

State of Ohio

Quality Monitoring User Guide

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Documentation

Call Recording consists of the documentation product editions described below. Modules may be added to product sets to meet the particular business requirements of your contact center.

For example, all the features that Call Recording Enterprise offers are available; however, the user has the option to select options that best satisfy their needs.

Product Documentation Editions and Guides

The following suite of products are offered by NGTS, each with their own documentation sets:

Standard Edition

Features include recording, monitoring, messaging, and reports;

Contact Center Edition

Includes all Call Recording Standard features, plus the Evaluate and Analyze module.

Enterprise Edition

Includes all Basic and Optional features, plus the Coach and Learn module. There are also separate user-specific guides for the **Call Recording Survey Module**, the **Speech Module**, and the **Reports Module**.

Optional Modules

The following optional modules are available:

Evaluate and Analyze

Evaluate provides a complete framework for evaluating agent performance for voice, email, and chat support transactions. Analyze provides a systematic approach to measure, monitor, and act upon Key Performance Indicators (KPIs) and metrics.

Coach and Learn

Coach enables interaction between managers and employees with guidance and critical feedback. Learn is used to create a repository of courses and quizzes that can be assigned to employees.

Survey

Used to improve performance of agents in a contact center through customer-driven feedback.

Speech

A powerful analytical tool that enables a user to perform precision search and analysis of recorded calls using keywords and phrases found in actual conversations between agents and customers.

Reports

The Reports module enables a user to create a wide variety of pre-defined and custom management reports. The Reports module consists of report templates that are designed to create reporting data for the most critical contact center information.

Documentation and Technical Support

For technical support assistance, please contact the Helpdesk: incidents@cbts.net.

Introduction

Quality Monitoring is a web-based suite of tightly integrated tools, designed to enhance and improve all aspects of the contact center's operations and performance. It is easy to implement, maintain, and manage in a variety of diverse contact center deployment models—from centralized contact centers, to distributed branches, to work-at-home agents.

The Quality Monitoring flexible and comprehensive solution empowers contact center staff and businesses with scalable applications that synchronize and unify the entire workforce, regardless of VoIP architecture.

Quality Monitoring's sophisticated yet easy to use monitoring, recording, quality assurance, reporting, and analytic features provides contact center management and agents alike with all the tools necessary to effectively manage the entire agent life cycle process.

Agent Life Cycle Management

Quality Monitoring's unique "Collect/Assess/Analyze/Act" contact center methodology helps you identify, track, and address performance issues proactively, through all stages of the agent life cycle.

Data collection starts with Quality Monitoring's real-time recording of agent calls

and associated screen captures. Recording is rule-based—length of call, agent tenure, etc.—and customer satisfaction can be mapped to post-interaction surveys.(Note: The optional - Quality Monitoring Survey module required.)

Quality assessment is instantaneous, as Harmony’s reporting functionality is tightly integrated with the Dashboard view, providing personalized, at-a-glance snapshot views of key agent and contact center metrics.

Real-time evaluation of contact center activity is provided through Silent Monitoring and Quality Monitoring's unique interactive Dashboard, and the optional Evaluate and Analyze module helps with offline data assessment. Finally Harmony’s offline Coach and Learn module helps improve agent performance and the overall efficiency of the entire contact center with learning plans, courseware, and quizzes.

Feature Highlights

Quality Monitoring consists of powerful voice recording, silent monitoring, messaging, and reporting applications, as described below.

Call Recording

Call Recording automatically records and archives agent phone conversations. The frequency of recordings is configured by the System Administrator on an agent-by-agent basis. Call Recording can also capture periodic screenshots of an agent’s desktop, which can then be displayed when playing back calls via the Call Recording module.

Silent Monitoring

Quality Monitoring's Silent Monitoring allows authorized personnel to monitor live calls between agents and customers, to spot check agent performance and provide instant online feedback and assistance.

Messaging

Quality Monitoring's Messaging provides real-time Dashboard alerts and notifications for pre-defined contact center conditions, both mission-critical and informational. Supervisors can also broadcast messages to users for display on their VoIP phones or delivery to their Dashboard Inbox.

Reporting

Quality Monitoring's Reporting includes numerous system reports that allow you to create a wide variety of on-demand and scheduled reports, provide information about voice sessions, agent performance, quality trends, and so forth. You can also upload your own custom report templates and export report data for further analytical processing in numerous formats.

Evaluate

Quality Monitoring's Evaluate allows you to review and evaluate agent performance for all customer service and support transactions. Evaluations can be scored and results presented to an agent's Dashboard for real-time performance feedback. (Evaluate is included with Quality Monitoring's Contact Center and Enterprise Editions, and is optional for Standard Edition.)

Analyze

Quality Monitoring's Analyze allows managers to create KPI-based scorecards to measure the performance of all members of the contact center team against specific metrics. (Analyze is included with Quality Monitoring's Contact Center and Enterprise Editions, and is optional for Standard Edition.)

Dashboard

The Quality Monitoring Dashboard provides users with a browser-based interface to access the application modules. You can easily customize your Dashboard view to ensure that the information you need and use most often is readily available

The Dashboard consists of window panes for your Favorites, Inbox, and four portlets (best used for displaying reports). Portlets can also be configured to link to external websites, if desired.

Logging In

Note:

Internal Revenue Publication 1075 provides guidance to ensure the policies, practices, controls, and safeguards are employed by recipient agencies, agents, or contractors adequately protect the confidentiality of information.

Effective January 15, 2015, the **Next Generation Telephony Service (NGTS)** requires NGTS users to comply with the guidelines below to create a complex password.

1. The rules include a password that:
 - Uses a minimum of eight (8) total characters in length.
 - Has as at least one (1) upper case letter (a capitalized letter)
 - Has as at least one (1) lower case letter (a non-capitalized letter)
 - Has at least one (1) special character (a symbol such as a percentage sign (%),

- asterisk (*), exclamation point (!), etc.
2. A password cannot be repeated until after the 25th occurrence.
 3. A stand user is required to change a password every ninety (90) days.

To log into Quality Monitoring :

1. **Step 1** Open your internet browser and enter your Quality Monitoring URL, as provided by your System Administrator.
2. **Step 2** The login page appears. Enter your user ID and password, as provided by your System Administrator.
3. **Step 3** Click **Login**. The Quality Monitoring Dashboard appears.

The features that appear on your Dashboard, and the reports you are able to access, are contingent upon the roles and permissions assigned to you by your System Administrator.

Module Selections

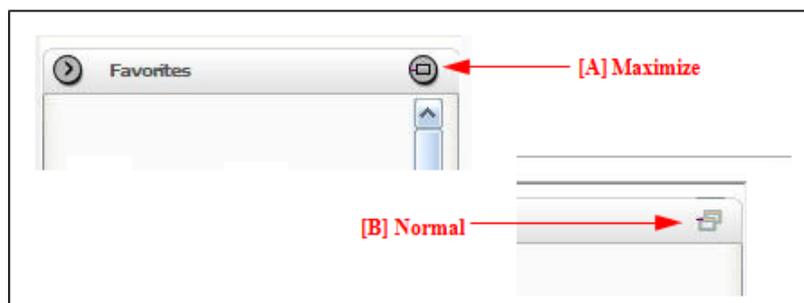
The Dashboard allows you to select the various modules of functionality available to you—Coach, Learn, etc.—as per your particular Quality Monitoring Edition.

Quality Monitoring uses a tab-based approach to navigating the system. As you click open various modules, they will appear as tabs at the top of the page, for easy back-tracking and referral.

Refer to the “Product Documentation Editions” topic in the Preface for information on which modules are available for specific Quality Monitoring Editions.

Portlet Window Sizing

To expand a portlet to its maximum window size, click the maximum icon [A] in the top-right corner of the portlet. When the window is maximized, click the normal icon [B] to return the window to its normal (condensed) size.



Record Call Now

On-demand recording (i.e., record call now functionality) is also available, if the System Administrator has enabled this feature for the logged in user.

This allows a user to record a call they are currently handling, if desired, by clicking on the **Record Call Now** link that appears on Dashboard.

Refer to the “On-Demand Recording” topic in Chapter 4 of the *System Administration Guide* for more information on enabling this feature.

Favorites

The Quality Monitoring Dashboard has a Favorites list that you can populate with direct links to particular Quality Monitoring features, for easy, one-click navigation. (Information for each feature is provided throughout this guide.)

To select the items that appear in the Favorites list:

Step 1 Click **My Profile > Dashboard > Favorites**.

Step 2 Select the items you want to appear in your Favorites list, then click **Save**.

