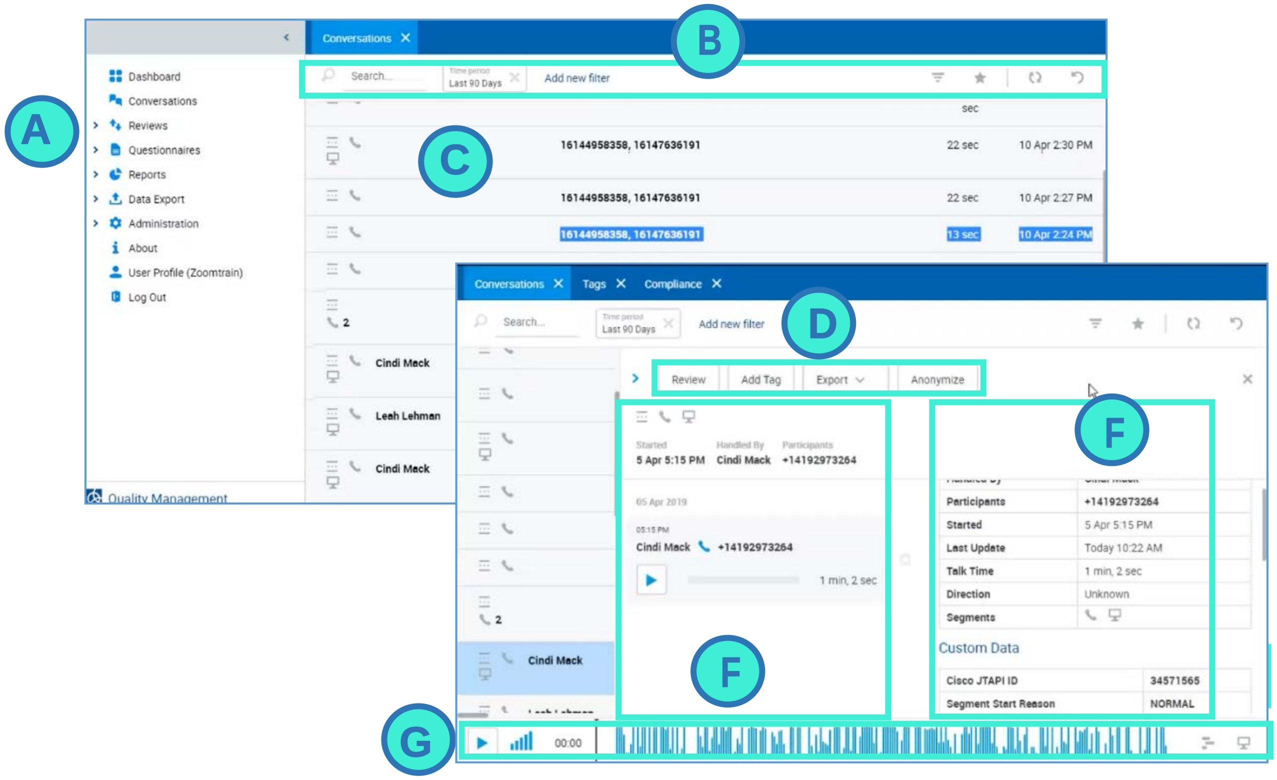
Quality Management

Upgrade Changes to ScoreCARD

cbts

QUALITY MANAGEMENT – QUICK REFERENCE GUIDE



1. QUALITY MANAGEMENT (QM) UPGRADE – GENERAL INFO	
New URL	There will be a new URL to login to after the upgrade. The project manager will include that in the upgrade communication.
Login Credentials	▪ Continue to use your existing Username and Password
Major Changes	The look and feel of this software is vastly different from previous versions. The major changes were made to the Conversations Screen and are covered in Sections 2 through 6. Changes to the Questionnaires Screen are covered in Section 7; additions to the Scoring Tiers are defined in Section 8; updates to the Reviews – Review Scheduler Screen (Evaluations) can be found in Sections 9 through 11; and new functionality for Data Export is in Section 12.
2. QM – CONVERSATIONS SCREEN – MAIN SECTIONS	
Conversations Screen – Major Changes	The Conversations screen, which has the most notable changes, was redesigned to accommodate the number of filter and feature changes. The way calls and associated data are displayed is very different. Column labels no longer exist, but additional data is now available. This screen is where you