

# Interaction Quality Manager Help Printed help

# PureConnect powered by Customer Interaction Center® (CIC)

# 2018 R5

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# Abstract

This document is a printable version of the Interaction Quality Manager help. Interaction Quality Manager view in IC Business Manager is used to retrieve recordings with associated Questionnaire Scorecards that need to be scored. The view also displays the scorecard status. Questionnaires can be automatically assigned to recordings by creating policies in Interaction Recorder Policy Editor.

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# **Interaction Quality Manager**

# **Introduction to Quality Manager view**

Interaction Quality Manager view is used to retrieve recordings with associated Questionnaire Scorecards that need to be scored. The view also displays the scorecard status.

For more information, see About Interaction Quality Manager.

#### **About Interaction Quality Manager**

Interaction Quality Manager view is used to retrieve recordings with associated Questionnaire Scorecards that need to be scored. The view also displays the scorecard status. Questionnaires can be automatically assigned to recordings by creating policies in Interaction Recorder Policy Editor.

Recordings with scorecards are retrieved based on:

- Date and Time
- Scorecard Status
- Scoring User

The Interaction Quality Manager intuitive user interface guides you to:

- Retrieve recordings to score
- Preview scorecards associated with recordings
- Playback and score recordings

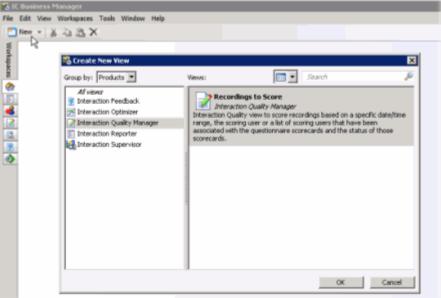
For more information on using Interaction Quality Manager, see <u>Get Started with Interaction Quality</u> <u>Manager</u>.

For information on using Interaction Quality Manager to create and organize your Questionnaires, see <u>Interaction Quality Manager Navigation Pane</u>.

## **Get Started with Interaction Quality Manager**

To get started, from IC Business Manager, create a **New** view for an Interaction Quality Manager **Recordings to Score** view. To create this view, follow these steps.

1. From the IC Business Manager toolbar, click **New**. The **Create New View** dialog is displayed.



- 2. In the **Group by** box, select **Products** or select **Categories**. **Interaction Quality Manager** is displayed as an option in the left pane.
- 3. In the left pane, select **Interaction Quality Manager**. **Recordings to Score** view is displayed in the right pane of the Create New View dialog.
- 4. In the right pane, select **Recordings to Score** and click **OK**. The **Recordings to Score View Attributes** search dialog is displayed.

Recordings to Score View Attribu	utes		×
Date/Time			
Recording Date/Time	<ul> <li>Specify a date period</li> </ul>	C Specify shift date/time period	
C Today     C Last 1	C Last week	C Last month	-
Scorecard Status	mplete 🗖 Finished		
Scoring User Supervisor Supervisor;			
Display scorecard preview with	results Maximum results:	100 Create	Cancel

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5. Complete the <u>Recordings to Score View Attributes</u> dialog and click **Create**. The **Recordings to Score** view tab is displayed in the workspace.

Recordings to Score [2]				
Scoring Date/Time	T Scoring Status	Questionnaire Directory	Questionnaire	Recording Date/Time
160	100	<b>a</b> .	(A)	101
18/4/2813 2:38:35 PM	Assigned	Test Folder	Test QN	18/4/2013 2-35-30 PM
9/26/2013 2:58:17 PM	Scoring incomplete	Test Folder	Test QN	9/18/2013 150:17 PM

For more details, see <u>Search for Recordings to Score</u>.

# **Recordings to Score**

#### **Recordings to Score**

Use the Recordings to Score view to easily and quickly retrieve recordings, with assigned scorecards, that need to be scored.

For more information see <u>Search for Recordings to Score</u>.

#### Search for Recordings to Score

After you have created a <u>new Interaction Quality Manager view</u>, use the **Recordings to Score View Attributes** search dialog to create a search and retrieve recordings to be scored.