Category	Item	Selected
Administration	Organization	<input checked="" type="checkbox"/>
	Work Type	<input checked="" type="checkbox"/>
	Employee Management	<input checked="" type="checkbox"/>
	Voice Configuration	<input checked="" type="checkbox"/>
	Custom Groups	<input checked="" type="checkbox"/>
	Message	<input checked="" type="checkbox"/>
Analyze	Metric Library	<input checked="" type="checkbox"/>
	Scorecard Builder	<input checked="" type="checkbox"/>
Coach	Attributes	<input checked="" type="checkbox"/>
	Plans	<input checked="" type="checkbox"/>
	Coach Others	<input checked="" type="checkbox"/>
	Coach Me	<input checked="" type="checkbox"/>
Evaluate	Evaluations	<input checked="" type="checkbox"/>
	Calibration	<input checked="" type="checkbox"/>
	Clarify	<input checked="" type="checkbox"/>
	Distribution Pool	<input checked="" type="checkbox"/>
	Plans	<input checked="" type="checkbox"/>
Learn	Assigned to Me	<input checked="" type="checkbox"/>
	Team Assignments	<input checked="" type="checkbox"/>
	Library	<input checked="" type="checkbox"/>
Monitor	Silent Monitoring	<input checked="" type="checkbox"/>
Reports	Home	<input checked="" type="checkbox"/>
	Templates	<input checked="" type="checkbox"/>
	Scheduler	<input checked="" type="checkbox"/>
	Import New Templates	<input checked="" type="checkbox"/>

Save Reset Cancel

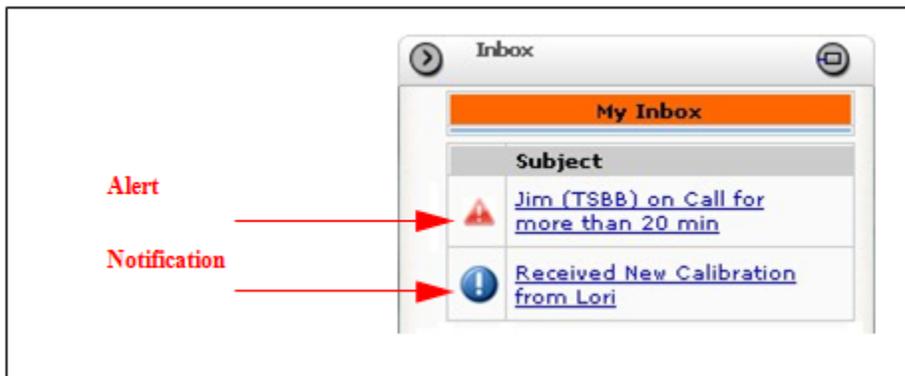
You can also add specific reports to your Favorites list, if desired. Refer to the “Favorite Reports” topic in the *Reports User Guide*.

Inbox (Messaging)

Quality Monitoring's Messaging functionality provides real-time alerts and notifications for numerous pre-defined contact center conditions.

Typically, alerts are triggered by real-time contact center data (e.g., the agent has put the caller on hold too many times), whereas notifications are more informational (e.g., a new eLearning course is available).

Alerts and notifications can be subscribed for delivery to one or more mediums, i.e., VoIP phone, Dashboard Inbox, and email inbox. In addition to these system generated alerts and notifications, custom alert, notifications, and messages can also be broadcast and sent via the same mediums.



Alerts

Alerts are user-configured to provide mission-critical information about contact center conditions to your Inbox. Alerts are generated by the system once a pre-defined threshold value for a certain has been crossed. These include when the number of times a call has been placed on hold exceeds the threshold, when the AHT of the call exceeds the threshold, and so forth.

Calls with too many holds or transfers are good indicators to initiate Silent Monitoring. Refer to the Silent Monitoring chapter for more information.

Notifications

Notifications are user-configured and provide information to your Dashboard Inbox, VoIP phone, or email about system conditions that do not necessarily require your immediate action.

For example, notifications are used to inform you when a new coaching is available or an evaluation is pending.

To select the notifications you want to deliver to your VoIP phone, Dashboard Inbox, or email:

1. Click the **My Profile > Dashboard > Message**.
2. Select the notifications you want delivered to your

3. VoIP phone, Quality Monitoring.
4. Select the frequency to refresh the Inbox to show new notifications by entering a value (in minutes) in the **Inbox Refresh Rate** text area.
5. Click **Save**.

The screenshot shows a web interface with three tabs: 'Favorites', 'Message', and 'Portlets'. The 'Message' tab is active. Below the tabs, there is a text input field for 'Inbox Refresh Rate' with the value '5' and a note '(Minimum Refresh Rate is 5.0 min.)'. Below this is a table with columns for 'Voip Phone', 'Inbox', and 'Email'.

		Voip Phone	Inbox	Email
Monitor	My AHT exceeded by Work Type(mins)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Monitor	Number of holds placed by me in Work Type	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Monitor	My hold duration by Work Type(mins)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Monitor	AHT exceeded by my team in Work Type(mins)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Monitor	No of Holds by Work Type for my team	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Monitor	Hold duration by Work Type(mins) for my team	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Evaluate	Number of evaluations done today for my team by Work Type	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Broadcast Messages

Users with a supervisor designation can broadcast messages to users, which will either display on their VoIP phones or be delivered to their Dashboard Inbox as an alert, notification, or information-only message.

1. To broadcast a message Click **Broadcast** on the Dashboard. The Broadcast Message window appears.
2. Filter who you want to send the message to using the appropriate **Client**, **Site**, **Group**, and **Employee** selections.
3. Select the message format to be broadcast, via **Voip Phone**, **My Inbox**, or **Email**.
4. Select a message type from the **Type** drop-down menu—**Alert**, **Notification**, or **Information**.
5. Enter the message in the **Message** text field.
6. Click **Send**. The message is broadcast to the selected users.

Note: An evaluation plan broadcast message or email is sent only to those users who have initiated, executed, or updated the plan.

Broadcast Message

Client

ALL
Diligent Systems ISP

Site

ALL
Madhapur

Work Type

(ELNKSG)
 (EMBARQ)
 INBOUND
 OUTBOUND
 Tech_Support_Broadband
 Tech_Support_Dailup
 TS(Chat)
 VAS

Group

ALL
 All_Agents_DLGT_QA
 All_Agents_MGNS
 All_Agents_PRNL
 All_Agents_SMRT
 JOHN_DINAKAR_JAKKULA
 Narendra_Reddy_Group
 Sridhar_Grp

Employee

ALL
 John Dinakar Jakkula
 Narendra Reddy
 Padmini Donavalli

Broadcast To

Client : Diligent Systems ISP
 Site : ALL
 Work Type : Tech_Support_Broadband, Tech_Support_Dailup
 Group : ALL
 Employee : ALL

Broadcast on

Voip Phone My Inbox Email

Message

Type Pick One

Portlets

Select the items that appear in the Dashboard portlets—i.e., reports or external links—by clicking **My Profile > Dashboard > Portlets**.

Favorites

Message

Portlets

Favorites

Portlet 1

Portlet 2

My Inbox

Portlet 3

Portlet 4

Portlet	Report	Report Refresh Rate	External Link	External Title
Portlet1	External	0 min.	https://www.mail.knoahsoft.com	KnoahSoft
Portlet2	External	0 min.	http://www.msn.com	MSN
Portlet3	External	0 min.	http://www.knoah.com	Knoah
Portlet4	External	0 min.	http://www.google.com	Google

Adding Reports to Portlets

To add a report to a portlet window, select an existing report from the **Report** drop-down menu. Add reports to all four portlet windows, if desired.

Also, select how often to refresh the report in the portlet window by entering a value (in minutes) in the **Report Refresh Rate** text box.

Adding External Links to Portlets

To add an external website to a portlet window, select **External** from the **Reports** drop-down menu, then enter the website URL in the **External Link** text area.

Enter a title for the external link in the **External Title** text area.

Be sure to specify the full URL when entering an external link, including the **http://** prefix.

Designations

The Quality Monitoring interface is organized around employee designations typically found in contact center operations. Each of these designations has access to a different set of system features (as determined by the System Administrator), and the user interface is customized for each user to support their designation.

The upper-right corner of the Dashboard displays the login name and designation.

A sample reporting structure of designations and their associated departments in a typical contact center are listed in the following tables.

Sample Designations, Management

Designation	Department	Reports To
CEO	Management	Self
Operations Director	Management	CEO
Quality Director	Management	CEO

Sample Designations, Operations

Designation	Department	Reports To
Operations Manager	Operations	Operations Director
Team Leader	Operations	Operations Manager
Agent	Operations	Team Leader

Sample Designations, Quality

Designation	Department	Reports To
Quality Manager	Quality	Quality Director
Quality Leader	Quality	Quality Manager
Quality Agent	Quality	Quality Leader

General Settings

Click on the **My Profile > General** link on the Dashboard to display the personal preferences screen. The first section of this screen contains basic information about the user —name, employee code, hire date, etc.—as created by the System Administrator.

Note: This is the Change Password section.

The **Employee Profile** is also created by the System Administrator, and defines the role within the system as it relates to Call Recording's reporting capabilities. This provides information about:

- The department and site assigned;
- Access to certain groups
- The Work Types assigned (Chat, Voice, etc.);
- The designation within a department.

Silent Monitoring

Silent Monitoring provides real time monitoring capability, allowing you to listen to agent calls in progress. While listening to a call, the user can provide instant email feedback to the agent and also flag the call for quality management evaluation.

If the number of times an agent has put the caller on hold is excessive, this is a good indication that the agent may require monitoring and assistance. Novice agents may require more monitoring and assistance

Only certain employee designations are allowed to monitor calls in progress. The System Administrator has determined which features are available for the various employees and designations in your organization.

