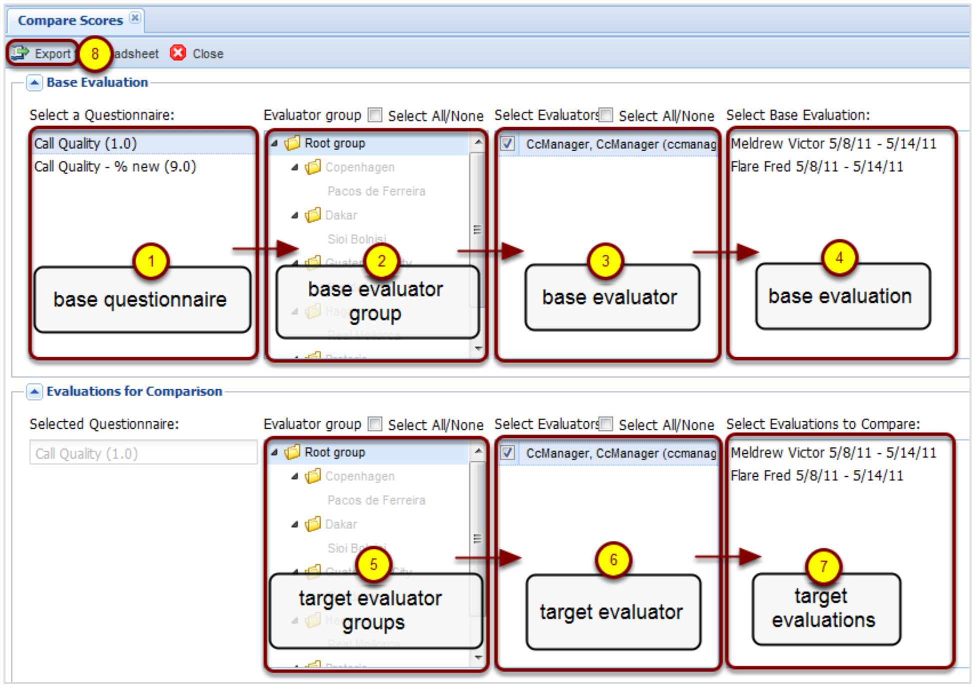


Figure 70: Compare Scores Report – 1

The **Compare Scores** report enables the comparison of the performance of evaluators and their questionnaires across agents or groups. The following two modes are available:

- **evaluation-based comparison** ("head to head"); compare the scoring by two evaluators for one specific evaluation
- **agent-based comparison** ("general comparison"); compare the scoring by two evaluators for a specified agent

Click **Reports > Compare Scores** to display the parameters page. The first row of boxes define the parameters for the base evaluation, from which all comparisons are made.

1. Select a base questionnaire to use.
2. Select a base evaluator group.
3. Select a base evaluator.
4. Select one evaluation (only one can be selected here).
   The second row of boxes define the parameters for all other evaluations that

will be compared to the base evaluation. The questionnaire is now automatically selected.

5. Select one or more target evaluator groups.
6. Select one or more target evaluator.
7. Select one or more target evaluations for comparison.
8. Click **OK** to start the process of creating the report or export as a spreadsheet (.xlsx) file.

Compare Scores Report - 2

Compare Scores

Questionnaire: **Call Quality (1.0)**

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

Figure 71: Compare Scores Report – 2

The Figure: *Compare Scores Report* shows a sample spreadsheet report. All evaluation values are shown in columns. The first evaluation displayed is the base evaluation, while the remaining evaluations shown are those selected for comparison to the base evaluation.

The first column of figures for an evaluation displays the simple average value for that question (or weighted average value for question groups). The second column of figures displays the calculated difference between this evaluation's value and the base evaluation.

Important:

Question groups, together with their assigned weight (w) are listed on the left side of the report, each followed by the list of questions it contains. Values shown in red are a negative difference (the evaluation contained a higher mark for the question / question group than the base evaluation).

League Table - 1

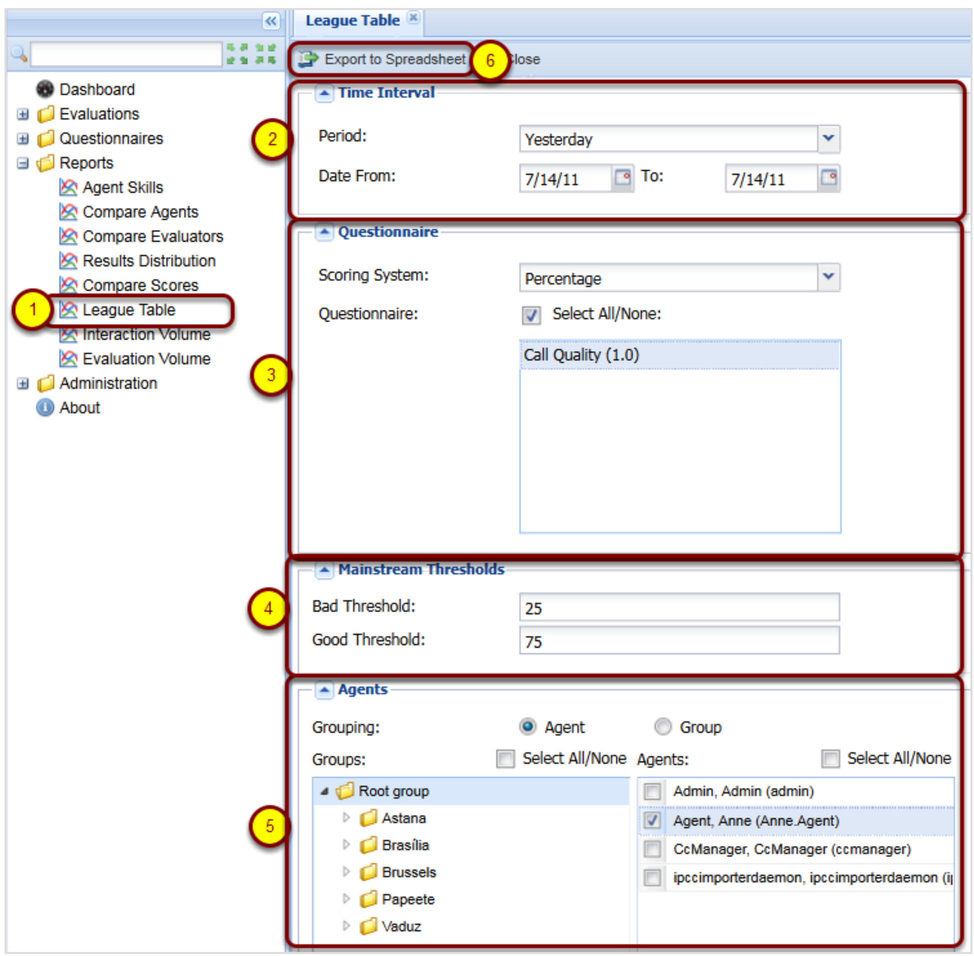


Figure 72: League Table – 1

The **League Table** report provides a simple way to create an agent 'leader board', with the highest performing agents overall or for a given questionnaire / agent group displayed in ranked order.

1. Click **Reports > League Table** to display the parameters for this report.

2. Specify from / to dates to limit the number of finished evaluations analyzed, then a scoring system (for example, Percentage).
3. Specify one or more questionnaires as the source of the evaluations.
4. Additional criteria can be specified: Mainstream limits the range of scores to upper / lower limits, and Agent / Agent Group allows the League Table to be confined to a subset of agents.
5. Finally the **Grouping** option displays the ranked results at Agent level (default) or at Group level (useful when agent groups need to be directly compared).
6. Click **Export to Spreadsheet** to generate the report as a downloadable spreadsheet file (.xlsx).

League Table - 2

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

Figure 73: League Table – 2

The Figure League Table shows an example **League Table** report grouped by agent. This spreadsheet report can be printed or further processed manually or with other tools.

Interaction Volume

The **Interaction Volume** report displays all interactions **Evaluated**, **Replaced**, and **Not Evaluated** over a specific time period.

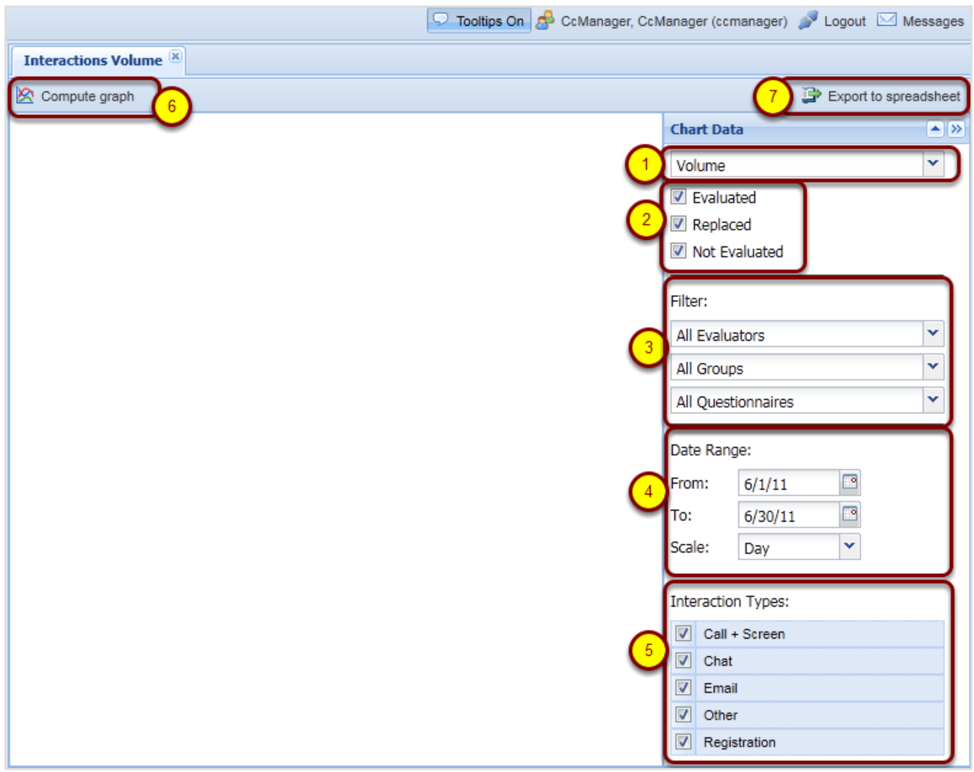


Figure 74: Interaction Volume Tab

To open the **Interaction Volume** tab, click **Reports > Interaction Volume**.

In the **Chart Data** section:

1. Select the type of volume in the **Volume** dropdown box. The **Volume** dropdown box has 4 options.
   - **Volume:** Shows the total number of interactions.
   - **Volume Ratio:** Shows the percentage ratio between interactions in the given state.
   - **Call Length:** Shows the total length of calls and screens that were evaluated / not evaluated / replaced.
   - **Call Length Ratio:** Shows the call lengths in percent of total volume.

Volume is selected by default.

Interactions between two agents may be calculated twice (once for each agent), but the effect on the statistics will be negligible.

2. Check the boxes **Evaluated**, **Replaced**, and **Not Evaluated**, and select which states are shown in the chart. **Evaluated** and **Replaced** are selected by default. **Not Evaluated** is unselected by default.
3. Select filters from the dropdown in the **Filter** section:
   - The evaluators default is **All Evaluators**.
   - The groups default is **All Groups**.
   - The questionnaires default is **All Questionnaires**.
4. In the **Date Range:** section:
   - Select a **From** date.
   - Select a **To** date.

Choose the scale for the graph, there are 5 options:

- Day (default)
- Week
- Month
- Quarter
- Year

5. Check the checkboxes in **Interaction Types** to select the interaction types available in the system to be included in the graph. These are:
   - **Call + Screen**
   - **Chat** (such as instant messages)
   - Email
   - Other
   - Registration

All are selected by default unless **Call Length** or **Call Length Ratio** are selected where only **Call + Screen** is enabled.

6. Click **Compute Graph**.

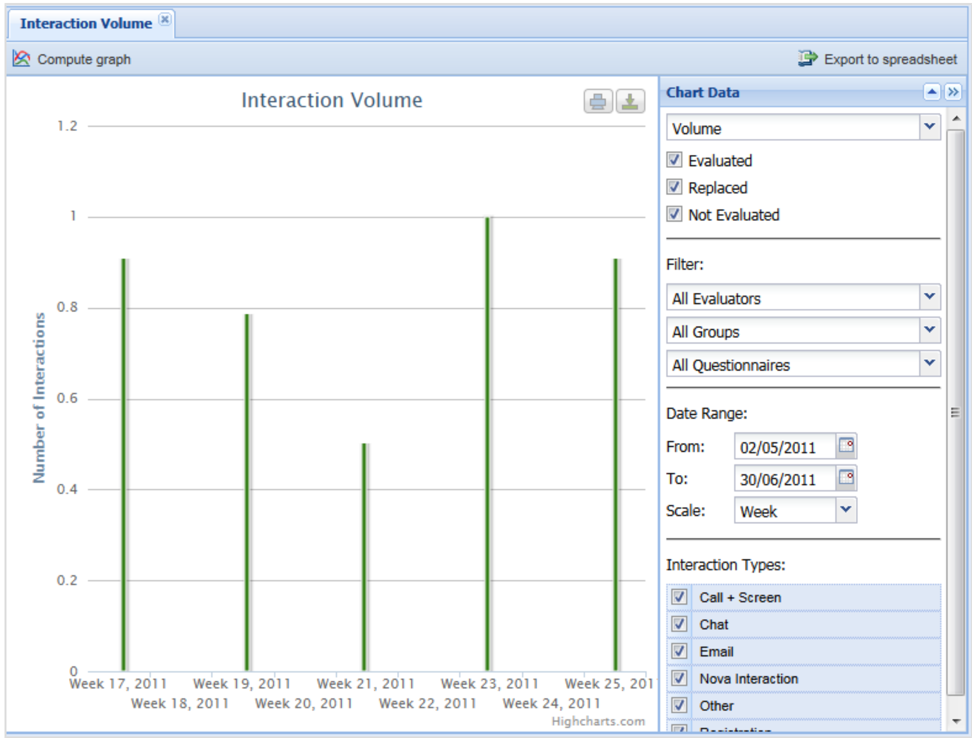


Figure 75: Interaction Volume Chart

The graph displays the following colors:

- Green for **Evaluated**.
- Orange for **Replaced**.
- Gray for those that were **Not Evaluated**.