can search and view emails, chats or play recorded conversations, as well as initiate a conversation review. Icons on the left side reflect call direction (inbound, outbound, internal or conference) and the number of call legs.
A – Navigation Tree	▪ A change to the **Navigation Tree** is a name change - **Conversations** replace Customer Interactions.
B – Top bar	▪ **Top Bar** contains the **Search Bar**, **Filters** and **Action buttons** used for saving, refreshing and resetting searches.
C – Conversations	▪ **All conversations** or **filtered ones** are listed in this main section.
D – Key Conversation Info & Actions	▪ **Conversation summary** and **key actions** of the selected call are used for reviewing, tagging and exporting.
E - Preview pane	▪ **Preview pane** shows conversation segments and the review history in a timeline. Call segments can be played from here and listed in the order they occurred.
F – Detail pan	▪ **Detail pane** shows detailed information about the selected conversation.

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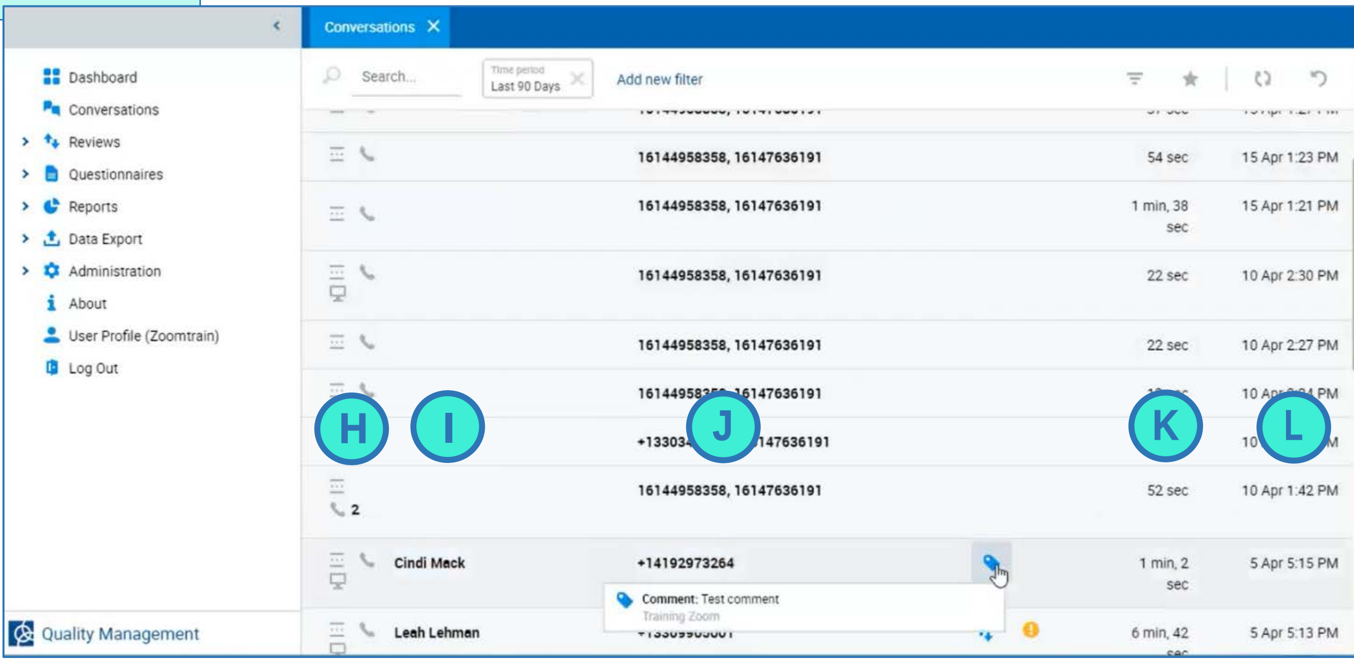
G - Player	▪ Voice conversations play here, the **audio waveform** and **screen recording** icon will be visible if available.