Monitoring a Call

1. To silently monitor a call:
 - a. Click **Monitor**. The Silent Monitoring screen appears.
 - b. Use the Basic Search tool in the left navigation pane to filter a list of agents currently on calls. Be sure to select **Show Live Agents**, then click **Search**.

Basic Search

Group
 ▼

Recording
 ▼

Refresh Rate min.

Call Duration Threshold(min.)
 Less Than
 Between &
 Greater Than

Show Live Agents

 Search

- c. A table of all currently active calls is displayed. The table lists the agent’s personal information (name, extension, etc.), as well as the current state of the call (call duration, number of times the call has been put on hold, etc.).

Play	Employee	Extn.	Work Type	Agent Tenure (Wks)	Call Duration	Current State	Current State Duration	Hold Count	ANI Number	Call Type	Recording	Line Instance
	Abhinav Hooda [3257]	70119	OUTBOUND	156	03:46:45	Talking	03:46:45	0	911	Outbound	Yes	LINE - 1
	Abhishek Mittal [Y-492]	70121	OUTBOUND	156	03:47:11	Talking	03:47:11	0	911	Outbound	Yes	LINE - 1
	Abhishek Mohan [Y-664]	70123	OUTBOUND	186	03:47:40	Talking	03:47:40	0	911	Outbound	Yes	LINE - 1
	Abhishek Sharma [Y-423]	70061	OUTBOUND	186	03:47:40	Talking	03:47:40	0	911	Outbound	Yes	LINE - 1
	Abhishek Srivastava [Y-460]	70083	OUTBOUND	185	03:46:46	Talking	03:46:46	0	911	Outbound	Yes	LINE - 1

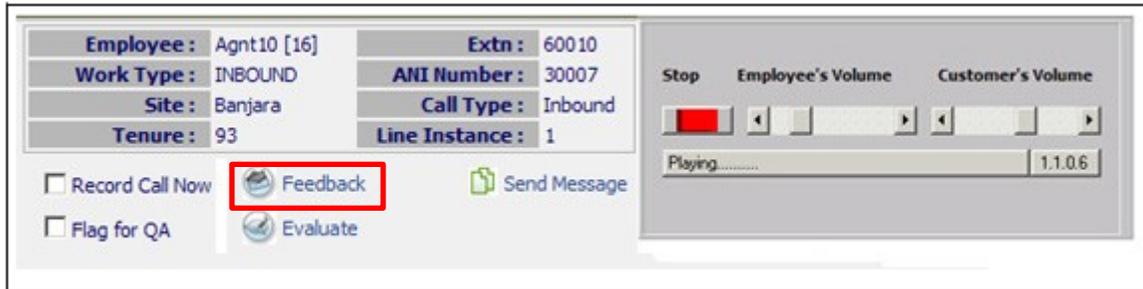
- d. Click the green **Play** icon next to the call to monitor. The Silent Monitoring call window launches and begins to play the call.

Note: Calls with too many holds or transfers are good indicators to initiate silent monitoring for the agent on the call.

Silent Monitoring Call Window

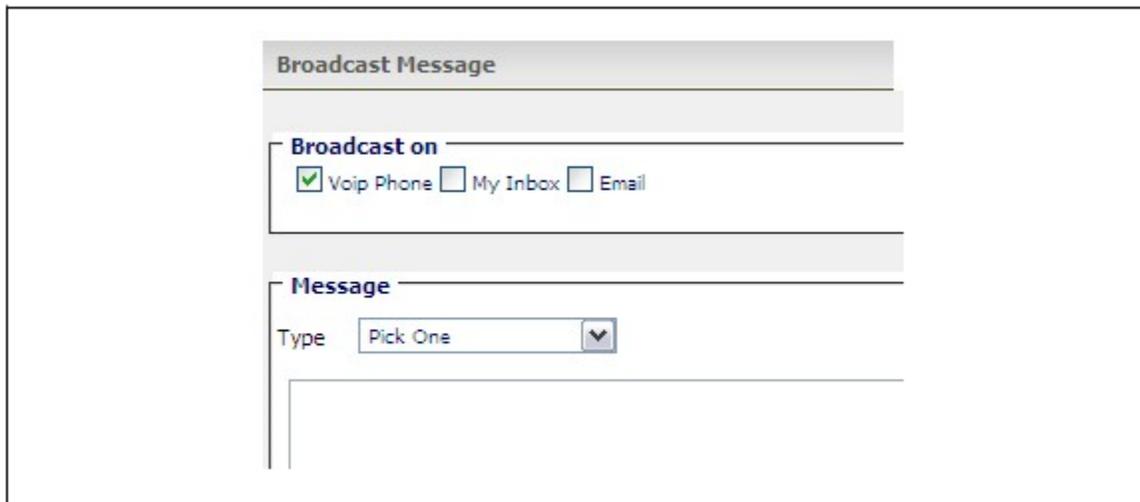
The Silent Monitor call window shows the name and extension of the agent on the call, and screenshots of the agent’s desktop appear in the bottom of the screen during the call.

Also, adjust the volume levels of the agent's and customer's voices, independently, for optimum balanced listening.



Click the **Feedback** icon to launch a separate pane in the window, which allows you to send an email and provide feedback to the agent during the call.

To send a broadcast message to the agent click the **Send Message** icon and then select a Message **Type**. This sends a message directly to the agent's VoIP phone, Dashboard Inbox, or email in real time.



Note: To review any call, select Flag for QA and click Evaluate.

Record Call Now

View the message bar above the call window to monitor a call.

If there is a message noting that the call is not being recorded, select **Record Call**

Now and the call will be recorded.

Note: Depending on system configuration, the call can be recorded either at the time the user makes the selection or from the beginning of the call.

Note: Enablement of Record Call Now is configured by the System Administrator.

Evaluating a Call

To evaluate an agent's performance, in real time, listen to the agent while he/she are on the call.

1. Click the **Evaluate** icon in the Silent Monitoring call window. A separate pane launches in the window.
2. Select an **Issue Type** and **Evaluation Form** from the drop-down menus.

Record ID: Agnt4_MYCLI_BAAB_60004_01112012_094120

* Evaluation Form: Quality

* Issue Type: N/A

Score(Weighted Score):

General Comments

Expand All | Collapse All

		score	Weightage Score (Weightage)		
<input type="checkbox"/> Quality					
Basic Communication Skills	Pick One				
Syntax, Grammar, and Format	Pick One				

3. Click **Expand All** to see all of the selections available to evaluate the call.
4. Select the rating that best corresponds to the agent's performance from the drop-down lists for each selection.
5. Click **Save**. The evaluation is saved and the score displayed. It can now be viewed on the **Evaluate > Evaluations > View Evaluations** page.

Call Recordings

This tab provides a quick view into the call recordings that have occurred in the environment. A user, can view and have access to all the calls recordings of the employees including

inactive employees. An agent with QM Call Recording User permission, can also view recordings.

If a call was transferred or put on hold, this will be reflected in the segment summary screen, and the user can view details about each segment of the call, as appropriate.

Only certain employee designations are allowed to view call recordings.

The System Administrator has determined which features are available for the various employees and designations in your organization.

Play Call Recordings

1. Select **Recordings** from the Dashboard. The Call Recordings screen appears.
2. Use the Basic Search tool in the left navigation pane to filter a list of call recordings (Work Type, Group, SearchBy ANI Number, etc.). Use the **Begins With/Contains/Ends With/Equals** drop-down and associated text box to further refine your search criteria.

Play	Record Id	Employee	Supervisor	Call Start Time	Call End Time	Work Type	Call Duration	Call Type	ANI Number	Archived
	Agnt29_flog1_GRG_50029_08052011_172917_000040_5	Agnt29 [Agnt29]	Sup6	08/05/11 17:29:17	08/05/11 17:29:57	OUTBOUND	00:00:40	Outbound	911	No
	Agnt3_flog1_GRG_50003_08052011_172859_000058_5	Agnt3 [Agnt3]	Sup1	08/05/11 17:28:59	08/05/11 17:29:57	OUTBOUND	00:00:58	Outbound	911	No
	Agnt19_flog1_GRG_50019_08052011_172858_000059_5	Agnt19 [Agnt19]	Sup4	08/05/11 17:28:58	08/05/11 17:29:57	OUTBOUND	00:00:59	Outbound	911	No
	Agnt22_flog1_GRG_50022_08052011_172854_000103_5	Agnt22 [Agnt22]	Sup5	08/05/11 17:28:54	08/05/11 17:29:57	OUTBOUND	00:01:03	Outbound	911	No
	Agnt7_flog1_GRG_50007_08052011_172850_000107_5	Agnt7 [Agnt7]	Sup2	08/05/11 17:28:50	08/05/11 17:29:57	OUTBOUND	00:01:07	Outbound	911	No
	Agnt13_flog1_GRG_50013_08052011_172846_000111_5	Agnt13 [Agnt13]	Sup3	08/05/11 17:28:46	08/05/11 17:29:57	OUTBOUND	00:01:11	Outbound	911	No
	Agnt30_flog1_GRG_50030_08052011_172845_000112_5	Agnt30 [Agnt30]	Sup6	08/05/11 17:28:45	08/05/11 17:29:57	OUTBOUND	00:01:12	Outbound	911	No
	Agnt1_flog1_GRG_50001_08052011_172840_000117_5	Agnt1 [Agnt1]	Sup1	08/05/11 17:28:40	08/05/11 17:29:57	OUTBOUND	00:01:17	Outbound	911	No
	Agnt5_flog1_GRG_50005_08052011_172834_000123_5	Agnt5 [Agnt5]	Sup1	08/05/11 17:28:34	08/05/11 17:29:57	OUTBOUND	00:01:23	Outbound	911	No
	Agnt4_flog1_GRG_50004_08052011_172825_000132_5	Agnt4 [Agnt4]	Sup1	08/05/11 17:28:25	08/05/11 17:29:57	OUTBOUND	00:01:32	Outbound	911	No
	Agnt25_flog1_GRG_50025_08052011_172823_000134_5	Agnt25 [Agnt25]	Sup5	08/05/11 17:28:23	08/05/11 17:29:57	OUTBOUND	00:01:34	Outbound	911	No
	Agnt18_flog1_GRG_50018_08052011_172817_000140_5	Agnt18 [Agnt18]	Sup4	08/05/11 17:28:17	08/05/11 17:29:57	OUTBOUND	00:01:40	Outbound	911	No
	Agnt10_flog1_GRG_50010_08052011_172814_000143_5	Agnt10 [Agnt10]	Sup2	08/05/11 17:28:14	08/05/11 17:29:57	OUTBOUND	00:01:43	Outbound	911	No
	Agnt20_flog1_GRG_50020_08052011_172811_000146_5	Agnt20 [Agnt20]	Sup4	08/05/11 17:28:11	08/05/11 17:29:57	OUTBOUND	00:01:46	Outbound	911	No

