Cisco Unified Workforce Optimization

Quality Management Desktop User Guide 2.7(3)
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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

Contents

Contents

Contents

Contents

Overview

1

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, agents, and knowledge workers 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 and knowledge workers 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 automatically 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. Agents and knowledge workers can review their own archive recordings only if that feature is enabled by an administrator.

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.

QM Desktop Feature Levels

There are three feature levels of QM Desktop: Basic, Advanced, and Compliance Recording. Cisco provides the following license types with these feature levels.

- For the Basic license type, contact recordings are audio-only for archival and quality management purposes.
- For the Advanced license type, contact recordings are audio-only for archival purposes and screen and audio for quality management purposes.
- For the Compliance Recording license type, contact recordings are limited to audio recording and archive search and playback. Status and archive reports are available to supervisors and managers only.

The license determines what is recorded, not what is viewed, in QM Desktop. For example, Agents X and Y use an Advanced license, so they can record their screens. If the supervisor for these agents has a Basic license, the supervisor can still view screen recordings made by these agents.

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. Your password is set up in QM Administrator for you by your administrator.

You will not be able to log in if:

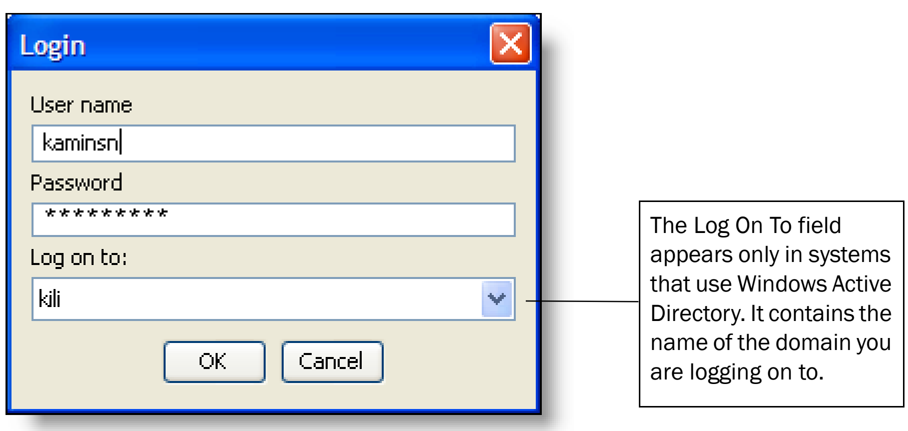
- You are not a licensed QM user
- The license has expired
- You are a manager who is deactivated or not assigned to a group
- You are a supervisor who is deactivated or not assigned to a team
- You are an evaluator and there are no active groups
- You are an agent or knowledge worker and you are not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

To log into QM Desktop:

1. Choose one of the following options to access the Login dialog box for QM Desktop.
   - 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. Complete the fields in the Login dialog box.

- If your system uses Windows Active Directory, type your Windows user name, password (the password is case-sensitive), and select your domain (in the Log On To field).
- If your system does not use Windows Active Directory, type your Windows user name and your QM password.

3. Click OK.

   You are now logged into QM Desktop. Which view you see depends on your role and license type. See Table 1 on page 15 for more information on roles and permissions.

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 service) 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

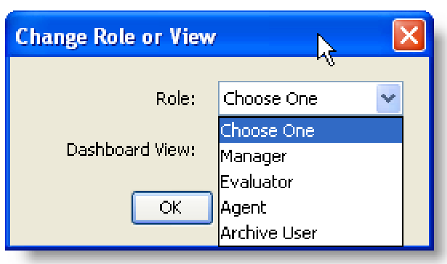
To access the functions appropriate to your multiple roles, you must change from one role to the other from within QM Desktop.

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 dashboard view.

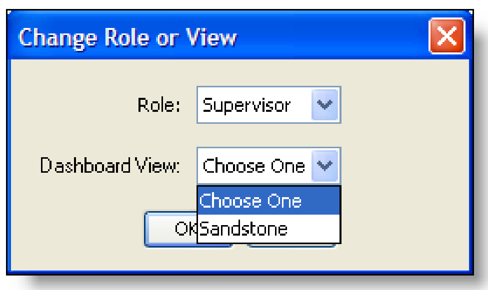
You can change your view only from the Dashboard tab.

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 Dashboard View field is enabled only if your role is Manager or Supervisor.

   Figure 4. Changing your view

2. From the Dashboard 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 > Log Off.

   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 and permissions. Roles, permissions, and licenses are set by the administrator in QM Administrator.

The available tabs for the Basic and Advanced licenses are shown in Table 1.

Table 1. QM Desktop display tabs per user role for Basic and Advanced licenses

Tab	Evaluator	Agent	Knowledge Worker	Supervisor	Manager	Archive User
Dashboard		×	×	×	×	
Recordings	×	×	×	×	×	
Evaluation*	×	×	×	×†	×‡	
Archives	×	×‡	×‡	×	×	×
Reports		×	×	×	×	

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

† Supervisors can display the Evaluations View for recordings of agents on their team. Supervisors can only evaluate records of their agents if the privilege is enabled by the administrator.

‡ If enabled by the administrator.

The available tabs for the Compliance Recording license are shown in Table 2. Access to the Reports tab is dependent on the user's role.

Table 2. QM Desktop display tabs per user role for Compliance Recording license

Tab	Evaluator	Agent	Knowledge Worker	Supervisor	Manager	Archive User
Archives		×*	×*	×	×	×
Reports†				×	×	

* If enabled by the administrator.

† The only reports available with the Compliance Recording license are status and archive.

For more information on licensing, see "Licensing Rules" in the *Quality Management Administrator User Guide.*

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 marked as Training recordings, which can be reviewed by all roles. The scoping rules do apply to all other recordings, including those marked 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 training recordings and their own evaluated contacts. They can also see their own archive recordings if enabled by the administrator.

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 3 summarizes how the values reported are different, based on where the information is viewed.

Table 3. 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.
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.

Table 3. Scoping Differences Between Dashboard and Reports Data — *Continued*

Information Type	Dashboard	Reports
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.

Moving Within the Navigation Tree

The Recordings tab displays a navigation tree. Use these mouse or keyboard actions to move within the navigation tree.

Mouse

- Double-click an icon/node name to expand or collapse the tree.
- Click the plus sign (+) to expand the tree.
- Click the minus sign (–) to collapse the tree.

Keyboard

- Press the up and down arrow keys to move from one node to the next.
- Press the left arrow key to collapse the tree.
- Press the right arrow key to expand the tree.

Sorting Tables

Data that is presented in table form (Figure 5) can be sorted by as many columns as there are in the table. The sort can be ascending or descending.

The small triangles at the right of the column heading display the direction of the sort, ascending or descending. These arrows also change size depending on the column's position in the sort. The triangle in the primary sort column is biggest, the one in the secondary sort column is slightly smaller, and so on.