Important:

The **Interaction Volume** chart will only function correctly if Quality Manager configuration parameters in the Call Recording Web GUI are correctly configured, such as the **Agent Key ID**. Please refer to the Quality Manager Configuration Settings section in the Quality Manager Administration Guide for more information.

Evaluations Volume

Evaluations Volume: displays evaluation volume by status. Choose from **Planned**, **In Progress**, and **Finished** or all three, over a specific time period.

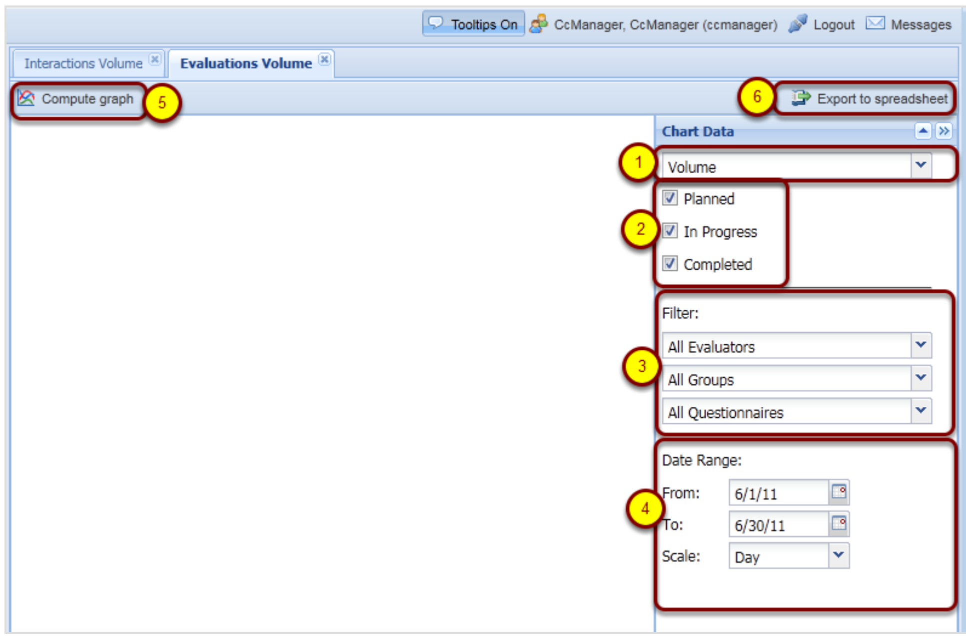


Figure 76: Evaluations Volume Tab

To open the **Evaluations Volume** tab click **Reports > Evaluations Volume**.

In the Chart Data section:

1. Select the type of volume in the **Volume** dropdown box. The **Volume** dropdown box has 2 options:
   - **Volume:** Shows total number of interactions.
   - **Volume Ratio:** Shows percentage ratio between interactions in the a given state.

Volume is selected by default.

2. Check the boxes **Planned**, **In Progress**, and **Completed**, and select which states are shown in the chart.
3. Select filters from the dropdown lists in the Filter Section.
   - The evaluators default is **All Evaluators**.
   - The groups default is **All Groups**.
   - The questionnaires default is **All Questionnaires**.
4. In the **Date Range:** section:

- Select a **From** date.
- Select a **To** date.

5. Click **Compute Graph**

The graph will display.

6. To export to a spreadsheet, click **Export to Spreadsheet**.

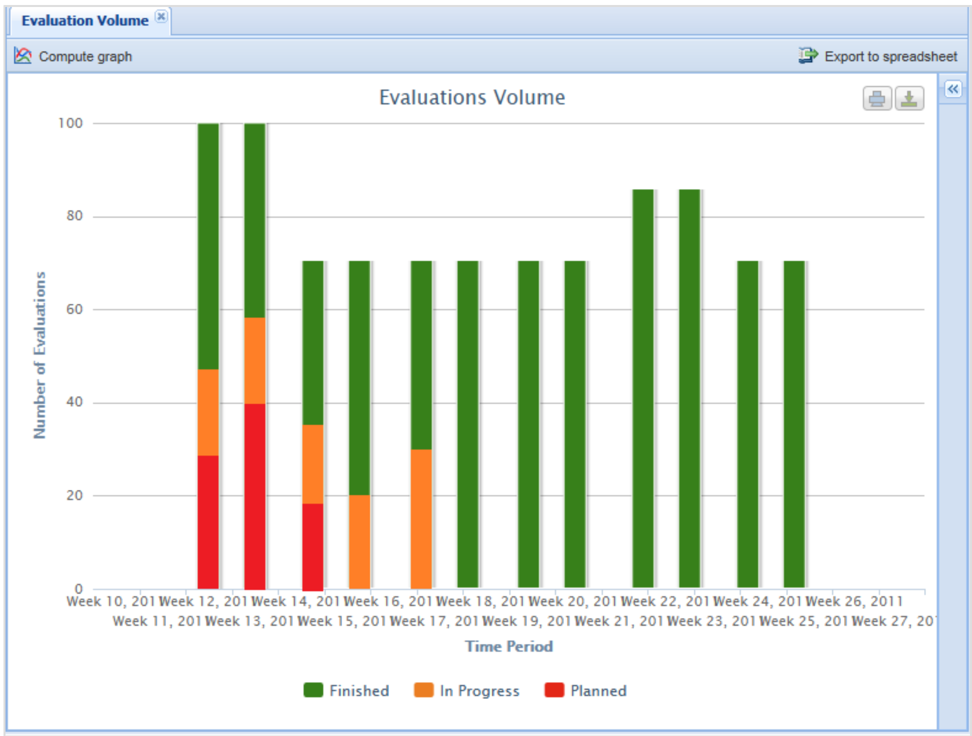


Figure 77: Evaluations Vol Chart

The graph displays the following bar colors:

- Red for **Planned**
- Orange for **In Progress**
- Green for **Completed**

Mouse over a stacked bar item on separate lines to show:

- The total number of evaluations in the stack in format <number of evaluations in stack> of <number of evaluations in bar>.
- The percentage of all evaluations in the bar in format <percentage>% (no decimals).

Reports for a Single Evaluation

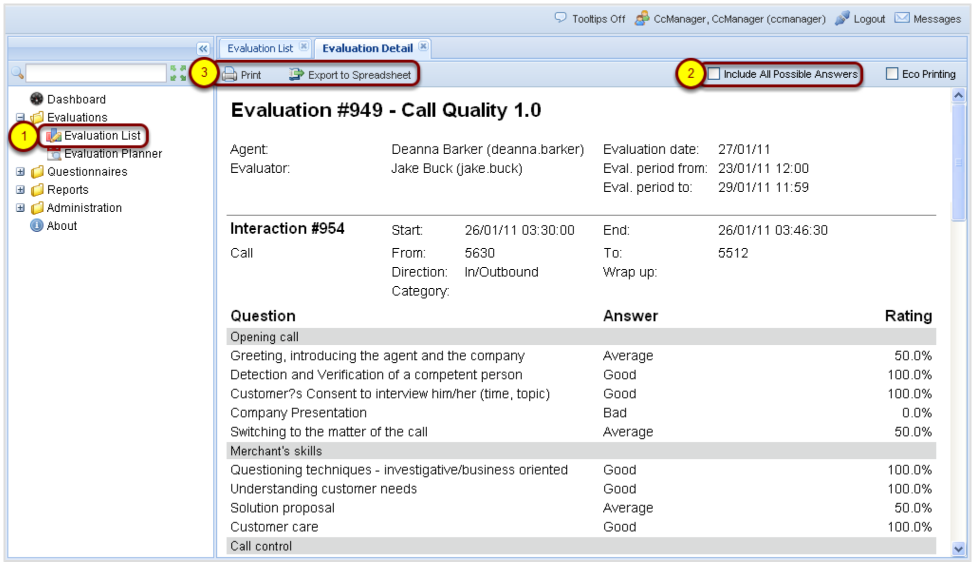


Figure 78: Reports for a Single Evaluation

1. Click **Evaluation list** in the left hand menu. The **Evaluation List** tab opens and displays available evaluations. Select the check box of an evaluation in the **Evaluation List**.
2. Click **Report** at the top of the **Evaluation List** tab. This creates a simple text-based report with the following options:
   Include All Possible Answers: Shows all possible answers (with those not selected grayed out).
   Eco Printing: Creates a simpler text-based version of the report, with graphical borders removed for more economic printing.
3. To print, click **Print**. To save as an Excel file (.xlsx) file click **Export to Spreadsheet**.

Tip:

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

Exporting Report Data

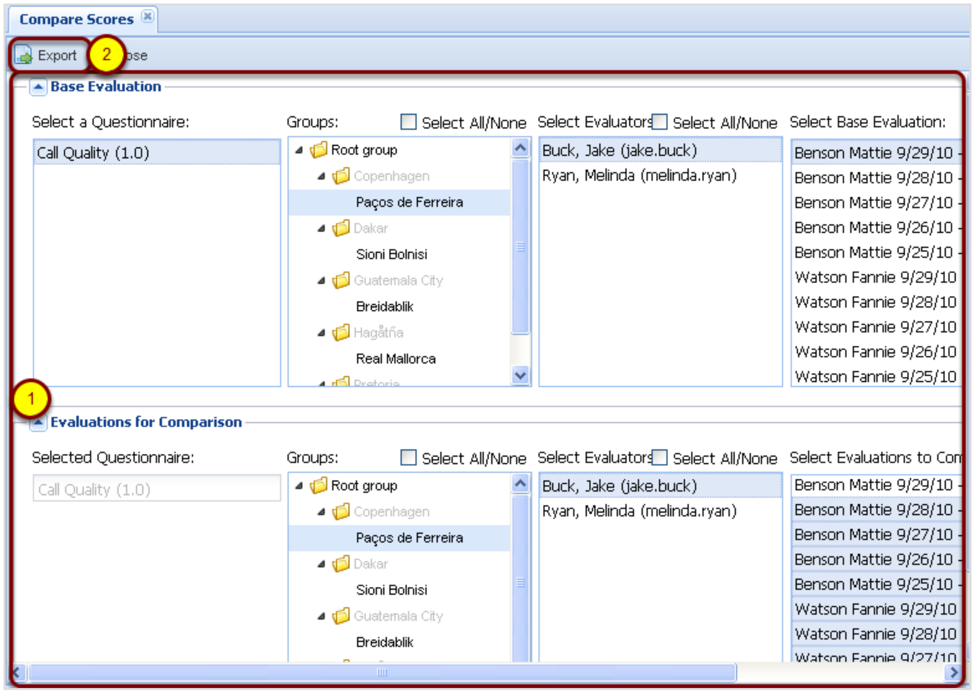


Figure 79: Exporting Graph Data to a Spreadsheet - 1

To export all graph data to a Microsoft Excel 2007 or above (.xlsx) spreadsheet file:

1. Configure the graph parameters.
2. Click **Export to Spreadsheet** at the top of each graph.

Important:

The Compare Scores and League Table ‘graphs’ do not actually create any visual graphs in Quality Manager; rather they enable the Compare Scores and League Table reports to be downloaded in spreadsheet format.

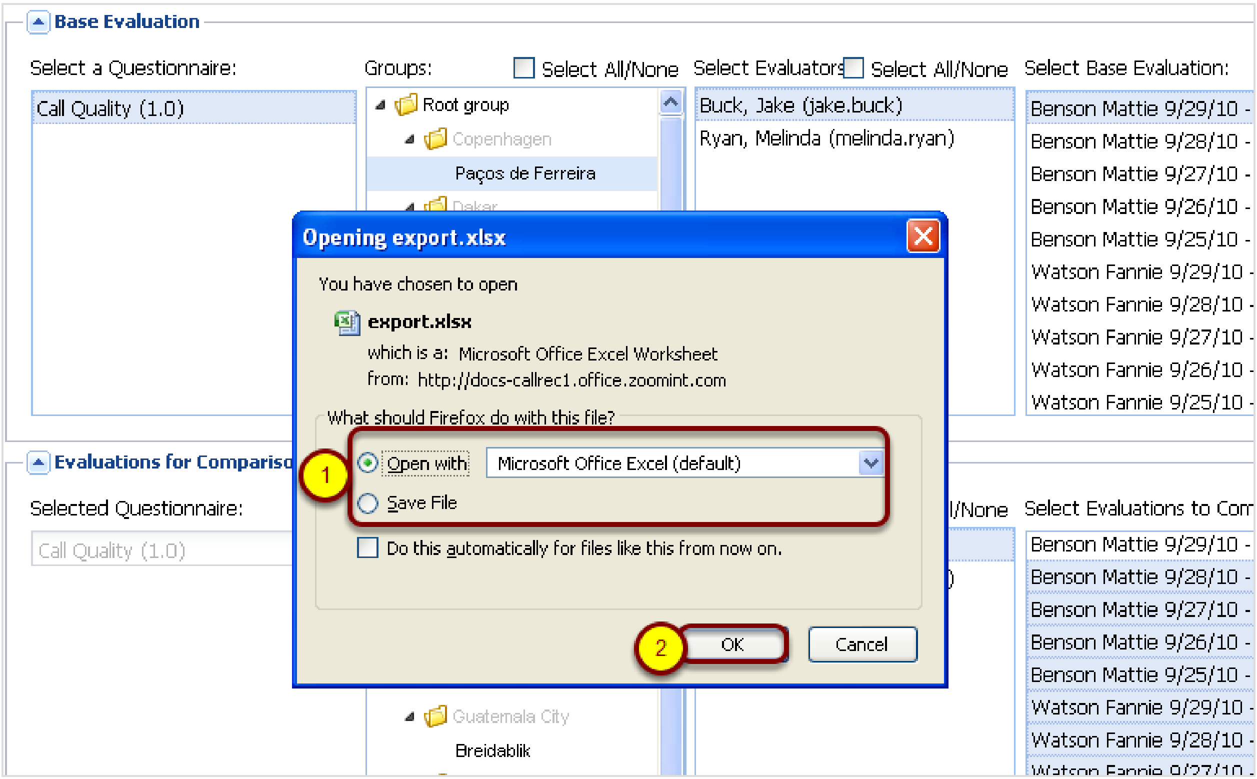
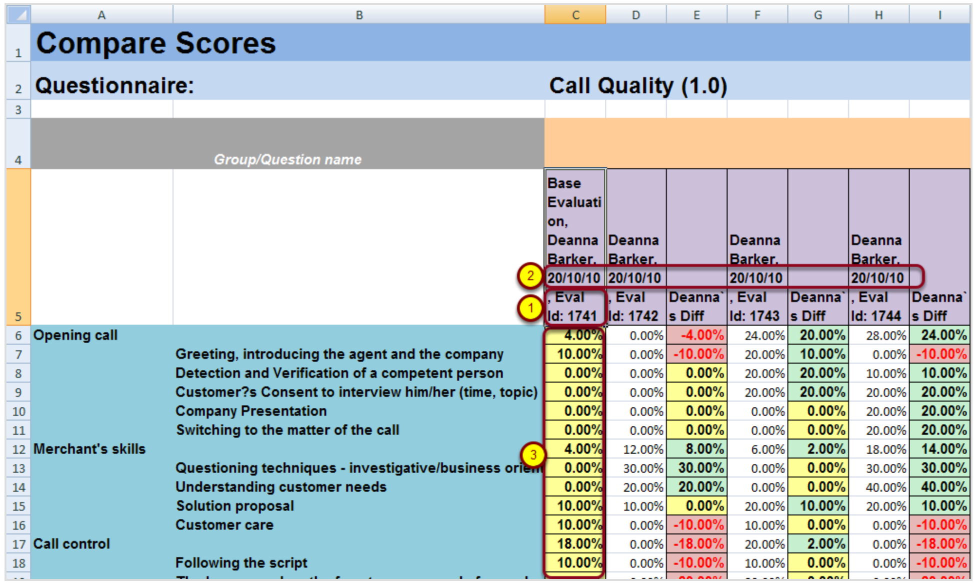


Figure 80: Exporting Graph Data to a Spreadsheet - 2

Export to Spreadsheet creates a downloadable .xlsx file within a short space of time (how this appears depends on the web browser used).

