

Genesys Quality Management 8.1

Quality Manager User Guide: Supervisor

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Document Version: 81gqm_us_supervisor_10-2012_v8.1.501.00



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Chapter

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 PurposeAudienceDocument VersionTypographical ConventionsExpected KnowledgeBrowser Recommendations and Technical RequirementsInternet Explorer Security Settings:Technical Requirements for Playing Audio and Video Media

Document Purpose

This document describes the Genesys Quality Manager 8.1.500+ user interface and contains guides for every task that a Supervisor may perform.

Audience

This document is intended for Call or contact Center Supervisors.

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

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.

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-plugindownload

- 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 Prompt to change your password Retrieving a Forgotten Password Quality Manager User Interface Editing Your User Profile Changing Your Password Viewing System Messages

Logging in to Quality Manager

1	
~	
	Log In
	Password: (2)
	3 Log In Forgot password? Clear
	Version 8.1
	©2002 - 2012 ZOOM International
	Genesys suite applications are covered by U.S. and Foreign Patents.
Loading Quality	vanager

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.

Choose a New Password											
Your password	has expired. Please provide a new one.										
Old Password:	•••••										
New Password:	•••••										
Repeat Password:	•••••										
	Change and Continue Cancel										

Figure 2: Choosing a New Password

Retrieving a Forgotten Password

	Log In
	Log In: Anne.Agent Password:
	Log 1 Forgot password? Clear
	Alert! Please enter the login of the user. A new password will be generated and sent to the e-mail account registered for this account Anne.Agent 2
Loading Quality I	Mans 3 OK Cancel

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.
- 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

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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 Profiletab 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

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Dashboard	General	
	My Language:	English (US)
Reports	Login ID:	comanager
Administration About	Name:	CcManager
About	Surname:	CcManager
	E-mail:	jane.doe@company.com
(1 Change Password	Choose a New Password
	Delegation User Settings Records on a page: Dashboard Display On Startup:	Old Password:
×		🤤 1024x768

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.

Viewing System Messages

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Figure 7: Viewing System Messages

- 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.



Chapter



This chapter describes how to plan and use Evaluations. This chapter contains the following sections:

Performing an Evaluation



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.

Searching for Evaluations

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Figure 8: 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.
- 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.

Opening the Scheduled Evaluation

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Figure 9: 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 <u>Re-Using the Evaluation - 1 (Optional)</u> steps at the end of this tutorial.

The Evaluator Screen

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Figure 10: 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

					🖓 То	oltips Off 🧃	CcMa	nager, Ccl	Manager	(ccmai	nager) 🧃	🖉 Logout 🖂	Messages		
»	Evaluation List	Evaluato	r Form (491	258) 🗵											
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Figure 11: 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

		Add Specific Intera	ction(s) 🛛 🛛	(jake.buck) 🎤 Logout 🖂 Messages
» (6	Evaluator Fit Evaluator Fit Add Interactions M Add Ran Questionnaire: Call Quality (1.0 N Status 1 1 (26/11 320 P) 2 1/25/11 256 P 3 1 (25/11 251 P) Comments	Agent: Barker, Dearna Media Direction: All External Data Key: External Data Value: Customer Number: Ustomer Number: Ustomer Number: Nin. length 0:00 Max. length	ription: a Type: vp: vp: v d: ent Week: vi t: t: riteractions 5	Reveal Results to Agent Complete om: 1/23/11 To: 1/29/11 Current Rating 0.0% Quick Note 0.0% Quick Note 0.0% Quick Note
		SID From To Length	Start End	
	Feedback	16965586192.168.7.58:1 5630 5512 00:16:31	1/26/11 3:29 PM 1/26/11 3:46 PM 💽 🔷	*
	Evaluation Feedback (things to	46965478192.168.7.51:1 5512 5506 00:00:06	1/25/11 2:56 PM 1/25/11 2:56 PM 💽	
		10 16965595192.168.7.58: 5630 5512 00:01:18	1/26/11 4:17 PM 1/26/11 4:18 PM 💽 📲	
		16965498192.168.7.58: 5630 5512 00:00:34	1/25/11 3:48 PM 1/25/11 3:49 PM 💽	
		16965589192.168.7.58:: 56: interaction select	ion dialog 1/26/11 3:47 PM 💽	
		16965446192.168.7.51 :: 5512 5506 00:00:03	1/25/11 11:21 AM 1/25/11 11:21 AM 💽 🚽	