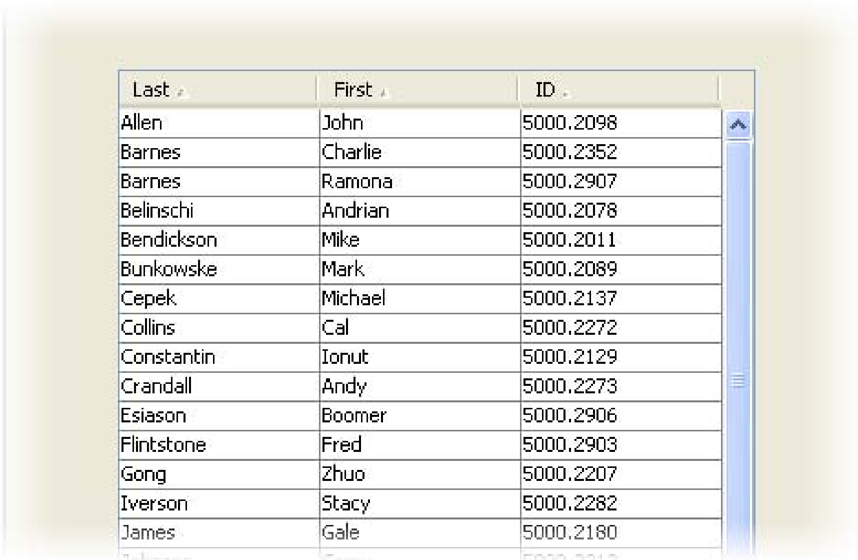
To sort a table by one column:

- Click on the column heading. Click again to reverse the sort order.

To sort a table by multiple columns:

1. Ctrl + click the primary sort column heading.
2. Continue holding down the Ctrl key and then click any other column headings you want to sort the table by.

Figure 5. Example of a sortable table



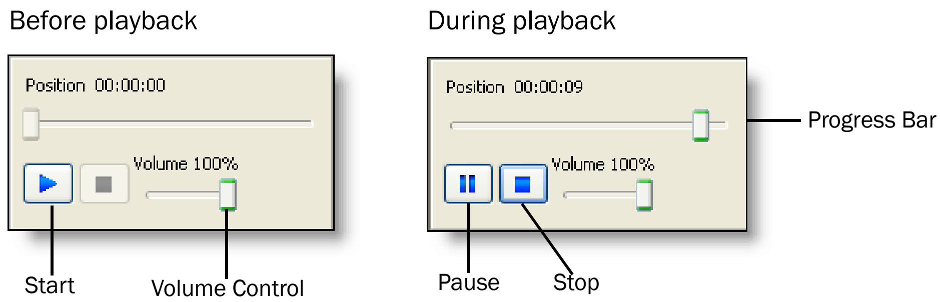
Last	First	ID
Allen	John	5000.2098
Barnes	Charlie	5000.2352
Barnes	Ramona	5000.2907
Belinschi	Andrian	5000.2078
Bendickson	Mike	5000.2011
Bunkowske	Mark	5000.2089
Cepek	Michael	5000.2137
Collins	Cal	5000.2272
Constantin	Ionut	5000.2129
Crandall	Andy	5000.2273
Esiason	Boomer	5000.2906
Flintstone	Fred	5000.2903
Gong	Zhuo	5000.2207
Iverson	Stacy	5000.2282
James	Gale	5000.2180

About Recordings

You can play recordings from the Evaluation View pane. The Evaluation View pane can be accessed from the Recordings tab and the Archives tab. For more information on accessing the Evaluation View pane, see "Recordings Tab" on page 29, "Archives Tab" on page 48. See "Evaluation View" on page 33 for a description of this pane.

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 6. 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 Multiple-Monitor Recordings

The Evaluation View window can display recordings of both single- and multiple-monitor setups.

When configuring display properties on a machine for recording multiple monitors, additional host monitors must be located below or to the right of the primary display monitor (see Figure 7). Any monitor located above and/or to the left of the primary display monitor will be cut off (this is a Windows restriction). The Evaluation View window will display the screens in the recording according to how you arranged them in the Display Properties window.

Figure 7. Display Properties

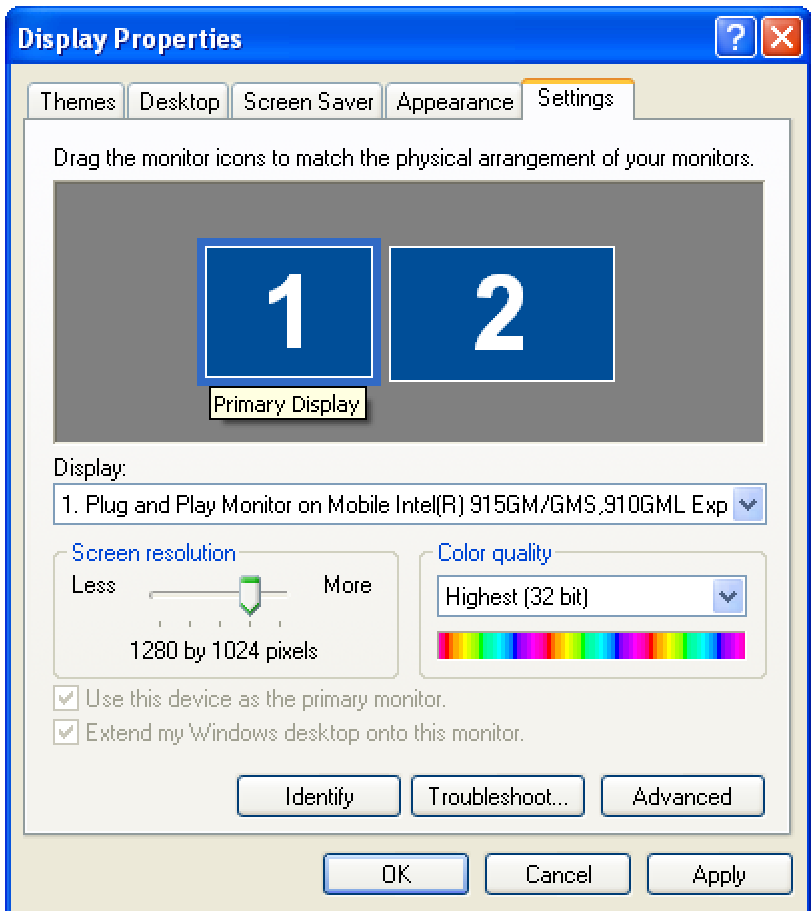
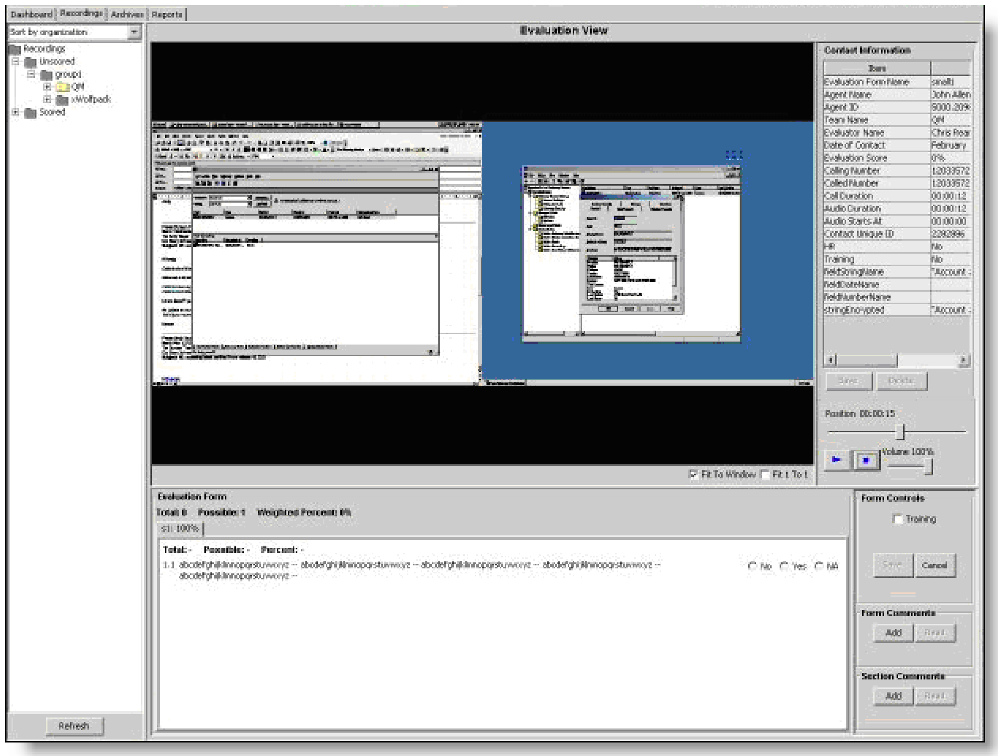


Figure 8 shows the Evaluation View window playing a recording of a multiple-monitor setup.

