# Cisco Unified Workforce Optimization

Quality Management Desktop User Guide 2.6
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**Americas Headquarters**
Cisco Systems, Inc.
170 West Tasman Drive
San Jose, CA 95134-1706
USA
http://www.cisco.com
Tel: 408 526-4000
800 553-NETS (6387)
Fax: 408 527-0883

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# Overview

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## Introduction

Cisco Quality Management (QM) Desktop enables managers, supervisors, agents, knowledge workers, archive users, and evaluators to use the same application to monitor and evaluate the performance of groups, teams, and individual agents in a contact center environment.

QM Desktop provides summaries and details of the results of agent evaluations on a group, team, and individual agent basis in the QM Desktop dashboard. Your assigned role gives you access to varying levels of information. Evaluators, managers, and supervisors can actually evaluate a contact, view evaluation results, and enter comments on an evaluation; agents can view and comment on their own evaluation results.

All roles except evaluators and archive users can view historical reports that display data for a specified time period selected by the user. The time period can be from one day to up to a year from the current date.

If archiving is enabled, managers, supervisors, and archive users have access to archive audio recordings. Managers can access the recordings for their assigned groups, and supervisors can access the recordings for their assigned teams. Archive users can access all recordings.

Audio recordings can be archived for any length of time as configured by the administrator. Archived recordings can also be exported to any desired location on a recording-by-recording basis.

### What’s New In This Version

QM Desktop 2.6 includes the following new features:

- User-defined and editable metadata associated with recordings
- Support for dual-monitor recordings
- Maintain the aspect ratios (4:3 and 16:9) of video recordings

- Ability to view the entire video recording in the playback window or zoom in to a 1 to 1 resolution to view recordings full size
- If configured by the administrator, users can export contact recordings within their scope and their associated metadata as WMV, WMA, and WAV files
- If configured by the administrator, evaluations using specified evaluation forms can require approval by managers, supervisors, and/or evaluators
- Contact evaluations can be saved in progress
- QM Desktop can be configured to timeout after a specified idle time
- All segments of a call through a contact center can be played back so that the user can review the entire call

## QM Desktop Feature Levels

There are two feature levels of QM Desktop: Basic and Advanced.

- At the Basic feature level, contact recordings are audio only.
- At the Advanced feature level, contact recordings are both audio and video.

## Logging In

QM Desktop requires a user name and password in order to log in. Only one instance of QM Desktop can run at a time on your PC.

You will not be able to log in if:

- You are not a licensed QM user
- The license has expired
- You are a manager who is deactivated or not assigned to a group
- You are a supervisor who is deactivated or not assigned to a team
- You are an evaluator and there are no active groups

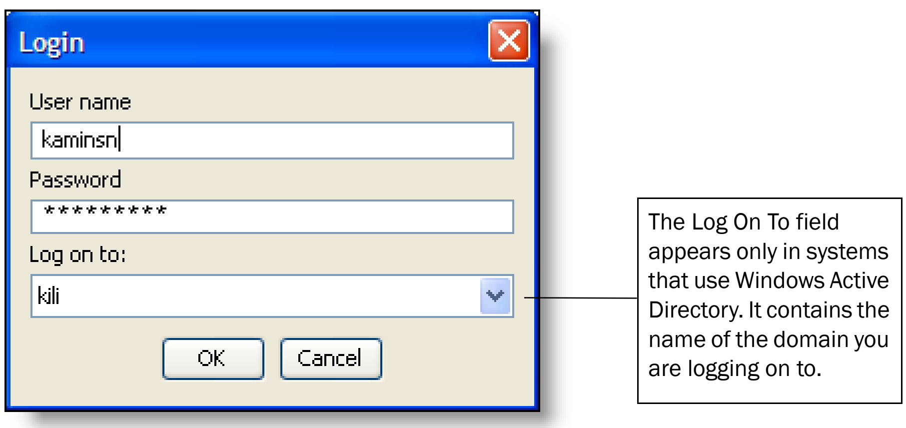
***To log into QM Desktop:***

1. If QM Desktop is not open on your desktop, click Start > All Programs > Cisco > WFO > Quality Management Desktop.

   If QM Desktop is open on your desktop, choose File > Login from the menu bar.

   QM Desktop starts and the Login dialog box appears (Figure 1).

   **Figure 1. Login dialog box (Active Directory system)**

2. If your system uses Windows Active Directory, enter your Windows user name, password (the password is case-sensitive), and domain (in the Log On To field).

   If your system does not use Windows Active Directory, enter your Windows user name and your QM password. This password is set up in QM Administrator for you by your administrator.

3. Click OK.

You are now logged into QM Desktop.

Which view you see depends on your role:

- Agents, knowledge workers, supervisors, and managers see the QM Desktop dashboard
- Evaluators see the Recording view
- Archive users see the Archive view

**NOTE:** If you are assigned multiple roles within QM, you are logged in at the highest role level. For example, if you are assigned as both an evaluator and a manager, you are logged in at the manager role level. You can change roles within QM after you are logged in. See "Changing Your Role" on page 13.

## Automated Updates

QM can be configured to enable automated updates. This means that whenever a newer version of QM is installed on the servers, all instances of the client applications (QM Administrator, QM Desktop, and QM Desktop Recording) will also be updated the next time they are started.

When automated updates are enabled, every time you start QM Desktop it checks to see if there is an updated version available. If there is, it automatically runs the update process.

> **NOTE:** If the automated update process is running, do not attempt to start any of the QM desktop applications, or another instance of the automated update process may start.

When the automatic updating process occurs you will see a dialog box notifying you that your instance of QM Desktop will be updated. Click OK and then follow the instructions in the installation wizard that follows.

When the update is finished, you will see a final dialog box telling you that your update is complete. Click OK, and then restart QM Desktop and log in as usual.

> **NOTE:** If you cancel an update, the update will fail. However, you will still see a message that the upgrade has completed. The next time you start QM Desktop, the automated update process will run again.

## Changing Your Role

If you have been assigned to multiple roles within QM (for instance, if you are both an evaluator and a manager), you automatically log into QM Desktop at the highest role level. Your current role is indicated in the upper right portion of the QM Desktop window (Figure 2).

Figure 2. Your role is displayed in the right corner of the QM Desktop window

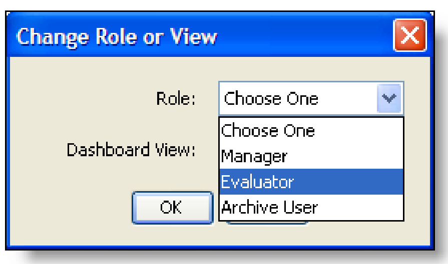

To access the functions appropriate to your multiple roles, you must change from one role to the other from within QM Desktop.

***To change your role:***

1. From the menu bar, choose Settings > Change Role or View.

   The Change Role or View dialog box appears (Figure 3).

   Figure 3. Changing your role

2. From the drop-down list, select the desired role and then click OK.

   **NOTE:** If the role you are changing to does not have a choice of views, the View field is disabled.

   QM Desktop now displays information appropriate to the new role.

## Changing Your View

The QM Desktop dashboard displays one team's or one group's information at a time. However, supervisors can be assigned to multiple teams, and managers can be assigned to multiple groups. To access the information for another team or group, you must change your view.

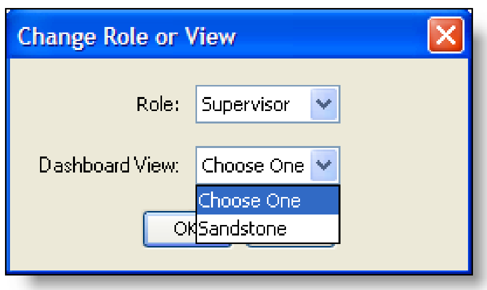
You can change your view only from the Dashboard tab.

***To change your view:***

1. From the menu bar, choose Settings > Change Role or View.

   The Change Role or View dialog box appears (Figure 4). The View field is enabled only if your role is Manager or Supervisor.

   **Figure 4. Changing your view**

2. From the View drop-down list, select the desired view and then click OK.

   The dashboard now displays information appropriate to the team or group selected.

## Logging Out

You can log out of QM Desktop two ways:

- Log out and exit (close) the application
- Log out and leave the application open

**NOTE:** Closing QM Desktop (using the procedure below or by clicking the Close button in the upper right corner of the window) automatically logs you out of the system.

The administrator can configure QM Desktop so that after a specified amount of idle time, it automatically times out your session. You are logged out and the application is left open. By default, this feature is not enabled.

**NOTE:** If you are in the process of exporting a recording when QM Desktop times out, the export will continue but all progress windows are closed.

***To log out and exit QM Desktop:***

- From the menu bar, choose File > Exit.

  You are logged out of QM Desktop and the application closes.

***To log out and leave QM Desktop running:***

1. From the menu bar, choose File > Logout.

   A confirmation dialog box appears.

2. Click OK to confirm you want to log out.

   You are logged out of QM Desktop but the application remains open.

# The QM Desktop Interface

# 2

## Introduction

QM Desktop displays information on tabs. Which tabs you see and the level of information presented on the tabs depends on your role, as shown in Table 1.

**Table 1. QM Desktop display tabs per user role**

| Tab | Evaluator | Agent | Knowledge Worker | Supervisor | Manager | Archive User |
|---|---|---|---|---|---|---|
| Dashboard | | × | × | × | × | |
| Recordings | × | × | × | × | × | |
| Evaluation | × | × | × | × | × | |
| Archives | × | | | × | × | × |
| Reports | | × | × | × | × | |

**NOTE:** The Evaluation view is a window accessed by choosing a recording on the Recordings tab.

**NOTE:** Supervisors and managers can evaluate contacts only if that feature is enabled by an administrator in QM Administrator.

### Scoping Rules

Your role not only controls what information is available to you, but also the scope of that information. In this case, “scope” refers to the contacts you can view and/or evaluate.

**Scoping Rules and HR/Training Recordings.** The scoping rules described in this section do not apply to contacts tagged as Training recordings, which can be reviewed by all roles. The scoping rules do apply to all other recordings, including those tagged as HR recordings.

#### Managers

Managers can view contacts made only by their currently active groups. For example, if a manager had been assigned to Group A last week, but is now assigned to Group B, that manager can view only contacts recorded by currently active agents on currently active teams in Group B. This includes contacts recorded by the Group B agents before the manager was assigned to Group B. Managers can also view training and HR contacts.