Figure 12: Adding Specific Media for Evaluation

- 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

						🖓 То	oltips Off 💈	🖗 CcMa	nager, CcMana	ger (ccma	nager) 🔊	Logout 🖂 Me	ssage
> Eval	uation	List 🙁	Evaluator	Form (491	258) 🗵								
🛃 A	dd Int	eraction	s 🍺 Add R	andom Intera	ctions 🧿	Remove 3	Repo	ort 🖂 :	Send Feedback	Fee	dback Histo	ry	>
Que	stion	naire: 1	TES ⁻ Agent:	Habart, Lu	ıkas Evalua	tor: CcMana	ager, CcMa	nager E	valuation Peri	od: From	n: 29/08/2	012 To: 29/08/	2012
	N.	Stat	Start	End	Length	From	То	Туре		_	Curr		
	1	0	29/08/2012	29/08/2012	00:00:57	073723091	77770			2	0.0 %	Quick Note	^
V	2	0	29/08/2012	29/08/2012	00:00:24	5655	5507			8 👪	0.0 %	Quick Note	
Com	nment	ts						Tot	al Rating		0.0 %		
								•					

Figure 13: 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

		🗢 Tooltips On 🔗 Co	Manager, Co	Manager ((ccmanager) 🎤 Logout 🖂 Messages			
>>	Evaluation List 🗶 Evaluator Form (19500) 🛞 Grading Form (19500) 🛞							
	💷 Feedback History 🔚 Save & Close 🛛 Close 🚺							
6	Questionnaire: Average Handling Time (2.0) Agent: B	loggs, Joe	Evaluation	period:	From: 08/08/2012 To:			
C	Mail Tracking Number 121456 Ticket Number 2	21564	Category		celect a category			
	Question			Answe	r Not			
	🖻 Opening script, 13.0 % (2 items)				<u> </u>			
6	1. Opening script followed? (30.0 %)		_	Yes -	but agent rushed the c 🝸 🏼 🍃 🗐			
	2. Own and company's name stated when greeting customer? (70.0 %)		Yes	Yes - agent followed script completely. (100.0 Yes - but agent rushed the delivery. (70.0 %)				
	□ Compliance, 1.0 % (1 item)		Part	ly (30.0 9	%)			
	3. Verification procedure correctly followed? (100.0 %)		Cust	omer hu	ng up (n/a)			
			Age	nt did no	t follow script at all. (0.0 %)			
	Internal Note The Outcomer was impatient		Play 15:2	8:53 - 🎽	Total Rating 4.6 %			
4								
	Feedback Panel				*			
	Things To Improve	Things To Maintain						
5	Script adherence say name so that the customer has a point of reference for any return calls	Politeness and patience	e					

Figure 14: 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.

- 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

	🔽 Toottips On 🍰 CcManager, CcManager (ccmanager) 🚀 Logout 🖂 Messages
Evaluation List 🕱 Evaluator Form (19500) (8)	
🚯 Add Interactions 🎒 Add Random Interactions 🥥 Remove 📃 Report 🖂 Send	Feedback 🔲 Feedback History 🕕 Evaluation Info 🔽 Reveal Results to Agent 📀 Complete
Questionnaire: Average Handling Time (2.0) Agent: Bloggs, Joe Evaluator:	CcManager, CcManager Evaluation Period: From: 08/08/2012 To: 08/08/2012
N. Stat Start End Length From	To Type Current Rating
1 08/08/2012 15:28 08/08/2012 15:32 00:03:19 222345589	8003 📔 🕡 🔯 🚛 47.7 % 👍 Quick Note
Comments	Total Rating 47.7 % 5
Great Start some things to work on though	
Feedback	-
Evaluation Feedback [things to improve]	Evaluation Feedback [things to maintain]
avoid getting impatient with customer	Great Chatty style natural working of company values into conversation, good support and intelligent suggestions

Figure 15: 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

🗢 Tool	tips On 🛃 CcManager, CcManager (ccmanager) 🍠 Logout 🖂 Messages					
Evaluation List 🕱 Evaluator Form (19500) 🛞						
🚯 Add Interactions 🎒 Add Random Interactions 🤤 Remove	Report 🖂 Send Feedback 📖 Feedback History 🕕 Evaluation Info 🛛 »					
Questionnaire: Average Hani Agent: Bloggs, Jo Evaluator: CcMan	ager, CcManage Evaluation Period: From: 08/08/2012 To: 08/08/201					
N. Stat Start End Length From	To Type Curre					
I • 08/08/2012 1: 08/08/2012 1: 00:03:19 222345589	8003 📔 🔁 🔯 🛃 47.7 % Quick Note					
Confirmation Email						
Do you want user?	to send feedback to the					
Comments	No 47.7 %					
Great Start some things to work on thoug						
Feedback	X					
Comments Yes No 47.7 % Great Start some things to work on thoug Image: Arrow of the start some things to work on thoug Image: Arrow of the start some things to work on thoug eedback Image: Arrow of the start some things to improve start some things to improve start some things to improve start some start						
avoid getting impatient with customer	Great Chatty style natural working of company values into conversation, good support and intelligent suggestions					

Figure 16: 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 <u>Re-Open An Evaluation</u>. 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