3. CONVERSATIONS SCREEN – LAYOUT FOR LIST OF CONVERSATIONS	
H – Direction & Types	▪ **Direction** icon displays the call direction, such as an Inbound (arrow pointing to the right), Outbound (arrow pointing to the left), Internal or Conference or an unknown direction. ▪ **Types** icon reflects if the recorded conversation was a Call, Screen, Video Call, Email or Chat, as well as the associated conversation information. o The number of screens captured, if more than one, are listed; the legs / segments of calls, if more than one, are posted. These examples reflect 3 for both. 3 3 o Warm transfers (announced ones) are also pieced into the recordings. This occurs when you place a call on hold, place a call to a 3rd party, then bridge call in. This automatically attaches that warm transferred call and will show both agents' names. This is called Call Threading.
I – Agents	▪ Identified Agent(s) who are involved in the conversation are listed
J – Other participants	▪ Customers identified either by Name, ID, Phone or Email Address and other participating agents not identified in this column.
K – Review Planned, Review Score & Tags	▪ If available, the **Review** icon indicates whether or not the conversations is (at that moment) planned for a review. **Click** the **Review** icon to open the **Review Details** section for the Conversation in the Details window ▪ If available, the conversation's review score will be displayed: 50%. **Click** the **Review** icon to open the **Review Details** section in the Conversation window. This is covered in Section 4. This example does not reflect a score. ▪ Tags are a great way to mark conversations for future references, such as for quality management. Use the filter to quickly find tagged conversations. Default tags are available and new ones may be created. This is covered in Section 6. o Hovering over the Tag icon will preview all available tags. Clicking the tag icon will enable you to view all the associated tags and comments with the selected conversation. o An example of one is Comments that can be associated with any conversation or its segments. When added to a conversation, the Tags Comments icon is displayed on the screen as shown above.
L – Talk time & Start time	▪ Duration of the call conversation are displayed in hours, minutes and seconds. The date and time of when the conversation started is also listed.
Load more	▪ **Scroll down** to the bottom of the **Conversations** screen, **click** the **Load more** button Load more to load more conversations. The total number of found conversations is displayed at the bottom of the active window.