Recordings to Score View Attribu	ites		
Date/Time			
Recording Date/Time	•		
C Specify a date/time range	<ul> <li>Specify a date period</li> </ul>	C Specify shift date/time period	_
Today	C Last week	C Last month	
C Last 1 🚊 hours	C Last 1 📩 days		
Scorecard Status			
🗹 Assigned 🛛 🔽 Scoring incor	mplete 🗖 Finished		
Scoring User			
Supervisor Supervisor;			
Display scorecard preview with i	results Maximum results:	100 Create	Cancel

#### **Retrieve Recordings to Score**

To retrieve recordings with associated Questionnaire Scorecards that need to be scored, configure the attributes in the **Recordings to Score View Attributes** dialog.

Re	cordings to Score View Attribu	ites		×
Da	ite/Time			
	ecording Date/Time	-		
1 C	Specify a date/time range	<ul> <li>Specify a date period</li> </ul>	Specify shift date/time period	
	Today	C Last week	C Last month	-
	C Last 1 🚊 hours	C Last 1 🚊 days		
Sc	orecard Status			
1	Assigned 🔽 Scoring incor	nplete 🗖 Finished		
Sc	oring User			
2	pervisor Supervisor;			
ا	Display scorecard preview with r	results Maximum results:	100 Create	Cancel

The available attributes are:

#### Date and Time

Select **Recording Date/Time** to retrieve recordings based on the date and time of the recording, or select **Scoring Date/Time** to retrieve recordings based on the date and time the recording was last scored, and configure the attribute.

#### **Scorecard Status**

The Scorecard Status attribute searches for recordings based on their scorecard status. To narrow your search, select a scorecard status check box. The available scorecard statuses are: **Assigned**, **Scoring incomplete**, and **Finished**.

You can select more than one status in a search. If no Scorecard Status check boxes are selected, recordings for *all* scoring statuses are included in the search results.

#### **Scoring User**

The Scoring User attribute searches for users who have scored recordings. In the Scoring User field, begin typing a user name to display available User Names to choose from. Multiple user names can be specified to create a list of scoring users.

For additional information on configuring the attributes for your recordings to score search, see <u>Recordings to Score View Attributes</u>.

#### **Displaying Search Results**

Use these settings for displaying your search results.

#### Display scorecard preview with results

Select the **Display scorecard preview with results** check box to show or hide the scorecard preview control when a recording is selected in the **Recordings to Score** view.

#### Maximum results

Specify the number of results to be returned with the search in the **Maximum results** box. Valid values are between 1 and 10000.

After the **Recordings to Score View Attributes** search dialog is complete, click **Create** to run the search. The search results are displayed in the **Recordings to Score** view in the workspace.

Next, see <u>Recordings to Score View</u>.

#### **Recordings to Score View**

The Recordings to score view displays the results of the search in a grid and includes the details of a selected recording. The number of returned recordings to be scored from the search is indicated in the header of the view.

Recordings to Score (5)				
			Show Search Details +	
E Scoring Date/Time	∇ Scoring Status	Questionnaire Directory	Questionnaire	
1 A 1	A	A	A	
11/7/2013 2:41:22 PM	Assigned	Test Folder	Test QN	
10/4/2013 2:30:35 PM	Assigned	Test Folder	Test QN	
9/26/2013 2:58:17 PM	Scoring incomplete	Test Folder	Test QN	
9/3/2013 2:37:42 PM	Finished	Test Folder	Test QN	
9/3/2013 2:33:37 PM	Finished	Test Folder	Test QN	
Call, recorded on 1	1/7/2013 2:38:29 PM der/Test ON	Duration: 00:00:51	Score Recording	
Call. recorded on 1 Assigned - Test Fold		Duration: 00:00:51 Scored User:	Score Recording	
Call, recorded on 1			Score Recording Calibration Only	
Call. recorded on 3 Assigned - Test Fol Passed Failed	der/Test QN	Scored User:		
Call. recorded on 3 Assigned - Test Fol Passed Failed	der\Test QN	Scored User:		
Call. recorded on 1 Assigned - Test Fold	der/Test QN	Scored User:		

#### **Show Search Details**

Search attributes are collapsed when the view is displayed. To display the search attributes and run the search again, click the **Show Search Details** expand button.

To paste recording information into another application, use Ctrl+C in the grid to Copy an entire row, or multiple rows, to the clipboard.

#### Select Fields for the grid

The columns, or Fields, are displayed in the grid in the following order:

• Scoring Date/Time

- Scoring Status
- Questionnaire Directory
- Questionnaire
- Recording Date/Time
- Recording ID
- Scoring User
- Scored User
- Total Score
- Scorecard Rank
- Marked for Calibration
- Assign Questionnaire Policy

To change the Fields that are displayed in the grid, click the Field Chooser for the upper left of the grid. In the Show/Hide Columns dialog select the fields to display in the grid.