1. Select **Open with** and select a spreadsheet application to open the file or click **Save File** to save the spreadsheet to the operating system.
2. Click **OK**.



Compare Scores

Questionnaire: Call Quality (1.0)

	A	B	C	D	E	F	G	H	I
4		Group/Question name							
5			Base Evaluation, Deanna Barker. 20/10/10, Eval Id: 1741	Deanna Barker. 20/10/10, Eval Id: 1742	Deanna`s Diff	Deanna Barker. 20/10/10, Eval Id: 1743	Deanna`s Diff	Deanna Barker. 20/10/10, Eval Id: 1744	Deanna`s Diff
6	Opening call		4.00%	0.00%	-4.00%	24.00%	20.00%	28.00%	24.00%
7		Greeting, introducing the agent and the company	10.00%	0.00%	-10.00%	20.00%	10.00%	0.00%	-10.00%
8		Detection and Verification of a competent person	0.00%	0.00%	0.00%	20.00%	20.00%	10.00%	10.00%
9		Customer?s Consent to interview him/her (time, topic)	0.00%	0.00%	0.00%	20.00%	20.00%	20.00%	20.00%
10		Company Presentation	0.00%	0.00%	0.00%	0.00%	0.00%	20.00%	20.00%
11		Switching to the matter of the call	0.00%	0.00%	0.00%	0.00%	0.00%	20.00%	20.00%
12	Merchant's skills		4.00%	12.00%	8.00%	6.00%	2.00%	18.00%	14.00%
13		Questioning techniques - investigative/business orien	0.00%	30.00%	30.00%	0.00%	0.00%	30.00%	30.00%
14		Understanding customer needs	0.00%	20.00%	20.00%	0.00%	0.00%	40.00%	40.00%
15		Solution proposal	10.00%	10.00%	0.00%	20.00%	10.00%	20.00%	10.00%
16		Customer care	10.00%	0.00%	-10.00%	10.00%	0.00%	0.00%	-10.00%
17	Call control		18.00%	0.00%	-18.00%	20.00%	2.00%	0.00%	-18.00%
18		Following the script	10.00%	0.00%	-10.00%	10.00%	0.00%	0.00%	-10.00%

Figure 81: Exported Graph (Compare Evaluations) in Spreadsheet Format

View the downloaded file in Microsoft Excel versions 2007 and above, and other programs that can read the Excel .xlsx format. The file can also be processed or analyzed by other tools.

The following types of data are visible:

1. Evaluation ID (click on the column or row to expand the cell to read the full ID).
2. Evaluation Date (when the evaluation was completed).
3. Weighted totals.

The color coding of the cells is:

- Green better than base level.
- Yellow same as base.
- Red worse than base.

Tip:

Evaluations are identified by their evaluation ID. The evaluation ID is included in a header row of exported graph data, but is normally hidden from view. Increase the height of this row (normally row 5) to see the IDs (see figure).

Using an ID number, you can search for the specific evaluation in the ScoreCARD evaluation list using the search (enter the same ID into **From** and **To** ID fields).

Genesys

Chapter

7 Calibrating Evaluations

To ensure that all evaluations are carried out to the same standard using the same scoring, it is necessary to compare how each evaluator scores agents. The best way to do this is get all of the evaluators to score the same agent, call (or media), and questionnaire to compare the scores for each section. When the evaluations have been carried out and compared, the group of evaluators should discuss the different evaluations and agree on a standard set of criteria that they will all use.

Selecting a Suitable Evaluation for Calibration

Find a suitable evaluation for calibration by navigating to the **Evaluation List**. The **Evaluation List** tab opens and displays the most recent evaluations. Use the page controls at the bottom of the window to find **Finished** evaluations.

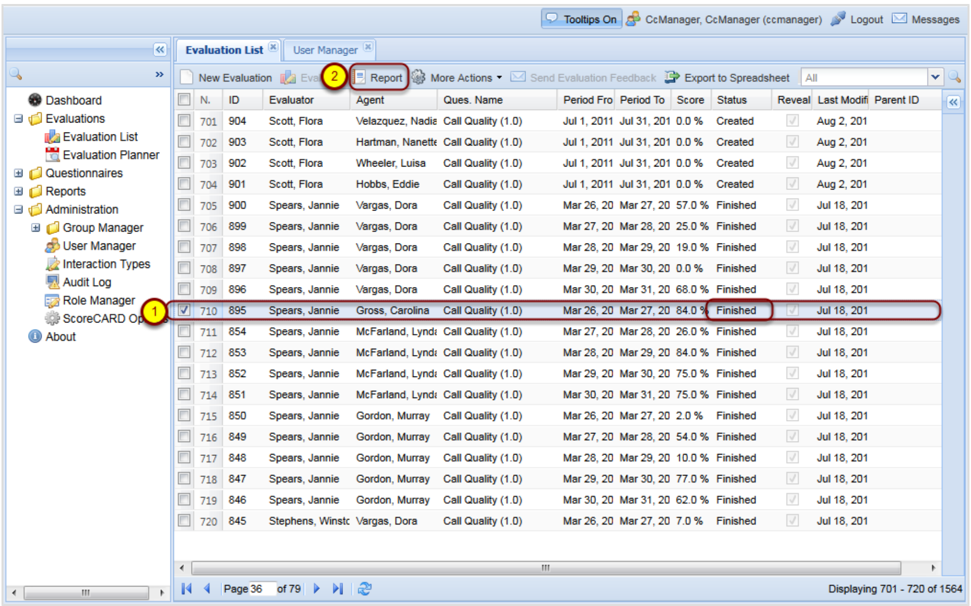


Figure 82: Select a Suitable Evaluation

1. Select the check box of an evaluation with the status **Finished**.
2. Click **Report** to see how the individual sections and questions have been scored in detail. The **Evaluation Detail** opens in a separate tab. If the evaluation is suitable, then the evaluation can then be used for calibration across the evaluation team.

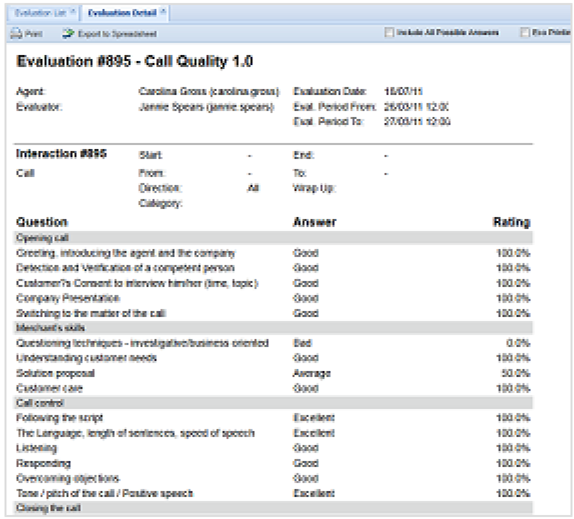


Figure 83: Evaluation Detail

Assigning Evaluators to the Agents Group

Before calibrating evaluators, you must ensure that they are assigned the right to evaluate the group that the target agent is in.

Find each evaluator in the User Manager section, open their profile and check if the groups have been assigned to them.

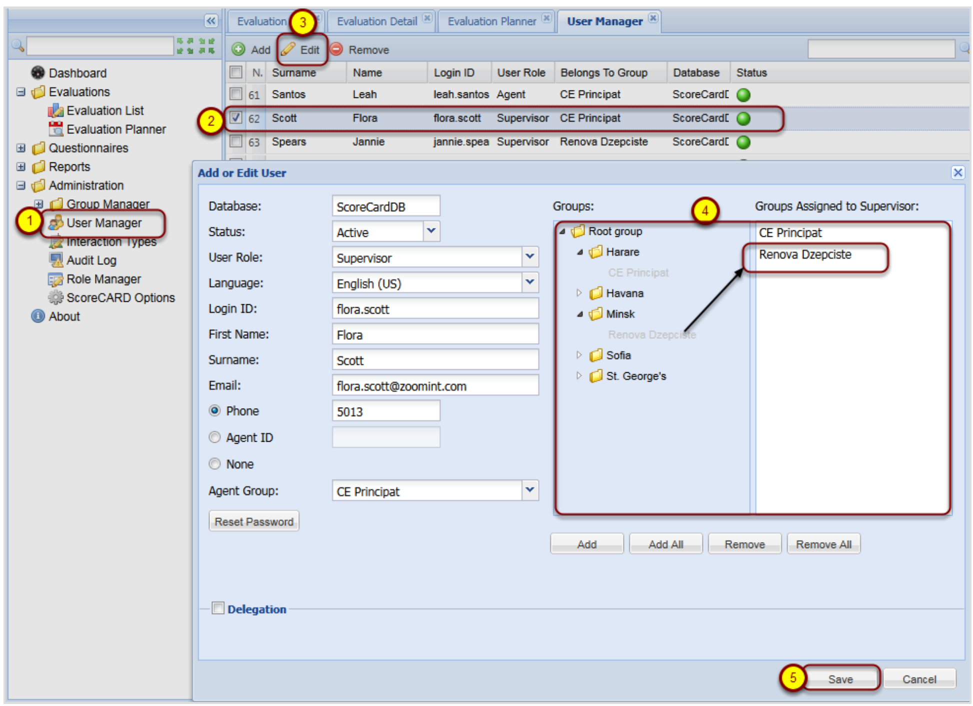


Figure 84: Assign Evaluators to Group

1. Select **User Manager** from the menu tree. The **User Manager** tab opens
2. Select an evaluator. In the figure above, this is a supervisor. Other roles may perform the evaluation if they have the appropriate permissions.
3. Click edit **Add or Edit User**. The dialog box opens for this evaluator.
4. Drag the group (in the example **Renova Dzepciste**) into the **Groups Assigned to Supervisor** field.
5. Click **Save**.

Repeat steps 2 to 5 for each evaluator.

Creating Evaluations for each Evaluator

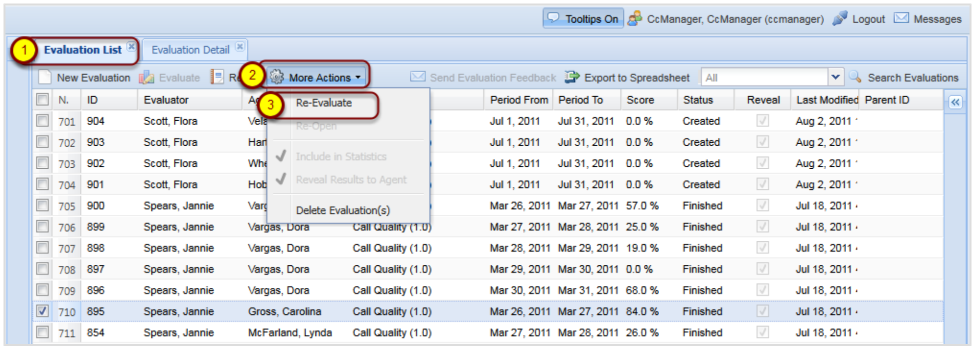


Figure 85: More Actions on Evaluation List

1. Select the **Evaluation List** tab again, ensure the evaluation is still selected.
2. Click **More Actions**.
3. Select **Re-evaluate**.

The **Evaluation Planner** tab opens populated with the same interactions and parameters as the original evaluation. The Remove Interactions dialog box opens.

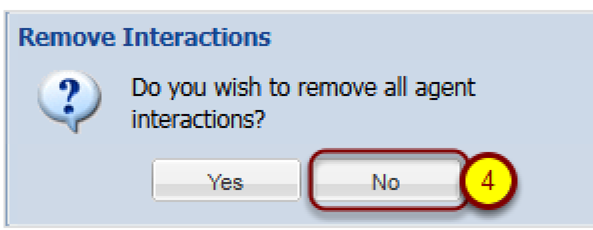


Figure 86: Remove Interactions

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

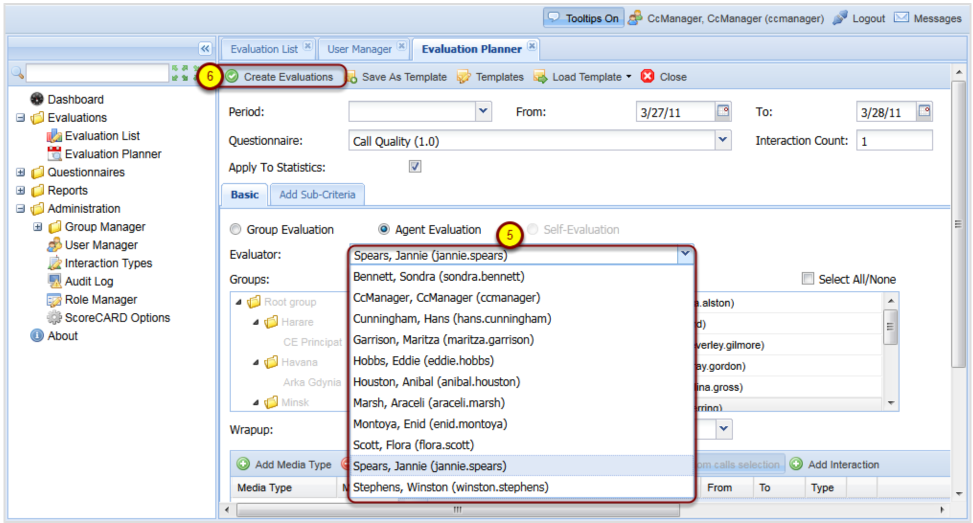


Figure 87: Choose an Evaluator

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

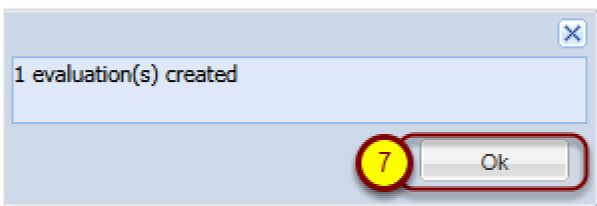


Figure 88: Evaluation Created

7. Click OK. The evaluation is created.

Repeat steps 1 to 7 for each evaluator.