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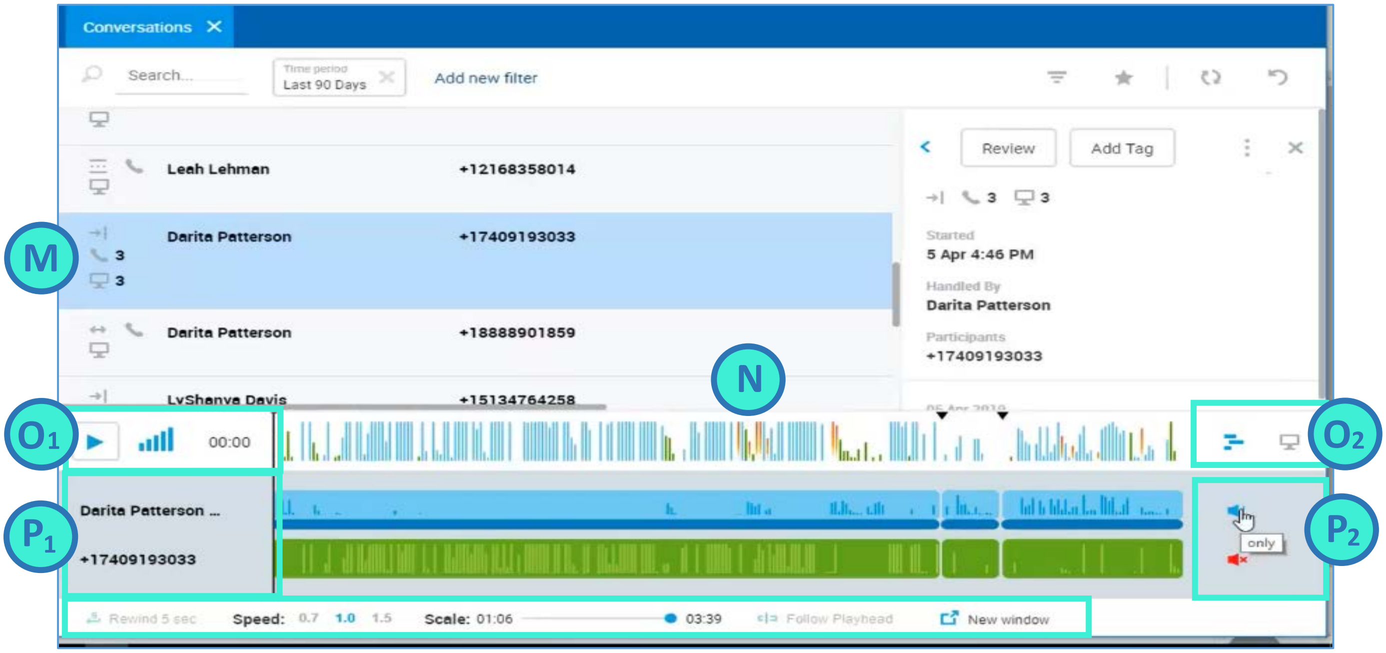
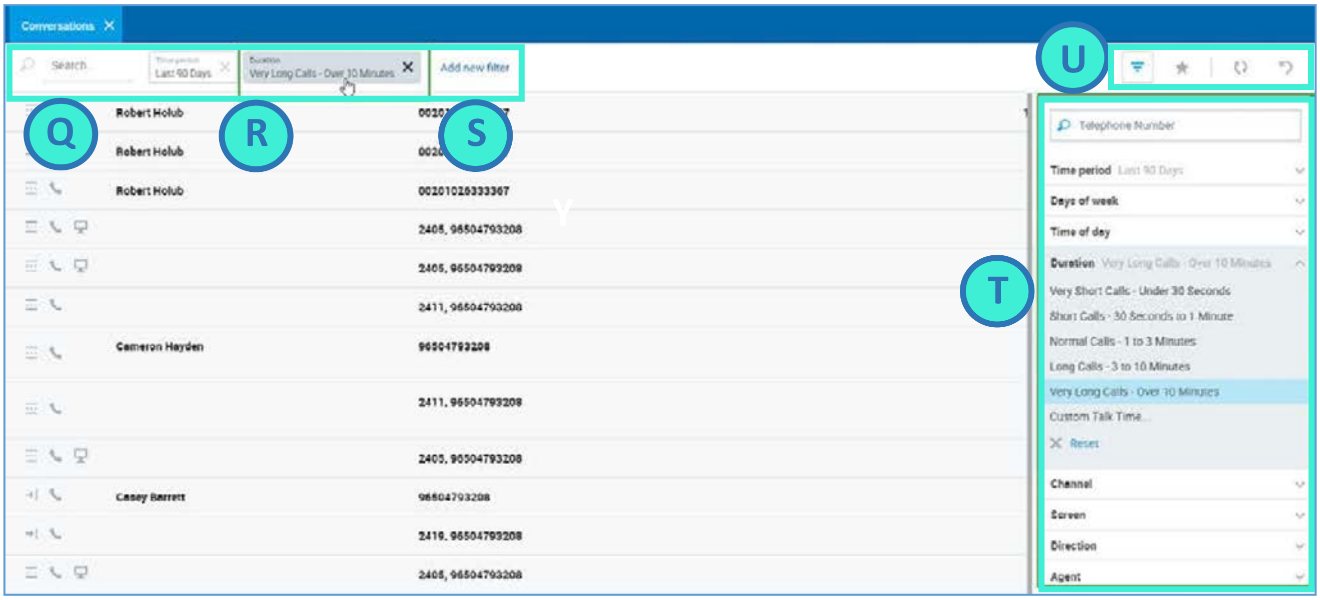