#### Supervisors

Supervisors can view contacts made only by their currently active teams. For example, if a supervisor had been assigned to Team A last week, but is now assigned to Team B, that supervisor can view only contacts recorded by currently active agents on Team B. This includes contacts recorded by the Team B agents before the supervisor was assigned to Team B.

#### Evaluators

Evaluators can view contacts for all currently active groups, teams, and agents. They cannot see any contacts made by deactivated groups, teams, and agents.

#### Archive Users

Archive users can view all archive contacts made by all active and inactive groups, teams, and agents.

#### Agents and Knowledge Workers

Agents and knowledge workers can view only their own contacts.

### Scoping Differences Between Dashboard and Reports

The QM dashboard and QM reports display information based on date ranges, roles, and organizational changes. Each displays the data in a slightly different way. Table 2 summarizes how the values reported are different, based on where the information is viewed.

**Table 2. Scoping Differences Between Dashboard and Reports Data**

| Information Type | Dashboard | Reports |
|---|---|---|
| Date ranges | Displays only completed months. For example, the Past Month is the last completed month. | Uses explicit date ranges selected by the user. |

Table 2. Scoping Differences Between Dashboard and Reports Data — *Continued*

| Information Type | Dashboard | Reports |
|---|---|---|
| Roles | Displays data based on the current role. | For managers and supervisors, the reports available are based on the current role. The groups, teams, and agents that are available for selection are based on the groups or teams that are currently managed or supervised, and which agents are currently on those teams. |
| Content and calculations | Calculations and totals are based on the current role. For example, to calculate a group's current average, all agents currently in the group and all their contacts are calculated into the average, whether or not they were in this group when those contacts occurred. | Calculations, totals and the contents of each report are based on historical configurations. For example, to calculate a group's historical average for a specified time period, all contacts that occurred for any agent that was on the team at any point in the time range are calculated into the group average for that time period. Note that if an agent was just added to the group, but all of the agent's contacts occurred before the agent was added, none of those contacts are calculated in the group average. |
| Organizational changes | Displays data based on the current organizational structure. For example, an agent that was recently removed from a supervisor's team will not appear in that supervisor's data. | Displays data based on the historical structure. For example, an agent will appear on a supervisor's team in a report if the agent was present on that team during the selected date range. |

## Time Zones

QM Desktop displays time in two different ways, depending on where it is displayed.

### Time in the QM Desktop Interface

In the QM Desktop interface, the time associated with a contact is the time the contact occurred at the agent's location, expressed in a format appropriate to the locale. For example, if the agent is located in Chicago, the time associated with any contacts made by that agent is Chicago local time.

The contact also displays the abbreviation for the local time zone. If the time zone associated with the contact is unknown to QM Desktop, then the time is displayed in Greenwich Mean Time (GMT).

### Time in QM Desktop Reports

In QM Desktop reports that involve single agents, the time associated with a contact is the time the contact occurred at the agent's location in a format appropriate to the locale, with no time zone designated.

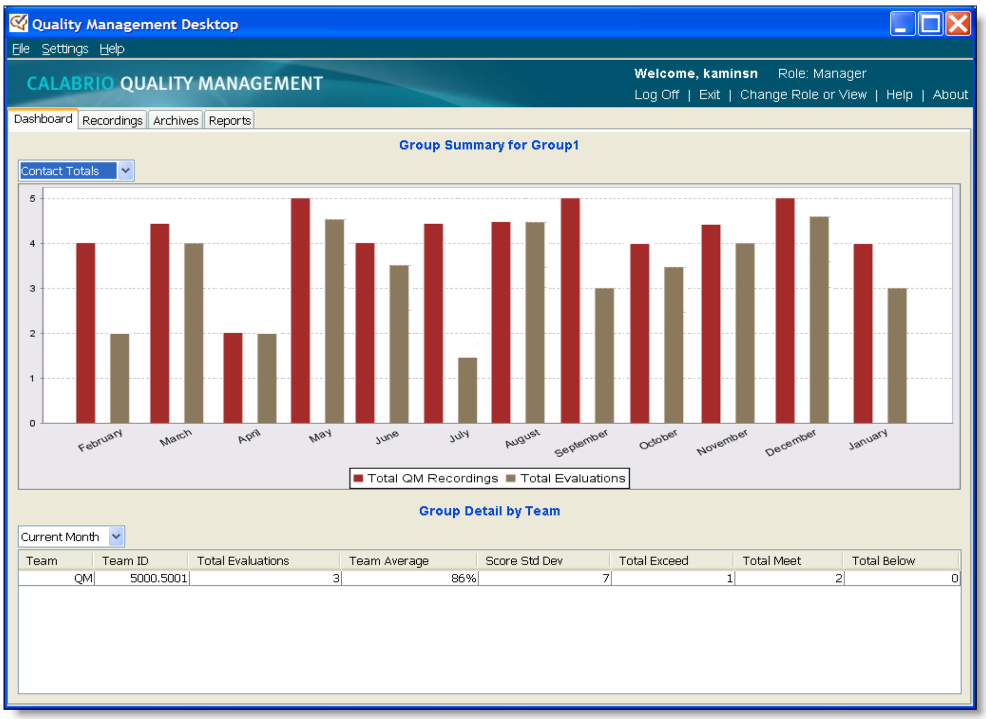
In reports that involve multiple agents, the time associated with a contact is in a format appropriate to the locale plus the GMT offset. For example, the time for a contact made by a Chicago agent at 3:42 PM (Chicago time) is displayed as 9:42 PM GMT -06:00.

## Dashboard Tab

The dashboard tab (Figure 5) provides a summary and detail display of the contact center's performance statistics for the last twelve months. The summary displays are in the form of bar charts and graphs.

There is a standard set of statistics displayed in the dashboard, but the level at which the statistics are presented depends on your role as agent, knowledge worker, supervisor, or manager.

**Figure 5. Dashboard tab for a manager, Evaluation Totals chart shown**




The upper half of the dashboard displays statistics in graphical form, either a bar chart (for the Evaluation Totals and Contact Totals) or a line chart (for the Quality Averages). The charted statistics are:

- Evaluation Totals (Total Exceed/Total Meet/Total Below)
- Contact Totals (total QM recordings/total evaluations)
- Quality Averages (Group/Team/Agent averages)

The default graph for all roles is the Quality Averages. The default time frame for this graph is 4 months (current month plus past 3 months). Otherwise, the graphs span 12 months (current month plus 11 past months).

## Summary Statistics

The statistics displayed in the summary pane are described in Table 3. Different roles see different statistics, as noted in the table.

**NOTE:** Any statistics concerning scored contacts do not include evaluations in progress or evaluations awaiting approval.

Table 3. Dashboard Summary Statistics

| Statistic | Viewed By | Description |
|---|---|---|
| Group Average | All | The average score of current group members' contacts during a specified time period, expressed as a percentage. |
| Team Average | Agent<br>Supervisor | The average score of current team members' contacts during a specified time period, expressed as a percentage. |
| Agent Average | Agent | The average score of the agent's contacts during a specified time period, expressed as a percentage. |
| Total Evaluations | All | The total number of contacts that were evaluated during the time period. |
| Total Exceed | All | The total number of evaluated contacts whose scores exceed expectations. The default score range is 90–100%. This range can be modified by the administrator. |
| Total Meet | All | The total number of evaluated contacts whose scores meet expectations. The default score range is 75–89%. This range can be modified by the administrator. |
| Total Below | All | The total number of evaluated contacts whose scores fall below expectations. The default score range is 0–74%. This range can be modified by the administrator. |
| Total QM Recordings | All | Total number of scored and unscored quality management recordings made for the group, team, or agent (depending on the role displayed) during the time period. |

The time periods displayed in the summary pane are described in Table 4. Each column header in the summary pane displays a tool tip that shows the specific time period covered by that column.

**Table 4. Dashboard Summary Time Periods**

| Time Period | Description |
|---|---|
| Current Month | The current calendar month. |
| Past Month | The past calendar month. |
| Past 3 Months | The past three calendar months. |
| Past 12 Months | The past twelve calendar months. |

## Detail Statistics

The statistics displayed in the detail pane are described in Table 5. Different roles see different statistics, as noted in the table. You select the time frame for the statistics from a drop-down list. Your choices are:

- Current month
- Past month
- Past 3 months
- Past 12 months

**NOTE:** Any statistics concerning scored contacts do not include evaluations in progress or evaluations awaiting approval.

Table 5. Dashboard Detail Statistics

| Statistic | Viewed By | Description |
|---|---|---|
| % Score | Agent | The percent score given to the agent’s contact by an evaluator. |
| Agent | Supervisor | The agent’s name. |
| Agent Average | Supervisor | The average score the agent has earned in the selected time period. |
| Agent ID | Supervisor | The agent’s ID. |
| Below | Agent | An X indicates that this evaluation falls below expectations. |
| Date | Agent | The date of the contact. |
| Duration | Agent | The duration of the contact. |
| Exceeds | Agent | An X indicates that this evaluation exceeds expectations. |
| Meets | Agent | An X indicates that this evaluation meets expectations. |
| Score Std Dev | Supervisor<br>Manager | The standard deviation of the agent’s score. A low standard deviation (closer to 0) indicates that scores are grouped closely to the mean score. A higher standard deviation (further from 0) indicates that scores are far from the mean. A lower standard deviation is an indicator of consistent performance; a higher standard deviation is an indicator of variable performance. |
| Team | Manager | The team name. |
| Team Average | Manager | The average score the team has earned in the selected time period. |
| Team ID | Manager | The team’s ID. |
| Total Below | Supervisor<br>Manager | The total number of evaluated contacts whose scores fall below expectations. The default score range is 0–74%. This range can be modified by the administrator. |
| Total Evaluations | Supervisor<br>Manager | The total number of evaluations the agent has had in the selected time period. |