Figure 8. Multiple-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.

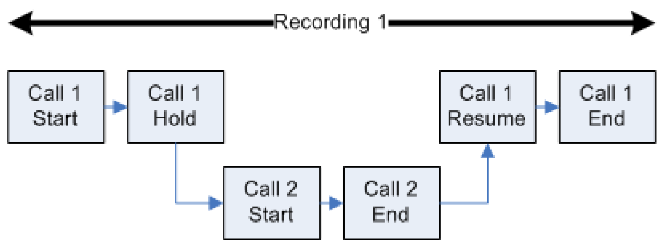
> **NOTE:** Multiple monitor recordings are twice the size of recordings for single monitors.

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.

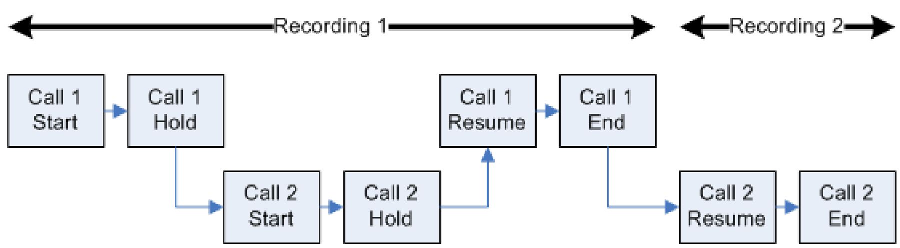
In Figure 9, Recording 1 is created for Call 1. It also contains the entire audio from Call 2. Call 2 is bracketed within Call 1.

Figure 9. Bracketed call



In Figure 10, 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 10. Interleaved calls



You can play all segments of a call, from when it enters the contact center to when it is terminated, using the Associated Contacts button on the Recordings tab. Clicking Associated Contacts enables you to see every call segment associated with a call. See "Playing All Segments of a Call" on page 53 for more information on associated contacts.

Dashboard Tab

The dashboard tab (Figure 11 and Figure 12) 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 11. Dashboard tab for a supervisor, Quality Averages chart

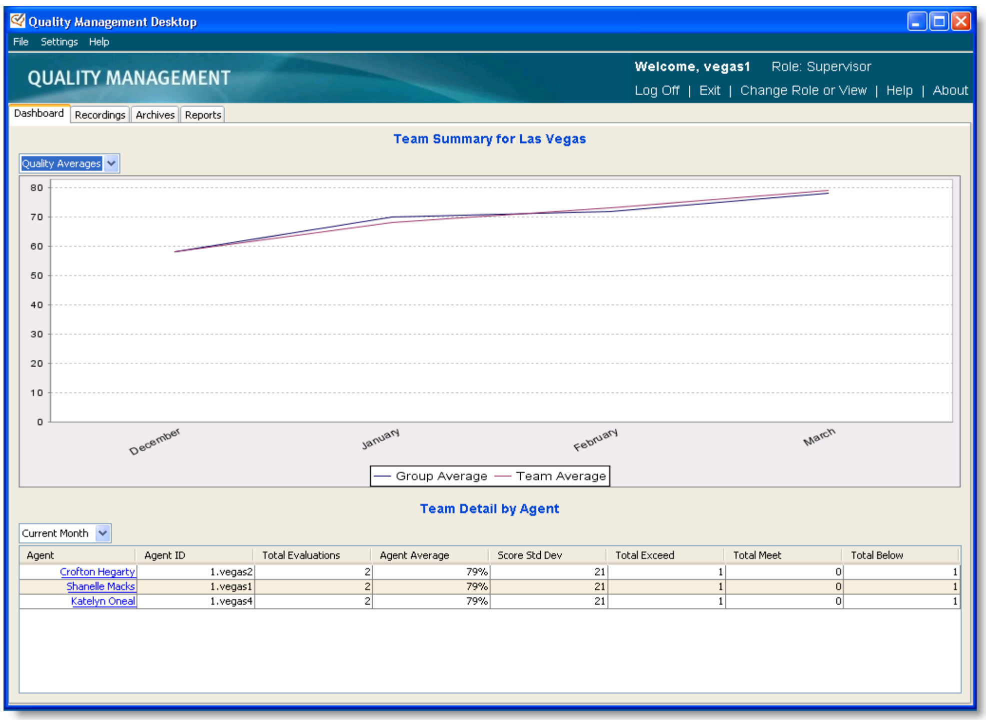
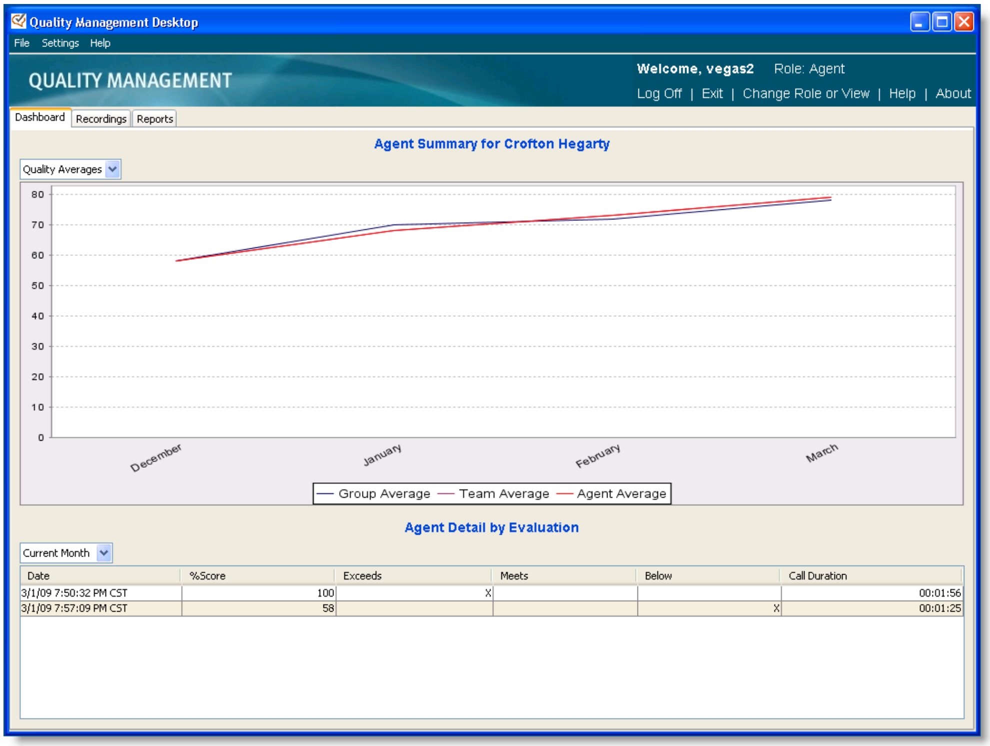


Figure 12. Dashboard tab for an agent, Quality Averages chart



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).