The newly created evaluations should now display in the **Evaluation List**with the most recent displaying at the top of the first page.

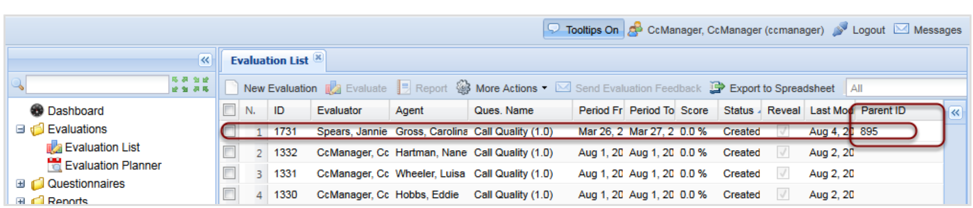


Figure 89: Showing Created Evaluation with Parent ID

The **Parent ID** denotes the original evaluation that the new evaluation is based on. This is useful for comparison purposes with the original.

The evaluators must all evaluate the same agent and interactions. Once all of the evaluations are completed, Quality Manager can generate reports to compare results.

The easiest way to compare evaluators in detail, is to find the **Finished** evaluations in the **Evaluation List**, select each evaluation, and click **Report**. The evaluators can then compare scores .

Evaluation #1731 - Call Quality 1.0

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

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

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

Evaluation #1732 - Call Quality 1.0

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

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

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

Figure 90: Detail Report Comparison

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

Compare Scores

Questionnaire: Call Quality (1.0)

Group/Question name		Evaluations: Base Evaluation, Carolina Gross, 04/08/11, Eval Id: 1,731	Carolina Gross, 04/08/11, Eval Id:	Carolina`s Diff
Opening call		80.00%	70.00%	-10.00%
	Greeting, introducing the agent and the company	100.00%	100.00%	0.00%
	Detection and Verification of a competent person	100.00%	50.00%	-50.00%
	Customer?s Consent to interview him/her (time, topic)	50.00%	100.00%	50.00%
	Company Presentation	100.00%	50.00%	-50.00%
	Switching to the matter of the call	50.00%	50.00%	0.00%
Merchant's skills		80.00%	90.00%	10.00%
	Questioning techniques - investigative/business orient	100.00%	100.00%	0.00%
	Understanding customer needs	50.00%	100.00%	50.00%
	Solution proposal	100.00%	50.00%	-50.00%
	Customer care	100.00%	100.00%	0.00%
Call control		66.90%	69.30%	2.40%
	Following the script	100.00%	80.00%	-20.00%
	The Language, length of sentences, speed of speech	78.00%	100.00%	22.00%
	Listening	45.00%	45.00%	0.00%
	Responding	100.00%	100.00%	0.00%
	Overcoming objections	0.00%	0.00%	0.00%
	Tone / pitch of the call / Positive speech	89.00%	89.00%	0.00%
Closing the call		100.00%	55.50%	-44.50%
	Thanks and farewell to the customer	100.00%	11.00%	-89.00%
	Summary after call - recap	100.00%	100.00%	0.00%
	Inviting the customer to call anytime the infoline	100.00%	100.00%	0.00%
Total Weighted Score:		81.00%	71.00%	-10.00%

Figure 91: Compare Scores

Comparing Evaluators

The Compare Evaluators chart provides an overview of evaluators in relation to each other.

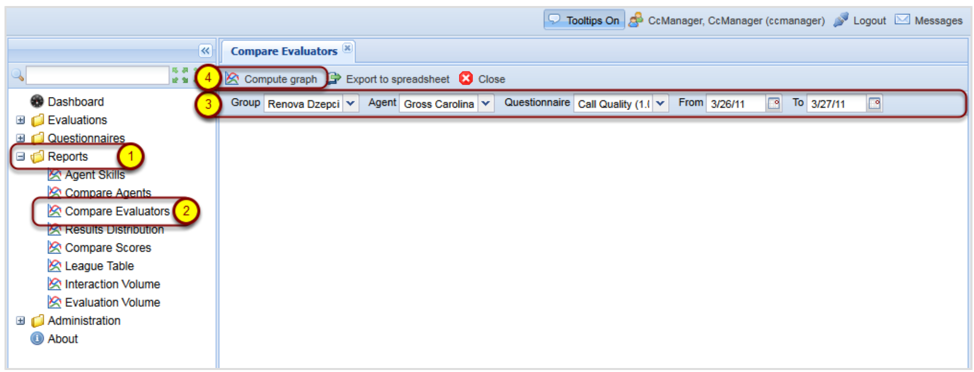


Figure 92: Select Compare Evaluators

To compare scores (logged on as ccmanager):

1. Select **Reports** in the left hand menu.
2. Select **Compare Evaluators**.
3. Select the **Group**, **Agent**, **Questionnaire**, **From** and **To** that correspond with an evaluation carried out in the previous section.
4. Click **Compute graph**.

Compare Evaluators Chart

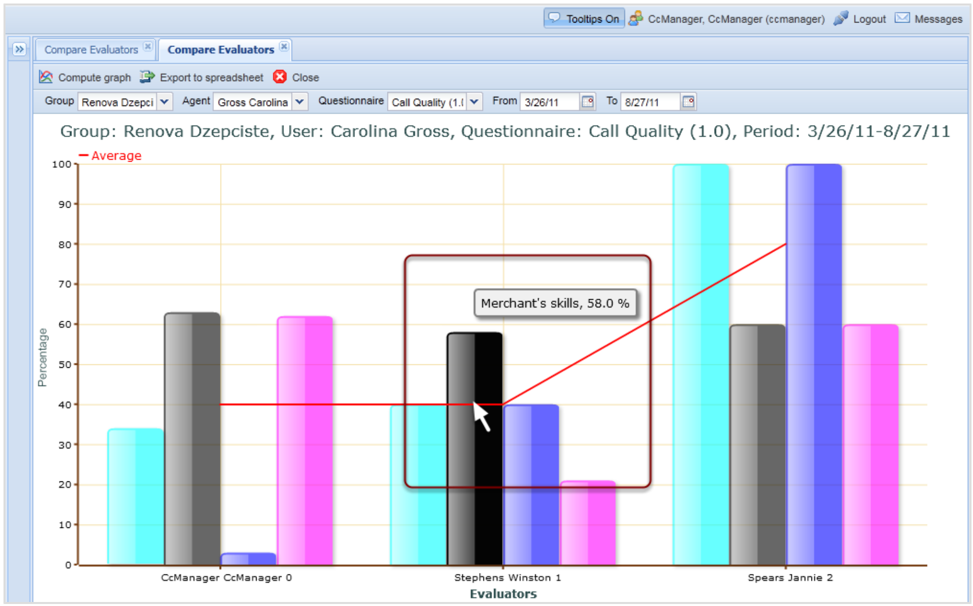


Figure 93: Compare Evaluators Chart

In this example, the Compare Evaluators chart is divided into three sections showing the scores given by three evaluators. The columns correspond to sections in the questionnaire in this example:

- The light blue columns represent the scores for **Opening Call**.
- The gray columns represent the scores for **Merchants skills**.
- The Blue column is represent the scores for**Call Control**.
- The purple columns represent the scores for **Closing the call**.

Hover over a particular column and the name of the column and the precise percentage display.

Genesys

Chapter

8 Dashboards

An introduction to setting up and managing widget dashboards for a fast real-time overview of call center performance in Quality Manager.

This chapter contains the following sections:

The Quality Manager Dashboard

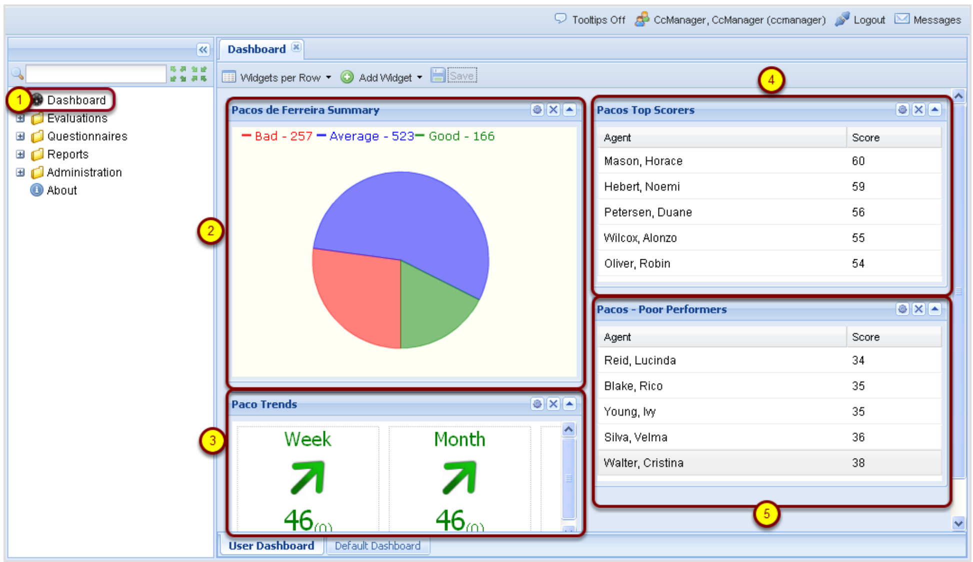


Figure 94: The Quality Manager Dashboard

The Quality Manager Dashboard is available to users with certain roles within Quality Manager (Team Leader, Supervisor, CC Manager).

You can configure a varying number of information boxes ('widgets') on the Dashboard. The widgets display a quick summary of evaluation data such as high/low performing agents and groups, in a simple visual format.

The widgets take data directly from the Quality Manager database, so Dashboard reflects an up-to-the-minute overview of your call center's performance.

Two dashboards are available:

Default is the basic setup for all Dashboard users. The default widgets can be set up to give users a generic top-level performance overview.
User Dashboard can be customized by each individual Dashboard user for his/her own requirements.

1. Select **Dashboard** to open the **Dashboard** tab.

The types of Widget in the figure are:

1. Pie
2. Trend

3. High Scoring Agent
4. Low Scoring Agent

Setting Up a Dashboard - 1

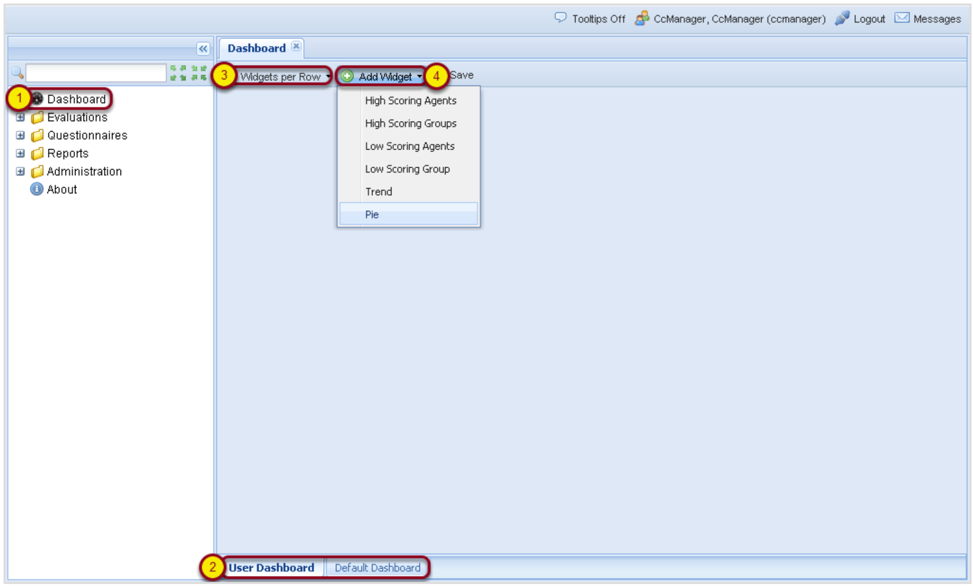


Figure 95: Setting Up a Dashboard – 1

A dashboard can only be properly set up when agents, groups and questionnaires have been defined.

1. Click **Dashboard** in the left hand menu. The **Dashboard** tab opens.
2. Click either **User Dashboard** or **Default Dashboard**
3. Choose the number of **Widgets per Row**from the dropdown list. For example, two **Widgets per Row** are used and two rows are in the figure, enabling four widgets in the display.
4. Create the first widget by clicking **Add Widget** and selecting one of the following types from the dropdown list:
   High Scoring Agents
   High Scoring Groups
   Low Scoring Agents
   Low Scoring Group

Specify the maximum number to display using the **Count** parameter.
Trend displays the average score trend from a specified questionnaire for an agent group (or groups), with numbers comparing this week/month to last week/month.
Pie uses the pass and fail criteria (**Good / Bad Threshold**) from a specified

questionnaire to display a pie chart of agent categories (good/average/bad) for a group or all groups. For an example of this please see Setting Up a Dashboard - 2.