4. CONVERSATIONS SCREEN – PLAYING CONVERSATIONS	
M – Play Conversations	▪ There are two ways to open the Player and play a conversation recording: o **Double-click the row** of the **conversation**, or o **Select** the **row of the conversation**, then **click** the **Play** button .
N– Player	▪ The Player is new! It's a HTML player versus a JAVA player that was in previous version. The Player is divided into sections: o Playback controls are on both sides of the conversation with all voices o The Agent's name is followed by the .wav file of just the agent's voice (Blue) o The caller's number is associated to the .wav file of the caller's voice (Green) ▪ Player displays the conversation with the color-coded .wav form. The various colors are displayed to distinguish the 'called' and 'calling' parties as follows: • Light green – Called customer • Dark green – **Calling party*** / customer • Light blue – **Called party*** / agent • Dark blue – Calling agent • Gradient red – Crosstalk *if a party isn't recognized as a customer or an agent. ▪ It is important to note that the waveform of the person initiating the call is always darker. ▪ The down arrows and segmented area show where one audio file ends and another one begins. The **gaps** between the two down areas is when a caller is placed on **hold**. ▪ At the bottom of the player allow to you **rewind** the audio, **speed forward**, **pop out** the **screen recordings in a new window**
O– Playback Controls	▪ Click the **play** , or **pause** , button to control the conversation playback. **Hover** over the **volume icon** and adjust the audio volume or click it to mute/unmute (O1) ▪ If the conversation you are playing contains a screen recording, **click** the **Screen** icon to open and view. Clicking the icon again will collapse the screen. ▪ Click on this icon to separate the agent and caller's voices (O2)
P – Agent & Caller Voices	▪ **Agents name** and caller's phone number are listed to the left of the separated audio files. (P1)

	▪ **Hover** over **the green and red arrows** to listen to each of the voices separately; when listening to one side of the conversation, the other side is muted. This can be very helpful when one or the other parties are talking over one another(P2).



5. QM – CONVERSATIONS SCREEN - FILTERS	
Q – Search	▪ **Click** the **Search** button to search **Conversations** that either include or exclude specified terms, names or other entered text contained in several fields.
R – Time period	▪ **Default Time period filter** – Preset filters to display conversations that occurred in the last 90 days ▪ Alternatively, along with other filters, you may change the Time Period filter to another date range within the Filtering pane. Once another filter time period is selected, the updated time period will display here. ▪ **Remove** the **filter** by **clicking** the **X** icon on the filter label.
S – Add new filter	▪ **Click** the **Add new filter** button to view the filtering options in the **Filters pane**.
T – Filters Pane	▪ **Filters pane** with all filter options opens to the right on the screen. ▪ **Click** the **filter** icon on the Filter Bar to open the **Filters pane**. ▪ As you will see, you can set filters for time, period, call duration, type of call, etc.
U – Filter Bar	▪ At any time while searching for conversations, you can use the top right buttons on the **Filter Bar** to perform the following actions: ▪ **Click** the **Filters** icon to view the filtering options available to narrow down the number of displayed conversations. ▪ **Click** the **Save Search** icon to save all the search parameters just set or to retrieve and use your previously saved searches. ▪ **Click** the **Refresh** icon to re-run the search with all the parameters you've just set. ▪ **Click** the **Reset Search** icon to clear ALL search criteria just set.