3. A table of all call recording is displayed. The table lists the agent’s personal information, as well as details about the call (Work Type, call duration, etc.).
4. Click the green **Play** icon for the call recording you want to display to launch the Segment Summary window. (Calls noted with a **red** Play icon indicate that the agent ended the call; **green** indicates that the customer ended the call; calls with associated comments have a notepad icon overlaid upon the Play icon.)

Segment Summary Window

The top portion of the Segment Summary window displays a Call Comments text box, for the User to add comments about the call.

Enter the comment and click **Submit**.

The comment about the call appears in the Previous Comments table. Calls with associated comments have a notepad icon overlaid upon the **Play** icon on the Call Recordings screen.

• Call Comments added successfully !!

Call Comments

[Submit](#)

Previous Comments

CEO 12/27/2011 02:50:00	Call has three holds
CEO 12/22/2011 12:16:35	Test Comment 12345

The left portion of the Segment Summary screen shows details about the call recording, related to customer interaction, segment details, and hold details. The right portion of the screen allows the User to listen to the call recording.

Customer Interaction	
Start Time	03/08/2010 19:55:56
End Time	03/08/2010 19:56:33
Dialed in From(ANI)	32
Dialed To(DNIS)	50015
Duration	00:00:37
Total No of Holds	2
Total Hold Time	00:00:06
Total No of Transfers	0
Total No of Conferences	0

Segment Details	
Record ID	18_KSOFT_MaAB_50015_03082010_195556_000037_0
Start Time	03/08/2010 19:55:56
End Time	03/08/2010 19:56:33
Duration	00:00:37
Emp Code	18
Employee Name	KAgnt2
Extension	50015
Location	Madhapur
Group	SUP6_K_GROUP, All Employees
Supervisor	Sup6_K
Channel	Voice
Screen	No
Number of Holds	2
Total Hold Time	00:00:06
Transfer No	-

Hold Details	
Hold1	
Start Time	03/08/2010 19:56:14
End Time	03/08/2010 19:56:20
Hold Duration	00:00:06
Talking to Agent Id	-
Agent Name	-
Extension	-
Dialed To	50015

The data in the Segment Details and Hold tables will change to reflect the information in whichever color-coded segment you've clicked on in the Segment Summary Screen.

Segment Summary Screen (right)



Evaluate

Call Recording's Evaluate feature leverages the multi-channel recording and archiving capabilities of Call Recording, for both voice and e-support transactions, to evaluate employee performance.

It offers the flexibility to evaluate voice transactions, and makes it easy to search and playback archived calls for evaluation.

Evaluate Tasks

The Evaluate module consists of numerous features to use to evaluate the calls and employees in the contact center. These include:

- **Value Sets and Issue Types**—used to create evaluation scoring variables.
- **Form Builder**—used to create the forms used in evaluations.
- **Scoring Patterns**—used to assign either a raw, weighted, or combination raw and weighted scoring method to the evaluation.
- **Evaluation Plan**—used to create evaluation plans, or automatically assign evaluations to a reviewer, thereby making calls available in the distribution pool for assignment.
- **Distribution Pool**—used to assign evaluations for review.
- **Evaluations**—used to execute transaction-specific employee evaluations.
- **Calibration**—used to create simultaneous evaluation plans for multiple evaluators, to measure the effectiveness of evaluations performed by

QA reviewers.

Adding Value Sets

Value sets are the scoring variables used in the evaluations—yes/no, range selections, etc. They are added to an evaluation during the form building process.

1. To create a new value set for an evaluation, or to edit an existing set Click **Evaluate > Form Builder > Value Set**. A list of all current value sets appears.
2. Add new value sets or edit existing ones, as required.

* Value Set Name

Base Value Set

Description

Status Active Inactive

List of Value Sets

Value Set Name	Base Value Set	Status
EGP ValueSet		Active
Excellent	EGP ValueSet	Active
Good	EGP ValueSet	Active
Poor	EGP ValueSet	Active
Yes - No ValueSet		Active
N/A	Yes - No ValueSet	Active
No	Yes - No ValueSet	Active
Yes	Yes - No ValueSet	Active

Adding Issue Types

Issue types are used during evaluations to reflect the specific nature of typical contact center issues—billing, policies, etc.

1. To create an issue type Click **Evaluate > Form Builder > Issue Type**. A list of all current Issue Types appears.
2. Enter a name and description for the issue type, then click **Save**. The Issue Type is now available for selection during an evaluation.

Building an Evaluation Form

The first step in the Evaluate process is to create evaluation forms using the Form Builder. Once created, a form is available for use in an evaluation plan and an evaluation. A User can also:

- Assign conditional criteria to a form, where the score is adjusted based on criteria failure.
- Assign scoring patterns—raw, weighted or both.
- Associate evaluation criteria to specific metrics, so that the criteria's score can be used in a scorecard (Refer to the "Creating a New Metric" topic in Chapter 6, Analyze for more information.)

Note: An evaluation form will remain inactive until it defines value sets and scores.

1. To build an evaluation form Click **Evaluate > Form Builder > Form Builder**.
2. Click your company name (notated with a red button) in the left navigation pane. (e.g., Knoahsoft). A blank **Evaluation Form** pane appears, along with a list of forms you have previously created.
3. Enter a **name** and **description** for the form.
4. (*optional*) Enter a numeric value in the **Re-Evaluation Lock Out Time (In Days)** field for the number of days a previously completed evaluation can no longer be re-evaluated, from the day it was completed.

The lockout value should be equal to or greater than the clarification threshold, as set by the System Administrator, so that an evaluator can modify a score after a clarification has been raised.

Evaluation Plans

Evaluation plans are used to track agent performance from recorded calls. They are designed to provide insight about the performance improvements being made in your contact center operations.

Evaluation plans can be used to define the target number of evaluations that need to be performed for an agent, and the User can define which calls to choose for evaluation. The User can also automatically distribute evaluation plans to QA agents and reviewers, to save time and improve workflow.

Evaluation plans are defined by Work Type, and multiple evaluation plans can be created for a single Work Type. Once created the evaluation plan, executes action for the selected employees and push calls through the distribution pool. (See the “Distribution Pool” topic, below).

All the employees belonging to assigned groups can be added to a plan. Only those Evaluation Plans created by the logged in user are listed in the Evaluate module screens.

1. To create an evaluation plan Click **Evaluate > Plans > New Plan**. The Define Plan screen appears.

The screenshot shows the 'New Evaluation Plan' screen with a progress bar at the top indicating five steps: 1. Define Plan, 2. Employee Target, 3. Call Selection Criteria, 4. Assign Calls, and 5. Review and Save. The 'Define Plan' step is currently active. Below the progress bar, there are input fields for 'Plan Name' and 'Description', a 'Status' section with radio buttons for 'Active' (selected) and 'Inactive', and 'Reset' and 'Cancel' buttons at the bottom.

2. Define the plan by:
 - a. Entering a **Name** and **Description** for the plan (default time period is one week).
 - b. Making it either Active or Inactive.
3. Click **Next** or **Employee Target**. The Employee Target screen appears.

Note: The default Plan Period is one (1) week, but can be changed on the Call Selection Criteria screen.