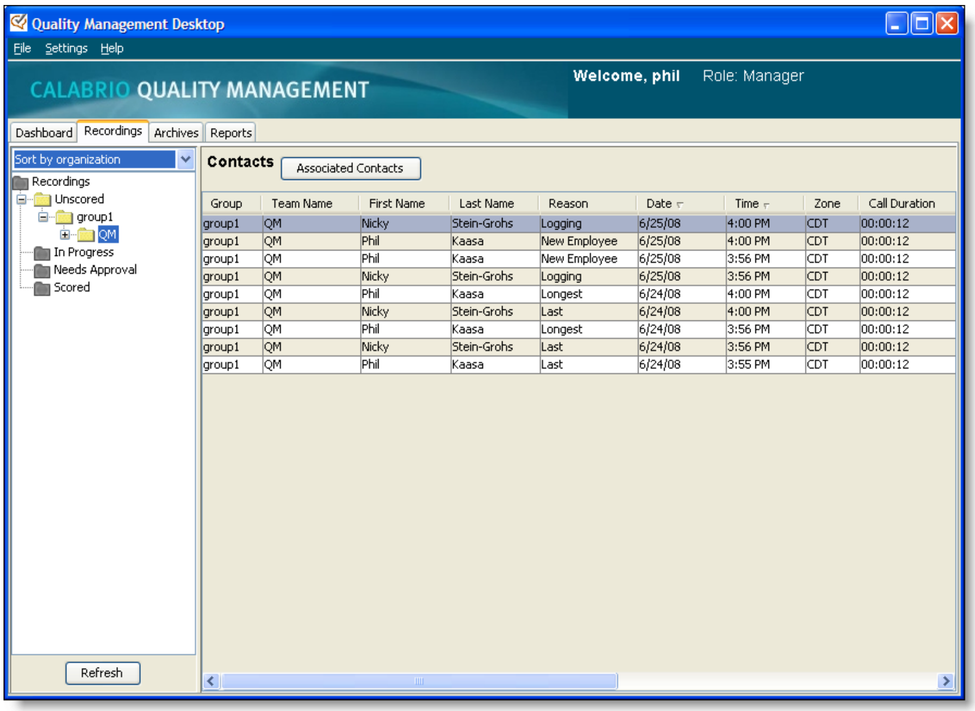
Table 5. Dashboard Detail Statistics — *Continued*

| Statistic | Viewed By | Description |
|---|---|---|
| Total Exceed | Supervisor<br>Manager | The total number of evaluated contacts whose scores exceed expectations. The default score range is 90–100%. This range can be modified by the administrator. |
| Total Meet | Supervisor<br>Manager | The total number of evaluated contacts whose scores meet expectations. The default score range is 75–89%. This range can be modified by the administrator. |

## Recordings Tab

The recordings tab (Figure 6) enables you to review a list of recorded contacts, and from this list access the associated evaluations. It displays a table containing a list of recorded contacts based on the node you select in the navigation tree.

Figure 6. Recordings tab for a manager




The recorded contacts displayed in the Contact view depends on your role:

- Evaluators see all active agents' contacts (scored, unscored, in progress, needs approval)
- Managers see their current groups' contacts (scored, unscored, in progress, needs approval)
- Supervisors see their current teams' contacts (scored, unscored, in progress, needs approval)
- Agents and knowledge workers see only their own scored contacts

You can view a selected contact's associated contacts by clicking the Associated Contacts button. When you do this, you are switched to the Archives tab. See "Playing All Segments of a Call" on page 47 for more information on associated contacts.

The administrator configures the minimum length of what is considered a valid recording for evaluating contacts. Any recording that is shorter than that minimum will not appear in QM.

The Contacts pane can display a maximum of 6,000 contacts in response to any query. If your query returns more than 6,000 contacts, you are prompted to narrow your search criteria.

Table 6 describes the fields displayed on the Recording tab. In addition to these standard fields, if user-defined metadata is associated with the recording, those fields will also be displayed.

**Table 6. Recording Tab Fields**

| Field | Viewed By | Description |
|---|---|---|
| %Score | All | The score given to the contact. |
| Call Duration | All | The duration of the contact. |
| Called Number | All | The number of the phone that received the call. |
| Calling Number | All | The number of the phone that made the call. Displays “unknown” if the calling number is unlisted or blocked. |
| Date | All | The contact date. |
| First Name | Manager<br>Supervisor<br>Evaluator | The agent’s first name. |
| Group | Manager<br>Evaluator | The name of the group. |
| HR | Manager<br>Supervisor<br>Evaluator | Yes/No. The contact has been tagged as an HR contact. |
| Id | All | The contact’s ID. |
| Last Name | Manager<br>Supervisor<br>Evaluator | The agent’s last name. |
| Reason | Manager<br>Supervisor<br>Evaluator | The reason the contact was recorded as set in the recording rule (First, Last, Longest, Shortest, Random, Logging, Tagged, Performance, and New Employee). |

Table 6. Recording Tab Fields — *Continued*

| Field | Viewed By | Description |
|---|---|---|
| Team Name | Manager<br>Supervisor<br>Evaluator | The name of the team. |
| Time | All | The contact time. |
| Training | All | Yes/No. The contact has been tagged as a training contact. |
| Zone | Manager<br>Supervisor<br>Evaluator | The time zone where the contact was recorded. |

## Sorting Recordings

Recordings in the navigation tree can be sorted in a number of ways, selected from the drop-down list at the top of the tree. You can choose to sort them by:

- Organization
- Date
- HR tag and then organization
- HR tag and then date
- Training tag and then organization
- Training tag and then date

## Recording Retention

The length of time recordings are kept is set up by the QM administrator. QM allows recordings to be retained according to the limits shown in Table 7.

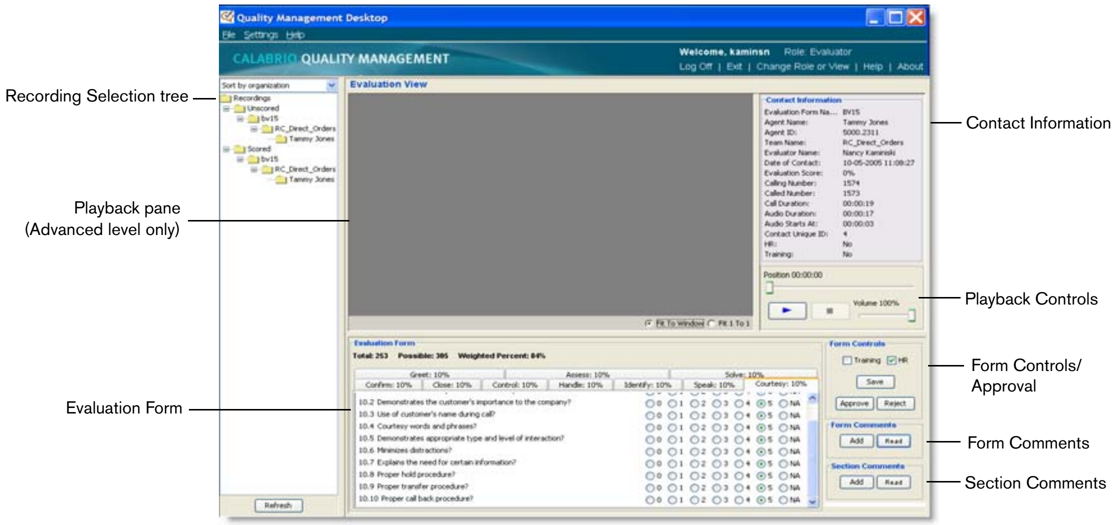
Table 7. Recording retention periods

| Recording Type | Retention Period |
|---|---|
| Unscored, In Progress, Scored, Needs Approval | 10–60 days |
| HR-tagged | 2–12 months |
| Training-tagged | 2 months–Indefinitely |
| Archived, Agent-tagged | 12 months–Indefinitely |

## Evaluation View

The Evaluation View window (Figure 7) is displayed when you select a specific recording from the Contacts window.

**Figure 7. Evaluation View window**




For information on how to evaluate a contact, see "Evaluating Contacts" on page 51.

### Parts of the Evaluation View Window

The Evaluation View window is divided into 8 sections (Figure 7).

- **Recording Selection tree**—Use this to sort contacts by organization, date, or tag, and then double-click the desired contact to display it in the Contact Evaluation window.
- **Playback pane**—(Advanced only) Contact screen recordings are played back in this viewing pane.
- **Playback Controls**—Use these buttons to play back, pause, and control the volume of a recorded contact. This section also includes a recording progress bar (slider), which can be used to quickly skip forwards or backwards in the recording.
- **Contact Information**—Displays the evaluation form header data for the recorded contact and any user-defined metadata associated with the contact. The data shown in this pane is configured by the administrator. You can edit the user-defined metadata.
- **Evaluation Form**—Displays the form used to evaluate the contact. Only evaluators can complete the form; all other roles can only review it.

- **Form Controls**—Enables you to tag the evaluation as an HR or Training contact, mark the evaluation as complete or as approved, and to save any changes made to the evaluation.
- **Form Comments**—The Add button in this section enables you to add a general comment about the contact. The Read button pops a window containing all form comments entered for the contact.
- **Section Comments**—The Add button in this section enables you to add a comment specific to the form section you have selected in the Evaluation Form pane. The Read button displays a popup window containing all comments entered for the selected form section.

## Reports Tab

The Reports tab switches you to your web browser, where a list of reports available to you are listed. From there you are able to display and print performance reports in a number of formats. The formats available are as follows:

- Acrobat PDF—Reports in PDF format can be viewed and printed from Adobe Acrobat Reader version 6.0 or higher. The free Adobe Acrobat Reader is available for downloading from www.adobe.com.
- CSV—Reports in CSV (comma separated values) format can be copied and pasted into a spreadsheet or word processing program for further manipulation. Note that there may be minor differences between the CSV reports and the HTML/PDF reports due to limitations of the file format.
- HTML—Reports in HTML format can be viewed and printed from your web browser.
- XLS–Reports in XLS format can be viewed and printed from Microsoft Excel.

The reports available for viewing depend on your role. Table 8 shows which reports are available to each role.

**Table 8. QM Desktop reports**

| Report Type | Report | Mgr | Spvr | Agent | KW |
|---|---|---|---|---|---|
| Agent* | Agent Scored Evaluation | × | × | × | × |
| | Agent Section Scores | × | × | × | × |
| | Agent Trend | × | × | × | × |
| Archive | Archive System Access Patterns | × | | | |
| | Audit Trail Access Report | × | | | |
| Enterprise | Enterprise’s Group Average Scores | × | | | |
| Evaluation | Evaluator Performance | × | | | |
| Group | Group’s Agent Average Scores | × | | | |
| | Group’s Team Average Score | × | | | |
| | Group’s Team Section Scores | × | | | |
| Status | User Recording Status | × | × | | |
| | System Status | × | | | |
| Team | Team’s Agent Average Scores | × | × | | |
| | Team’s Agent Section Scores | × | × | | |

* Knowledge workers view Agent Reports—the roles are equivalent.

***To generate a report:***

1. On the QM Reporting System page, click the hyperlinked name of the report you want to view.

   Search criteria fields appear to the right of the list of reports.