🛃 Sh	ow/Hide Columns	_ 🗆 🗡
	Assign Questionnaire Policy	
	Critical Score	
•	Marked for Calibration	
	Non-critical Score	
	Passed/Failed	
•	Questionnaire	
•	Questionnaire Directory	
	Recording Date/Time	
	Recording ID	
	Scorecard ID	
•	Scorecard Rank	
•	Scored User	
•	Scoring Date/Time	
	Scoring Status	
	Scoring User	
	Signature Comments	
	Signature Status	
•	Total Score	

#### Sorting Columns in the grid

To sort a grid column in ascending or descending order, click the Field name.

#### **Refining search results**

To further refine the search results, use the Filter Criteria selection fields  $\square$  below each Field name. To create a field filter for the search results displayed in the grid, select the field below the Field name. To select an operand for the search, click  $\square$ , and then click the arrow to select the search criteria from the list. Depending on the field and your selections, an additional dialog might be displayed. The search results are displayed according to your search filter. To clear the search filter criteria, click clear filter

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criteria 🖾 for the field. To clear all filters, click clear all filter criteria 🖾 on the left of the filter fields grid row.

#### **Recording Details**

When you select a recording in the Search results list, detailed information about a recording and a scorecard preview is displayed below the grid.

Recordings to Score (4)				
			Show Search Details	
Scoring Date/Time	∇ Scoring Status	Questionnaire Directory	Questionnaire	
1	A	83	<b>A</b>	
10/4/2013 2:30:35 PM	Assigned	Test Folder	Test QN	
9/26/2013 2:58:17 PM	Scoring incomplete	Test Folder	Test QN	
9/3/2013 2:37:42 PM	Finished	Test Folder	Test QN	
9/3/2013 2:33:37 PM	Finished	Test Folder	Test QN	
2	)/4/2013 2:35-38 PM	Duration: 00:00:52	Score Recording	
2		Duration: 00:00:52 Scored User:	Score Recording	
<u>Call. recorded on 1</u>			Score Recording Calibration Only	
Call, recorded on 1 Assigned - Test Fol Passed Failed	0%)	Scored User:		
Assigned - Test Fol	0%)	Scored User:		

If you have CanScoreRecording security rights, the Score Recording button is displayed.

#### Score Recording

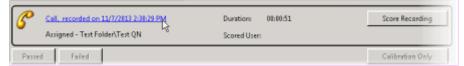
If the user has the **CanScoreRecording** security right, assigned in Policy Editor, associated with the selected recording, the Score Recording button is displayed. To score a recording, click **Score Recording**.

Test Folder\Test QN - Call, recorded on 10,	/4/2013 2:35:38 PM			_ 🗆 🗙
Passed Failed			Calibratio	n Only
■ \rm Test Group (Score: 0.00 %)	Test Group         * 1. This is a test question with comments         * 2. Another test numeric test question         * 3. Select either true or false <comments also="" be="" entered="" for="" may="" que<="" td="" this=""></comments>	C True C True stion>	C False	e e
Total Score: 0.00 %	*answer required			
	Finish		Save	Close

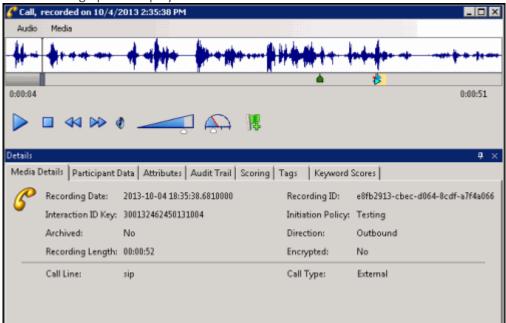
The Scorecard assigned to the recording is displayed. For more information, see <u>Score a Recording</u>.

#### **Open a Recording**

To open a recording associated with the Scorecard, click the Recording title link.



The recording opens for playback.



#### **Recording Shortcut menu**

Use the recording shortcut menu to open a recording and scorecard. To display the shortcut menu, right-click on a recording. You can also delete a scorecard from a recording from the shortcut menu.

#### **Run Search**

In addition to re-running a search from the Search Details, you can re-run a search with the Run Search toolbar button.

Next, see Score a Recording.