							Tooltips	s On 🦽 Co	Manager, Co	Manage	(ccman	ager) 🗯	🖗 Logout 🛙	🗹 Mess	ages
»	Eva	aluat	tion Lis	E (8)											
		New	💌 Vi	ew 📃 R 💙	٩	More Actions - Z Send Ev	aluation Fe	eedback 📴	Export Spr	eadshee	All			 ✓ 	Searc
		N.	ID	Evaluator		Reevaluate		Period	Period To	Score	Status	Rev	Last Mo	Par	~
		1	19500	CcManager, Cc			lling Ti	8 Aug 2	8 Aug 2	47.7	Finishe		25 Sep		
		2	19501	CcManager, Cc			lling Ti	8 Aug 2	8 Aug 2	0.0 %	Created		19 Sep		
		з	19499	CcManager, Cc	~	Include in Statistics	lling Ti	8 Aug 2	8 Aug 2	0.0 %	Created		19 Sep		
		4	19498	CcManager, Cc	1	Reveal Results to Agent	lling Ti	8 Aug 2	8 Aug 2	0.0 %	Created		19 Sep		
		5	19497	CcManager,	3	Delete	lling Ti	8 Aug 2	8 Aug 2	0.0 %	Created		5 Sep 2		
	1						1								
	Ċ														

Figure 17: 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.
- 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, noone on the system will be able to delete the agent's self evaluations.

Re-Using the Evaluation - 1

							🖓 Tooltips	s On 🔗 Co	Manager, Co	cManage	r (ccman	ager) 🗯	🖻 Logout 🛙	🗹 Mess	sages
»	Ev	alua	tion Lis	t 🗷											
		New	🕑 Vi	ew 📃 Re 2	ġ;	More Actions	Evaluation Fe	eedback 📴	Export Spr	eadshee	t All			v 🔍	Searc
		Ν.	ID	Evaluator	7	Reevaluate 3		Period	Period To	Score	Status	Rev	Last Mo	Par	~
		1	19500	CcManager, Cc		Reopen	lling Ti	8 Aug 2	8 Aug 2	47.7	Finishe		25 Sep		
		2	19501	CcManager, Cc			Iling Ti	8 Aug 2	8 Aug 2	0.0 %	Created		19 Sep		
		з	19499	CcManager, Cc	1	Include in Statistics	Iling Ti	8 Aug 2	8 Aug 2	0.0 %	Created		19 Sep		
		4	19498	CcManager, Cc	1	Reveal Results to Agent	Iling Ti	8 Aug 2	8 Aug 2	0.0 %	Created		19 Sep		
		5	19497	CcManager, Cc		Delete	lling Ti	8 Aug 2	8 Aug 2	0.0 %	Created		5 Sep 2		
1	1			l											
	Ľ	·													

Figure 18: 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.

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

Evaluation List 🗷	valuation Plann	er 🗵								
Create Evaluations	🔜 Save As Ter	nplate 🔯 Template	s 🛃 Load	Template 🔻 🌘	3 Close 🌔	1				
Date Range:		 From: 	08/	08/20: 🖪	To: 08/0	8/20: 🖻				
Questionnaire: Apply To Statistics:	Average Handlin	ng Time (2.0)			Y	Inter	raction	1		
Basic Add Sub-Cr	iteria		Remove Ir	nteractions	to remove all a	aent				
Group Evaluation	n 💿 Age	nt Evaluation	ir 🖓	iteractions?						
Evaluator:	CcManager,	CcManager (ccm		Yes	No					
Groups:		Select	All/None A	gents:				Select All/	None	
4 🃁 Root group				🔲 Admin, A	dmin (admin)					
TestGroup1				🔽 Bloggs, J	oe (vklatil)					
				Doe, Joh	n (agent1)					
				ipccimpo	rterdaemon, ipco	importerda	emon (ipcci	mporterdae	mon)	
Wrapup:		✓ Me	edia Directio	n: Inl	oound 💌]				
Add Media Type	🤤 Remove 🚦	Allow Replacemen	t 🖪 Allow	Selection 📄	Allow random	calls select	ion 🛈 Ad	ld Interactio		
Media Type	Min. Count N.	Start	End		Length	From	То	Туре		
Call + Screen	1	1 08/08/2012 15:28	8 08/08/2	2012 15:32	00:03:19	22234558	8003		3 Qu	ick Note

Figure 19: Re-Using the Evaluation - 2 (Optional)