Detail Statistics

The standard statistics displayed in the detail pane are described in Table 4 and Table 5. Different roles see different statistics, as noted in these tables. 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.

Detail Statistics for Agents

Table 4. Dashboard Detail Statistics for agents

Statistic	Description
% Score	The percent score given to the agent's contact by an evaluator.
Below	An X indicates that this evaluation falls below expectations.
Date	The date of the contact.
Call Duration	The duration of the contact.
Exceeds	An X indicates that this evaluation exceeds expectations.
Meets	An X indicates that this evaluation meets expectations.

Detail Statistics for Supervisors and Managers

Table 5. Dashboard Detail Statistics for supervisors and managers

Statistic	Description
Agent	The agent's name.
Agent Average	The average score the agent has earned in the selected time period.
Agent ID	The agent's ID.

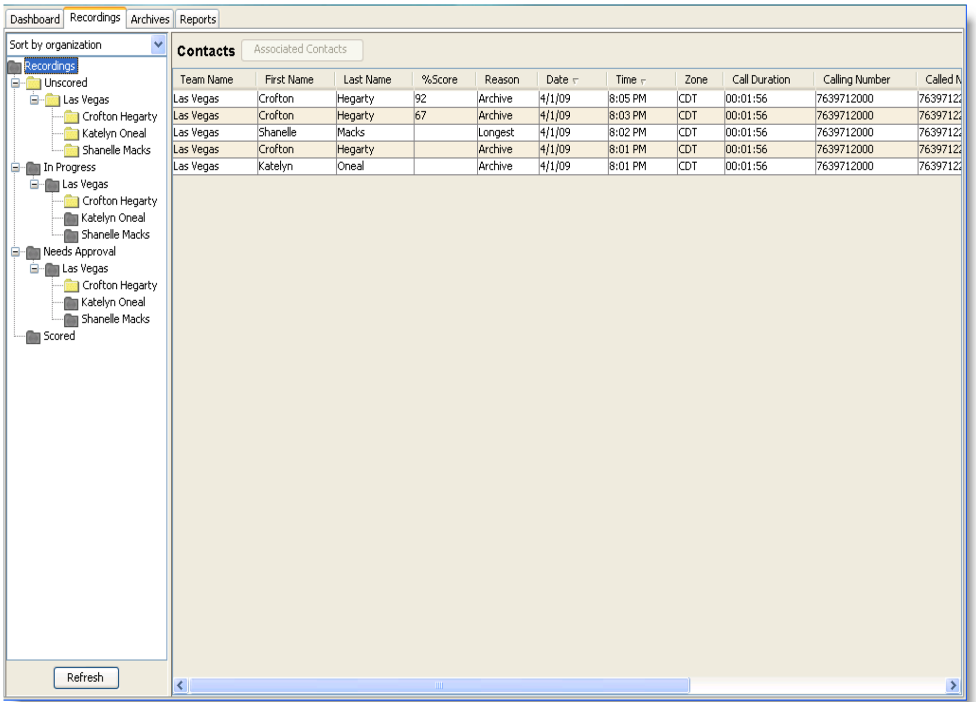
Table 5. Dashboard Detail Statistics for supervisors and managers — *Continued*

Statistic	Description
Score Std Dev	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	The team name.
Team Average	The average score the team has earned in the selected time period.
Team ID	The team's ID.
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.
Total Evaluations	The total number of evaluations the agent has had in the selected time period.
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.

Recordings Tab

The Recordings tab (Figure 13) 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 13. Recordings tab for a supervisor



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 and needs approval)
- Supervisors see their current teams' contacts (scored and needs approval)

  NOTE: Supervisors and managers only see unscored and in progress contacts if they have been granted evaluation privileges by the administrator.

- Agents and knowledge workers see only their own scored contacts and contacts designated as Training

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 53 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.

You can view an evaluation for a contact by double-clicking a contact in the list of recorded contacts. When you do this, you are switched to the Evaluation View window. See "Playing a Recording" on page 34 for more information on playing a contact recording.

The Contacts pane can display a maximum of 6,000 contacts. If your query returns more than 6,000 contacts, you are prompted to narrow your sort by 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. Recordings Tab Fields

Field	Viewed By	Description
%Score	Agent Manager Supervisor Evaluator	The score given to the contact.
Call Duration	Agent Manager Supervisor Evaluator	The duration of the contact.
Called Number	Agent Manager Supervisor Evaluator	The number of the phone that received the call.
Calling Number	Agent Manager Supervisor Evaluator	The number of the phone that made the call. Displays “unknown” if the calling number is unlisted or blocked.
Date	Agent Manager Supervisor Evaluator	The contact date.

Table 6. Recordings Tab Fields — *Continued*

Field	Viewed By	Description
First Name	Manager Supervisor Evaluator	The agent's first name.
Group	Manager Evaluator	The name of the group.
HR	Manager Supervisor Evaluator	Yes/No. The contact has been marked as an HR contact.
Id	Agent Manager Supervisor Evaluator	The contact's ID.
Last Name	Manager Supervisor Evaluator	The agent's last name.
Reason	Manager Supervisor Evaluator	The reason the contact was recorded as set in the recording rule (First, Last, Longest, Shortest, Random, Logging, Tagged, Performance, and New Employee).
Team Name	Manager Supervisor Evaluator	The name of the team.
Time	Agent Manager Supervisor Evaluator	The contact time.
Training	Agent Manager Supervisor Evaluator	Yes/No. The contact has been marked as a training contact.
Zone	Manager Supervisor 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

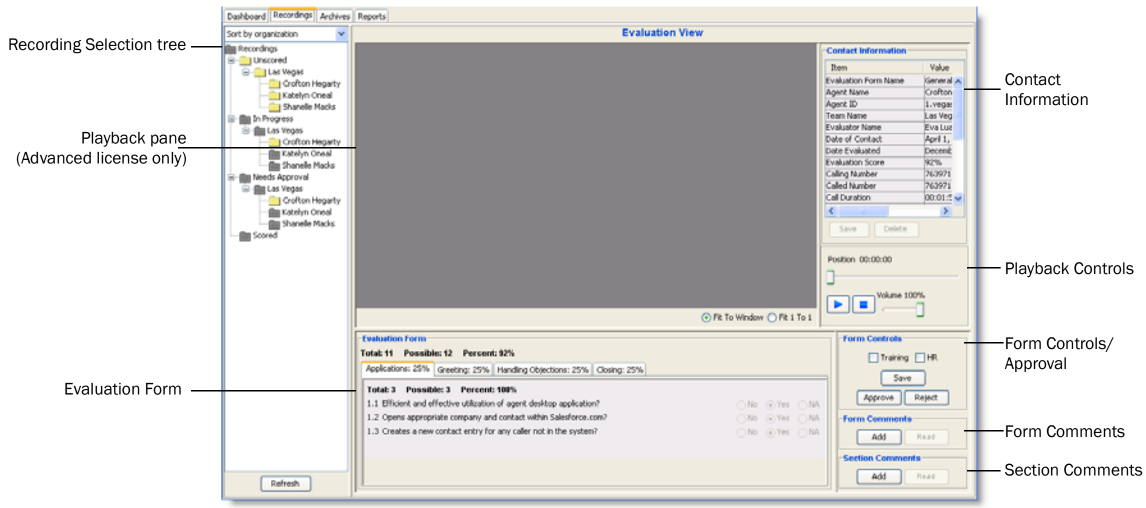
Recording Type	Retention Period
Scored	1 day–Unlimited (default = 30 days)
Unscored	1 day–Unlimited (default = 30 days)
HR	1 month–Unlimited (default = 6 months)
Training	1 month–Unlimited (default = 6 months)
Metadata	Default = 13 months*
Archive	1 month–Unlimited (default = 84 months)
Tagged	1 month–Unlimited (default = 120 months)

* The metadata retention time is fixed and cannot be changed.