SL.No.	Assigned	Employee	Supervisor	Tenure Weeks	Total Assigned	From	To	Quality Score	AHT (hh:mm:ss)
1		Dan Reed [991021]	Tom Lee	93	2	06/19/2009	07/19/2012	90.82	00:04:57
2		Dave Hall [991011]	James Smith	59	2			96.25	00:03:05
3		Karen Nelson [991020]	Tom Lee	88	2			96.79	00:02:40

4. Select the employees to assign to the plan from the **Department** and **Group** lists.
5. To further filter search results by how long the employee has been with the company, select an inequality variable from the **Tenure weeks** pull-down menu (less than or equal to, or greater than or equal to) and then enter a numeric value in the text field.
6. Click **Go**. A list of employees who match the search criteria is returned.
7. Enter the number of evaluations that must be performed for an employee, within the plan period, in the **Assigned** text field. This field is auto-populated from the **Work Type Target** entry on the previous screen, and can be changed if desired.

Note: The Total Assigned field lists the total number of plans that the employee currently has assigned to them.

Use the **From** and **To** search fields to view an agent’s quality score for the specified period, to assist you in determining employee-specific targets. The User can also click on the Employee’s name in the table to launch the 4-Week Summary window for the employee.

8. Click **Next**. The Call Selection Criteria screen appears.

Call Selection Criteria

Use Call Selection Criteria Yes No

Date Range

From  To 

Last Days

Selection Criteria

Select WorkType

- CustomerSupport
- InstallSupport
- OUTBOUND
- Partner_Tech_Support
- Tech_Support_Inbound
- UpgradeSupport

Random

CTI Data

9. To further refine the data to be used in the evaluation plan, as per your business conditions, select **Yes** for **Use Call Selection Criteria**, then select the criteria—**Date Range** (i.e., play period), **Work Type**, and **Random** or **CTI Data** (described below).
10. (optional) Select **CTI Data** for the plan—**Call Flow** (inbound or outbound), **Call Duration** (see note, below), and **Hold Duration**. When setting up Call Duration parameters, you define short, normal, and long call lengths and how you want to mix those call lengths in the plan. For example, you may define short call length as being less than 1 minute, and you want 50% of the calls in the plan to be of that length.

CTI Data

Call Flow Both

Call Duration

Short Calls % Less Than min

Normal % Between min and min

Long Calls % Greater Than min

Hold Data

No. of Holds (>=)

Hold Duration (>=) : : (hh:mm:ss)

(<=) : : (hh:mm:ss)

11. Click **Next**. The Automatic Distribution page appears.

Assign Calls

Default Evaluation Form Pick One

Automatic Distribution Enabled Yes No

Sl.No.	Assigned	Reviewer	Total Assigned
1	<input type="text"/>		0
2	<input type="text"/>		0
3	<input type="text"/>		0

Distribute Leftout Calls Yes No

12. Select a default evaluation form for evaluation plans from the **Default EvaluationForm** drop-down menu.
13. Select **Yes** for **Automatic Distribution Enabled** to enable automatic distribution of evaluation plans to the distribution pool. This automatically pushes calls to the Evaluation | New Evaluation | To Be Reviewed page of reviewers, removing the step in the manual distribution pool process where reviewers must accept an assigned call.
14. Enter the number of calls that each reviewer will be assigned in the **Assigned** text area. The **Total Assigned** column populates with the total number of assigned calls for each reviewer from all other evaluation plans (including those assigned on this page).

15. Select **Yes** for **Distribute Leftout Calls** if you want to distribute extra calls to the distribution pool. For example, if the total number of calls you have assigned is 600, but you have 750 calls, the extra 150 calls are pushed to the distribution pool for manual assignment.

Note: An evaluation plan broadcast message or email is sent only to those users who have initiated, executed, or updated the plan.

16. Click **Next**. The Review and Save page appears. Review the data for accuracy, then either:
 - Click **Save& Run Plan** to initiate the Evaluation Plan, or:
 - Click **Save&Schedule** to schedule the plan to run at a later time (see below)
17. The plan appears in the table on the **Evaluate > Plans > View Plan(s)** page.

Plans Scheduler

Schedule Pattern

Define a schedule that runs on Hourly, Daily, Weekly, Monthly or One-Time basis.

Hours
 Daily
 Weekly
 Monthly
 Once

Run the Scheduler every hrs mins

Starts Everyday At hrs mins AM PM

Specify the date to start and optionally end this schedule

Begin Schedule On

End Schedule On

Modify the scheduler by first viewing the evaluation plan, then clicking the **Yes** or **No** link in the **Scheduler Enabled** column to launch the scheduler.

Distribution Pool

The Distribution Pool page is used to view and select calls or assign calls to a reviewer. The user can view calls that have been assigned for evaluation to others, by clicking the **Assigned** link.

1. To assign a call to a reviewer enter search parameters in the **Basic Search** portion of the screen, then click **Search**.
2. Select the calls you want to assign, select a reviewer from the **Reviewer** drop-down menu, then click **Assign**.
3. The call appears on your Assigned page, and also in the To Be Evaluated section of the assigned reviewer's Evaluations page.

Note: To release a call from an assigned evaluation, select the call from Assigned page, then click Release.

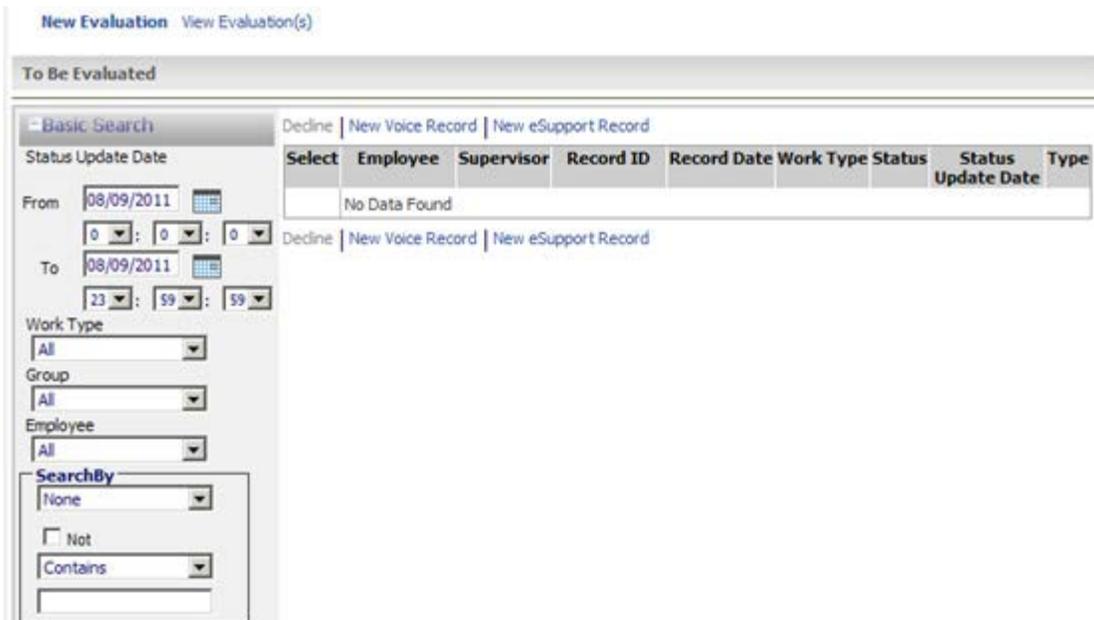
Evaluations

The **Evaluations > New Evaluation** page is used to view calls, including those that have been assigned . The **Evaluations > View Evaluations** page is used to view completed evaluations. The User can view the assigned recorded calls and is able to evaluate those calls.

The User can also evaluate a call or eSupport transaction that has not been assigned by clicking the **New Voice Record** or **New eSupport Record** links on the New Evaluations page, and proceeding with the evaluation.

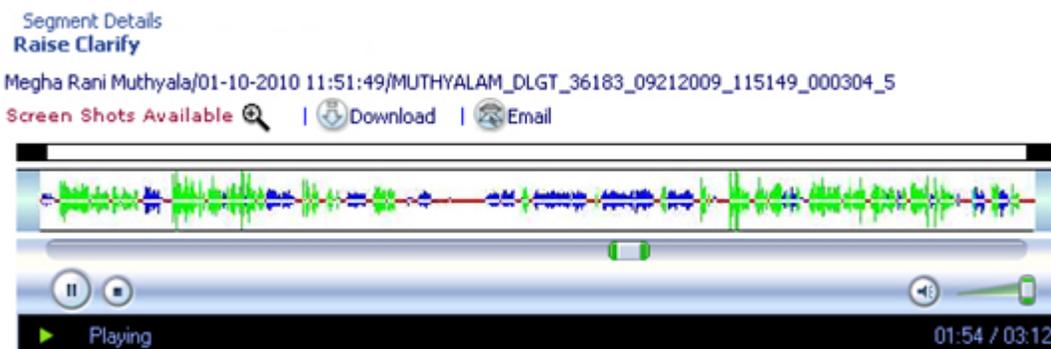
To decline an evaluation review, select the call, then click **Decline**. The call is pushed back to the Distribution Pool for re-assignment.

Note: The User can decline the review, when appropriate.