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

Setting Up a Dashboard - 2

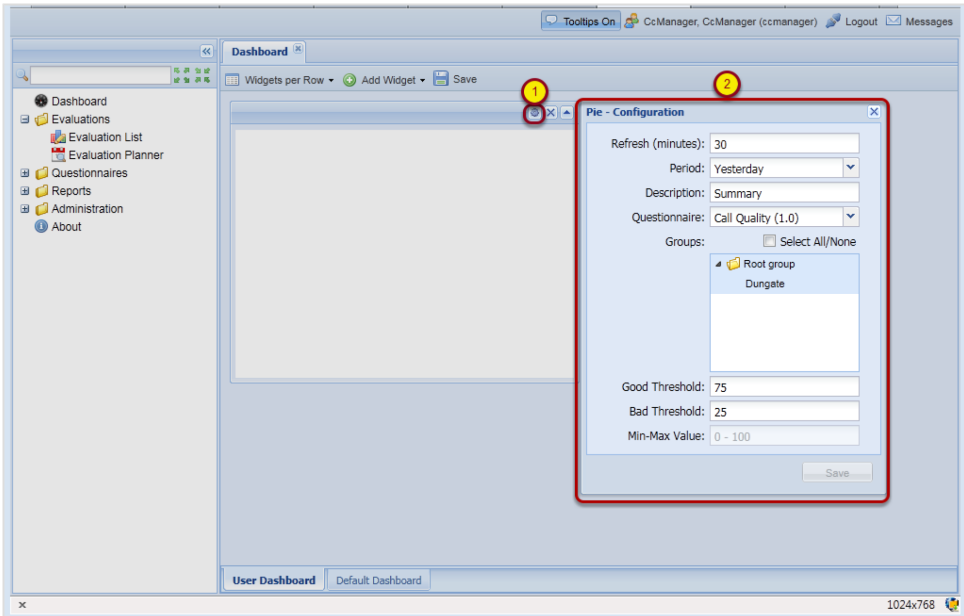


Figure 96: Setting Up a Dashboard – 2

In the example in the figure, a pie widget is selected from the list in **Add Widget**.

1. Click the settings button to configure the widget (see figure).
2. The **Pie Configuration** dialog box appears. In the **Pie Configuration** dialog box:

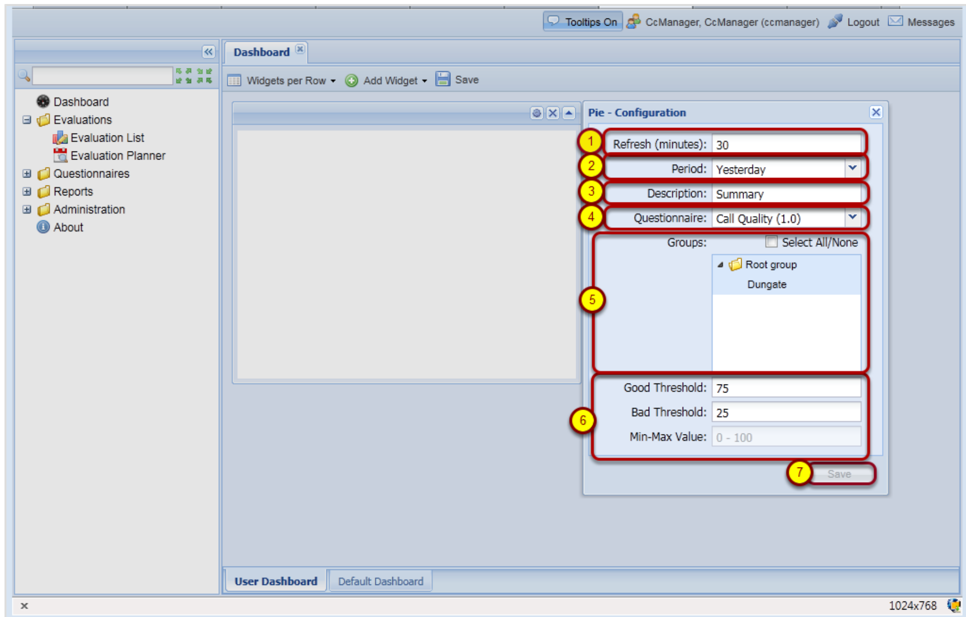


Figure 97: Pie Widget Configuration

1. Type a **Refresh:** rate in minutes. This dictates how often the data is refreshed for the widget. It is recommended that this value shouldn't be less than 5 minutes to avoid browser performance issues with multiple widgets refreshing together.
2. Select a **Period:** from which the data will be collected, from the **Period:** dropdown. Choose from:
   Yesterday, **Current Week**, **Last Week**, **Current Month**, **Last Month**, **Current Quarter**, **First Quarter**, **Second Quarter**, **Third Quarter**, **Fourth Quarter**, **Current Year**, **Last Year**
3. Type a **Description** for the widget.
4. Select a **Questionnaire** from the dropdown list. If a **Description:** is not provided for a widget during configuration, Quality Manager will display settings information in the title bar of the widget instead.
5. The threshold values can be modified if required. Select a target agent **Group**. Use the checkbox to **Select All/None** of the groups and use **CTRL** (Win) or **CMD** (Mac) while selecting to add or remove groups from your selection.
6. The questionnaire provides the default **Good Threshold**, **Bad Threshold**, and **Min-Max Value** (range).
7. Click **Save** to apply the settings and display the widget.

Setting Up a Dashboard - 3

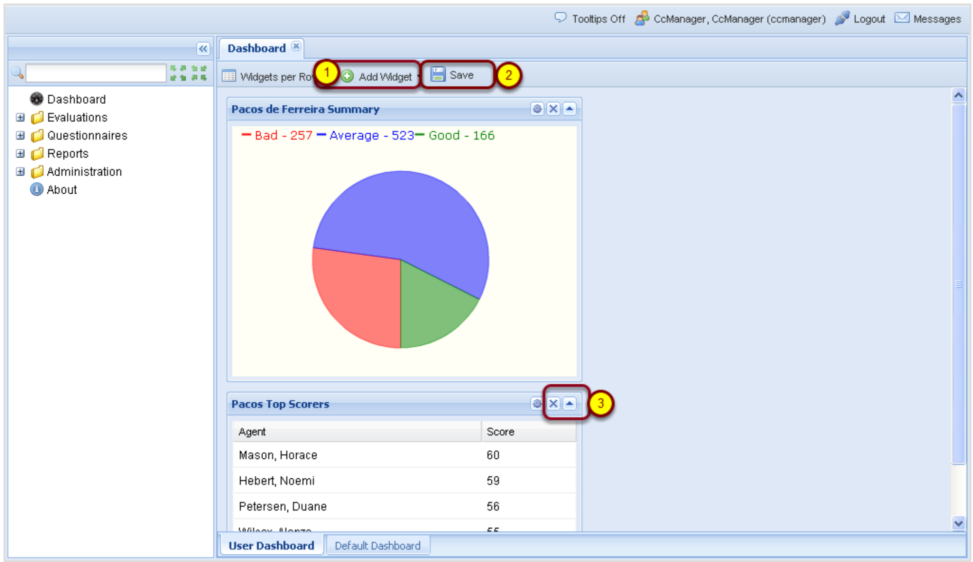


Figure 98: Setting Up a Dashboard – 3

After saving the widget configuration, the widget displays the data as appropriate.

1. Additional widgets can be added or removed, dragged to different positions by their title bars (the mouse cursor changes to a cross when dragging is possible), or minimized as required.
2. After completing the widget configuration, click **Save** to save the changes (the **Save** button is disabled if no changes need to be saved).
3. Use the appropriate buttons in the upper right hand corner of the widget to remove, minimize, or hide the widget.

Important:

For performance reasons, no more than 20 dashboard widgets can be added to a dashboard.

Chapter

9 Administration

The following chapter describes the Administration tasks available including how to manage groups and users.

This chapter contains the following sections:

User Management

A short tutorial to show how to create, modify, and remove users and groups in Genesys Quality Manager 8.1.50x. All tasks in the User Management section require a ccmanager login. If you are currently logged in to Quality Manager, log out, refresh your web browser, and log in with a ccmanager login and password.

The default log in is ccmanager with the default password admin.

Groups And Users In Quality Manager

User groups (also known simply as groups) can have a hierarchy and can help to organize Quality Manager users; for example, they can be used to allow the evaluation of a specific team of agents.

The group hierarchy levels and users are managed within the Group Manager, while the User Manager provides a simple method of performing bulk operations on the full list of Quality Manager users.

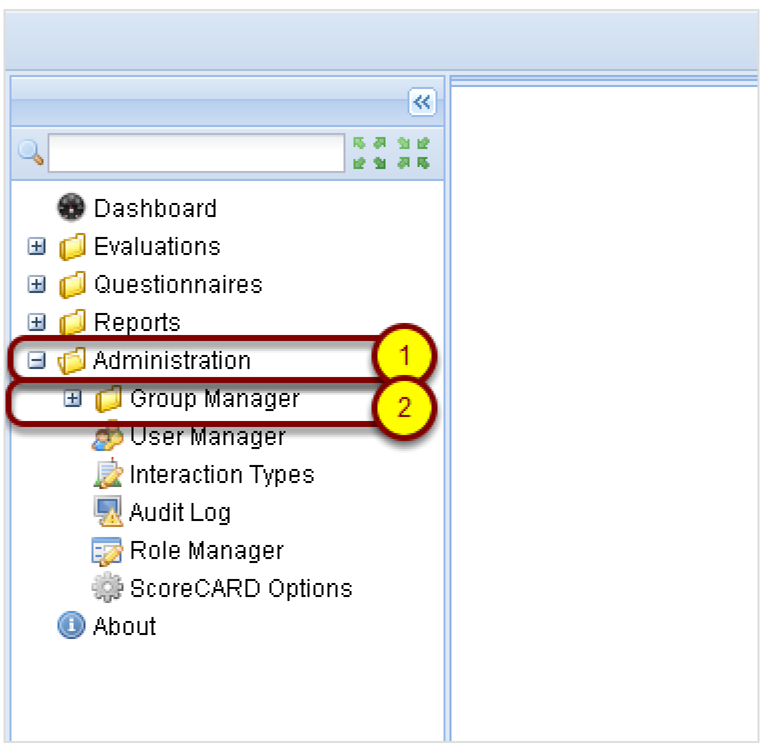


Figure 99: Groups and Users in Quality Manager

To create, modify, or remove users and groups in Quality Manager:

1. Select **Administration** in the left hand menu
2. Select **Group manager**

The **Group Manager** tab will open.

The Group Manager

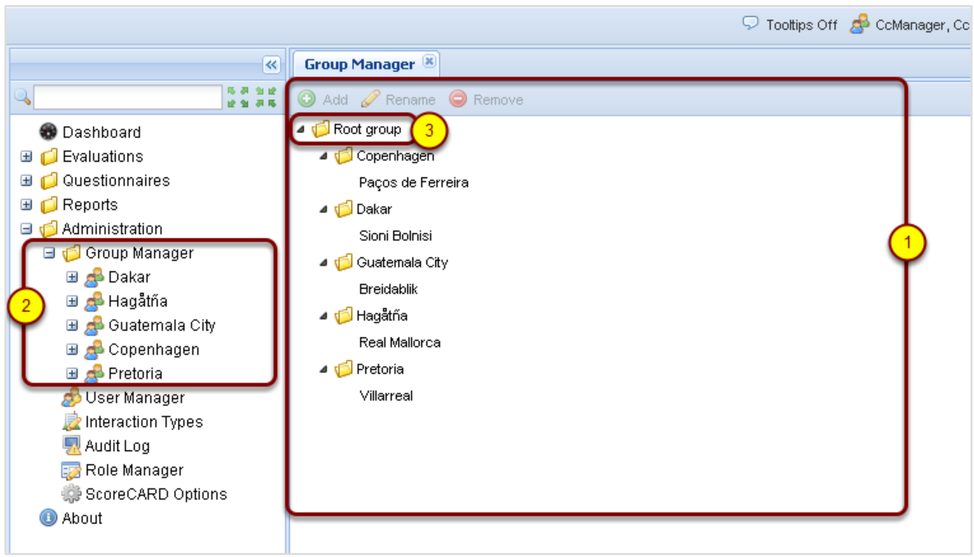


Figure 100: The Group Manager Tab Opens

1. The **Group Manager** tab opens displaying the group tree, which contains the **Root Group** and all of its subordinate groups. It is possible to change the structure of an existing tree by dragging and dropping groups from one position to another. This is useful when reassigning staff for a new campaign. Where group A has a sub group, it is shown as a folder with a name next to it. Groups with no subgroup are shown as just the name. If you move the last subgroup from a group it will change from being a folder to just the group name.
2. The group tree also appears on the left hand side below **Group Manager** in the menu.
3. Agents, team leaders, supervisors, cc managers, and administrators within Quality Manager are always contained within at least one User Group. The default group is called the **Root group**. All others groups are subordinate to the **Root group**. The **Root group** cannot be deleted.

Creating A User Group

You can only add new groups in the **Group Manager** (tree view) when an existing group is selected.

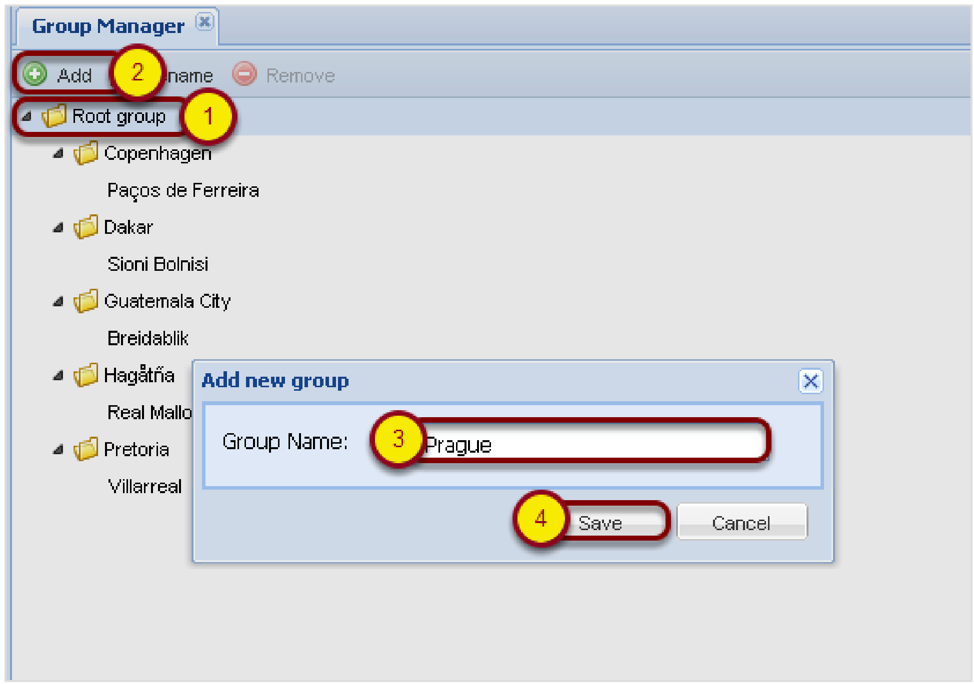


Figure 101: Creating a User Group

1. Select a group to add the new group to
2. Click **Add**
3. Type unique name for this group in **Group Name**
4. Click **Save** to create the group under (inside) the currently selected group

Important:

Every group name must be unique within the application, so it is suggested you use a sensible naming convention for groups, such as LocationFunction (for example, UKSales).