- 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

							🖓 Toottip	s Off 🛛 🛃 E	luck, Jake (ja	ike.buck) 🎤 Logout 🖂 Mes	sages
>> Evaluation List (*)											
Ne	🛚 💼 Grade	Rei 2		More Actions -	🖂 Send Agent's Evaluat	ion Feedback 🛛 📴 E	xport to Spreads	sheet All		👻 🔍 Search Evalua	ations
🗖 N.	D	Evaluator		Reevaluate	Ques. Name	Period From	Period To	Score	Status	Last Modified Parent ID	~
	949	Buck, J	5	Reopen	Call Quality (1.0)	Jan 23, 2011	Jan 29, 2011	74.0 %	Finished	Jan 27, 2011 1:	
	2 767	Buck, Jake			Call Quality (1.0)	Sep 25, 2010	Sep 26, 2010	57.0 %	Finished	Jan 25, 2011 1:	
	3 766	Buck, Jake	~	Include in Statistics	Call Quality (1.0)	Sep 26, 2010	Sep 27, 2010	70.0 %	Finished	Jan 25, 2011 1.	
	4 765	Buck, Jake	1	Reveal Results to Agent	Call Quality (1.0)	Sep 27, 2010	Sep 28, 2010	70.0 %	Finished	Jan 25, 2011 1.	
	5 764	Buck, Jake		Delete	Call Quality (1.0)	Sep 28, 2010	Sep 29, 2010	7.0 %	Finished	Jan 25, 2011 1:	
	6 763	Buck, Jake		Barker, Deanna	Call Quality (1.0)	Sep 29, 2010	Sep 30, 2010	64.0 %	Finished	Jan 25, 2011 1:	

Figure 20: 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.

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.

Ev	alua	tion Lis	t 🗷									
	Repo	rt 🎯 I	More Actions -			2 ⊵	Send Evaluation	Feedback	🚔 Export Sp	oreadsheet All		🗸 🔍 Search
	N.	D	Evaluator	Agent	Ques. Name	Period From	Period To	Score	Status	Last Modified	Parent ID	~
	1	920	Holland, Bethany	Bryant, Dana	Call Quality (1.0)	Sep 25, 2011	Sep 26, 2011	29.8 %	Finished	Mar 16, 2012 1:28:39 PM		
	2	919	Holland, Bethany	Bryant, Dana	Call Quality (1.0)	Sep 26, 2011	Sep 27, 2011	77.1 %	Finished	Mar 16, 2012 1:28:39 PM		
	3	918	Holland, Bethany	Bryant, Dana	Call Quality (1.0)	Sep 27, 2011	Sep 28, 2011	86.0 %	Finished	Mar 16, 2012 1:28:38 PM		
	4	917	Holland, Bethany	Bryant, Dana	Call Quality (1.0)	Sep 28, 2011	Sep 29, 2011	47.1 %	Finished	Mar 16, 2012 1:28:38 PM		
	5	916	Holland, Bethany	Bryant, Dana	Call Quality (1.0)	Sep 29, 2011	Sep 30, 2011	39.1 %	Finished	Mar 16, 2012 1:28:38 PM		
	6	850	Spencer, Quincy	Bryant, Dana	Call Quality (1.0)	Sep 25, 2011	Sep 26, 2011	77.1 %	Finished	Mar 16, 2012 1:28:33 PM		
	7	849	Spencer, Quincy	Bryant, Dana	Call Quality (1.0)	Sep 26, 2011	Sep 27, 2011	39.1 %	Finished	Mar 16, 2012 1:28:33 PM		
	8	848	Spencer, Quincy	Bryant, Dana	Call Quality (1.0)	Sep 27, 2011	Sep 28, 2011	47.1 %	Finished	Mar 16, 2012 1:28:33 PM		
	9	847	Spencer, Quincy	Bryant, Dana	Call Quality (1.0)	Sep 28, 2011	Sep 29, 2011	19.8 %	Finished	Mar 16, 2012 1:28:33 PM		

Figure 21: 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.

Ev	alua	tion Lis	t 🗷	Send Evaluation Feedback	1				
	Repo	rt 🎯 I	lore Actions -	Evaluation ID: 919 (1)	preadsheet All			🗸 🔍 Sea	arch
	N.	ID	Evaluator		atu	JS	Last Modified	Parent ID	~
	1	920	Holland, Bethany	Please can we meet in person regarding this evaluation? I need to give you some background information which could affect the evaluation result. Thanks,	ist	hed	Mar 16, 2012 1:28:39 PM		
	2	919	Holland, Bethany		ist	hed	Mar 16, 2012 1:28:39 PM		
	3	918	Holland, Bethany		ist	hed	Mar 16, 2012 1:28:38 PM		
	4	917	Holland, Bethany		ist	hed	Mar 16, 2012 1:28:38 PM		
	5	916	Holland, Bethany	I Y	ist	hed	Mar 16, 2012 1:28:38 PM		
	6	850	Spencer, Quincy		ist	hed	Mar 16, 2012 1:28:33 PM		
	7	849	Spencer, Quincy		ist	hed	Mar 16, 2012 1:28:33 PM		
	8	848	Spencer, Quincy		ist	hed	Mar 16, 2012 1:28:33 PM		
	9	847	Spencer, Quincy		ist	hed	Mar 16, 2012 1:28:33 PM		
	10	846	Spencer, Quincy	3 Send	ist	hed	Mar 16, 2012 1:28:33 PM		
	11	300	CcManager, CcManage	n Dryani, Dana Cail Quality (1.0) 36p 25, 2011 36p 20, 2011 14.7 /6 1	mist	hed	Mar 16, 2012 1:27:53 PM		

Figure 22: 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.