#### **Score a Recording**

After you have selected a recording in the Search results list, if you have the **CanScoreRecording** security right assigned in Policy Editor associated with the recording, the Score Recording button is displayed.

	Receiver and the second se	ordings to Score (5)	
			Show Search Details +
■ Scoring Date/Time	∇ Scoring Status	Questionnaire Directory	Questionnaire
a 🕰	A	A	A
11/7/2013 2:41:22 PM	Assigned	Test Folder	Test QN
10/4/2013 2:30:35 PM	Assigned	Test Folder	Test QN
9/26/2013 2:58:17 PM	Scoring incomplete	Test Folder	Test QN
9/3/2013 2:37:42 PM	Finished	Test Folder	Test QN
9/3/2013 2:33:37 PM	Finished	Test Folder	Test QN
-			
Call, recorded on 1	1/7/2013 2:39:29 PM	Duration: 00:00:51	Score Recording
-		Duration: 00:00:51 Scored User:	Score Recording
Call, recorded on 1			Score Recording Celibration Only
Call, recorded on 3 Assigned - Test Fol Passed Failed	der\Test QN	Scored User:	
Call, recorded on 3 Assigned - Test Fol Passed Failed	der\Test QN	Scored User:	Celibration Only
Call, recorded on 3 Assigned - Test Fol Passed Failed	der\Test QN	Scored User:	
Assigned - Test Fol	der\Test QN 00 %) *1. Thi	Scored User: up is is a test question with comments C	Celibration Only

To score a recording, click **Score Recording**. The Scorecard assigned to the recording is displayed. The title of the Questionnaire is displayed in the dialog title

📝 Test Folder\Test QN - Call, record	d on 10/4/2013 2:35:38 PM		_ O ×
Passed Failed		Calibratio	n Only
🗉 🌗 Test Group (Score: 0.00 %)	Test Group		
	* 1. This is a test question with comments C True	C False	<b>A</b>
	* 2. Another test numeric test question	_	
	* 3. Select either true or false C True	C False	ā
	<comments also="" be="" entered="" for="" may="" question="" this=""></comments>		
otal Score: 0.00 %	*answer required		
	Finish	Save	Close

#### **Scoring a Recording**

To score a recording:

- 1. Use the left pane to display Scorecard questions. Expand a Question Group. The questions are displayed in the right pane.
- In the right pane, answer the questions. If Help Text is available for a question, it is displayed below the question. If a comment can be added to a question while scoring, it is indicated by the Add Comments button. Required questions are indicated by an asterisk (\*).
- 3. Click **Passed** or **Failed**, and then click **Finish**.

#### Passed

Click this toggle button to indicate this Scorecard has passed.

#### Failed

Click this toggle button to indicate this Scorecard has failed. When the Failed button is selected a warning is displayed at the top of the dialog indicating the **Scorecard has been failed**, and the Finish button is labeled **Finish (Failed)**.

#### **Calibration Only**

Click this button to mark the Scorecard for calibration use only.

#### Notes

- Calibration provides confidence that monitored interactions will be scored consistently among Quality Assurance team members. Calibrating scoring ensures fairness to agents whose recorded interactions are being evaluated.
- When a scorecard is marked for Calibration, this indicates that the score is excluded from other scored interactions and does not count toward the agent's individual performance results. Scorecards marked for Calibration are also excluded from the overall group performance results.

**Important**: In Interaction Reporter, the **Calibration Only** parameter is required to be set within Calibration reports to ensure only scorecards that have been marked for Calibration are included in the report results. Excluding the Calibration Only parameter from the Calibration reports will result in all scorecards being included within individual and overall group performance results. See the Interaction Reporter help for more details on how to configure and run Calibration reports.

- When searching for scorecards in Interaction Quality Manager, scorecards marked for Calibration are included in search results. To exclude scorecards marked for Calibration in search results, select **No** when configuring the **Marked for Calibration** search attribute.
- In Interaction Reporter, only *completed* scorecards are included in Calibration reports. Scorecards that are still *in progress* are not included in Calibration reports.

#### **Scoring Results**

The **Score** percentage and **Rank** are displayed by **Group** in the left pane next to the Question Group.

#### **Total Score and Rank**

The averaged percentage and rank for scored Question groups is displayed next to the **Total Score**.

#### **Non-critical Score**

If applicable for the Questionnaire, the averaged percentage for the Non-critical questions is displayed in **Non-critical Score**.