2. Complete the search criteria fields and specify the format you want, and then click Continue.

   The report is generated and displayed in the format you selected.

   **NOTE:** Reports are displayed in a new browser window. If your browser has a popup blocker enabled, you must disable it before the report can be displayed.

## Report Descriptions

**NOTE:** QM Desktop rounds up scores for individual sections in evaluation forms. However, in reports that show section averages for agents, teams, and groups, the section scores are first added and averaged before being rounded up. As a result, the average displayed in reports will vary slightly from the number calculated by adding up section scores as displayed in QM Desktop and then averaging them.

### Agent Scored Evaluation Report

This report displays the details of all evaluations made of a specific agent or knowledge worker during a specified time period, including the scores given on each evaluation question, the score for each section, the overall score, and any added comments.

**Table 9. Agent Scored Evaluation Report Fields**

| Field | Description |
|---|---|
| Contact ID | The recording contact's ID. |
| Called Number | The number of the phone that received the call. |
| Calling Number | The number of the phone that made the call. |
| Contact Date | The date the contact was recorded. |
| Call Duration | The contact's talk time (length of time between call answered and call dropped). |
| Eval Date | The date the contact was evaluated. |
| Evaluator | The name of the person who evaluated the contact. |

Table 9. Agent Scored Evaluation Report Fields — *Continued*

| Field | Description |
| --- | --- |
| Eval Form | The evaluation form used to score the contact. |
| Score Type | The evaluation's scoring method: Yes/No or 1–5. |
| Score (%) | The evaluation's score. |

### Agent Section Scores Report

This report displays the average score for a specific agent or knowledge worker for each section of an evaluation form over a specified time period. The averages can be of scores from multiple evaluations using the same form.

Table 10. Agent Section Scores Report Fields

| Field | Description |
| --- | --- |
| Total Evaluations | The total number of evaluations during the specified time period using the specified evaluation form. |
| Section | The section title. |
| Section Average | The average score the agent received for the section on all evaluations during the specified time period. |

### Agent Trend Report

This report displays a specific agent's or knowledge worker's average score for each evaluation made over a specified time period, along with an indicator if that score meets, exceeds, or is below expectations for that form.

Table 11. Agent Trend Report Fields

| Field | Description |
| --- | --- |
| Contact Date | The date the contact was recorded. |
| Call Duration | The contact's talk time (length of time between call answered and call dropped). |
| Form | The form used to evaluate the contact. |
| Weighted Percent | The total weighted percent score for the evaluation. |
| Exceed | An X indicates the evaluation exceeds expectations. |
| Meet | An X indicates the evaluation meets expectations. |
| Below | An X indicates the evaluation is below expectations. |

### Archive System Access Patterns Report

This report displays a list of archived recordings that were reviewed over a specified period. It enables you to determine if a significant number of recordings concerning a particular agent, called number, or calling number were reviewed.

**Table 12. Archive System Access Patterns Report Fields**

| Field | Description |
|---|---|
| Access Date | The date the contact was accessed. |
| Contact ID | The ID of the contact accessed. |
| Contact Date | The date the contact was recorded. |
| Calling Number | The number of the phone that made the call. |
| Called Number | The number of the phone that received the call. |

### Audit Trail Access Report

This report displays which users accessed the archives over a specified period.

**Table 13. Audit Trail Access Report Fields**

| Field | Description |
|---|---|
| Accessed By | The name of the person who accessed the archives. |
| User ID | The Windows login (and domain, if an Active Directory system) of the person who accessed the archives. |
| Access Date | The date the specified contact was accessed. |
| Agent | The name of the agent associated with the contact. |
| Agent ID | The agent’s ID. |
| Contact Date | The date the contact was recorded. |
| Calling Number | The number of the phone that made the call. |
| Contact ID | The ID of the contact that was accessed. |

### Enterprise’s Group Average Scores Report

This report displays a summary of the evaluation points and average scores for each group within the enterprise over a specified time period.

Table 14. Enterprise’s Group Average Scores Report Fields

| Field | Description |
|---|---|
| Group | The name of the group |
| Number of Teams | The total number of teams assigned to the group during the specified time period. |
| Number of Agents | The total number of agents assigned to the group during the specified time period. |
| Total Evaluations | The total number of evaluations made for agents in the group. |
| Group Average | The average score of all contacts evaluated for agents in the group. |
| Score Std Dev | The score standard deviation, calculated from all evaluations in the group. |
| Total Exceed | The total number of evaluated contacts whose scores exceed expectations. The default score range is 90–100%. This range can be modified by the administrator. |
| Total Meet | The total number of evaluated contacts whose scores meet expectations. The default score range is 75–89%. This range can be modified by the administrator. |
| Total Below | The total number of evaluated contacts whose scores fall below expectations. The default score range is 0–74%. This range can be modified by the administrator. |

### Evaluator Performance Report

This report provides a summary of all evaluators’ productivity by displaying the number of evaluations they have performed over a specified time period, and the average score they have awarded to those evaluations.

Table 15. Evaluator Performance Report Fields

| Field | Description |
|---|---|
| Evaluator | The name of the evaluator. |

Table 15. Evaluator Performance Report Fields — *Continued*

| Field | Description |
|---|---|
| User ID | The evaluator's Windows login ID (and domain, if an Active Directory system). |
| Total Evaluations | The total number of evaluations performed by the evaluator over the specified period. |
| Average Score | The average score of the evaluations performed by the evaluator over the specified period. |

### Group's Agent Average Scores Report

This report displays the average evaluation score for each agent on each team in the group, and the group's average evaluation score and total evaluations.

Table 16. Group's Agent Average Scores Report Fields

| Field | Description |
|---|---|
| Team | The name of the team. |
| Agent | The name of the agent. |
| Agent ID | The agent's ID. |
| Total Evaluations | The total number of evaluations performed on the agent. |
| Agent Average | The average evaluation score of all the agent's evaluations. |
| Score Std Dev | The score standard deviation, calculated from all evaluations for the agent. |
| Total Exceed | The total number of evaluated contacts whose scores exceed expectations. The default score range is 90–100%. This range can be modified by the administrator. |
| Total Meet | The total number of evaluated contacts whose scores meet expectations. The default score range is 75–89%. This range can be modified by the administrator. |
| Total Below | The total number of evaluated contacts whose scores fall below expectations. The default score range is 0–74%. This range can be modified by the administrator. |

### Group’s Team Average Scores Report

This report displays a summary of the evaluation points and average scores for each team within the group over a specified time period, and the group’s average evaluation score and total evaluations.

Table 17. Group’s Team Average Scores Report Fields

| Field | Description |
|---|---|
| Team | The name of the team. |
| Team ID | The team ID. |
| Total Evaluations | The total number of evaluations performed on the team’s agents. |
| Team Average | The average evaluation score of all the team’s evaluations. |
| Score Std Dev | The score standard deviation, calculated from all evaluations for the team. |
| Total Exceed | The total number of evaluated contacts whose scores exceed expectations. The default score range is 90–100%. This range can be modified by the administrator. |
| Total Meet | The total number of evaluated contacts whose scores meet expectations. The default score range is 75–89%. This range can be modified by the administrator. |
| Total Below | The total number of evaluated contacts whose scores fall below expectations. The default score range is 0–74%. This range can be modified by the administrator. |

### Group’s Team Section Scores Report

This report enables a manager to compare average section scores on a particular evaluation form for each team in the group over a specified time period. The scores for each team are the average of all the scores given to all agents in each group on all evaluations performed over the time period specified.

Table 18. Group’s Team Section Scores Report Fields

| Field | Description |
|---|---|
| Team | The name of the team. |
| Number of Agents | The total number of agents assigned to the team during the specified time period. |

Table 18. Group's Team Section Scores Report Fields — *Continued*

| Field | Description |
|---|---|
| Total Evaluations | The total number of evaluations performed on the team's agents over the specified time period. |
| Section | The name of the evaluation form section. |
| Section Average | The average score given to all agents on the team for the section. |

### User Recording Status

This report displays a history of the status of agents' QM Desktop Recording services at the team level or group level, depending on your role. It also logs when metadata added by a particular agent fails to be added due to invalid key or format for a date or number.

You can choose to view messages generated by the service at the INFO, WARN, or ERROR level, or at all levels. Information is available for the past 7 days, including the current day.

Table 19. User Recording Status Report Fields

| Field | Description |
|---|---|
| Team | The name of the team. |
| Agent | The name of the agent. |
| Agent ID | The agent's ID. |
| Machine | The name of the computer on which the event occurred. |
| IP Address | The IP address of the computer on which the event occurred. |
| Date | The time and date of the event. |
| Level | The level of the event (INFO, ERROR, WARN). |
| Category | The service associated with the event. |
| Message | The event message. |

### System Status

This report displays system and administrative events associated with agents' QM Desktop Recording services, Upload Controller services, and the File Transfer service (FTS). You can choose to view messages generated by the service at the INFO, WARN, or ERROR level, or at all levels. Information is available for the past 7 days, including the current day.

The File Transfer service writes events that warn when free space is low on the voice and screen servers server or when uploads stop because free space is too low.

**Table 20. System Status Report Fields**

| Field | Description |
|---|---|
| Date | The time and date of the event. |
| Machine | The name of the computer on which the event occurred. |
| IP Address | The IP address of the computer on which the event occurred. |
| Level | The level of the event (INFO, ERROR, WARN). |
| Category | The application associated with the event. |
| Message | The event message. |

### Team's Agent Average Scores Report

This report displays the average evaluation score for each agent on a team, and the team's overall average evaluation score.

**Table 21. Team's Agent Average Scores Report Fields**

| Field | Description |
|---|---|
| Agent | The name of the agent. |
| Agent ID | The agent's ID. |
| Total Evaluations | The total number of evaluations performed on the agent over the specified time period. |
| Agent Average | The average evaluation score of the agent's evaluations over the specified time period. |
| Score Std Dev | The score standard deviation, calculated from the evaluations for the agent over the specified time period. |
| Total Exceed | The total number of evaluated contacts over the specified time period whose scores exceed expectations. The default score range is 90–100%. This range can be modified by the administrator. |
| Total Meet | The total number of evaluated contacts over the specified time period whose scores meet expectations. The default score range is 75–89%. This range can be modified by the administrator. |

Table 21. Team’s Agent Average Scores Report Fields — *Continued*

| Field | Description |
|---|---|
| Total Below | The total number of evaluated contacts over the specified time period whose scores fall below expectations. The default score range is 0–74%. This range can be modified by the administrator. |

### Team’s Agent Section Scores Report

This report displays the average section scores on a particular evaluation form for each agent on a team.