Ev	alua	tion List											
Ð	Repo	rt 🎯 N	lore Actions -			⊠ :	Send Evaluation Fe	edback 🃴	Export Sprea	adsheet All	v C	Sear	irch
	N.	ID	Evaluator	Agent	Ques. Name	Period From	Period To	Score	Status	Last Modified	Parent ID		«
	1	920	Holland, Bethany	Bryant, Dana	Call Quality (1.0)	Sep 25, 2011	Sep 26, 2011	29.8 %	Finished	Mar 16, 2012 1:28:39 PM		-	
	2	919	Holland, Bethany	Bryant, Dana	Call Quality (1.0)	Sep 26, 2011	Sep 27, 2011	77.1 %	Finished	Mar 16, 2012 1:28:39 PM			
	з	918	Holland, Bethany	Bryant, Dana	Call Quality (1.0)	Sep 27, 2011	Sep 28, 2011	86.0 %	Finished	Mar 16, 2012 1:28:38 PM			
	4	917	Holland, Bethany	Bryant, Dana	Call Quality (1.0)	Sep 28, 2011	Sep 29, 2011	47.1 %	Finished	Mar 16, 2012 1:28:38 PM		-	
	5	916	Holland, Bethany	Bryant, Dana	Call Quality (1.0)	Sep 29, 2011	Sep 30, 2011	39.1 %	Finished	Mar 16, 2012 1:28:38 PM		=	
	6	850	Spencer, Quincy	Bryant, Dana	Call Quality (1.0)	Sep 25, 2011	Sep 26, 2011	77.1 %	Finished	Mar 16, 2012 1:28:33 PM			
	7	849	Spencer, Quincy	Bryant, Dana	Call Quality (1.0)	Sep 26, 2011	Sep 27, 2011	39.1 %	Finished	Mar 16, 2012 1:28:33 PM			
	8	848	Spencer, Quincy	Bryant, Dana	Call Quality (1.0)	Sep 27, 2011	Sep 28, 2011	47.1 %	Finished	Mar 16, 2012 1:28:33 PM			
	9	847	Spencer, Quincy	Bryant, Dana	Call Quality (1.0)	Sep 28, 2011	Sep 29, 2011	19.8 %	Finished	Ma		_	
	10	846	Spencer, Quincy	Bryant, Dana	Call Quality (1.0)	Sep 29, 2011	Sep 30, 2011	31.8 %	Finished	Ma Message	cuccoccfully		
	11	300	CcManager, CcManager	Bryant, Dana	Call Quality (1.0)	Sep 25, 2011	Sep 26, 2011	14.7 %	Finished	Ma	successfully		
14	4	Page 1	of 1 🕨 🕅										

Figure 23: 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 <u>Viewing</u> <u>System Messages</u>.

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).

	«	E	valua	tion Lis	t 🗵		
Q ::	»		New	🚺 Ev	3 📃 Report	More Actions -	🖂 Send Agent's Evaluation I
🚯 Dashboard			Ν.	ID	Evaluator	Agent	Ques. Name
Evaluations			1	903	Rutledge, Matthew	Blair, Kendra	Call Quality (1.0)
1 Evaluation List	1		2	900	Gibson, Dominic	Herring, Kendall	Call Quality (1.0)
C Evaluation Plan	2	☑	3	899	Gibson, Dominic	Herring, Kendall	Call Quality (1.0)
G Reports	-		4	898	Gibson, Dominic	Herring, Kendall	Call Quality (1.0)
			5	897	Gibson, Dominic	Herring, Kendall	Call Quality (1.0)
() About			6	896	Gibson, Dominic	Herring, Kendall	Call Quality (1.0)
			7	895	Gibson, Dominic	Stout, Coleman	Call Quality (1.0)
			8	894	Gibson, Dominic	Stout, Coleman	Call Quality (1.0)
			9	893	Gibson, Dominic	Stout, Coleman	Call Quality (1.0)

Figure 24: 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.

>>	Evaluation Detail		
1	📄 Print 🍞 Export to Sprea	idsheet	
	Evaluation #288	0 - Call Quality 1.0	
	Agent: Evaluator:	Alva Riddle (alva.riddle) Chance Blankenship (chance.blankenship)	
	Interaction #2,880	Start:	-
	Call	From:	-
		Direction:	All
		Category:	

Figure 25: 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 26: Open the Spreadsheet

Click **OK** to open the spreadsheet

The Evaluation Detail report is displayed.