Evaluation View

The Evaluation View window (Figure 14) is displayed when you select a specific recording from the Contacts window.

Figure 14. Evaluation View window



For information on how to evaluate a contact, see "Evaluating Contacts" on page 57.

Parts of the Evaluation View Window

The Evaluation View window is divided into 8 sections (Figure 14).

- **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.

  NOTE: Supervisors and/or managers can also complete evaluations if enabled by the administrator.

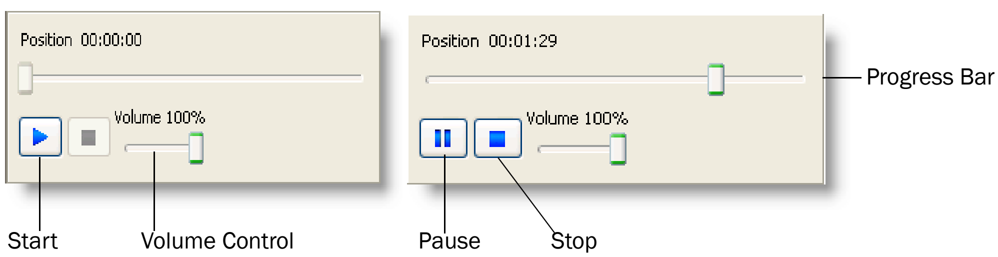
- **Form Controls**—Enables you to tag the evaluation as an HR or Training contact, mark the evaluation as complete or as approved, and to save any changes made to the evaluation.
- **Form Comments**—The Add button in this section enables you to add a general comment about the contact. The Read button 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.

Playing a Recording

To listen to a recording, double-click a contact in the right pane of the Contacts window. The Evaluation View window is displayed (Figure 14). The recording is loaded and is ready to play. Information about the contact is displayed in the Contact Information pane.

You can use the playback controls (Figure 15) to control the recording playback.

Figure 15. Playback controls



To control the recording playback:

- Click the Play button to listen to the recording.
- Move the Position progress bar to skip forwards or backwards in the recording.
- Move the Volume Control progress bar to control the volume of the recording.
- Click the Pause button to stop the playback of a recording and click it again to resume the playback of a recording where it stopped.
- Click the Stop button to end the playback of the recording.

See "About Recordings" on page 20 for more information on recordings.

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 and knowledge workers can add comments to an evaluation only after the evaluation has been scored.

There are two types of comments:

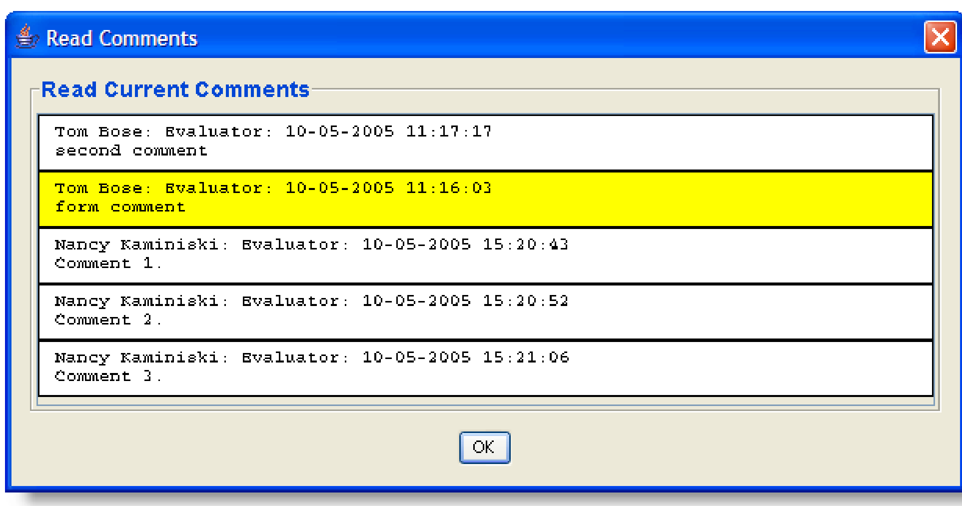
- Form comments—comments that apply to the entire evaluation
- Section comments—comments that apply to a specific section

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 16).

> **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 type 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 16. 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 38 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 for 6 months, unless otherwise specified by the administrator, 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 6 months. 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.

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	Audit Trail Access Report	×			
	Archive System Access Patterns	×			
Enterprise	Enterprise's Group Average Scores	×			
Evaluation	Evaluator Performance	×			
Group	Group's Team Average Scores	×			
	Group's Team Average Scores	×			
	Group's Team Section Scores	×			
Status	User Recording Status	×	×		
	System Status	×			

Table 8. QM Desktop reports — *Continued*

Report Type	Report	Mgr	Spvr	Agent	KW
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 Quality Management 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.

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

Field	Description
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.
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).

Table 11. Agent Trend Report Fields — *Continued*

Field	Description
Eval 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.

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

Field	Description
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.
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.

Table 16. Group's Agent Average Scores Report Fields — *Continued*

Field	Description
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.
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).

Table 19. User Recording Status Report Fields — *Continued*

Field	Description
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 Servlet (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 Servlet writes events that warn when free space is low on the voice and screen services 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.

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

Field	Description
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.
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

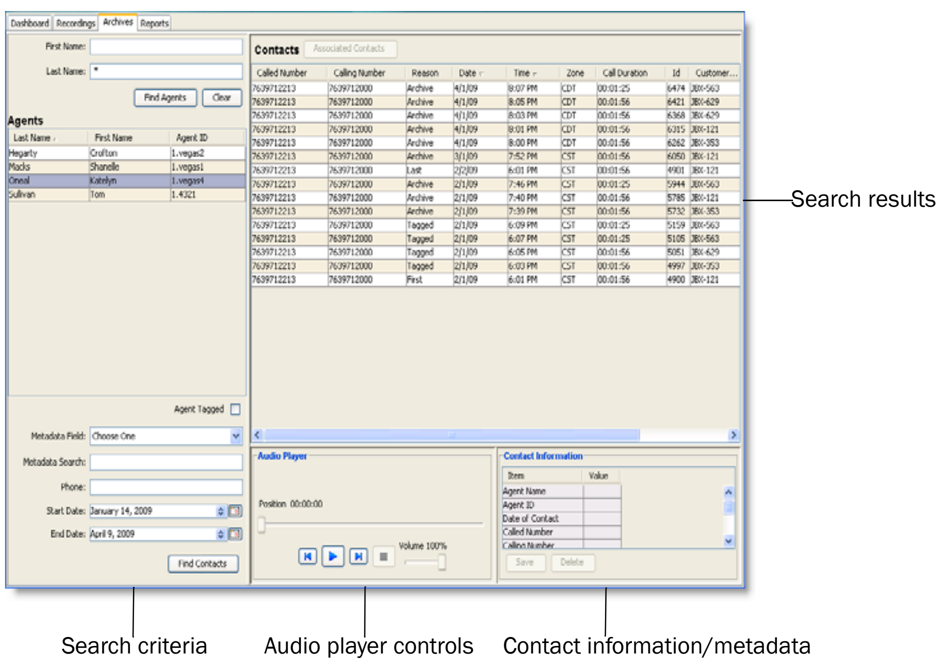
If archiving is enabled by the QM administrator, contact recordings can be saved for periods of one month or longer. The administrator sets the length of time that recordings are archived, depending on how much storage space is available in your system.