Table 22. Team’s Agent Section Scores Report Fields

| Field | Description |
|---|---|
| Agent | The name of the agent. |
| Agent ID | The agent’s ID. |
| Total Evaluations | The total number of evaluations performed on the agent for the specified evaluation form over the specified time period and while the agent was on this team. |
| Section | The name of the evaluation form section. |
| Section Average | The average score given to the agent for the section. |

## Archives Tab

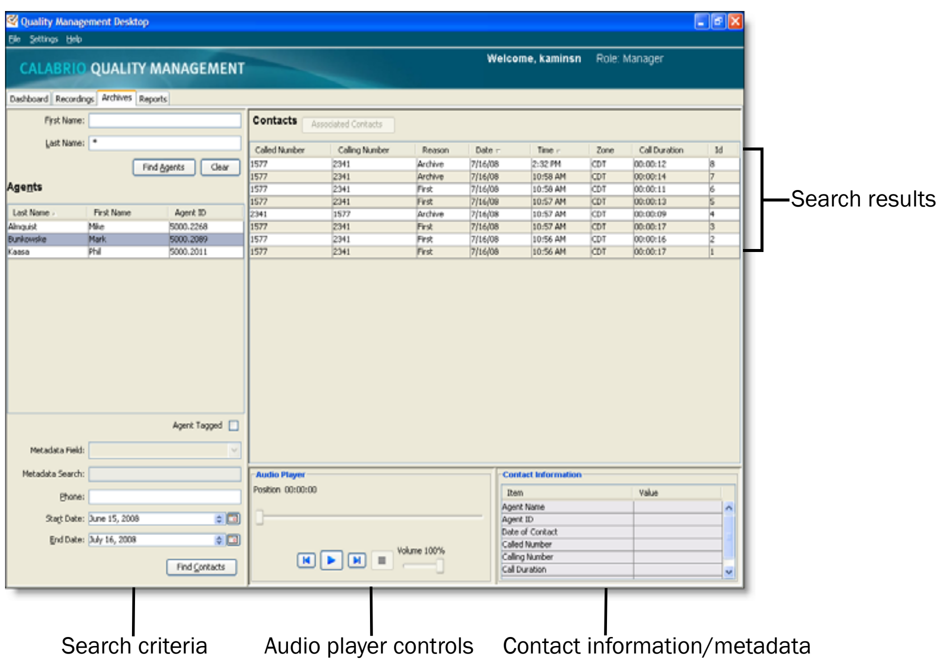
If archiving is enabled by the QM administrator, contact recordings can be saved for periods of one year or longer. The administrator sets the length of time that recordings are archived, depending on how much storage space is available in your system.

The minimum length of what is considered a valid archive recording is set at 5 seconds and cannot be changed.

Information about contact recordings (metadata) is available in the archives immediately after a call is recorded, even though the contact recording itself has not yet been uploaded from the client desktop to the voice server. If such a contact must be reviewed immediately, the voice recording is uploaded on-demand as long as the client desktop is on and available.

The Archives tab (Figure 8) enables you to search the stored archives for specific contact recordings.

**Figure 8. Archives tab, showing the result of a search**




The archive recordings are audio only, and are independent of contact recordings made according to configured workflows set up by the administrator.

The Archives tab is visible only to users with the role of supervisor, manager, evaluator, or archive user. Supervisors have access to archived contacts made by currently-active agents on their currently-active assigned teams; managers have access to archived contacts made by currently-active agents of their currently-active assigned groups. Archive users and evaluators have access to all contacts.

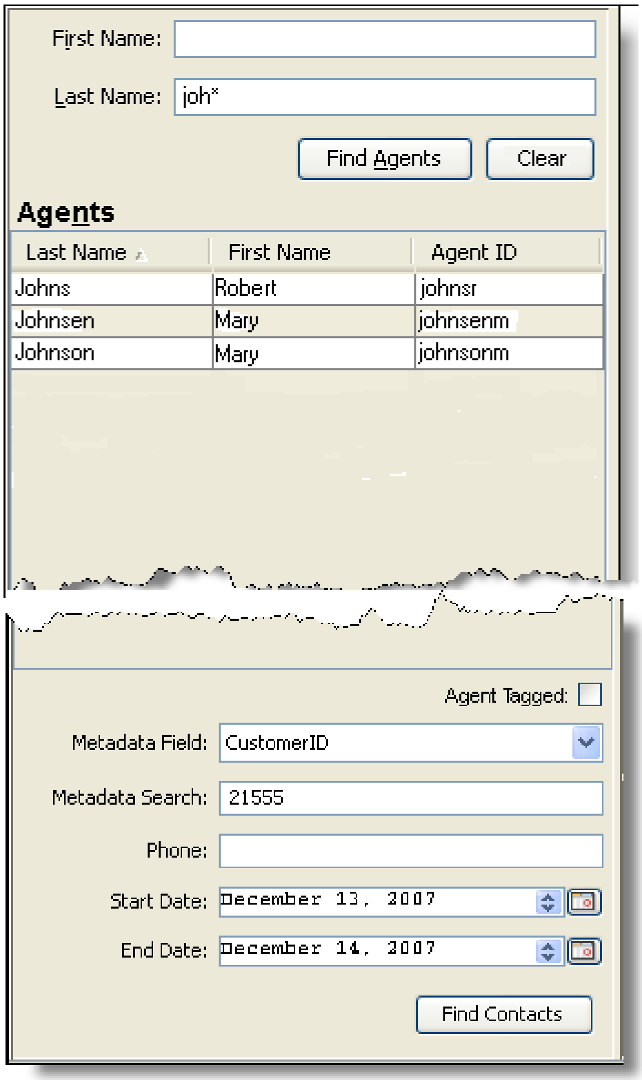
## Searching the Archives

To find a contact recording in the archives, search by contact date range and any one or all of the other available search criteria.

**NOTE:** Your search will be faster if you include the agent's name as part of your search criteria.

Figure 9 shows an example of typical search criteria.

Figure 9. An example of a search using the required date range, the first 3 letters of the agent's last name and a wild card, and then metadata




Your search can be either a one-step process or a two-step process.

- In the one-step process, you search for contacts only.
- In the two-step process, you first search for agents and then search for a particular agent's contacts.

The two-step process is the fastest way to locate a contact.

Any search you run can return a maximum of 3000 results. If the search exceeds 3000 results, you will see a message asking you to narrow the date range of your search.

The search criteria fields are defined in Table 23.

**Table 23. Archive search criteria fields**

| Field | Description* |
|---|---|
| First Name | The agent’s first name. |
| Last Name | The agent’s last name. |
| Agent Tagged | Select the check box to search for contacts that the agent has tagged to be saved, using a third-party API. |
| Metadata Field | A drop-down list that contains all unencrypted metadata fields that have been defined by the administrator. You cannot search encrypted metadata fields. |
| Metadata Search | Search string for contents of the selected metadata field. The format for this field is determined by the format of the selected metadata field: a date, a number, or text. |
| Start Date | Automatically filled with yesterday’s date. Select the desired date using the calendar button or entering the date in <Month> <day>, <year> format. |
| End Date | Automatically filled with today’s date. Select the desired date using the calendar button or entering the date in <Month> <day>, <year> format. |
| Phone | A phone number that is part of the contact’s enterprise data (calling number or called number). NOTE: Some calling numbers are private and are put into the database as “unknown”. You can enter unknown in this field to search for these customer contacts. |

* All search criteria fields except Start Date, End Date, and Metadata Field accept any defined unicode character, plus wild cards (? and *). A defined unicode character is any character that can be typed on your keyboard.

### One-Step Search Process

***To search the archives for a contact recording using the one-step process:***

1. Enter the start and end date of the period during which the contact occurred. By default these values are yesterday’s date (start date) and today’s date (end date).

2. Enter any one or all of the these search criteria:
   - Agent Tagged
   - Metadata Field and Metadata Search
   - Phone
3. Click **Find Contacts.**

   A list of the contacts that were made during the date range you selected by agents who were active at that time, and that fit your other search criteria, is displayed in the Contacts pane. If you are a manager or supervisor, the agents will be only those who currently belong to your group or team.

### Two-Step Search Process

***To search the archives for a contact recording using the two-step process:***

1. Enter the start and end date of the period during which the contact occurred. By default, these values are yesterday's date (start date) and today's date (end date).
2. Enter all or part of the first and/or last name of the agent whose contacts you want to find, and then click **Find Agents.**

   A list of agents who were active during the time period you selected and whose names fit your search criteria is displayed in the Agents pane. If you are a manager or supervisor, the agents will be only those who currently belong to your group or team.
3. Select the desired agent's name from the list of results, and then enter any or all of these search criteria:
   - Agent Tagged
   - Metadata Field and Metadata Search
   - Phone
4. Click **Find Contacts.**

   A list of the selected agent's contacts that fit your search criteria is displayed in the Contacts pane.

### Clearing the Search Results

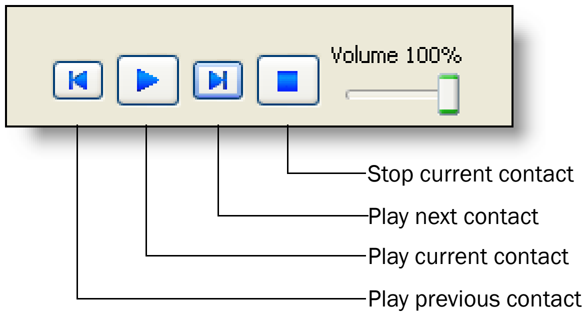
To clear your search results, click the Clear button in the top portion of the left pane.

## Playing Contact Recordings

Once you have found a contact using a one-step or two-step search, double-click the contact in the right pane. The recording is loaded and starts playing. Information about the contact is displayed in the Contact Information pane.

You can move forward and backward through the list of contacts using the call control buttons (Figure 10).

Figure 10. Associated contacts call control buttons




If nothing is selected in the list of contacts:

- Click the Previous button to select and play the last contact in the list.
- Click the Play or Next button to select and play the first contact in the list.