Viewing Users In Groups

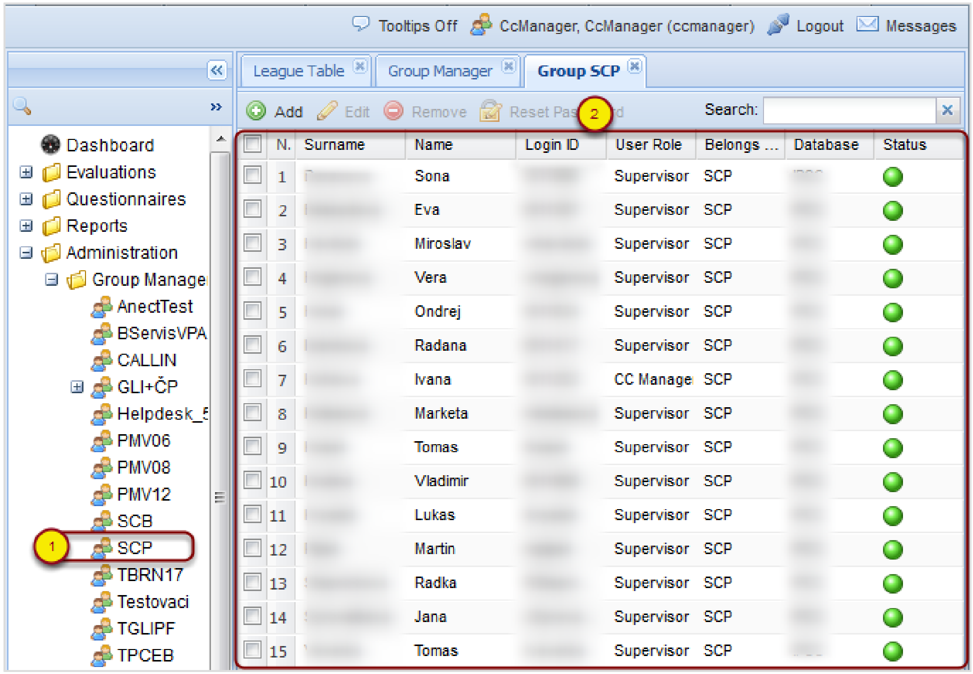
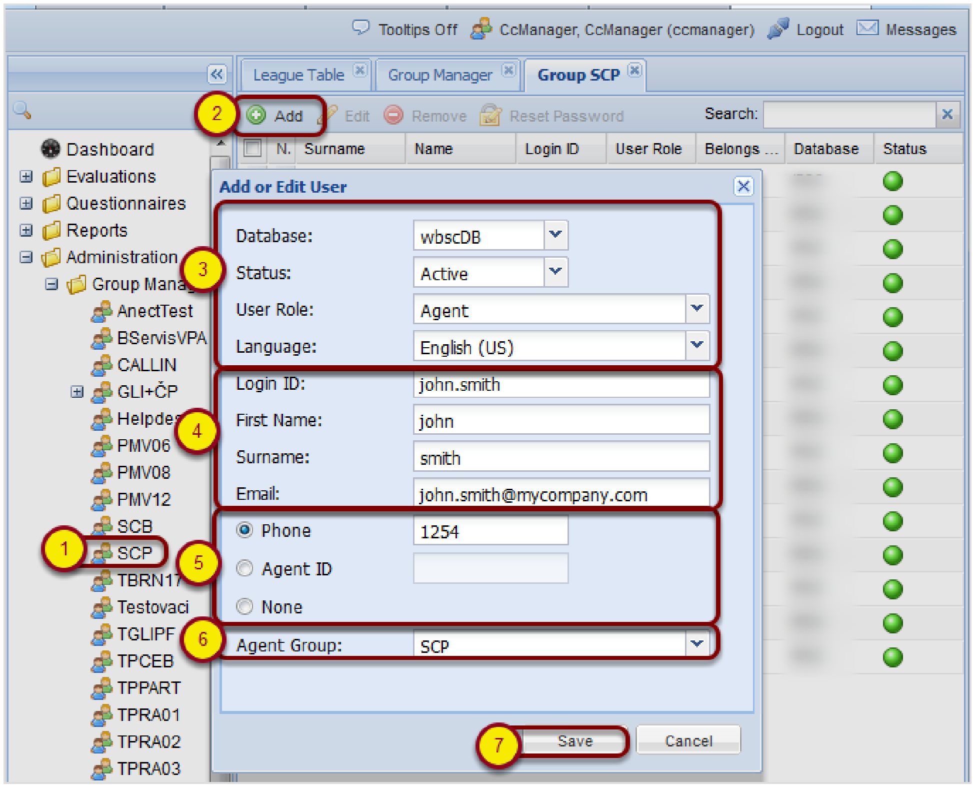


Figure 102: Viewing Users In Groups

1. To view users in a particular group, select the appropriate group name under **Group Manager** in the left hand menu.
2. The group members will appear.

If no groups have yet been created, users are all present in the default 'Root' group and can only be viewed and managed in the User Manager.

Adding an Agent User



Adding a User (Agent)

The **Active** setting indicates whether this user is available in Quality Manager for evaluations and reporting.

Agent profiles that are no longer relevant and/or available should have their **Active** status changed to **De-Activated** or **Blocked**. To unblock a user, change the status to **Active**.

For more information, see The Role Manager.

Select the **Language** that the Quality Manager interface displays in when the user logs in. This can be changed by the user.

Important:
Most user accounts are imported by the integration with the Genesysplatform database. There are some roles which are only used by Quality Manager.

The User Manager

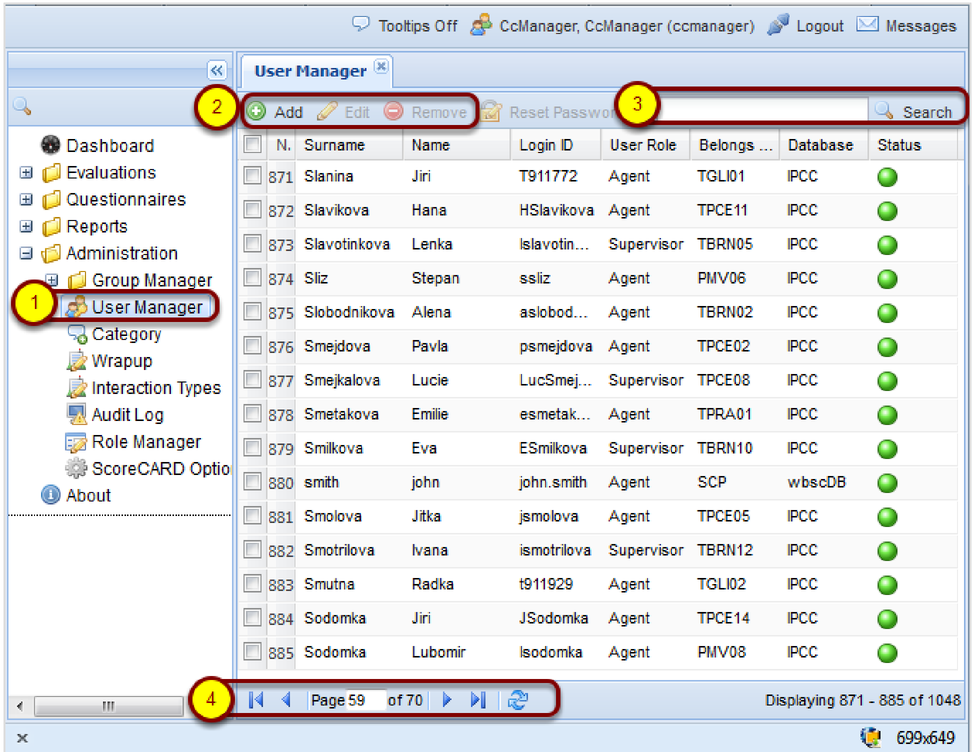


Figure 103: The User Manager

The **User Manager** tab displays a list of all users registered on Quality Manager. This list of all users makes searching and bulk editing of user profiles easier.

1. Select **Administration** then **User Manager** in the left hand menu to open the **User Manager** tab.
2. When viewing a list of users, double-click on the user record or select the checkbox of the user
   To add a new user click **Add**.
   To edit click **Edit**.
   To remove a user select the user and click **Remove**.
3. Enter a first or last name of a user to filter for a search.
4. Select which page of results to view.

Adding Supervisory Roles

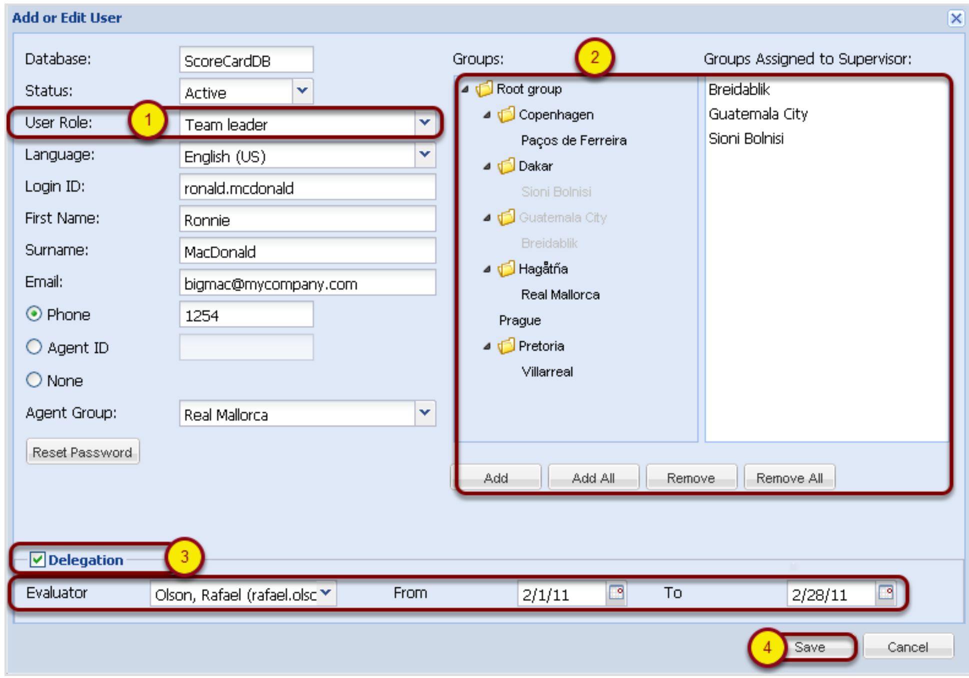


Figure 104: Adding Another User Type

Add users in the **User Manager** by clicking **Add** or edit users by selecting the user and clicking **Edit**.

1. If the user type being created or modified is not 'agent', the **Add or Edit User** dialog box expands to show the group assignment.
2. Group assignment allows the user to be recognized as an evaluator for one or more groups in Quality Manager (those shown in the right panel named Groups Assigned to Supervisor).
   To assign a group to the current user, select a group within the Groups panel and click **Add** .
   Add All allows all available groups to be assigned in one operation.
   Remove All removes all group assignments.
   To remove a single group assignment, select an assigned group in the right panel and click **Remove**.
3. **Delegation** enables another evaluator to inherit the same evaluation permissions for a pre-defined period (for example, during an evaluator's vacation). This can be enabled by clicking the **Delegation** checkbox, after which the target evaluator and the delegation period can be defined and

saved. During this period, the target evaluator will then be able to evaluate agents assigned to the original evaluator.

4. Click **Save** to update the user profile, or **Cancel** to exit the profile editor dialog without saving changes.

Removing Users

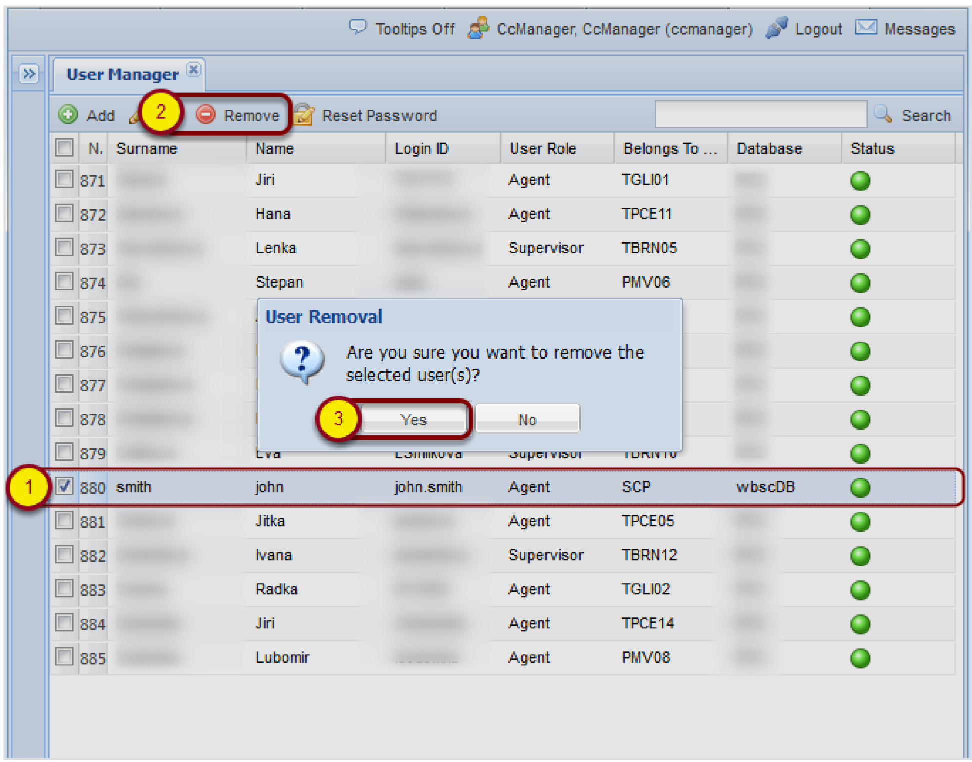


Figure 105: Removing Users

Users can be removed from Quality Manager in either the **User Manager** tab or from a group that is selected in the left hand menu under the **Group Manager**.