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 17) enables you to search the stored archives for specific contact recordings.

Figure 17. Archives tab, showing the result of a search



The archive recordings contains audio recordings according to configured archive workflows set up by the administrator.

The Archives tab is automatically visible to users with the role of supervisor, manager, 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 have access to all contacts. Evaluators only see archive files that are associated with a quality management recording. To see contacts associated with the quality management recording, the Evaluator must click the Associated Contacts button.

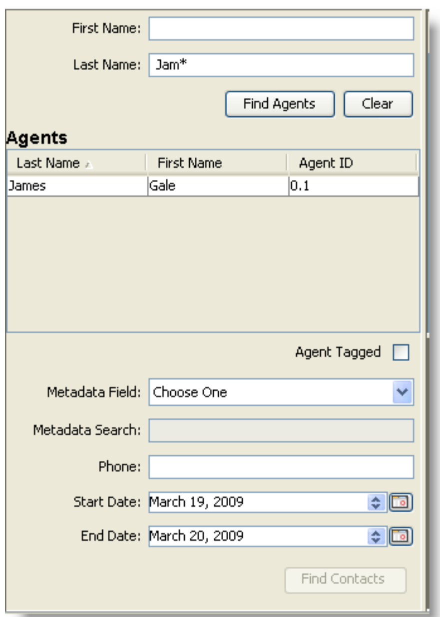
The Archives tab is visible to users with the role of agent and knowledge worker only if that feature is enabled by an administrator. The search criteria is limited to the agent's own recordings.

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.

Figure 18 shows an example of typical search criteria.

Figure 18. 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. All users with access to the Archives tab can use the one-step process. Agents and knowledge workers are limited to viewing only their own contacts.
- In the two-step process, you first search for agents and then search for a particular agent's contacts. Only supervisors, managers and archive workers can use this process. 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. This field does not appear for agents or knowledge workers.
Last Name	The agent's last name. This field does not appear for agents or knowledge workers.
Agent Tagged	Select the check box to search for contacts that the agent has marked 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.
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 type unknown in this field to search for these customer contacts.
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.

Table 23. Archive search criteria fields — *Continued*

Field	Description*
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.

* All search criteria fields except Start Date, End Date, and Metadata Field accept any defined unicode character, plus wild cards (that is "?" and "*"). A defined unicode character is any character that can be typed on your keyboard. The asterisk (*) can represent any quantity of any character, as long as the other characters in the string match. The question mark (?) in a string can be replaced by any character, but the length of the string must be exactly as represented.

One-Step Search Process

By default the start and end dates are yesterday's date (start date) and today's date (end date).

If you are a manager or supervisor, the list of contacts will only display the agents who currently belong to your group or team.

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

1. Enter any one or all of these search criteria:
   - Agent Tagged
   - Metadata Field and Metadata Search
   - Phone

   The Find Contacts button is enabled.
2. Enter the start and end date of the period during which the contact occurred.
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.

Two-Step Search Process

By default the start and end dates are yesterday's date (start date) and today's date (end date).

If you are a manager or supervisor, the list of contacts will only display the agents who currently belong to your group or team.

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

1. 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.

2. 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

   The Find Contacts button is enabled.

3. Enter the start and end date of the period during which the contact occurred.
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

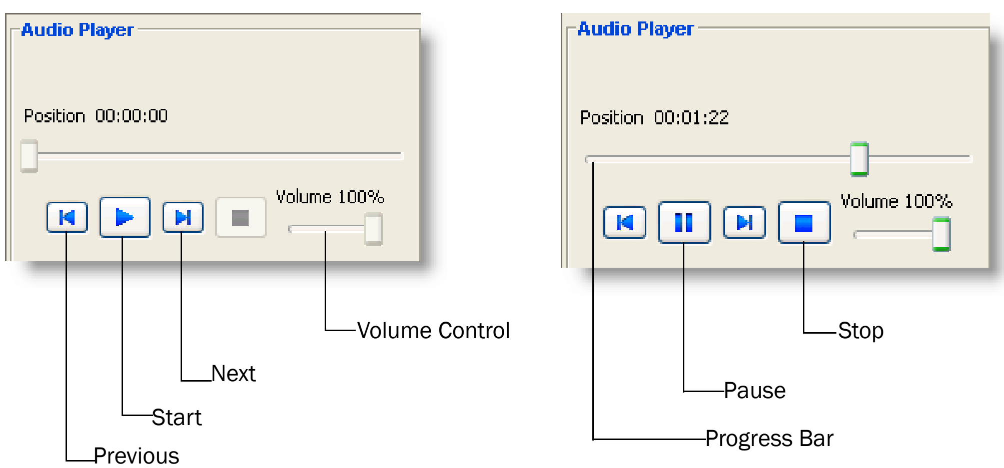
To clear your search results, click the Clear button in the top portion of the left pane.

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 audio player controls (Figure 19).

Figure 19. Audio player controls



If nothing is selected in the list of contacts:

- Click the Play or Next button to select and play the first recording in the list.
- Move the Position progress bar to skip forwards or backwards in the recording.
- Move the Volume Control progress bar to control the volume of the recording.
- Click the Pause button to stop the playback of a recording and click it again to resume the playback of a recording where it stopped.
- Click the Stop button to end the playback of the recording.

See "About Recordings" on page 20 for more information on recordings.

Editing Contact Metadata

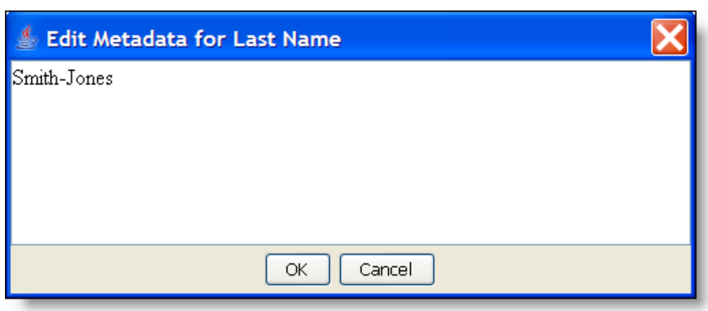
User-defined metadata, if any, is displayed in the Contact Information pane. You can add, edit, and delete this metadata.

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 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.

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.