Linking to a Read-only Grading Form



Figure 27: 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.

Evaluation List	Evaluator Form	(491258) ×	Grading Form (49	1258) 🗵				
Feedback Histor	📙 Save & (Close 😢 Close		,				
Questionnaire: Mail Tracking Num	TEST Č	P hovory (1.0)	Agent: Ticket Number	Habart, Lukas	Evaluation per Category	iod: From: 29/08 29/08/2012	8/2012 To:	
Question					A	nswer		N
🗉 Ověření, 20.0	% (1 item)							
Ověření dle MP a	PP (100.0 %	»)					*	
∃ Struktura hov	oru, 10.0 % (2	2 items)						
Internal Note					Play 19:	44:00 - 💙 Total	Rating 0.0 %	%
Feedback Panel								
Things To Improv	a			Things To M	aintain			
Things to improv								

Figure 28: 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

4 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 Setting Up a Report Reports for a Single Evaluation Exporting Report Data



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





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 30: 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**.
- 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.
- 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).
- 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.

	🖓 Tooltips Off 🍰 CcManager, CcManager (ccmanager) 🎤 Logout 🖂 Message
«	Results Distribution ®
0 8 2 2 2 2 9 2 2 2 2 9 2 2 2 2 9 2 2 2 2 9 2 2 2 2	🖄 Compute graph 😰 Export Spreadsheet 💈 Close
 Dashboard Evaluations Questionnaires Reports Agent Skills Compare Agents Compare Scores League Table Interaction Volume Evaluation Volume Administration About 	Parameters Parameters Show: Number of Agents Questionnaire: Question Group: Question: Period Period
	From Date: 14/08/2012
	To Date: 25/09/2012
	Scale: Month

Figure 31: Opening the Results Distribution Tab

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

Results Distribution Computing the spreadsheet Close		3	4
Show: Number of Agents Questionnaire: Call Quality	1.0) Question Group:	(Entire Questionnaire)	Question: (Entire Question Group)
Number of Agents	Parame	ters	·
Number of Evaluations	Pe	eriod	
Number of Interactions	From	Date: 6/1/11	
	To Da	te: 6/1/11	
	Scale:	Month	*

Figure 32: Results Distribution Tab

- 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.

Results Distribution 🗵			
🖄 Compute graph 🍃 Export Sprea	adsheet 😢 Close		
	Parameters		»
	Show:		-
	Number of Agents	•	
	Questionnaire:		
	ČP hovory - test (1.3)	•	
	Question Group:		
	Komunikační standardy	×	=
	Question:		
	Oslovení	*	
	Period		
	From Date:	14/08/2012	(1)
	To Date:	25/09/2012	2
	Scale:	Month	~
		– Day	1
	Agents	Week	3
	Groups:	Month	9
	4 🥼 Root group	Quarter	
	AnectTest	Year	

Figure 33: 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).

Groups:			Select All/None
a 🧔 Root group			
a 🧔 Alan Wande	rer		=
mobile			
a 🃁 Apia			
FC Sion			
🔺 📹 Asunción			-
Agents:			Select All/None
Barron, Glenn (gl	enn.barron)		
Buckner, Randy (randy.buckne	er)	=
Gomez, Harley (h	arley.gomez)	
Hendricks, Kristo	pher (kristoph	ner.hendricks)	
Macdonald, Earne	est (earnest.r	macdonald)	
Malone, Trenton	(trenton.malo	ne)	-
Scoring			
Scoring Type:	Percent	age	
Good Threshold:	75	Maximum:	100
Bad Threshold:	25	Minimum:	0

Figure 34: The Results Distribution Tab Parameters / Select Agents

- 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 35: Compute Graph

- 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).

Opening Agents+Score+History+15+Jul+2011+-+15+Jul+2011.xlsx							
You have chosen to open							
Agents+Score+History+15+Jul+2011+-+15+Jul+2011.xlsx							
which is a: Microsoft Excel Worksheet							
from: http://docs-callrec1.office.zoomint.com							
What should Firefox do with this file?							
Open with Microsoft Excel (default)							
Save File							
Do this <u>a</u> utomatically for files like this from now on.							
OK Cancel							

Figure 36: Export to Spreadsheet Dialog

Click **OK** to open the spreadsheet.