In either case,

1. Select the checkbox or click on the user you must remove.
2. Click **Remove** in the toolbar.
3. Click **Yes** in the confirmation dialog box that appears to confirm permanent user deletion.

Removing a User Group

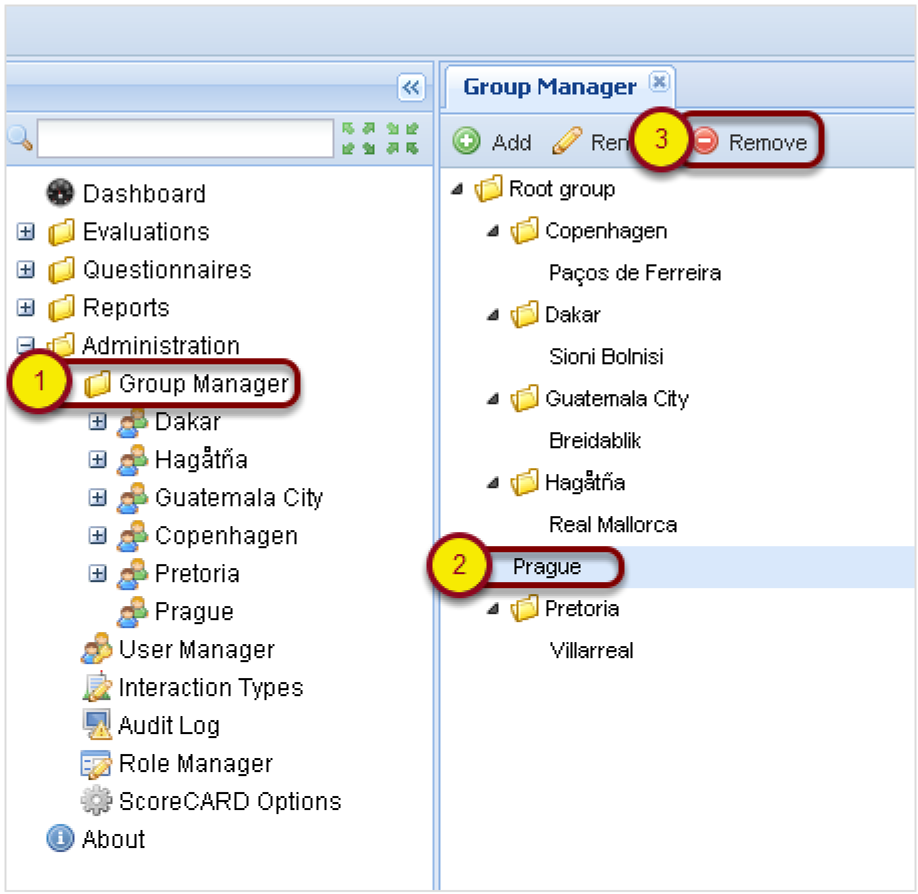


Figure 106: Removing a User Group

To open the **Group Manager** tab item click **Group Manager** in the left hand menu.

1. Removing a user group can only be performed in the **Group Manager** tab. Only an empty group (containing neither users nor sub-groups) can be deleted.
2. Click the group to select it.
3. Click **Remove** in the toolbar.
4. Click **Yes** in the confirmation dialog box that appears to confirm permanent user deletion.

Important:
User groups are handled by the integration with the Genesysplatform database.

The Role Manager

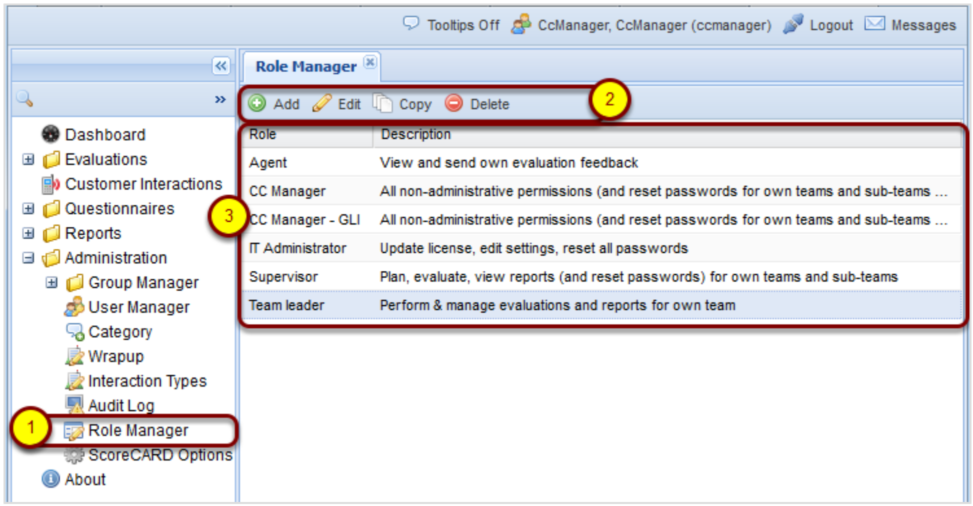


Figure 107: The Role Manager

Although Quality Manager supplies a number of standard user roles (including '**Agent**', '**Team Leader**', '**Supervisor**', '**CC Manager**', '**IT Administrator**'), it is useful to customize the permissions for each role, or create a new custom role structure. Any user who has been assigned the permission **Change roles, add/remove permissions** can modify user roles in Quality Manager.

1. Select **Role Manager**.
2. Click **Add** to create new roles or select a role from the list (the **Edit**, **Copy**, and **Delete** actions require a role to be selected for them to operate). The standard roles may be modified but not removed.
3. Click **Edit** to modify existing roles.
   Click **Copy** to create new roles based on an existing role.
   Click **Delete** to remove a role.
4. Click **OK** on the Edit User Role dialog to confirm changes.

Important:

The standard roles cannot be removed, but may be modified.

Re-Defining User Roles

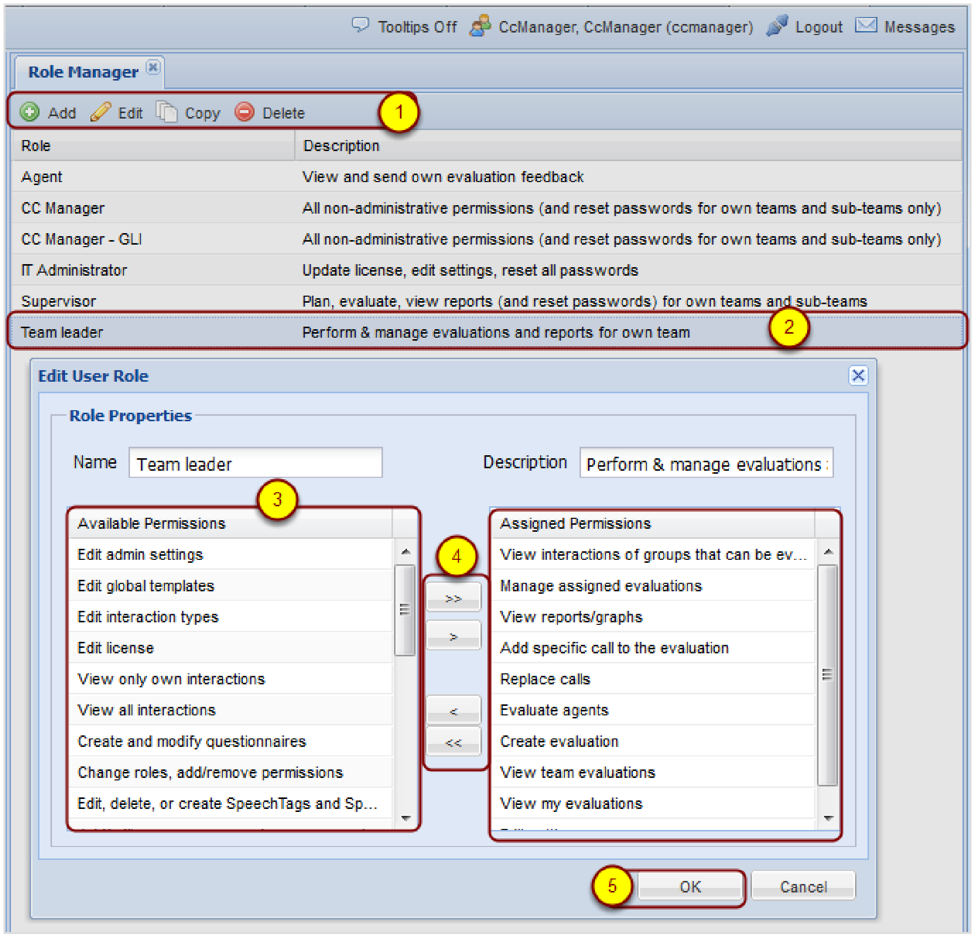


Figure 108: Re-Defining User Roles

As an example, imagine that you wish to enable users with a role of supervisor to create and modify questionnaires.

1. Click on **Team leader** in the list of roles.
2. Click **Edit** to open the Edit User Role dialog box.
3. Modify the current permissions for the **Team leader** role.
4. Click on a permission (in this example: **Create and modify questionnaires**) in the left window and move it over to the right window using the **>>** button. Conversely, moving a permission from the right window to the left using the **<<** button removes this permission for this role.
5. Click **OK** to save any modifications and immediately apply these permissions to all users who are assigned this role.

Important:

After modifying an existing role for the currently logged-in user, that user will need to log out and back in for the new permission properties to be enabled.

Permission Property	Allows the User To	By default in Role
Add specific call to the evaluation	Select and add a specific call recording to the evaluation. This feature is only available if the user who planned the evaluation did not disable this property.	Team leader, Supervisor, CC Manager
Add/edit users, groups and manage user hierarchy	Manage users, groups, and hierarchy for user's group and subgroups.	CC Manager
Change roles, add/remove permissions	Edit and add remove user roles and assign privileges to the roles.	CC Manager
Create and modify questionnaires	Create, modify and remove questionnaires.	CC Manager
Create evaluation	Create single evaluation for groups which are on the group list CanEvaluate (assigned groups). This permission is designed to only allow users to create/plan an evaluation for themselves to complete for their assigned groups. This permission will not allow evaluators to plan evaluations for any other evaluators.	Team leader, Supervisor, CC Manager
Edit admin settings	Edit system-wide settings (menu: Administration/Quality Manager options).	CC Manager
Edit settings	Edit technical settings only. No access to business data (Manage Wrapup, Category).	IT Administrator

Per-mission Property	Allows the User To	By default in Role
Edit closed eval-uations. Re-open	Open an evaluation with the status **Finished**. This will change the evaluation status from **Finished** to **In progress**, and allow users to edit or modify the grading form.	Supervisor, CC Manager
Edit interaction types	Add/Rename/Delete interaction types.	CC Manager
Edit license	Allows admin to upload or reload the Quality Manager license.	IT Administrator
Edit shared templates	Edit shared templates - delete, rename shared templates, change type from Shared to Private.	CC Manager
Evaluate agents	Execute prepared my evaluations, evaluate agents (My evaluations = evaluations where I'm the evaluator).	Team leader, Supervisor, CC Manager
List Audit events	List/Search Audit events	CC Manager
Manage assigned evaluations	This permission allows users that have created evaluations to delete evaluations they have created.	Team Leader
Password reset	The right to reset user's password, but does not allow the user to edit any other user parameters. Users with this right have read-only access to user administration and see the whole user tree. Able to open User Details, where everything except for the fields for resetting the password will be read-only.	IT Administrator
Password reset (team members only)	The right to reset team member's passwords, cannot edit any other user parameters. Users with this right have read-only access to user administration. The Root of the tree is the group that the user belongs to. Open User Details, where everything will be read-only, except for fields for resetting the password.	Supervisor, CC Manager
Plan evaluations for all groups	Plan evaluations for groups which are listed in the CanEvaluate list. This permission is to allow evaluators to also plan/create evaluations for other members (evaluators) of the groups assigned to that evaluator. This limits evaluators from planning evaluations outside of assigned groups. If evaluator is in the Belongs to group they may appear in the list of agents to evaluate. For this evaluator to evaluate themselves from this planning they must have the **Self evaluate** permission assigned.	CC Manager

Per-mission Property	Allows the User To	By default in Role
Plan evaluations for own group or subgroups	Plan evaluations for groups which are listed in the CanEvaluate list. This permission is to allow evaluators to also plan/create evaluations for other members (evaluators) of the groups assigned to that evaluator. This limits evaluators from planning evaluations outside of assigned groups. If evaluator is in the **Belongs to group**, they may appear in the list of agents to evaluate. To evaluate themselves from this planning they must have the permission **Self evaluate** assigned.	Supervisor, CC Manager, Team Leader
Replace calls	Replace a call in evaluations (enable the "replace call" button - will replace a single call with another randomly selected call).	Team leader, Supervisor, CC Manager
Remove all evaluations	Delete evaluations created by ANY user	CC Manager
Self-evaluation	Plan and create evaluations for themselves and their own interactions.	CC Manager, Team Leader, Agent
Send evaluation feedback	Send evaluation feedback to the evaluator. Enables "Send Feedback" in the agent view.	Agent
View all evaluations	View all evaluations.	CC Manager
View evaluations - agent view	View their own evaluations in read-only form. This will also allow agents to view the evaluation detail report and from the evaluation detail report click the **Interaction** link and be directed to the read access only grading form where the agent can view the grading form, listen to the call and /or view the screen recording.	Agent
View graphs	View reports and graphs of agents in associated teams only (CanEvaluate) "assigned to supervisor"	Team leader, Supervisor, CC Manager
View graphs for all groups	View graphs for other groups and the whole call center. This permission will over-ride group checks, the user will be able to see data of the whole call center.	CC Manager
View my evaluations	View evaluations (where the user is the evaluator). This should include evaluations that the role (supervisor, team leader, ccmanager) has created. They should not be able to see evaluations created by other team leaders, supervisors, or ccmanagers.	Team leader, Supervisor, CC Manager

Per-mission Property	Allows the User To	By default in Role
View team evaluations	View evaluation of agents in associated teams. View evaluations of agents which are in the user's CanEvaluate (assigned groups) group list. This means the user can see all evaluations of the team they are a member of and all evaluations of teams that they can evaluate. This is also true for the group in which they belong. This permission will also restrict the view of the evaluation detail report to the "assigned to supervisor" groupings.	Team leader, Supervisor, CC Manager

Table 1: Role Permissions Properties

Enabling Agent Self-Evaluation

A typical example of role modification is to enable agents to plan and perform evaluations of their own performance (self-evaluations). By default, this is disabled, so this **Self-evaluation** permission must be added to the agent roles in Quality Manager as shown. Agents will now see the Evaluations menu item, but only be allowed to plan and perform evaluations for themselves. See the Quality Manager Agent User Guide for more information.