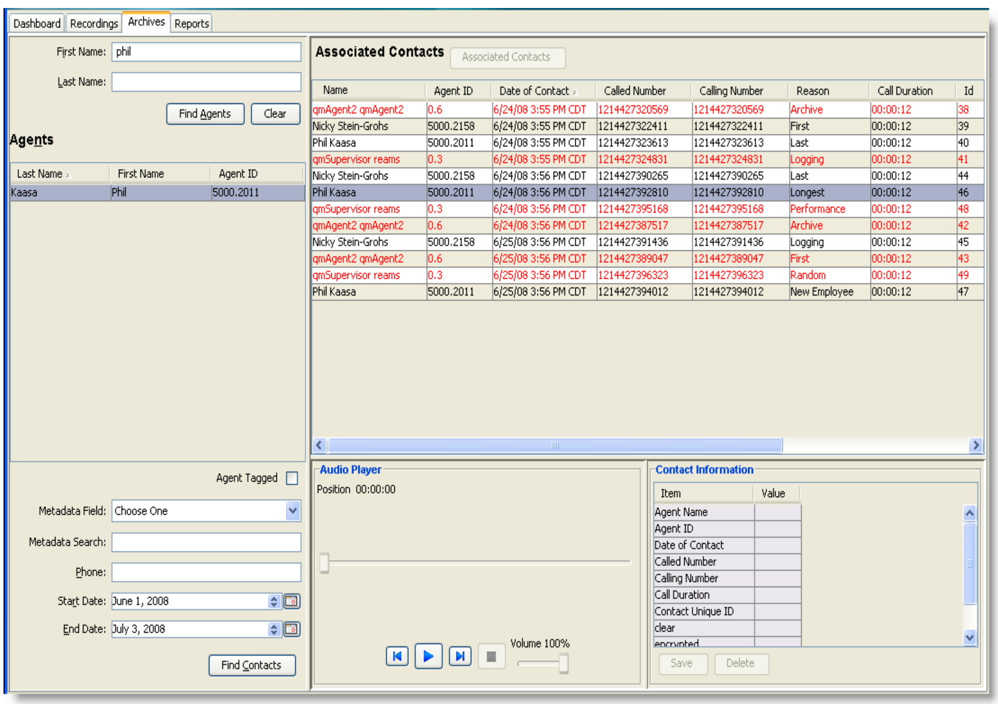
Once you have searched for and found a contact, clicking the Associated Contacts button enables you to see every call segment associated with that contact listed in the Contacts pane.

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 21), 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 21. 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)

The administrator can enable or disable the export feature.

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**: Recordings must be exported one at a time. If a recording is in the process of being exported, and you select another recording for export, the second recording will be queued to start export after the first recording export has completed.

To export a contact recording:

When you save a recording file, the default recording file name is the contact ID.

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.
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.

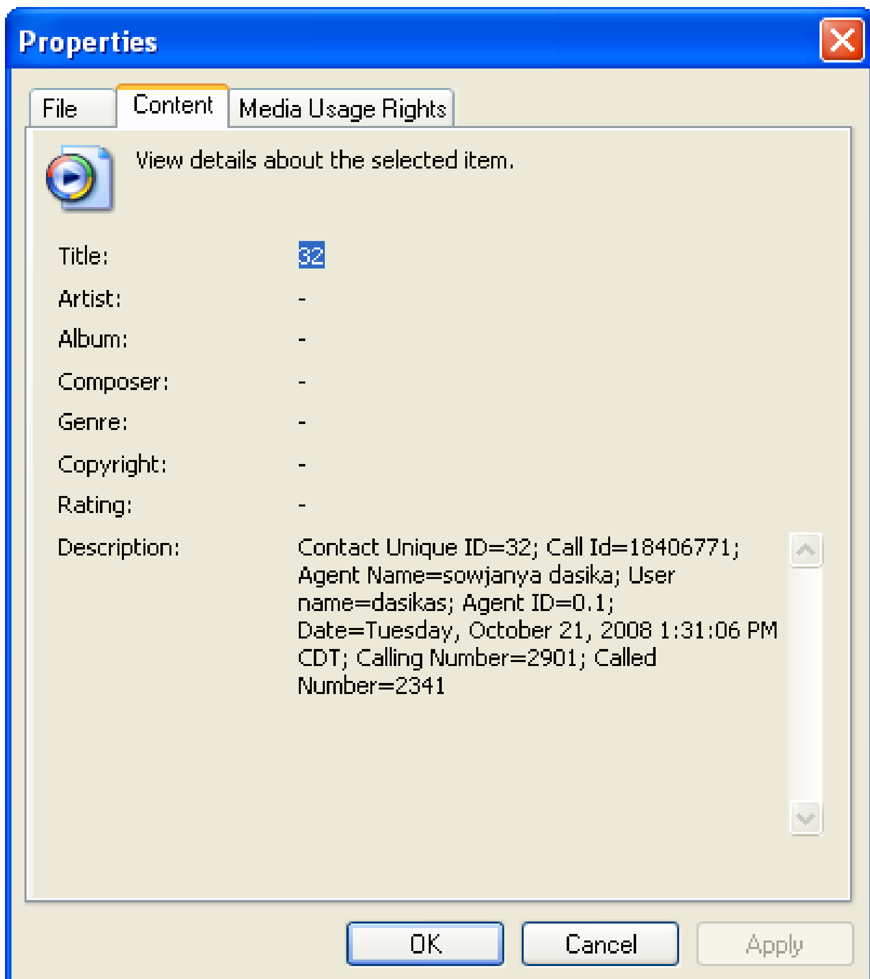
The supported tags are displayed in the Windows Media Player Properties window, in the Description field on the Content tab. Only system metadata and metadata that is enabled for export in QM Administrator is displayed. System metadata includes ID, ANI, DNIS, acdCallId, lastName, firstName, agentId,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

To view QM metadata in Window Media Player:

1. Launch Windows Media Player.
2. Locate and select the desired exported recording file.
3. Right-click the exported recording file and choose Properties, and from the Properties window, select the Content tab.

   The metadata is displayed on the Content tab (Figure 22).

Figure 22. QM metadata displayed in Windows Media Player



3 Evaluating Contacts

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.

NOTE: Supervisors and managers can also claim and evaluate contacts if enabled by the administrator.

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.

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.

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.

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.
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.

Evaluating an Agent-Tagged Recording

A contact that was recorded because an agent marked 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.

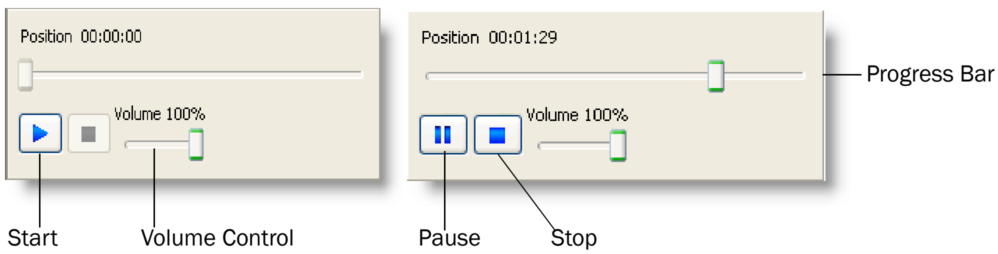
   When you have scored and saved the evaluation, that form is permanently associated with the contact and cannot be changed.

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. See "Playing a Recording" on page 60 for more information on playing a recording.

You can use the playback controls (Figure 23) to control the recording playback.

Figure 23. Playback controls



To control the recording playback:

- Click the Play button to listen to the recording.
- Move the Position progress bar to skip forwards or backwards in the recording.
- Move the Volume Control progress bar to control the volume of the recording.
- Click the Pause button to stop the playback of a recording and click it again to resume the playback of a recording where it stopped.
- Click the Stop button to end the playback of the recording.

See "About Recordings" on page 20 for more information on recordings.

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.