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

X	🔒 🖻 - (34 × [∓	, Ag	ents+	Score+	His		. 0	Σ	3
	File Hor	Inse	Pag F	For	Dat Re	v v	ŝ	? -	ē	Σ3
ſ	۴ 🎦	A	3		%		A		Σ	
Pa	este 🛷	Font	Aligr	nment	Numb	er S	tyles	Cells		, ,
Clip	pboard 🗔								Ec	ł
G16 ▼ f _x									v	
	A B			(C	D		E		
1	Agents	s Sc	ore	His	tory	/ - 1	/lon	thly		
2	ory From:	15.7.	2011		Н	listor	у То:	15.7.2	011	
3	tionnaire:	Qualit	y 1.0			Sco	ring:	CENT	AGE	
4	on Group:		All		Good:			: 75,00%		
5	Question		A 11		Bad:			l: 25,00%		1.1
6	Question.		All				buu.	20,0	JU /0	
	Groups:		All				buu.	Bruss	sels	
7	Groups: Agents:		AII				Her	Bruss bert Ay	sels /ala	

Figure 37: Example of Exported Spreadsheet

The cells can be resized as required.



Results Distribution Graph - 2

Figure 38: 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 39: 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.
- 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.
- 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	-	1			I				
		Base								
		Evaluati								
		on, Deenne	Deenne		Deenne		Deenne			
		Barkor	Barkor		Barkor		Barkor			
		20/10/10	20/10/10		20/10/10		20/10/10			
		Eval	Eval	Deanna`	Eval	Deanna`	Eval	Deanna`		
		ld: 1741	ld: 1742	s Diff	ld: 1743	s Diff	ld: 1744	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 orien	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%		
Call control	Customer care	10.00%	0.00%	-10.00%	10.00%	0.00%	0.00%	-10.00%		
Call Control	Following the corint	10.00%	0.00%	-10.00%	20.00%	2.00%	0.00%	-10.00%		
	Following the script	10.00%	0.00%	-10.00%	10.00%	0.00%	0.00%	-10.00%		

Figure 40: 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

(*)	League Table 🗷	
C	Export to Spreadsheet 6	lose
Dashboard Evaluations	Time Interval	
Cuestionnaires Compare Agents	Date From:	Yesterday Y 7/14/11 Image: To: 7/14/11 Image: To:
Compare Evaluators	Questionnaire	
Compare Scores	Scoring System:	Percentage 👻
League Table	Questionnaire:	Select All/None:
 ➢ Evaluation Volume ☑ ☑ Administration ☑ About 		Call Quality (1.0)
	 Mainstream Threshold 	5
4	Bad Threshold:	25
-	Good Threshold:	75
	Agents	
	Grouping:	Agent O Group
	Groups:	Select All/None Agents: Select All/None
	A General Actions	Admin, Admin (admin)
5	Astana Stana	CcManager CcManager (ccmanager)
	File Brussels	ipccimporterdaemon, ipccimporterdaemon (ij
	▷ Ø Papeete ▷ Ø Vaduz	

Figure 41: 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:		9/26/2	010	,							
Ter		0/20/2	010								
10.		9/29/2	010								
					Average						
#	Name	Surname	Login	Group	Score						
۳.	Patricia	Cortez	patricia.cortez	Pacos de Ferreira	52.56%						
2.	Eva	Sanders	eva.sanders	Pacos de Ferreira	51.52%						
3.	Charlie	Lester	charlie.lester	Pacos de Ferreira	51.19%						
4.	Marco	Ochoa	marco.ochoa	Pacos 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.	lvy	Young	ivy.young	Paços de Ferreira	36.12%						
Average Scor	e				46.97%						

Figure 42: 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 43: 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 44: 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 45: 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 46: 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

		🖓 Tool	tips Off 🛛 🥵 CcManager,	CcManager (ccmanager) 🏼 🔊 Logo	out 🖂 Messages			
«	Evaluation List 🗷 Evaluation	Detail 🛎						
Q 5 # 3	🖨 Print 🛛 😰 Export to Spread	dsheet		(2)	Include All Possible Answers	Eco Printing		
Dashboard Evaluations	Evaluation #949	- Call Q	uality 1.0			<u> </u>		
Evaluation List	Agent:	Deanna Ba	arker (deanna.barker)	Evaluation date:	27/01/11			
Gestionnaires Evaluator: Jake Buck (jake.tr			(jake.buck)	Eval. period from:	23/01/11 12:00			
🗉 📁 Reports	I C Reports			Eval. period to:	29/01/11 11:59			
🗉 📁 Administration								
About	Interaction #954	Start	26/01/11 03:30:00	End:	26/01/11 03:46:30			
	Call	From:	5630	To:	5512			
		Direction: Category:	In/Outbound	Wrap up:				
	Question			Answer		Rating		
	Opening call							
	Greeting, introducing the	agent and th	ie company	Average		50.0%		
	Detection and Verification	of a compe	tent person	Good		100.0%		
	Customer?s Consent to in	nterview him/	'her (time, topic)	Good		100.0%		
	Company Presentation			Bad		0.0%		
	Switching to the matter of	the call		Average		50.0%		
	Merchant's skills	investigative	business oriented	Good		100.0%		
	Understanding customer i	needs	abuarresa orienteu	Good		100.0%		
	Solution proposal	10040		Average		50.0%		
	Customer care			Good		100.0%		
	Call control	Call control						

Figure 47: 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**.
- 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 48: 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.