If some but not all agents are allowed to perform self-evaluations, it will be necessary to create a second custom **Agent** role that includes this permission.

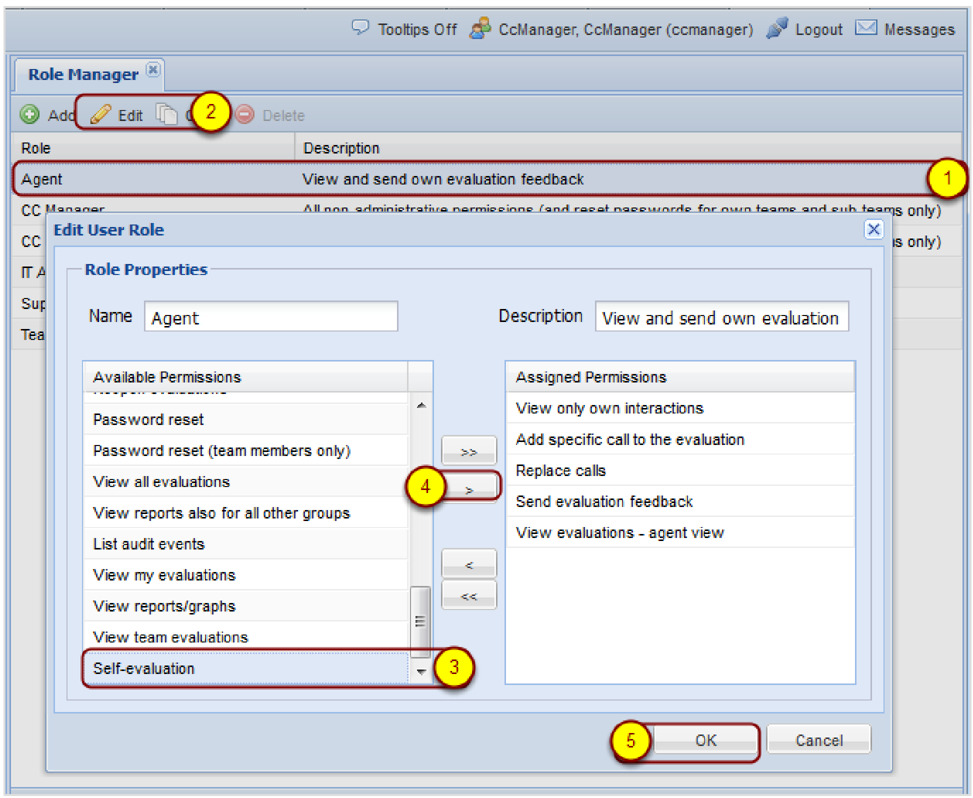


Figure 109: Enabling Agent Self-Evaluation

To Add Self-evaluations to the Agent Roles Navigate to **Administration > Role Manager**

1. Select Agent from the **Roles** available
2. Click **Edit**
3. Select **Self-evaluation**
4. Click **>**

5. Click **OK**

By default, Quality Manager does not include the results of self-evaluations in reports and graphs, since these results are generally subjective in nature. However, if self-evaluations are to be reported (for example if Quality Manager is configured to only run self-evaluations), this setting can be changed in the Application Options.

Additional Options

A short tutorial to show the use of additional administrative options in Genesys Quality Manager 8.1.50x for users with CC Managers or Administrator permissions.

Interaction Types

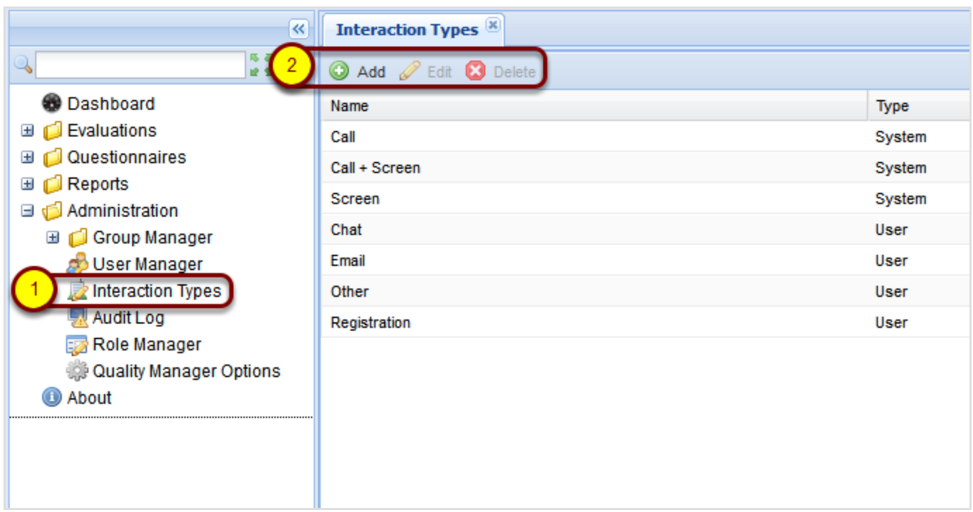


Figure 110: Interaction Types

Interaction Types define the types of interaction that Quality Manager can process in evaluations and reports. The interaction types can be modified (renamed) on the **Interaction Types** screen as required.

To add an interaction type:

1. Select **Interaction Types** in the left hand menu.
2. Click **Add**.
3. Type an interaction name in the Name field.
4. Click **Save**.

To Delete an Interaction Type

1. Select **Interaction Types** in the left hand menu. Select an interaction type to delete.
2. Click **Delete**.

Important:

The system interaction types, **Call**, **Call+Screen** and **Screen** cannot be deleted cannot be renamed or removed.

To Edit an Interaction Type:

1. Select **Interaction Types** in the left hand menu. Select an Interaction type to edit
2. Edit Click **Add**
3. Type an Interaction Name in the **Name** field.
4. Click **Save**.

Audit Log

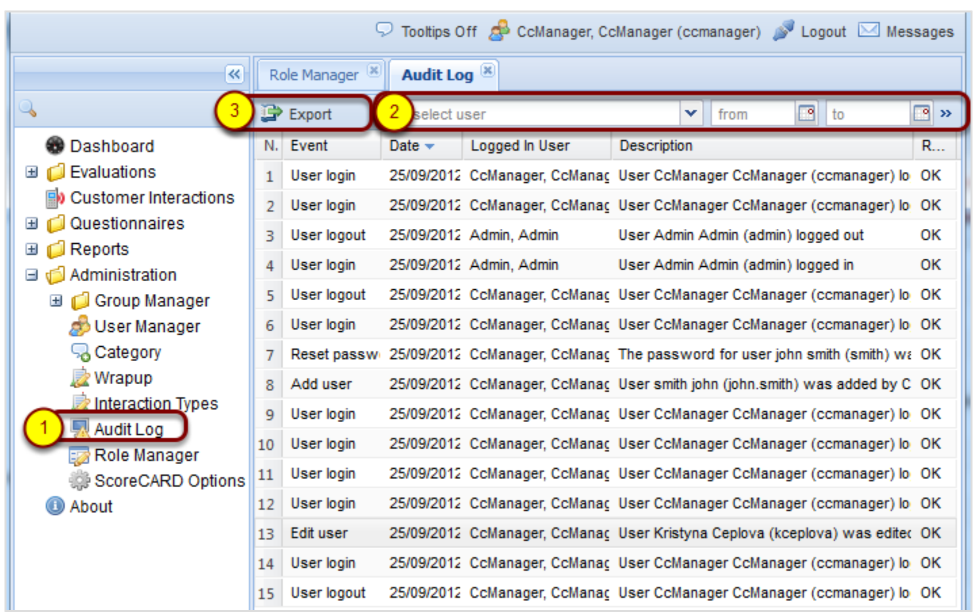


Figure 111: Audit Log

Quality Manager tracks all user interactions within the application by keeping an audit log. By default, this is only available to users with CC Manager status.

1. Click **Audit Log** and a list of the most recent events in Quality Manager displays in the **Audit Log** tab.
2. Use the filtering options (user name, from and to date range, event type) to reduce the list to relevant events.

3. Alternatively, export all entries to an Excel (2007 and later) spreadsheet file (.xlsx) for additional analysis.

Quality Manager Options

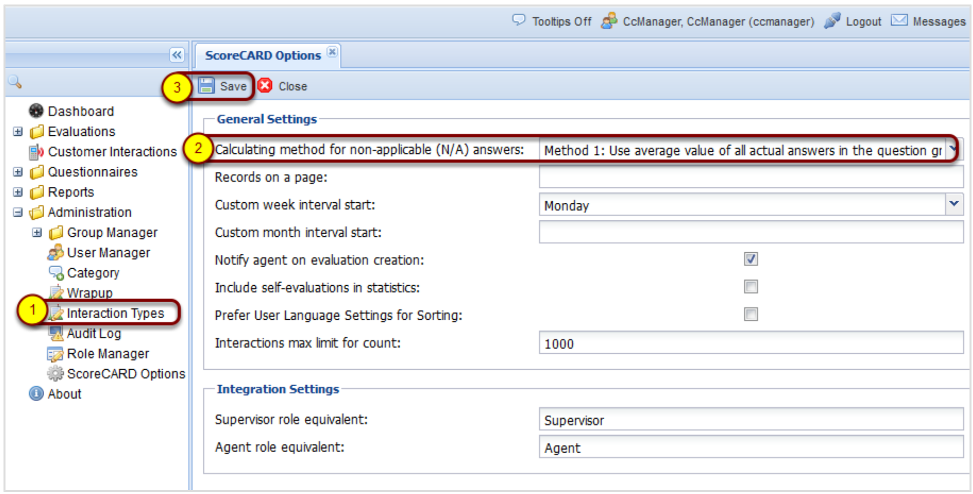


Figure 112: Quality Manager Application Options

Quality Manager application level options (Call Recording application user login etc.) can be viewed and modified by a user with CC Manager permissions in the **Quality Manager Options** section of the Administration menu.

1. Click **Quality Manager Options** to open the **Quality Manager Options** tab.
2. The **Calculating method for non-applicable (N/A) answers** setting, controls how the N/A compliance setting for questionnaire answers is calculated. These options are global for all questionnaires. Their purpose is to assign a score to N/A answers that will be statistically non-significant, neither unduly penalizing nor rewarding the agent for being given such an answer. They have the following meaning:

- **Method 1:** Use the average value (arithmetic mean) of all the submitted answers in the question group to define the score for all non-applicable answers (that is the score depends on which answers have already been selected). This means that the score given to the N/A answers reflects the agent's performance in the question group as a whole.
- **Method 2:** Use the average value (arithmetic mean) of all possible answers for the question groups to define the score for all non-applicable answers (that is the score does not depend on which answers have already been

selected). This means that the score given to the N/A answers reflects the average mark of all available answers in the questionnaire.

- **Method 3:** Skip the N/A answer (that is exclude this question from the final group score, so N/A answers are ignored). In this case the agent will be awarded a score of zero points for this question.

The **Records on a page** setting is a global count of how many list rows appear on a single list page (for example the evaluation list). Increasing this number can reduce the number of result pages, but also slow down page builds / refreshes.

The following two settings (**Custom week interval start**, **Custom month interval start**) enable cultural time settings to be designated, for example in the US, the first day of the week is Sunday, whereas in most of Europe it is Monday (this can be specified in **Custom week interval start**).

Notify agent on evaluation creation notifies agents automatically that an evaluation has been created for them. This allows them to follow the progress of the evaluation and (if they are given the view report permission) to view the results.

Include self-evaluations in statistics is switched off by default. Since self-evaluations are subjective, including their results in statistics could affect results considerably. However, checking this option will include self-evaluations in all reporting.

The **Supervisor role equivalent** and **Agent role equivalent** options enable the user to map these two roles in Quality Manager (agent and supervisor) to their two equivalent roles in Genesys Configuration Manager when integrating the agent databases.

3. Ensure that all details are correct before saving changes.

About Tab

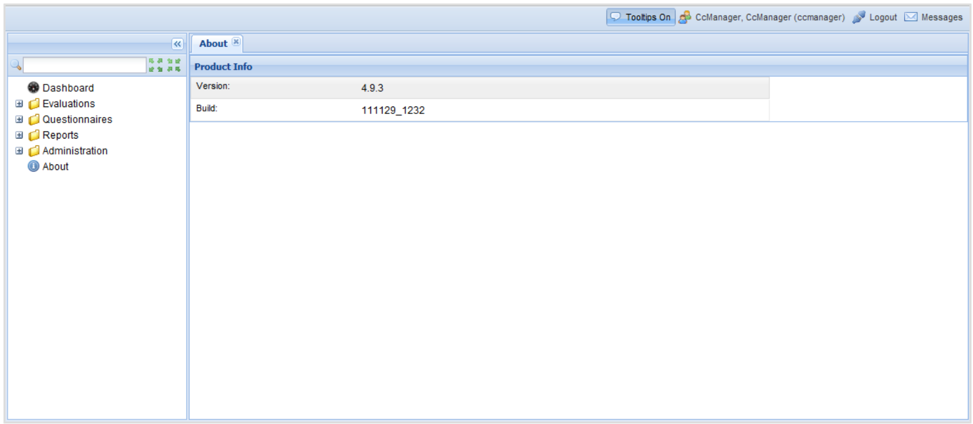


Figure 113: About Tab

The About tab shows the currently installed version and build number for Quality Manager.

Chapter

10 Request Technical Support

Technical Support from VARs

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

Technical Support from Genesys

If you have purchased support directly from Genesys, please contact http://genesyslab.com/support/contact Genesys Technical Support.