To listen to calls available for your evaluation:

1. To listen to calls available for your evaluation enter search parameters in the **Basic Search** and **Advanced Search** portion of the screen, then click **Search**. A list of assigned evaluations that match your search criteria appears.
2. Select the call you want to review by clicking its **Record ID** link. The Evaluation page appears, consisting of two panes: the recorded call pane, which contains a recording of the call along with its associated screenshots, and the evaluation pane, where you can evaluate the call. Click on any column heading (Employee, Status, etc.) to sort that column's results (alphabetically, by date, etc.).
3. Click the **Screen Shots Available** magnifying glass icon to launch a second, larger window which displays a full screen view of the associated screenshots.



*Note: To view details about the recording (date, duration of call, etc.) click the **Segment Details** link.*

- Review the recorded conversation between the agent and caller by clicking the blue **Play** icon. During playback, screenshots of the agent's desktop dynamically appear in the transaction details section of the screen, as captured by the system during the call, if screen capture was enabled.

Note: Your System Administrator may have elected to not record screenshots for every voice transaction, to save on data storage.

- Click the pause icon during playback to open the Comment window. Add a text comment to the recorded conversation, if desired (see below).
- To stop playback without displaying the comment window, click the stop icon.

Adding Text Comments

Comments are a good way to provide an agent with feedback about their verbal skills, such as pronunciation and tone.

Click Pause during a voice transaction playback, the Comment pop-up window launches. From this screen enter text feedback about the conversation. Add any number of comments to a single transaction.

Text Snippet: From To

* Snippet Caption

Play Transaction

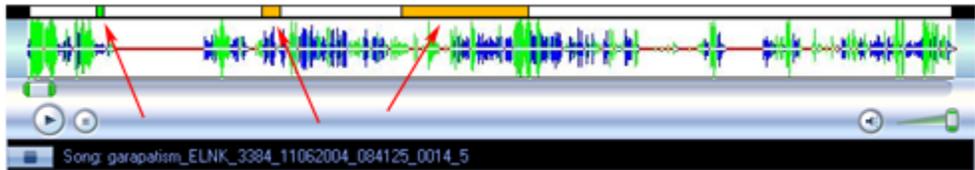
Text Comments

Comment Severity Low Medium High

- To add a text comment enter feedback text in the Text Comments field.
- Select a Comment Severity (green for **Low**, yellow for **Medium**, red for **High**).

3. Enter a name for the comment in the Snippet Caption text field, then click **Save**. A bar appears in the timeline above the audio waveform, indicating the position of the comment in the timeline. The bar is color-coded, based on the Comment Severity selected.

Note: Certain pop-up blocking software may block the Comment window from launching. To prevent this, disable the pop-up blocking software.



Note: You can always edit the text comment, if desired, as long as the transaction has not been evaluated (i.e., scored).

Snippet Begin And End Points

The first time to pause a transaction, the snippet begins (or from) point is marked by the system as the beginning of the recording (00:00), and the end (or to) point is marked where you are paused (e.g., 01:12 for one minute twelve seconds). The system tracks snippets in contiguous fashion. So, if you save a snippet with a begin point of 00:00 and an end point of 01:12, the next snippet begin point will be 01:12.

The User can always reset the begin point by clicking **Play Transaction** in the Comments window and then pausing the transaction at the desired new begin point; or sliding the time line indicator to the desired new begin point.

Viewing Or Playing Back A Saved Comment

1. To view a saved text comment click on the color-coded bar in the timeline above the audio waveform to open the Comment window.
2. Playback the transaction, and the Comment window will pop-up at the appropriate time in the timeline. Saved text comments appear in the Text Comments text field.

Note: You can always delete a comment by clicking Delete, as long as the transaction has not been evaluated (i.e., scored).

Downloading a Transaction

To download the transaction (in either WAV, MP3, or WMV format) click the **Download** icon in the recorded call pane, and then select a download format from the Download Transaction screen.

Voice Case Id MUTHYALAM_DLGT_36183_09212009_115149_000304_5

* Purpose

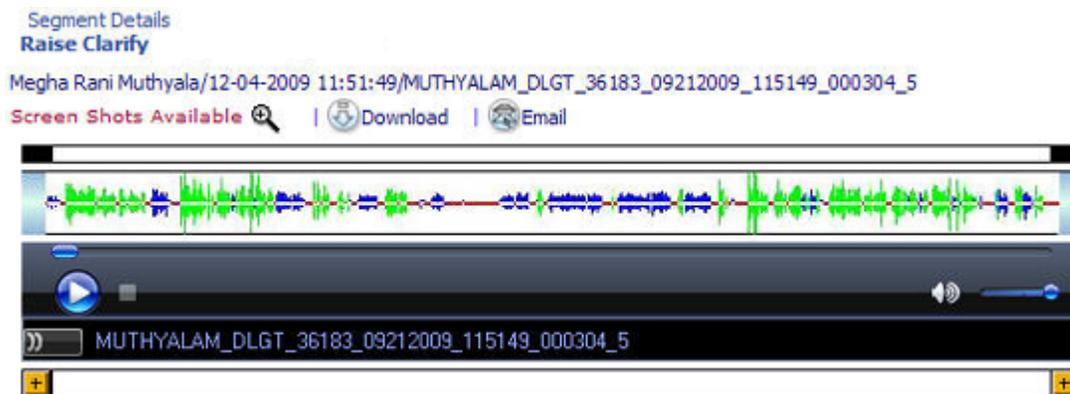
WAV (Audio only)
 MP3 (Audio only)
 WMV (Audio and Screens)

Raise Clarify

Allow the agent to ask for clarification about an evaluation from an evaluator, after an evaluation has been performed.

The system provides for a series of back and forth feedback notes between the agent and evaluator until the clarification is final and accepted.

1. To initiate a new clarification click **Raise Clarify** in the recorded call pane of the evaluation screen. The New Clarification screen appears.



2. Enter comments in the **Your Comments** text area for the appropriate performance criteria.
3. Click **Save**. A notification is sent to the evaluator, and the clarification appears in the evaluator's **Clarify | List** page, with a clarification status of Created.
4. The evaluator reviews the comments, adds their comments in the **Your Comments** text area, then clicks **Review**. A notification is sent to the initiator of the clarification, and the clarification status is updated to Review.

New Clarification						
Record ID	Evaluation Form	Evaluated Date	Evaluated By	Score	Clarification Raised On	Status
KAgt1_KS_MADH_35013_09292009_120354_000049_0	Quality	09/29/09 17:58:30	QMgr1_KV	91.0 (91%)	01/07/10	NEW

Save Cancel

- Transfer - Good Better - 25.0/34.0

Your Comments :

QMgr1_KV
09/29/2009 17:58:30 -

- Upsell - Yes - 15.0/15.0

Your Comments :

QMgr1_KV
09/29/2009 17:58:30 -

- Communication - Yes - 51.0/51.0

Save Cancel

The initiator and evaluator can exchange comments in this method, until the clarification is final and accepted.

Evaluating a Call

1. To evaluate a call open and listen to the call, as described above.
2. Select an **Evaluation Form** from the drop-down menu in the evaluation pane.
3. Select an **Issue Type** from the drop-down menu, to note the nature of the transaction.

Evaluation Form	Reviewer	Evaluation Status	Evaluation Date	Assigned Course/Quiz
Agent Form	Joe Jones	EVALUATED	12/18/11 10:30:50	-

* Evaluation Form:

* Issue Type:

Score(Weighted Score): General Comments

[Expand All](#) | [Collapse All](#)

	Score	Weighted Score (Weightage)	
<input type="checkbox"/> Call Procedure			
<input type="checkbox"/> Opening Verification			
Did agent demonstrate good product knowledge	<input type="text" value="Pick One"/>		
Verification Process followed	<input type="text" value="Pick One"/>		

4. Click **Expand All** to reveal all of the performance criteria groups. Click the question mark icon to view explanations of the scoring criteria and how you are expected to appropriately rate an agent’s performance.
5. To score an agent on a particular criteria, select the rating that best corresponds to the agent’s performance from the drop-down list. (You may be prompted to write a explanatory comment if you give an agent a negative score on a particular criteria. Click the notepad icon to add a comment.)
6. Once you’ve made all your scoring selections, click **Save**. The agent’s total performance score is automatically calculated by the system (according to the weights set up by the form creator) and appears in the **Score** box.

Note: If your evaluation form was created so that a quiz or course must be assigned for a particular result of a particular performance criteria selection (e.g., select Poor for the criteria), then the Assigned Courses and Quizzes window will automatically launch after saving the evaluation. See “Assigned Courses and Quizzes” topic, below, for more information.

7. you’re the rating selections and the score are archived with the transaction, for reporting and future reference. Subsequent changes to scores can be made only by employees with specific supervisory roles.

Note: The User can score a transaction with an evaluation form one time only, but a different user can evaluate the same transaction with the same form. Also, the User can evaluate the same transaction with different evaluation forms, if desired.

Assigned Courses and Quizzes

The evaluation form can be designed so that a quiz or course must be assigned (i.e., is mandatory) for a particular result of a particular performance criteria selection (e.g., select Poor for the criteria).

New mandatory courses and quizzes are always listed in **green** font.

When the criteria is selected and the evaluation is saved, the Assigned Courses and Quizzes window will automatically launch. The User can then view all of the eLearning courseware currently assigned and add new ones, if desired.

1. To assign a course or quiz, The Assigned Courses and Quizzes window (below) shows all the current courses and quizzes assigned for this form in the Pre-Assignments section.