### Editing Contact Metadata

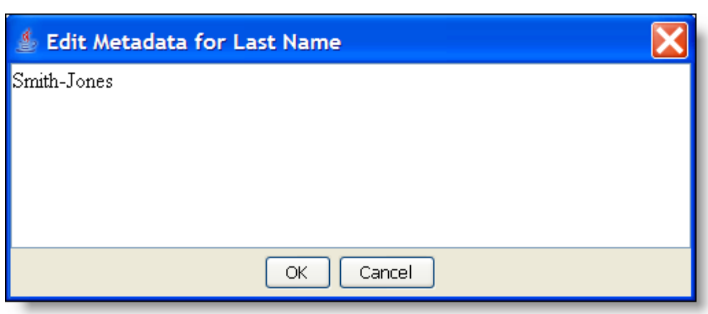
User-defined metadata, if any, is displayed in the Contact Information pane. You can add, edit, and delete this metadata.

***To add, edit, or delete user-defined metadata:***

1. In the selected contact's Contact Information pane, double-click the metadata field you want to edit.

   The Edit Metadata for <metadata> dialog box appears.

   Figure 11. Edit Metadata for <metadata> dialog box

2. Add new metadata, or edit or delete the existing metadata in the dialog box, and then click OK.
3. Click Save.

## Playing All Segments of a Call

You can play all segments of a call from when it enters the contact center to when it is terminated, using the Associated Contacts feature.

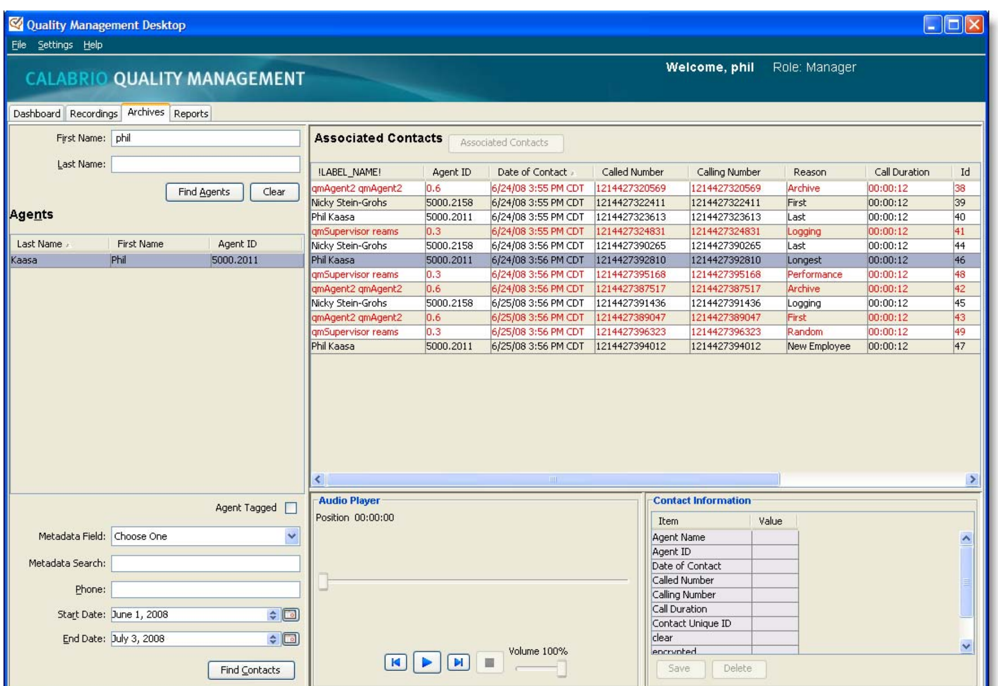
Once you have searched for and found a contact, clicking the Associated Contacts button enables you to see every call segment associated with that contact listed in the Contacts pane.

An example of the segments of a call is:

1. Customer dials in and is routed to Agent A
2. Agent A transfers customer to Agent B
3. Agent B conferences call with Supervisor A

The list of associated contacts is presented in chronological order in the Associated Contacts window (Figure 12), with the original contact highlighted. Some of the contacts listed might not be able to be played back. This is due to various reasons: they are for agents not on your team; they were deleted; they didn't meet workflow criteria; or they were under the minimum length. These segments are listed in red. You cannot listen to those segments of the call, but you can view them so that you can follow how the call moved through the contact center. When you use the call control buttons to move through the list of contacts, it automatically skips over contacts you cannot listen to (those displayed in red).

**Figure 12. Associated contacts window**



## Exporting Contact Recordings

QM can be configured by the administrator so that users can export contact recordings by saving them in one of the following formats:

- WMA (compressed audio files)
- WAV (uncompressed audio files)
- WMV (compressed audio/video files)

By default, the export feature is disabled.

Recordings can be exported from the Recording tab and the Archives tab. When a recording is selected for export, all available data connected with the recording—audio, video, and metadata—are included in the exported file (except WAV files, which cannot include metadata).

Exported recordings can be played using Microsoft Windows Media Player 9 or newer.

The time needed to export a recording depends on the length of the recording and whether it includes video. If a recording is in the process of being exported and the QM Desktop session times out, the export process will continue to completion.

> **NOTE:** Multiple audio-only recordings can be exported simultaneously. Audio/video recordings must be exported one at a time. If an audio/video recording is in the process of being exported, and you select another audio/video recording for export, the second recording will be queued to start export after the first recording export has completed.

***To export a contact recording:***

1. Select the recording you want to export from the Recordings tab or from the Archives tab.
2. Choose File > Save Recording As from the menu bar, and specify a file name, file format, and location where you want the recording saved. By default, the recording file name is the contact ID.
3. Click Save. The contact recording is saved to the selected location.

### Viewing Exported Metadata

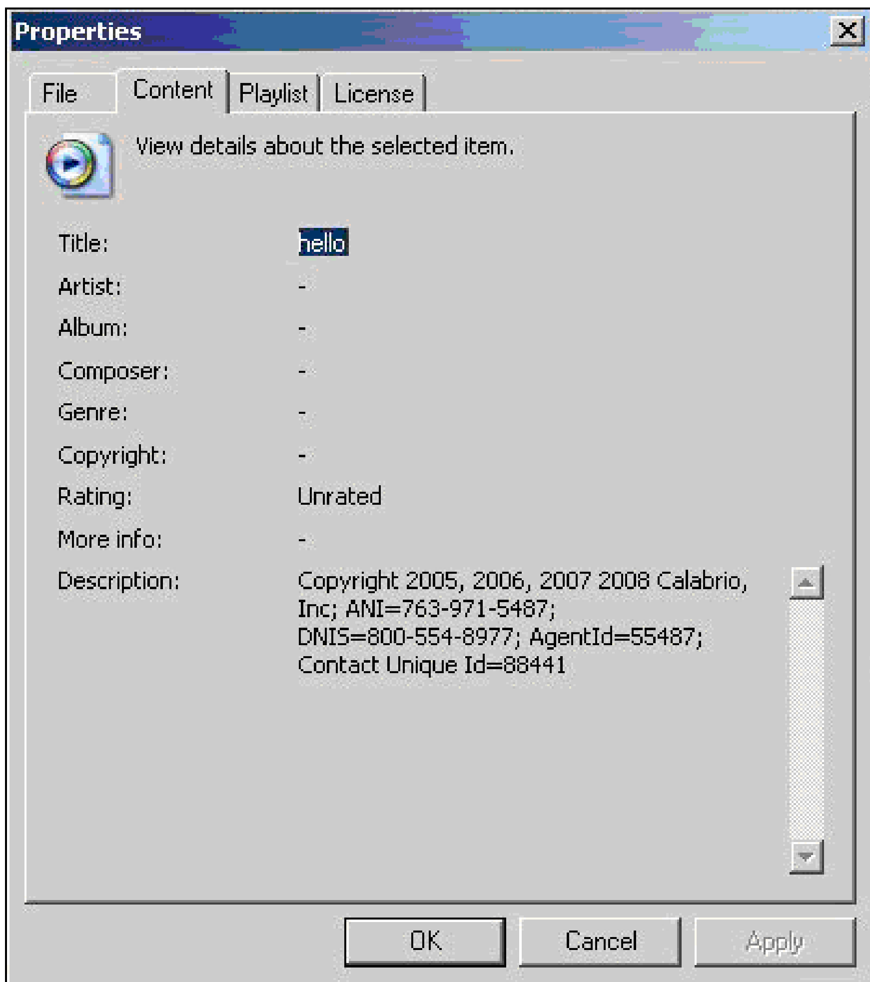
Call metadata is inserted into WMV and WMA files. Call metadata is not available in WAV files, since the WAV file format does not support tags.

The supported tags are displayed in the Windows Media Player Properties window, in the Description field on the Content tab. Only system metadata and metadata that is enabled for export in QM Administrator is displayed. System metadata includes ID, ANI, DNIS, acdCallId, lastName, firstName, agentId, username, and startTime.

***To view QM metadata in Window Media Player:***

1. Launch Windows Media Player.
2. Select the desired exported recording file.
3. From the menu bar, choose File > Properties, and from the Properties window, select the Content tab. The metadata is displayed on the Content tab (Figure 13).

**Figure 13. QM metadata displayed in Windows Media Player**



# Evaluating Contacts

# 3

## Introduction

Contacts can be evaluated and scored by playing back contact audio and video recordings made during a call. The performance statistics available in the Dashboard and Reports windows are based on these evaluation scores.

### General Procedure for Evaluating a Contact

The following is the general procedure for evaluating a contact.

***To evaluate a contact:***

1. Select the desired contact from the Unscored or In Progress folders in the navigation tree.
2. Score the contact, and add comments and tags as needed.
   - If you cannot complete the evaluation at this time, click Save to save it to the In Progress folder. The evaluation can be continued at a later time.
3. When the evaluation is complete, click Save and then Complete. If the evaluation must be approved, it is moved to the Needs Approval folder. If no approval is required, it is moved to the Scored folder.

The following sections of this chapter discuss these steps in more detail.

## Folders in the Recordings Navigation Tree

There are 4 folders in the Recordings tab navigation tree. These folders contain all contacts that are in the process of being evaluated. Table 24 details which contacts are in each folder.

Table 24. Recordings tab folders

| Folder | Contact Description |
|---|---|
| Unscored | Contacts that are as yet unclaimed by an evaluator and unscored. |
| In Progress | Contacts that are claimed by an evaluator but which are not yet completely scored. |
| Needs Approval | Contacts that are claimed by an evaluator, are fully scored, and are awaiting approval. |
| Scored | Contacts that are claimed, fully scored, and, if approval is required, are approved. |

## Evaluating a Contact

The first step an evaluator takes is to select and display a contact recording.

***To select and display a contact recording:***

1. In the navigation tree, click the drop-down list to select the way you wish the contact recordings to be sorted.
2. Expand the resulting folders as necessary.