#### **Critical Accuracy**

If applicable for the Questionnaire, the averaged percentage for the critical questions is displayed in **Critical Accuracy**. The correct number of responses for the total number of critical questions is also indicated.

#### Save

To save a scored interaction to be emailed or to finish scoring later, click Save.

#### Finish

When you have completed scoring the interaction, click **Finish**. If the Scorecard has been failed, the Finish button is labeled **Finish (Failed)**. The scored results are now available for reporting.

**Note** When you click Finish, the Search Results View is dynamically updated for the Scorecard status.

# **Recordings to Score View Attributes**

The following table defines the search attributes on the **Recordings to Score View Attributes** dialog, to retrieve recordings to be scored.

Recording Date/Time	-		
C Specify a date/time range	<ul> <li>Specify a date period</li> </ul>	C Specify shift date/time period	_
<ul> <li>Today</li> </ul>	C Last week	C Last month	
C Last 1 🚊 hours	C Last 1 🚊 days		
Scorecard Status			
Z Assigned 🔽 Scoring inco	mplete 🗖 Finished		
Scoring User			
Supervisor Supervisor;			

# **Recordings to Score Search Attribute Descriptions**

Attribute	Description		
Date/Time	Date/Time is a rich attribute that contains multiple sub-fields. First, in the Date/Time box: select <b>Recording</b> <b>Date/Time</b> to retrieve recordings based on the date and time of the recording; or select <b>Scoring Date/Time</b> to retrieve recordings based on the date and time the recording was last scored.		
	You can select: <b>Specify a date/time</b> <b>range, Specify a date period</b> , or <b>Specify</b> <b>shift date/time period</b> . Operands are displayed depending on your selection.		
	For <b>Specify a date/time range</b> , select an operator from the drop-down list. The available operators are: Equal, Before, After, or Between. Next, specify a date argument using the drop-down box and selecting a date from the calendar. Type		

	or select a time to specify a time argument. For <b>Specify a date period</b> , specify a date in which the interactions occurred to be included in the search. Available options are: Today, Last week, Last month, Last N hours, or Last N days. For <b>Specify shift date/time period</b> , specify a shift date range and time of day range. For example, a shift date/time might be Monday through Friday, 8:00 a.m. to 5:00 p.m. The date/time attribute uses the Windows time zone set for the Windows User on the Interaction Recorder Client machine.
Scorecard Status	This attribute searches for recordings based on their scorecard status. The search options are <b>Assigned</b> , <b>Scoring</b> <b>incomplete</b> , or <b>Finished</b> . To narrow your search, select a scorecard status check box. You can select more than one status in a search. If no Scorecard Status check boxes are selected, recordings for <i>all</i> scoring statuses are included in the search results.
Scoring User	This attribute searches for users who have scored recordings. In the Scoring User field, begin typing a user name to display available User Names to choose from. Multiple user names can be specified to create a list of scoring users.

# Display scorecard preview with results check box

Select this check box to show or hide the scorecard preview control when a recording is selected in the **Recordings to Score** view.

			R.	condinge to Score (25)			
						1	how Search Details
Scoring Enter/Time	V Scoring Status	Queitions	are Garactory	Question taile	Recording Date/Ter	w Recording ID	Scoring User
0	10	80		16	81	80	100
MINUTE STOLEN.	finited	Customer	Service	Customer Sevice Alteristated	ALLWEID CERSOL AM	M 84/42912-880c	- Bob Skeperk
0757833 24633 PM	Finished	Customer		Customer Satisfaction Standard 1			Rebecca Gibsor
M4 EC 46/GE E2/GE E3/GE	Finished	Customer		Customer Service Abbreviated	8/6/2813 1:53:12 PM		
U3/2813 9:58:38 PM	Finished	Sale:@Marketing		RDNS	1/15/981312:13:13		Brady Moore
US/2833 SHEAR PM	Finished	Salesdoffer		REARS	2012/0012512014		Bradly Moore
25/1813 9:4914 PM	finished	Tale-8Mar	izting	RD415	ND/2013 122/01 PM	5411111-7280	Bradly Moore
Granting (Score 17.18%)		_	6				
ed Esled				t Same	and is already first bed.	Fan Report	Calibration D
Contract Process To Mark	1						
	Score IS 81% Vey Good)		Genting				
Hold Departs (Marked)			Greating				
Communications / Pacin Resolution DNort Gcore	rg (Score 55.56% Unacceptable)						
HERE AND A CALOR	and a remain		*1. UsePHdu*or	5- similar salufation:		₽74 O.M	
			12. Skotfod of t	Cutorer		0.111 - @141	
		* 2. Did the agent act: happy to get the call?			Yes, also outly tool. their reads to 🗢		
			4. Comments real	gent grading skills:			
							-
							-
		Etter comments to	18				
			Customer Service St	4.			_
			Control or Service Ski	4.			_
			*1. Did the agent passes good understanding of product line?			Set of The agent know much of 11	
			*1. Did the agent p	econo pred vederatanding of product line?		Seried. The agentices	eret of in