- A Base Evaluation						
Select a Questionnaire:	Groups:	Select All/N	one	Select Evaluators Select /	All/None	Select Base Evaluation:
Call Quality (1.0)	a 🃁 Root gr	oup	^	Buck, Jake (jake.buck)		Benson Mattie 9/29/10 -
	a 🕼 Copenhagen			Ryan, Melinda (melinda.ryai	n)	Benson Mattie 9/28/10 -
	Paços de Ferreira					Benson Mattie 9/27/10 -
	🔺 🗂 Dakar					Benson Mattie 9/26/10 -
Open	ning export.xlsx 🛛 🔀					Benson Mattie 9/25/10 -
You	have chosen to open					Watson Fannie 9/29/10 -
		opon				Watson Fannie 9/28/10 -
12	which is a: Mi	wasaft Offica Event W		Watson Fannie 9/27/10 -		
	from: http://d		Watson Fannie 9/26/10 -			
	at should Firefor		Watson Fannie 9/25/10 -			
		C do man anis nic:	-			
Evaluations for Compariso	• Open with	Microsoft Office Ex	cel (c	lefault) 💌		
Selected Questionnaire:	🔿 <u>S</u> ave File				l/None	Select Evaluations to Com
Call Quality (1.0)	Do this <u>a</u> uto	matically for files like	this f	rom now on.		Benson Mattie 9/29/10 -
					þ	Benson Mattie 9/28/10 -
			_			Benson Mattie 9/27/10 -
		(2	OK Cancel		Benson Mattie 9/26/10 -
						Benson Mattie 9/25/10 -
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Figure 49: 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.

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8	2	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	0	Company Presentation	0.00%	0.00%	0.00%	0.00%	0.00%	20.00%	20.00%		
13	1	Switching to the matter of the call	0.00%	0.00%	0.00%	0.00%	0.00%	20.00%	20.00%		
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14	4	Understanding customer needs	0.00%	20.00%	20.00%	0.00%	0.00%	40.00%	40.00%		
15	5	Solution proposal	10.00%	10.00%	0.00%	20.00%	10.00%	20.00%	10.00%		
16	6	Customer care	10.00%	0.00%	-10.00%	10.00%	0.00%	0.00%	-10.00%		
10	7 Call control		18.00%	0.00%	-18.00%	20.00%	2.00%	0.00%	-18.00%		
17	0	Following the script	10.00%	0.00%	-10.00%	10.00%	0.00%	0.00%	-10.00%		
5 6 7 8 9 10 11 12 13 14 15	Opening call Openi	Greeting, introducing the agent and the company Detection and Verification of a competent person Customer?s Consent to interview him/her (time, topic) Company Presentation Switching to the matter of the call Questioning techniques - investigative/business orient Understanding customer needs Solution proposal Customer care	4.00% 10.00% 0.00% 0.00% 0.00% 4.00% 0.00% 10.00% 18.00% 10.00%	0.00% 0.00% 0.00% 0.00% 0.00% 12.00% 30.00% 20.00% 10.00% 0.00% 0.00%	-4.00% -10.00% 0.00% 0.00% 0.00% 30.00% 20.00% -10.00% -10.00% -10.00%	24.00% 20.00% 20.00% 20.00% 0.00% 6.00% 0.00% 20.00% 10.00% 10.00%	20.00% 10.00% 20.00% 20.00% 20.00% 20.00% 2.00% 0.00% 10.00% 2.00% 0.00%	28.00% 0.00% 10.00% 20.00% 20.00% 18.00% 30.00% 40.00% 0.00% 0.00% 0.00%	24 -10 20 20 20 20 14 30 40 -11 -11 -11		

Figure 50: 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).



Chapter

5 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 Setting Up a Dashboard - 1 Setting Up a Dashboard - 2 Setting Up a Dashboard - 3

The Quality Manager Dashboard



Figure 51: 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

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«	Dashboard ®	
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Dashboard Deviluations Count of the second se	Widgets per Row Add Widget A Save High Scoring Agents Low Scoring Groups Low Scoring Group Trend Pie	
	User Dashboard Default Dashboard	

Figure 52: 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 <u>Setting Up a Dashboard -</u> <u>2</u>.

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

Setting Up a Dashboard - 2

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	Jave	
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Figure 53: 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:

	🔽 Tooltips On 🧬 CcManager, CcManager (ccmanager) 🧬 Logout 🖂 Messages
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x	1024x768 😲

Figure 54: 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.
- 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.
- 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

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	Agent		
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	Petersen, Duane	6	
	User Dashboard Default Dashboard		×

Figure 55: 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

6 **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.



Chapter 6 Request Technical Support