   Recordings belonging to the group, team, agent, or knowledge worker (depending on how you sort the navigation tree) are listed in the Contacts pane in alphabetical order.
3. In the Contacts pane, double-click the contact recording you want to evaluate.

   The contact opens in the Evaluation View pane.

   **NOTE**: To ensure that the navigation tree displays all current contact recordings, click the Refresh button at the bottom of the navigation tree pane.

When the navigation tree is first displayed, the folders are a dark gray. As you expand the folders and display lists of contacts in the Recording View pane, the folders turn yellow. This indicates that the contact metadata—information about each contact such as the agent's name, the time and date of the contact, and so on—is now cached in your computer's memory.

### Evaluating an Agent-Tagged Recording

A contact that was recorded because an agent tagged it for retention displays "Tagged" in the Reason column on the Recordings window. These recordings do not have an evaluation form associated with them until the first person who evaluates them assigns one.

***To assign an evaluation form to an agent-tagged recording:***

1. In the Contacts pane, double-click the agent-tagged recording.

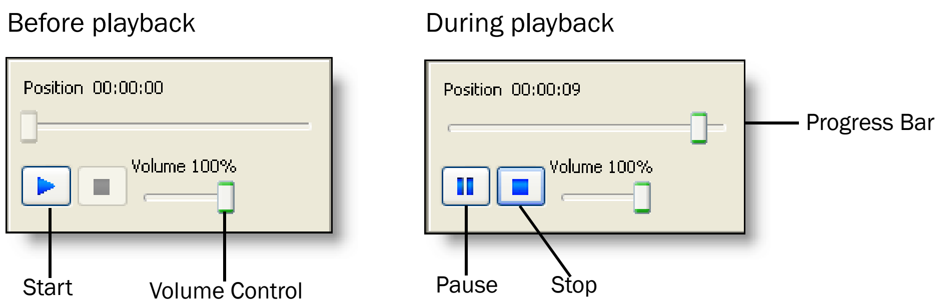
   The contact opens in the Evaluation View pane. There is no evaluation form associated with the contact, so the bottom portion of the pane is blank.
2. Directly below the playback pane is a drop-down list from which you can select any active evaluation form. Select the desired active form.
3. Score and save the evaluation.

   When you have scored and saved the evaluation, that form is permanently associated with the contact and cannot be changed.

## Playing a Recording

When the Evaluation View pane is displayed, the evaluation form and the contact information is visible and the audio portion of the contact starts downloading. Click the Start button in the Playback Control pane to start the recording.

**Figure 14. Playback controls**




When you click the Start button, the video portion of the recording starts streaming from the Screen Service server. The audio starts playing several seconds into the recording (the contact information might indicate exactly when the audio starts).

> **NOTE:** Video is available only with the Advanced version of QM.

It is possible for the audio and video streams to fall out of sync on rare occasions. If this happens, you will receive an error message. Stop and then restart the playback to resync the audio and video. If that does not work, click the Cancel button and exit the evaluation form, then open it again and start over.

The volume slider works within the constraints of your PC's system volume. If the system volume is set to zero, the QM volume slider will not be able to turn the volume up. If the system volume is set to 50%, the QM volume, even when maximized, will only increase the volume to a maximum of 50%.

### Video Recording Playback

You can control the size of the video recording when you view it. By default, the video recording is displayed so that it fits in the playback pane and the aspect ratio (4:3 or 16:9) is maintained. If you adjust the size of the playback pane, the recording will resize accordingly.

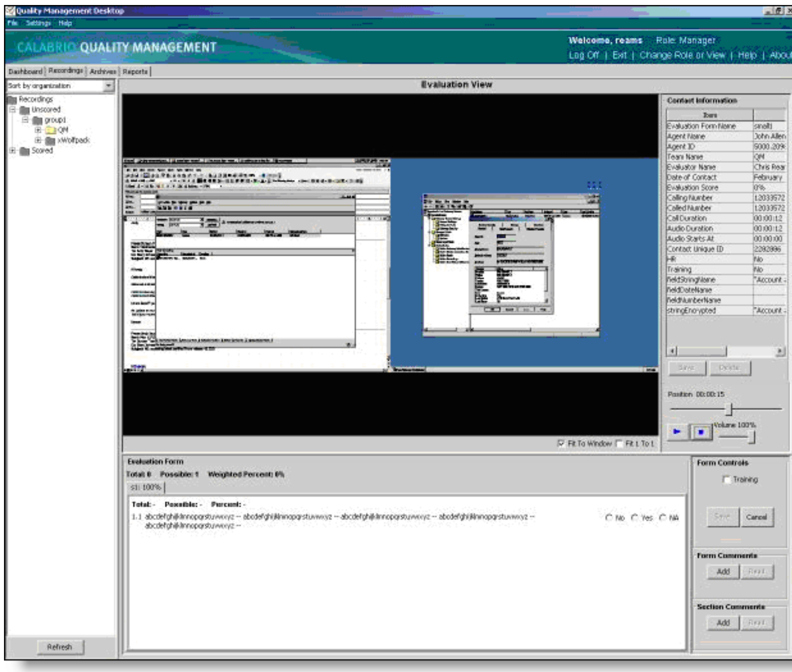
If you want to view the recording at the resolution at which it was recorded, select the Fit 1 to 1 option in the lower right corner of the playback pane. This will resize the recording so that it is actual size. Use the scroll bars to view the entire recording.

To return to the default view, select the Fit to Window option. The recording will resize so that the entire recording is visible within the playback pane.

### Single- and Dual-Monitor Recordings

The Evaluation View window can display recordings of both single- and dual-monitor setups. Figure 15 shows the Evaluation View window playing a recording of a dual-monitor setup.

**Figure 15. Dual-monitor recording**



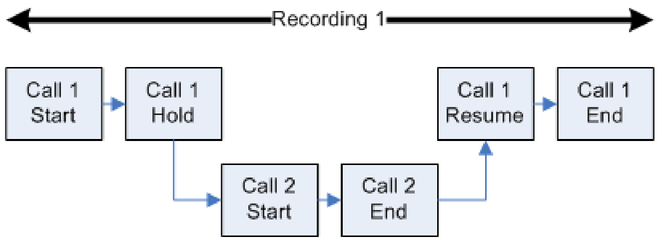

You can zoom in on the recording by selecting the Fit 1 To 1 option and using the scroll bars to move around the window.

### Bracketed and Interleaved Call Recordings

When an agent or knowledge worker handles two calls simultaneously by putting one on hold and switching between them, the result can be either one or two recordings, depending on if the calls are bracketed or interleaved.

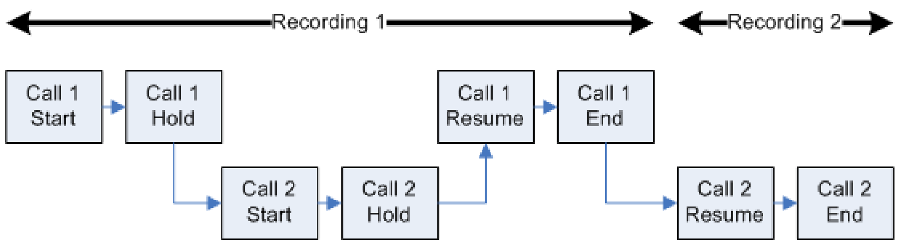
In Figure 16, Recording 1 is created for Call 1. It also contains the entire audio from Call 2. Call 2 is bracketed within Call1.

**Figure 16. Bracketed call**




In Figure 17, Recording 1 is created for Call 1. It will also contain the portion of audio from Call 2 during the time when both calls are active. Recording 2 is created for Call 2 when Call 1 ends. Recording 2 only contains the portion of audio from Call 2 from the time Call 1 ends. Call 1 is interleaved with Call 2. The duration reported for Call 2 is from the time when Call 2 starts until the time that Call 2 ends. However, the actual duration of Recording 2 will be from the time Call 1 ends until the time Call 2 ends.

**Figure 17. Interleaved calls**




## Completing the Evaluation Form

To complete an evaluation form, select the appropriate score button for each question on each section of the form.

- You can select only one score per question.
- If you elect to leave the form before you have completed the evaluation, click Save to mark the form as In Progress.
- Once the evaluation is saved and completed, only the original evaluator can modify the evaluation scoring. If for some reason Evaluator A is no longer available and Evaluator B must take over Evaluator A's evaluations, Evaluator B must log in as Evaluator A.

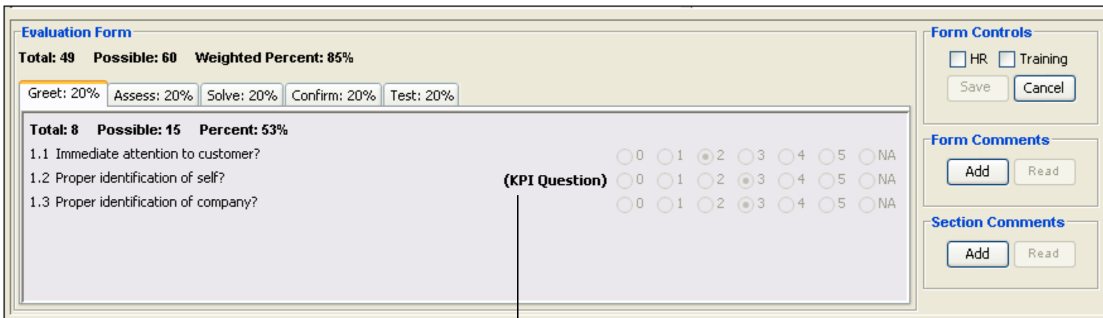
Only an administrator can create a form. A form can use either a Yes/No or scale of 0–5 method of scoring. There can be up to 10 sections in a form, and each section can contain up to 10 questions.

### Key Performance Indicator (KPI) Questions

The administrator who creates the evaluation form might designate some questions as “key performance indicator” (KPI) questions (Figure 18). A poor score on a KPI question (“no” on a Yes/No question or “zero” on a 0–5 question) results in a zero score for the entire evaluation, no matter how the agent scores on other questions.

You still must continue to score the entire evaluation when a KPI question triggers a final zero score. The scores you assign to all questions and sections are retained and are available for review.

**Figure 18. Evaluation form with a KPI question shown**




Scoring a zero on this Key Performance Indicator question results in a zero score for the entire evaluation.