#### Maximum results field

Use this field to specify the number of results to be returned with the search. Valid values are between 1 and 10000.

#### **Questionnaires**

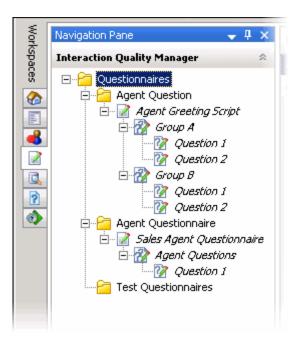
#### **Questionnaires**

Questionnaires are used to score recorded interactions. Use Questionnaires to measure script adherence, compliance, and customer satisfaction. Questionnaires are integrated with scoring and simplify the quality assessment process, by easily adding a Questionnaire to the recording's Scoring page.

Use the Interaction Quality Manager navigation pane to create and publish Questionnaires.

#### **Interaction Quality Manager Navigation Pane**

Use the Interaction Quality Manager pane to create and organize your Questionnaires. Questionnaires are created in folders, and Questions are organized within Groups.



• Questionnaires Folder Use the Questionnaires folder to create Questionnaire sub-folders. To create a Questionnaire folder, select the Questionnaires folder, right-click, point to New, and click Folder. On the New Questionnaire Folder dialog, type a name for the folder.

When you select the **Questionnaires** folder, the Questionnaires List View--a list of all Questionnaires--is displayed in the Workspace.

- Questionnaire Folder Use the Questionnaire folder to create new Questionnaires. To create a questionnaire in the folder, right-click, point to New, and click Questionnaire. A New Questionnaire is created under the Questionnaire folder, and it includes a Group and a Question 2.
- **Questionnaire** When a Questionnaire is created, it is displayed in the Questionnaire View in the Workspace. Use the Questionnaire View to configure the settings for your questionnaire.

Descriptive Groups, which are created to organize Questions, can be added from the Questionnaire View. To create a Group from the Questionnaires pane, right-click a Questionnaire, and click **New Group**.

Also, Questionnaires can be published from the Questionnaire View.

• **Group** When a Group is created, it is displayed in the Group View in the Workspace. You configure Group settings in this view. Use a descriptive name for the Group, which will contain a set of logically related questions.

To create a question in a Group, right-click a Group, and click **New Question**.

• **Question** When a Question is created, it is displayed in the Question View in the Workspace. Configure the Question settings in the Question View. You can also add a new question from the Question View.

#### Note

For Security Access:

- To create new Questionnaire folders, or delete existing Questionnaire Folders, a User must have the Application Security Right for Recorder Policy Create/Delete Questionnaire Directories and Modify Rankings assigned in Interaction Administrator on the Security page.
- For a User to View or Modify Questionnaires, a User must have Access rights for the Recorder Questionnaires folders, assigned in Interaction Administrator on the Security page.

#### Related Topics

Creating a Questionnaire Interaction Quality Manager Navigation Pane

Introduction to Quality Manager view

Publishing a Questionnaire

## **Creating a Questionnaire**

Use the **Interaction Quality Manager** navigation pane to create Questionnaires for scoring recorded interactions. Questionnaires can be created to measure script adherence, compliance, and customer satisfaction. Questionnaires are integrated with scoring and simplify the quality assessment process, by easily adding a Questionnaire to a recording's Scoring page.

#### Note

For Security Access:

- To create new Questionnaire folders, or delete existing Questionnaire Folders, a User must have the **Application** Security Rights for Recorder Policy **Create/Delete Questionnaire Directories and Modify Rankings** assigned in Interaction Administrator on the Security page.

- For a User to **View** or **Modify** Questionnaires, a User must have Access rights for the **Recorder Questionnaires** folders, assigned in Interaction Administrator on the Security page.