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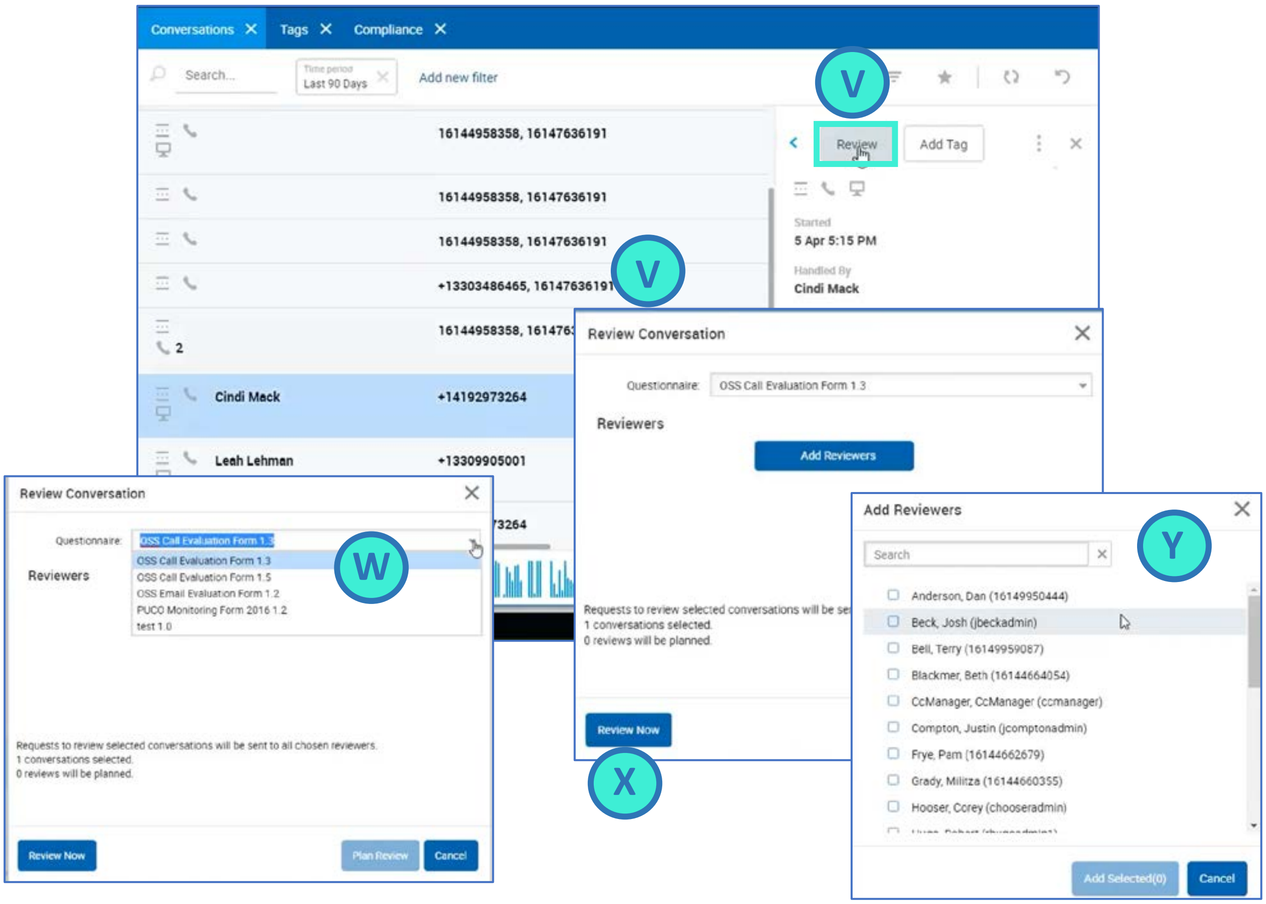

5. QM – CONVERSATIONS SCREEN – REVIEW OPTIONS	
V – **Review button**	▪ Improvements have been made for reviewing calls within the Conversations screen. ▪ **Click** the **Review** button to open the **Review Conversation** window.
W – **Choose Questionnaire**	• **Select** a **Questionnaire** from the dropdown list.
X – Review Now	▪ **Click** the **Review Now** button to evaluate the call immediately.
Y – **Add Reviewers**	▪ **Click** the **Add Reviewers** button. ▪ In the **Add Reviewers** window, select one or more Reviewer(s). You can select/deselect all Reviewers by clicking the top checkbox next to **Reviewer**. Only reviewers that have the right to review the respective agents will be listed. ▪ **Click** the **Add Selected** button to confirm. The button also displays the count of selected reviewers.