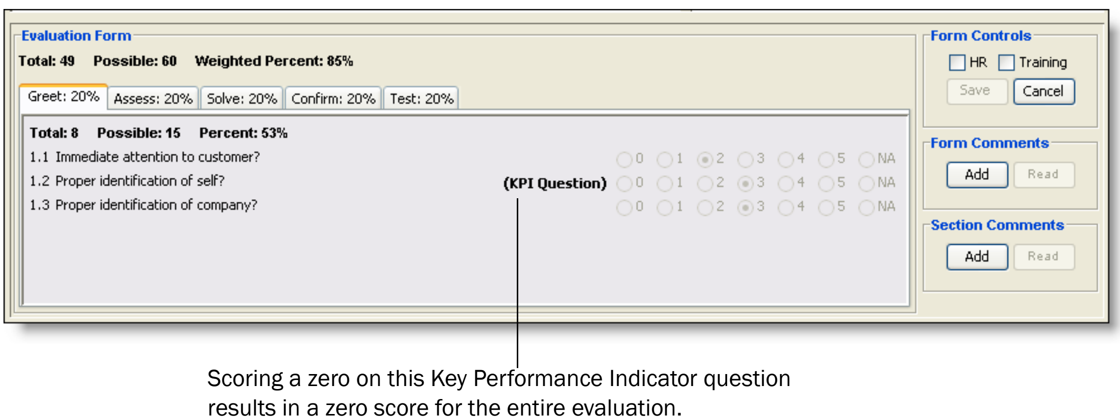
Only an administrator can create a form. A form can use either a Yes/No or scale of 0–5 method of scoring. There can be up to 10 sections in a form, and each section can contain up to 10 questions.

Key Performance Indicator (KPI) Questions

The administrator who creates the evaluation form might designate some questions as "key performance indicator" (KPI) questions (Figure 24). 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 24. Evaluation form with a KPI question shown



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:

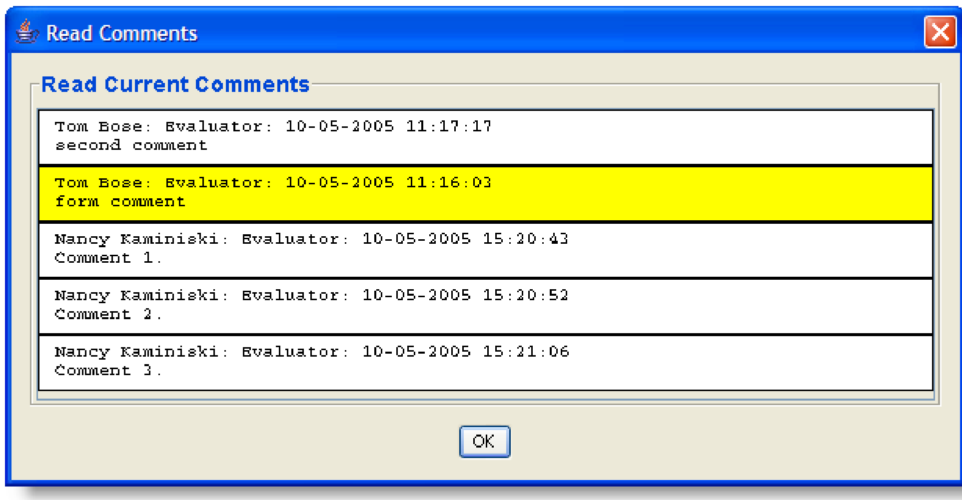
- Form comments—comments that apply to the entire evaluation
- Section comments—comments that apply to a specific section

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 25).

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 type 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 25. 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 38 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 for 6 months, unless otherwise specified by the administrator, 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 6 months. 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

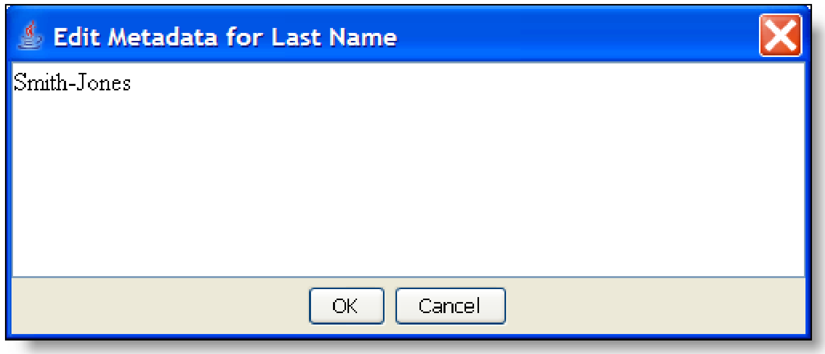
User-defined metadata, if any, is displayed in the Contact Information pane. You can add, edit, and delete this metadata.

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 26. **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 Save to save the evaluation, and then click Complete 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. If you are a supervisor, you can approve only evaluations that are for agents and knowledge workers on your team. If you are a manager, you can approve only evaluations that are for agents and knowledge workers in your group. 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

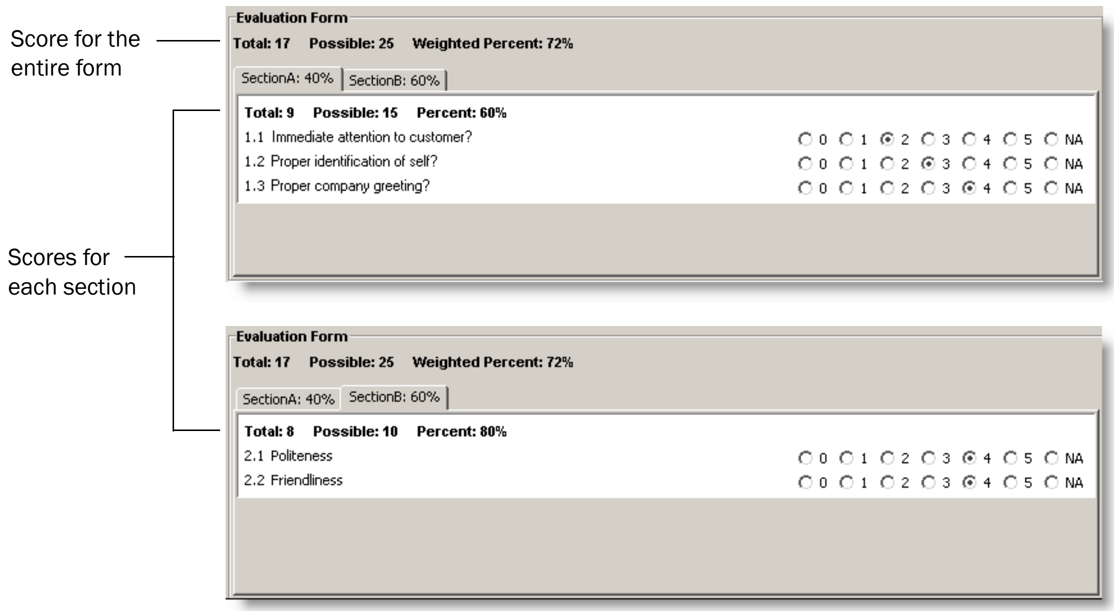
As the evaluator scores a section on an evaluation form, a rolling total and percent is displayed on that section. For example, Figure 27 shows a completed form with two sections.

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 27, 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 27. Sample scored evaluation form



Section Weighting

The administrator who set up the evaluation form shown in Figure 27 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

Index

Q

R

S

T

V