#### **Create a Questionnaire folder**

When you create a questionnaire, first create a folder to hold your questionnaires.

Here's how to create a folder to hold a Questionnaire:

- 1. In the Interaction Quality Manager pane, select the Questionnaires folder.
- 2. Right-click the Questionnaires folder, point to **New**, and click **Folder**. The New Questionnaire Folder dialog is displayed.
- 3. Type a descriptive name for the folder that will contain the questionnaire. In the **Description** box, you can type a description. This description is displayed in the tooltip for the folder.

**Note** The **Description** can be edited in the **Questionnaire Directory** view, after the folder has been created.

When you have completed the dialog, click **OK**.

The new Questionnaire folder is created under **Questionnaires**.

#### **Create a Questionnaire**

To create a questionnaire, right-click the questionnaire folder, point to **New**, and click **Questionnaire**. The new questionnaire is displayed in the Questionnaire View in the Workspace. A New Questionnaire  $\overrightarrow{M}$  and a Group and a Question are automatically created in the Questionnaire folder.

#### **Configure Questionnaire settings**

Configure the settings for the New Questionnaire.

- 1. Select the Rew Questionnaire in the Questionnaire folder. The current settings are displayed in the Questionnaire View in the Workspace.
- 2. In the **Name** box type a descriptive name for your questionnaire. When you move to the next field, the Questionnaire name is updated in the Questionnaires pane.
- 3. You can make comments about the questionnaire in the **Notes** box.
- 4. In the **Ranking** drop-down list, select a Ranking system. You can also create a new ranking system at this time by clicking Create new ranking.
- 5. To hide scores for incomplete questionnaires while they are being scored, select the **Hide scores** when **questionnaire scorecard is incomplete**. Choose this option so scorers cannot see the current ranking and scores for incomplete questionnaires while they are being scored. After the questionnaire scorecard is complete, the scores panel is displayed for the questionnaire.
- 6. If you want to hide the Pass/Fail buttons on the questionnaire scorecard, select the **Hide Pass/Fail options on the questionnaire scorecard** check box.

Minimum score and Maximum score for the Questionnaire are displayed.

**Note** You can Add a new question group to the questionnaire from this view by clicking **Add new** group.

#### **Configure Questionnaire Group settings**

When you have completed configuring the settings for the questionnaire, set the values for the  $\overrightarrow{B}$  *Group*.

- 1. Select the **Group** in the Interaction Recorder Questionnaires pane under the questionnaire. The current settings are displayed in the Group View in the Workspace.
- 2. In the **Name** box, type a descriptive name for the questionnaire Group. When you move to the next field, the group name is updated in the Questionnaire pane.

3. If you want to mark this group optional, allowing questions to be marked Not Applicable, select the **Allow group to be Optional** check box.

**Minimum score** and **Maximum score**, and **Total Score Contribution** for all Questions in the Group are displayed.

**Note** You can Add a new question to the questionnaire from this view by clicking **Add new question**.

#### **Configure Question settings**

Next, to configure the settings for a question:

- 1. Select the *Question* in the Group. The current settings are displayed in the Question View in the Workspace.
- 2. In the **Question** box, type the name for the question. When you move to the next field, the question name is updated in the Questionnaire pane.
- 3. In the **Help Text** box, add any additional text that will help the scorer grade the question.
- 4. In the **Data type** drop-down list, select a question type. Depending on the question type you selected, other fields are presented for configuration. The available question types are: **Free text (non-scoring), Integer, Multiple Choice, Numeric, True/False,** and **Yes/No**.
- 5. Assign a value to the question in the **Weight** box.
- 6. To allow comments to be added when scoring a Questionnaire, select the **Allow comments** check box.
- 7. To classify a Question, use the **Importance** drop-down box. Questions can be classified as:
  - Required, if the Question must be answered
  - Optional, if an answer is not required

- **Critical** when the question represents agent behavior that is a key requirement to successfully handling the interaction. Critical questions require a **Yes/No** or **True/False** answer type. Score value for Critical questions can be weighted and/or have a low value for a No or False response in order to result in a failing score. Additionally the scorer can choose to use the manual **Fail** button when the response to a Critical question is No or False.

 To allow the Scorer to mark a Question not applicable, select the Allow Not Applicable (N/A) Answer check box. Selecting this box adds N/A to the list of choices for a response when Scoring a Questionnaire.