Pre-Assignments

Note : The Courses and Quizzes (mandatory) highlighted in 'Green' are assigned to the agent for this evaluation

Course

Via	Assignment Id	Course	Assigned By	Assigned Date	Due Date	Work Type	Is Quiz Associated	Status
No Course Available								

Quiz

Via	Assignment Id	Associated Course	Quiz	Max Duration (in min)	Quiz Score	No.of Questions	Assigned By	Assigned Date	Due Date	Work Type	Status
Eval	167	-	Editing Quiz10	150	0.0	4	CEO	12/16/11 01:09:06		OUTBOUND	NEW
eLearn	56	-	Quiz1	40	0.0	4	CEO	12/02/11 13:04:36	12/12/11	TS(Chat)	NEW

To Be Assign

NonMandatory Learn Courses Quizzes

Course4
Editing Quiz2

2. Select the course or quiz you wish to assign to the evaluation from the **NonMandatory Learn Courses Quizzes** list.
3. Click **Assign**. The course or quiz is assigned to the evaluation.
4. Close the window and return to the evaluation.

Note: You can view the actual courses and quizzes by clicking View under the Assigned Course/Quiz column at the top of the evaluation pane.

Calibrations

The Calibration module measures a single transaction among multiple users, to ensure that all managers and supervisors are using the evaluation form correctly and applying the quality criteria consistently.

1. To create a new voice calibration select **Calibration > New Voice Calibration**. The New Voice Calibration screen appears.

The screenshot shows the 'New Voice Calibration' interface. At the top, there are navigation tabs: 'View Calibrations', 'New Voice Calibration', and 'New eSupport Calibration'. Below this is a progress bar with two steps: '1 Select Record' and '2 Assign'. The main area is titled 'New Voice Record' and contains a search form on the left and a table on the right. The search form includes fields for 'Record Date' (From: 08/09/2011, To: 08/09/2011), 'Work Type' (All), 'Group' (All), 'Employee' (All), and 'SearchBy' (None). The table has columns: Employee, Supervisor, Record Id, Call Start Time, Call End Time, Work Type, Call Duration, Call Type, All Number, and Archived. The table content is 'No Data Found'.

2. Use the **Basic Search** and **Advanced Search** tools to filter your transaction records as required, then click **Search**. A list of records that match the search criteria appears.
3. Select the transaction to calibrate then click **Next**.

The screenshot shows the 'New Voice Calibration' interface at the 'Assign' step. The progress bar shows '1 Select Record' and '2 Assign'. Below the progress bar is a table for selecting a moderator and reviewer. The table has columns for 'Select All', 'Select None', and 'Select Moderator Reviewer'. The table content is as follows:

Select All	Select None	Select Moderator Reviewer
<input checked="" type="checkbox"/>	<input type="radio"/>	CEO
<input type="checkbox"/>	<input type="radio"/>	Sup1
<input type="checkbox"/>	<input type="radio"/>	Sup2

At the bottom of the screen, there are additional options: '* Evaluation Form' (Pick One), 'Due Date' (12/30/2011), and 'Lock On Due Date' (checkbox).

4. Select the reviewers for the calibration from the list.
5. Select a Moderator for the calibration. A moderator is an experienced QA agent whose evaluations are highly regarded within the contact center, whose scores can be used as a benchmark comparison against the other reviewers.
6. Select the Evaluation Form to be calibrated and enter a Due Date for the calibration.
7. Select **Lock On Due Date** to ensure that users cannot perform a calibration beyond the due date.
8. Click **Save**. The transaction now appears in the To Be Evaluated tab and in the reviewers inbox, to be evaluated.
9. To create a new eSupport calibration select **Calibration > New eSupport Calibration**. The

New eSupport Calibration screen appears.

The screenshot shows the 'New eSupport Calibration' interface. At the top, there is a header 'New eSupport Calibration' and a progress bar with two steps: '1 Select Record' and '2 Assign'. Below the progress bar, there are several input fields: 'Work Type' (dropdown menu), 'Group' (dropdown menu), 'Employee' (dropdown menu), 'Record Date' (text field with a calendar icon, showing '11/01/2009'), 'Record ID' (text field), and 'Transaction Content' (text area).

10. Select a Work Type, Group, Employee, and Record Date.
11. Enter a Record ID and information about the record in the **Transaction Content** text area.
12. Click **Next**. The Assign screen appears.

New eSupport Calibration

1 → 2
 Select Record Assign

Select All Select None		Select Moderator Reviewer
<input checked="" type="checkbox"/>	<input checked="" type="radio"/>	CEO
<input type="checkbox"/>	<input type="radio"/>	Sup1
<input type="checkbox"/>	<input type="radio"/>	Sup2

* Evaluation Form Due Date Lock On Due Date

13. Select the reviewers for the calibration from the list.
14. Select a Moderator for the calibration. A moderator is an experienced QA agent whose evaluations are highly regarded within the contact center, whose scores can be used as a benchmark comparison against the other reviewers.
15. Select the Evaluation Form to be calibrated and enter a Due Date.
16. Select **Lock On Due Date** if you want to ensure that users cannot perform a calibration beyond the due date.
17. Click **Save**. The calibration now appears in the To Be Evaluated tab and in the reviewers inbox, to be evaluated.

Analyze

Call Recording's Analyze feature measures and analyzes employee performance across all contact centers through the creation and maintenance of graded scorecards.

Supervisors and agents can then use a scorecard to help develop employee objectives, set performance expectations, and so forth. Any user with a manager designation can create a scorecard.

Metrics

Metrics are broad-based categories of contact center performance measurement.

Metrics have a scale (either decreasing or increasing) and minimum and maximum values. For example, the Average Hold Time (AHT) metric consists of a decreasing scale, since it is a metric you want to see decrease for an agent.

System Metrics

Call Recording's system default metrics consist of typical contact center performance measurements, which are used in the creation of scorecards.

System metrics include:

- AHT
- Number of coachings
- Number of eLearnings
- Number of evaluations
- Number of Inbound Calls
- Number of Outbound Calls
- Quality Score
- Quiz Score
- Survey score

The User can edit but not delete system metrics.

Associating Metrics with Evaluation Criteria

Evaluation criteria can be associated to a system metric or custom metric (see below), if desired. This allows the evaluation criteria's score to be used in a scorecard.

Refer to the "Building an Evaluation Form" topic in Chapter 5 Evaluate, for information on how to associate evaluation criteria with metrics.

Creating a New Metric

1. To create a new custom metric click **Analyze > Metric Library > New Metric**.

The screenshot shows a web-based form titled "New Metric" within a "Metric Library" tab. The form contains the following fields and options:

- Name:** A text input field.
- Description:** A larger text area with scrollbars.
- Scale:** A dropdown menu currently showing "Pick One".
- Metric Data Source:** Two checkboxes: "Data Import Spreadsheet" and "Evaluation".
- Metric Association:** Three checkboxes: "Department", "Designation", and "Employee".
- Metric Calculation:** A dropdown menu currently showing "Pick One".
- Minimum value:** A text input field.
- Maximum Value:** A text input field.
- Status:** Two radio buttons: "Active" (selected) and "Inactive".

2. Enter and name and description for the metric, then the following data:
- **Scale**—Select either **Increasing** or **Decreasing**, as per the function of the metric. For example, a metric that measures the number of calls an agent handles may be considered a metric whose value should increase.
 - **Metric Data Source**—Select one of the following:
 - **Data Import Spreadsheet**—The metric value will be entered into the system via spreadsheet upload (see “Data Upload Scheduler,” below).
 - **Evaluation**—The metric value will be entered into the system based on the evaluation criteria scores for criteria associated with metrics.
 - **Metric Association**—Select applicable metric associations:
 - **Department** —Metric value is applicable at the department level and the metric is listed in the departments spreadsheet.
 - **Designation**—Metric value is applicable at a designation level and the metric is listed in the designations spreadsheet.
 - **Employee**—Metric value is applicable at the employee level and the metric is listed in the employee spreadsheet.

If all three checkbox options are enabled, the metric will be available in all three spreadsheets.

- **Metric Calculation**—Select how the metric value will be calculated, by **Sum**, **Average**, or **Median**, as follows:
 - To use the addition of all scores, select **Sum**.
 - To use the average value of all scores, select **Average**.
 - To use the middle value of all scores, select **Median**.

- **Minimum Value**—Minimum acceptable value for the metric.
- **Maximum Value**—Maximum acceptable value for the metric.

Some system metric calculation types are non-editable (e.g., AHT is always average; Inbound Calls is always sum).

3. Click **Save**. The metric is available for use in a scorecard.
4. To view a list of your metrics, click **View Metrics**.