## Adding Comments to the Evaluation

Evaluators, managers, and supervisors can add comments to an evaluation either while they are scoring it, or after they have completed scoring the form. Agents can add comments to an evaluation only after the evaluation has been scored.

There are two types of comments:

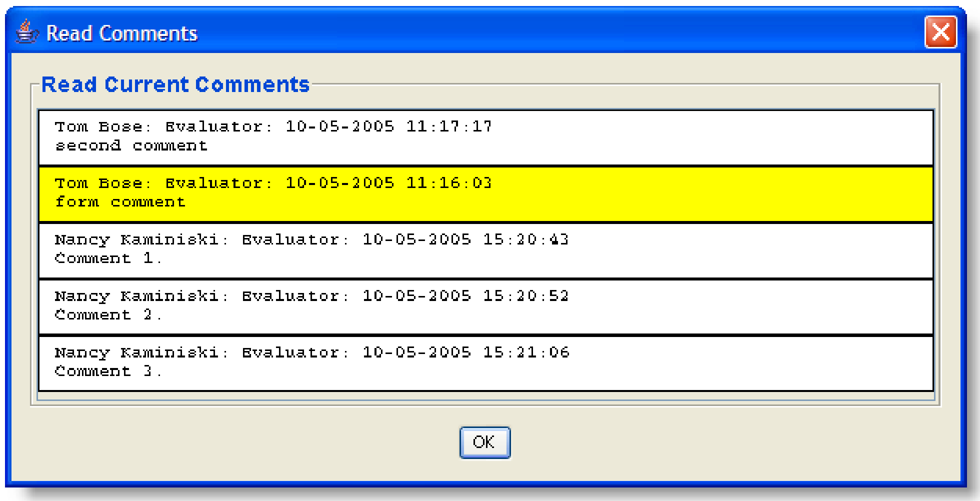
- Form comments—comments that apply to the entire evaluation
- Section comments—comments that apply to a specific section

The Read button in the Form Comments and Section Comments pane is enabled when comments are saved for the form or for a specific section. When you click the Read button a popup window containing the comments already entered is displayed (Figure 19).

> **NOTE:** You must select a section to see the comments for that section. If there are no comments for a section, the Read button is disabled.

Comments are not added to the Read Comments window until you save them. If you enter a comment in the Add Comment window but do not save it, the next time you click Add that comment will still be visible in the Add Comment window.

**Figure 19. Sample Read Comments window**




In the Read Comments window, each comment is identified with the name and role of the person who entered the comment and the date and time it was entered.

When you select a comment it is highlighted in yellow. You can select the text of a comment and use standard Windows commands to copy and paste it into another application.

An evaluation's comments are also available for viewing and printing in the Agent Scored Evaluation report. See "Reports Tab" on page 31 for more information.

> **NOTE:** Each comment can be up to 1300 characters, and the total of all comments can be up to 65,000 characters.

***To add a general (form) comment:***

1. In the Form Comments pane, click Add to display the Add Comment dialog box.
2. Type your comment and then click OK to close the dialog box.
3. Click Save to save your comment.

***To add a section comment:***

1. Select the section of the evaluation form you wish to comment on.

2. In the Section Comments pane, click Add to display the Add Comment dialog box.
3. Type your comment and then click OK to close the dialog box.
4. Click Save to save your comment.

   **NOTE:** Section comments might or might not be enabled on this form. This functionality is configured by the administrator who created the form.

## Tagging the Evaluation for Training or HR

The “Training” tag is added to a recording that the evaluator, supervisor, or manager decides can serve as a training example. By default, any recording with a Training tag is kept indefinitely and can be viewed by any role. The retention time is configured by the administrator. The evaluator, supervisor, or manager can remove a Training tag from a recording.

The “HR” (Human Resources) tag is added to a recording that an evaluator or supervisor decides should be reviewed by Human Resources for some reason. By default, any recording with an HR tag is kept for 180 days. The retention time is configured by the administrator. Only a supervisor or evaluator can remove an HR tag from a recording.

***To tag an evaluation for Training or HR:***

1. In the Form Controls pane, select the Training or HR check box, or both.
2. Click Save.

## Editing Contact Metadata

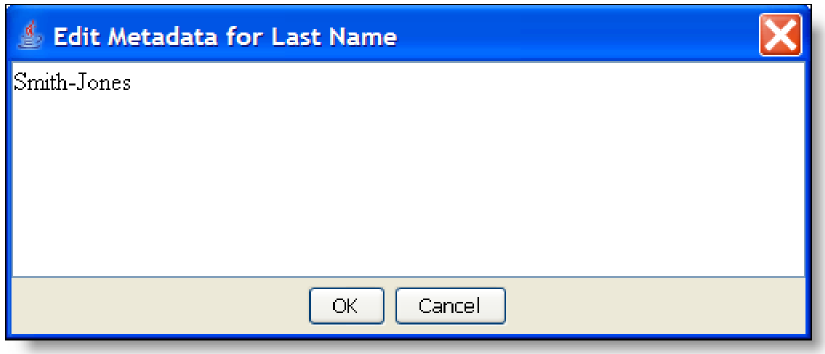
User-defined metadata, if any, is displayed in the Contact Information pane. You can add, edit, and delete this metadata.

***To add, edit, or delete user-defined metadata:***

1. In the Contact Information pane, double-click the metadata field you want to edit.

The Edit Metadata for <metadata> dialog box appears.

**Figure 20. Edit Metadata for <metadata> dialog box**




2. Add new metadata, or edit or delete the existing metadata in the dialog box, and then click OK.
3. Click Save.

## Saving the Evaluation

You can save an evaluation at any time while you are working on it. The saved evaluation is moved to the In Progress folder.

Only the evaluator who saved the evaluation can resume working on it. Other evaluators can view it, but the only change the other evaluators can make to the evaluation is to add comments and to add the Training/HR tags.

## Completing the Evaluation

When you are finished scoring the contact, adding comments, and tagging the evaluation with the HR or Training tag if needed, click the Save button to save the evaluation, and then the Complete button to mark it as complete. The completed evaluation is moved to the Scored folder if no approval is required, and to the Approval Needed folder if approval is required.

## Approving the Evaluation

The administrator can configure QM so that evaluations must be approved by a manager, supervisor, and/or evaluator. The approval requirement is enabled on an evaluation form basis and for specific roles. By default, approval is not required.

Evaluations that require approval are listed in the Needs Approval folder in the navigation tree. You can approve only evaluations that are for agents on your team. The approver of an evaluation does not have to be different from the person who scored the contact—you can evaluate a contact and then approve the evaluation yourself if you are configured to do so.

***To approve an evaluation:***

1. Select the Needs Approval folder in the navigation tree to display evaluations that need approval.
2. Double-click the desired evaluation to display it in the Evaluation View pane.
3. Review the evaluation.
4. In the Form Control section of the window, click Approve or Reject, and then click Save.
   - If you click Approve, the evaluation is moved from the Needs Approval folder to the Scored folder. Once approved and saved, you cannot undo the approval.
   - If you click Reject, a comment window appears. Add a comment explaining why the evaluation is rejected. When the comment is saved, the evaluation is moved to the In Progress folder so that it can be amended.

**NOTE**: If an evaluator makes a change to an evaluation that has been approved, that evaluation is moved back to the Needs Approval folder.

## Understanding Evaluation Scoring

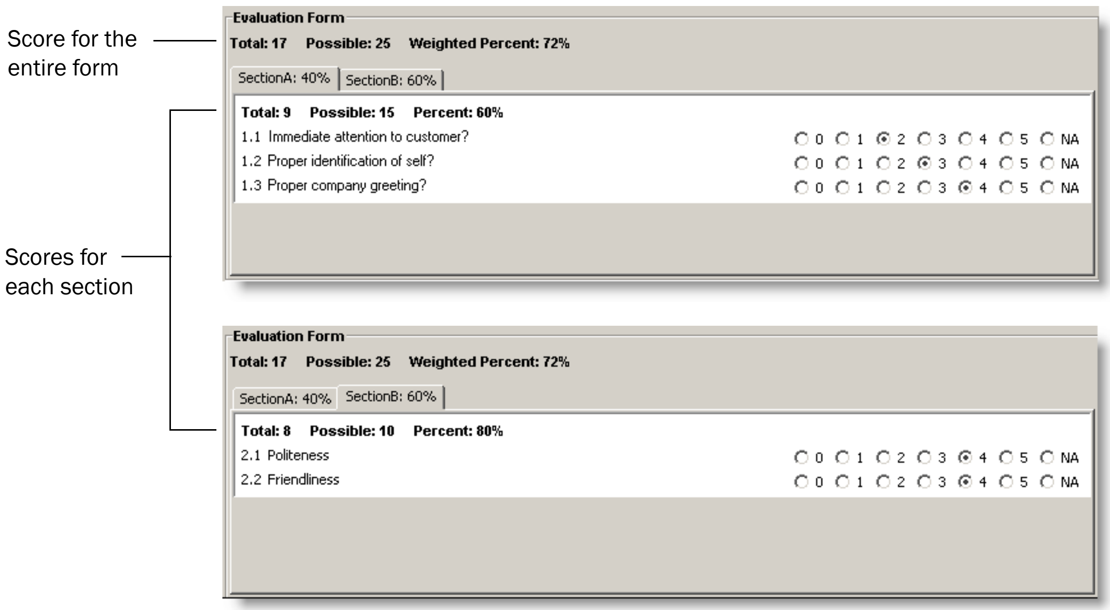
As the evaluator scores a section on an evaluation form, a rolling total and percent is displayed on that section. For example, Figure 21 shows a completed form with two sections.

Section A has a possible total of 15 points. As the evaluator scores each question in the section, the total section score earned is displayed. In Figure 21, the agent has earned 9 out of the possible 15 points, or 60%.

Likewise, Section B has a possible total of 10 points and the agent has earned 8 points, or 80%.

The overall form score for the evaluation is displayed in the gray area at the top of the form. These numbers are calculated as each section is completed.

**Figure 21. Sample scored evaluation form**




## Section Weighting

The administrator who set up the evaluation form shown in Figure 21 determined that Section A would contribute 40% towards the evaluation score and Section B would contribute 60%. The section weighting is indicated on each section tab.

These weightings are applied after all sections are scored to arrive at the weighted percent score for the evaluation.

The weighted percent is calculated as follows:

Section percent × section weight = section weighted percent

Sum of all section weighted percents = total weighted percent

In this example:

Section A = 60% × 0.4 = 24%

Section B = 80% × 0.6 = 48%

24% + 48% = 72% weighted percent

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