Minimum score and Maximum score, and Total Score Contribution for the Question are displayed.

#### **Preview Questionnaire**

You can preview a Questionnaire while you are creating it and after it has been published, using the

**Preview Questionnaire** toolbar button

Interaction Quality Manager Help

Question View is displayed in the Workspace, click Preview Questionnaire to display the Questionnaire Scorecard.

#### Save Questionnaire

While you are creating a Questionnaire, you can save it using the **Save Questionnaire** toolbar button

**Save Questionnaire**. Saving the Questionnaire allows you to edit and make changes to the questions before publishing. When your Questionnaire is saved, the name is no longer in italics.

#### **Organize Groups and Questions**

You can change the order of question groups in a questionnaire and you can also change the order of the questions within a group. Use the **Move Down/ Move Up** toggle button on the toolbar to order groups and questions in your questionnaire.

Related Topics
Publishing a Questionnaire
Score a Recording
Interaction Quality Manager Navigation Pane

## **Publishing a Questionnaire**

Published questionnaires are activated and available for scoring. When a Questionnaire is published, it cannot be modified or unpublished. A published questionnaire can be deactivated if you do not want it available for scoring purposes. For more information, see <u>deactivating a questionnaire</u>.

There are two ways to publish a questionnaire from the Questionnaire View:

- Clicking Publish Questionnaire in the Workspace
- Using the Publish Questionnaire toolbar button

📕 Publish Questionnaire

#### Publish a Questionnaire

In the Questionnaires Navigation pane, unpublished Questionnaires are indicated by the unpublished questionnaire icon **a**.

To publish a questionnaire:

- 1. From the Questionnaires Navigation pane, select the questionnaire to be published. The Questionnaire View is displayed in the Workspace.
- 2. On the upper-right corner of the Workspace, click **Publish Questionnaire**. Or, click the Publish Questionnaire button on the toolbar.

A message box is displayed to remind you that when a Questionnaire is published, it cannot be modified or unpublished.

Click OK. The questionnaire is now displayed in the Questionnaire pane with a published questionnaire icon
 Also, the group and question icons are updated to published icons.

**Note** Published Questionnaires can be duplicated and renamed, allowing you to create a new questionnaire with the same properties as the published questionnaire. The new, duplicated, questionnaire is unpublished and can be modified.

**Note** To delete a Published Questionnaire, the user needs to have write access to the questionnaire directory.

#### Deactivate or Activate a Questionnaire

Published Questionnaires are activated and available for scoring. if you do not want a questionnaire available for scoring purposes, a published questionnaire can be deactivated. Questionnaire and scorecard data are still available for historical reporting for deactivated questionnaires.

Following these steps to Deactivate a questionnaire.

- 1. In the Interaction Quality Manager navigation pane, right-click on the questionnaire to be deactivated. A shortcut menu is displayed.
- 2. On the shortcut menu, click **Deactivate**.

Deactivating a published questionnaire allows existing scorecard data, associated with the questionnaire, to be available for historical reporting purposes. Deactivated questionnaires are no longer available in IC Business Manager Interaction Recorder or for Interaction Recorder policies, for creating and assigning scorecards. If you want to add additional scorecards to a deactivated questionnaire, you can Activate the questionnaire again.

Follow these steps to Activate a questionnaire.

- 1. In the Interaction Quality Manager navigation pane, right-click on the questionnaire to be activated. A shortcut menu is displayed.
- 2. On the shortcut menu, click Activate.

To Deactivate and Activate Questionnaires, you must have Modify Access Control rights for Recorder Questionnaires, assigned in Interaction Administrator.

# **Interaction Quality Manager Reports**

## **Interaction Quality Manager Reports**

Interaction Quality Manager Help

Interaction Quality Manager reporting is available in Interaction Reporter in IC Business Manager. For more information see <u>Interaction Quality Manager Reporting</u>.

## **Interaction Quality Manager Reporting**

Interaction Quality Manager reporting is available in Interaction Reporter in IC Business Manager.

The Interaction Quality Manager Reports include:

- Calibration Details
- Calibration Question Group Details
- Calibration Recording Summary
- Deleted Recording Audit by Date
- Deleted Recording Audit by User
- Recorder Questionnaire Detail
- Recorder Scoring Summary
- Recorder User Scoring Summary
- Quality Scoring Details

For detailed information on running these reports, see the Interaction Reporter Help.