The screenshot shows a web interface with a navigation bar containing 'Metric Library', 'Scorecard Builder', and 'Data Upload Scheduler'. Below the navigation bar, there are tabs for 'View Metrics' and 'New Metric'. The main content area is titled 'List of Metrics' and includes a 'Basic Search' section with dropdown menus for 'Created/Updated By' (set to 'All') and 'Status' (set to 'Active'), along with a 'Search' button. To the right of the search section is a 'Delete' button. The main part of the interface is a table with the following data:

Select	Metric	Scale	Min Value	Max Value	Created/Updated By	Status
<input type="checkbox"/>	AHT	Decreasing	0.0	100.0	System	Active
<input type="checkbox"/>	No. of Coachings	Increasing	0.0	100.0	System	Active
<input type="checkbox"/>	No. of eLearnings	Increasing	0.0	100.0	System	Active
<input type="checkbox"/>	No. of Evaluations	Increasing	0.0	100.0	System	Active
<input type="checkbox"/>	No. of Inbound Calls	Increasing	0.0	100.0	System	Active
<input type="checkbox"/>	No. of Outbound Calls	Increasing	0.0	100.0	System	Active

You cannot edit, delete, or de-activate a metric that is currently being used in a KPI or scorecard.

Use a Scorecard

Every contact center has its own set of Key Performance Indicators (KPIs) that it uses to reflect the overall well-being of the organization. Scorecards provide a systematic approach to measure, monitor, and act upon your KPIs, to better track and manage the performance of your contact center staff.

1. To build a scorecard; click **Analyze > Scorecard Builder > New Scorecard**.
2. Define the scorecard as follows:
 - **Name**—Unique identifying name for scorecard
 - **Description**—Brief description of scorecard’s function
 - **Work Type**—Work Type the scorecard will measure
 - **Groups**—Groups the scorecard will report on
 - **Designations**—Designations the scorecard will report on
 - **Handle Null Values**—Select one of the following for how the scorecard will process null values:
 - **Range Minimum Value**
 - **Range Maximum Value**
 - **Range Average Value**
 - **Zero**
 - **Ignore Null and Scale Up**



* Name

Description

WorkTypes

Groups

Designations

3. Click **Next**. The **KPIs and Metrics** page appears.

Select	Metric ID	Metric	Weight (%)	Min Score (%)	Max Score (%)	Target	Metric Display Order
<input type="checkbox"/>	m1	AHT	20	0.0	100.0	5.0	1
<input type="checkbox"/>	m2	Adherence (%)	20	0.0	100.0	97.0	3
<input type="checkbox"/>	m3	Occupancy (%)	20	0.0	100.0	97.0	5
<input type="checkbox"/>	m4	Attendance (%)	20	0.0	100.0	97.0	2
<input type="checkbox"/>	m5	Availability (%)	20	0.0	100.0	97.0	4

4. Click **[+] Add KPI** to add a KPI, then enter the following data:

- **KPI**—Name of KPI
- **Weight**—Assigned weight (note: sum of all KPIs must equal 100).
- **Formula**— The weighted scores of all KPIs in a report are calculated based on this formula—add (+), subtract (-), multiply (*), and divide (/)—using Metric IDs. Note that only those metrics defined in the formula are used in the report.

example, a formula of $m1+m2-m3*m4$ would be calculated as metric 1 added to metric 2 subtracted from the multiplication result of m3 and m4. For a formula of $m1/100*200$, metric 1 would be divided by 100 and then multiplied by 200.

In a Balanced Scorecard report, the weighted score of the KPI is first calculated using the metric formula, and then the Grading Scale or Make/Break calculation is applied (see below).

- **KPI Display order**—Placement of KPI in scorecard listing of KPIs

5. Click **Add Metrics** to add a user-defined metric to the KPI. The Metrics pop-up screen displays all active metrics.



6. Select a metric from the list, then click **Add to KPI**.

7. Enter the following data for the metric:

- **Weight**—Assigned weight for KPI (note that the sum of all KPIs must equal 100).
- **Min Score(%)**—Minimum score for the metric, as a percentage.
- **Max Score(%)**—Maximum score for the metric, as a percentage.
- **Target**—Target value for the metric.
- **Metric Display order**—Placement of metric in list.

8. Click **KPI Grading** to launch the Scaling Grade window. Here you can select either **Grading Scale** or **Make/Break** grading type:

Select Type Grading Scale Make / Break + Add Range

Select All | Select None

Select Range		Score Type	Score
From	To		
<input type="checkbox"/>	70.0	79.99	Score Range ▼ 1.0 to 99.99
<input type="checkbox"/>	80.0	100.0	Fixed Score ▼ 100.0
<input type="checkbox"/>	0.0	69.99	Fixed Score ▼ 0.0

Delete Save

Note: To change to Make / Break, all the Grading scale ranges added in the screen should be deleted.

Select Type Grading Scale Make / Break

Range	Score
Greater Than or Equal ▼ 50.0	15

Save

To change to Grading Scale, the Range option selected should be 'Pick One'.

- **Grading Scale**—Create grading scale ranges for the KPI, clicking **Add Range** to add the desired number of range values and then defining:
 - **From/To** range values (0 to 100).
 - **Score Type (Fixed Score or Score Range)**.
 - **Score**, enter a fixed score for the grading scale in the text field for Score Type Fixed Score, or a from/to range in the Score Type Score Range.
 - **Make/Break**—Create a make or break range and assign a corresponding score as follows:
 - Select the make or break range type from the **Range** pull-down menu, either **Greater Than or Equal To** or **Less Than or Equal To**.
 - Enter a range value in the middle text field, from 0 to 100 (e.g., 50).
 - Enter a score value in the Score text field (e.g., 15). For example, if you select Greater Than or Equal To with a value of 50 and a score of 15, and the weighted score of the KPI is greater than or equal to 50, the KPI for the score will be 15. If the score is less than 50, the score will be zero.
9. Repeat steps 5 through 9 to add as many KPIs and metrics as required.
 10. Click **Next**. The **Grades** page appears.
 11. Enter grading rules for the scorecard as follows:
 - **Grade**—Description of grade (A, B, C; Excellent, Good, Fair; Pass, Fail).
 - **Min Value**—Lower limit of grade (e.g., 90 for A)
 - **Max Value**—Upper limit of grade (e.g., 100 for A)
 - **Color**—Visual indicator for grade, as it will appear in the scorecard
 - Click **[+] Add** to continue adding grades.

12. Click **Next** to review the scorecard, then click **Save Scorecard**. The scorecard can be viewed on the **Scorecard Builder > View Scorecards** page.

Data Upload Scheduler

The Data Upload Scheduler configures and uploads system metrics into the Call Recording database, and has the output automatically delivered to the User as an email attachment in an Excel formatted spreadsheet.

The User can manually upload the spreadsheet and schedule when the data will be entered into the Call Recording database.

1. To configure the data upload schedule click **Analyze > Data Upload Scheduler > Configuration**.

Configuration Scheduler
Data Upload Configuration

Folder Structure

Template Folder	<SERVER>\<KS_HOME>\pidataupload\Latest Templates	Pick One	Generate Template	Download
Upload Folder	<SERVER>\<KS_HOME>\pidataupload\upload			
History Folder	<SERVER>\<KS_HOME>\pidataupload\history			
Log Files	<SERVER>\<KS_HOME>\pidataupload\logs		Download Log File	

Scheduler Status

Last scheduled status	Failure
Schedule Type	Scheduler was scheduled to run Once basis to Start On : 06/13/2012 at 03:12:00
Next run time	N/A

Refresh

Manual Upload

File input field: Browse... Import

2. The Folder Structure section of the screen depicts Hamony's metric template file storage structure, as configured by your System Administrator, listing:

- **Template Folder**—Contains the latest templates for use.
- **Upload Folder**—Shows directory where file is manually uploaded. Upon successful upload, the file is moved into the History directory.
- **History Folder**—Contains all the files that have successfully uploaded, in *<filename><timestamps.xls>* format.
- **Log Files**—Contains the log files for the upload utility.

Click the **Download Log File** link to download the log file to view to ensure a successful import to the metric data into the appropriate rows and columns of the spreadsheet.

3. Select a spreadsheet from the Generate Template pull-down menu—**Department, Designation, or Employee**—then click **Generate Template**. The selected spreadsheet (template) is generated by the system.
4. Click **Download** to save the templates to the local machine.
5. Edit a template with the metrics, per business conditions.
6. Click **Browse** from the Manual Upload section of the screen to locate the template, then click Import to upload the template into the Call Recording database.
7. To schedule automatic uploading, Click **Analyze > Data Upload Scheduler > Scheduler**

Note: Users receive an email alert, with logfile attached, when the templates are uploaded and the spreadsheet is moved into the History folder.

Metric Library
Scorecard Builder
Data Upload Scheduler

Configuration **Scheduler**

Data Upload Scheduler

Schedule Pattern

Define a schedule that runs on Hourly, Daily, Weekly, Monthly or One-Time basis.

Hour
 Day
 Weekly
 Monthly
 Once

On Day Sun Mon Tue Wed Thu Fri Sat

Start Time hrs mins AM PM

Specify the date to start and optionally end this schedule

Begin Schedule On

End Schedule On

Email Option

* From

* To

Subject

Message

Schedule
 Reset

8. Define how and when for the scheduler to run from the **Schedule Pattern** section of the screen.
9. Enter for the uploader to start and end in the **Begin Schedule On** and **End Schedule On** data fields, respectively.
10. In the **Email Option** section of the screen, enter email delivery options for the metrics spreadsheet.
11. Click **Schedule**. The scheduler runs and an Excel email attachment is delivered as configured.