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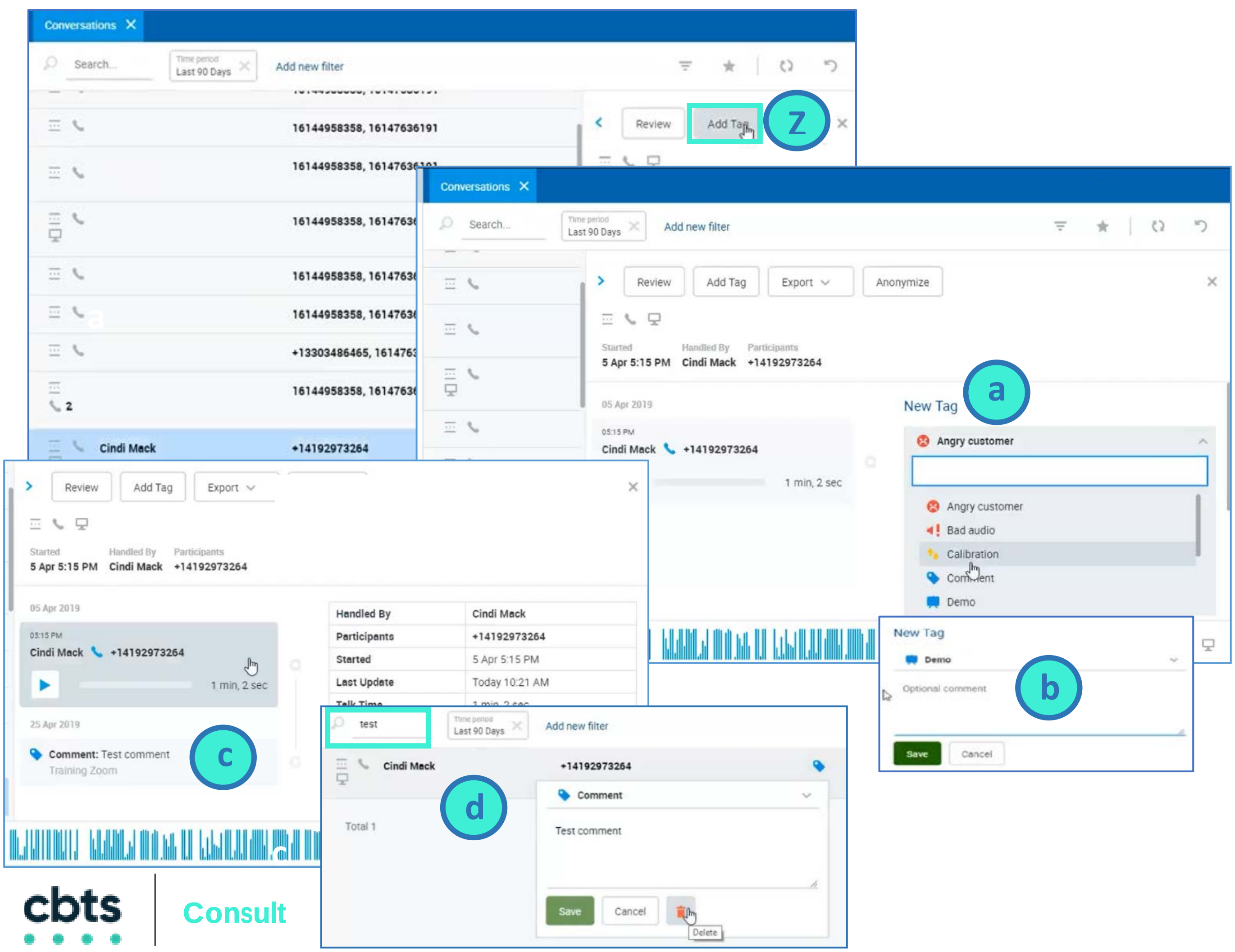
Self-Evaluations	▪ The self-evaluation process has been streamlined. An agent's name, who have been assigned the **Review – Review Myself** permission, will be listed in the list of Add Reviewers. If agents are not listed, contact your administrator and request this permission be added to the list of agents you provide. ▪ Self-evaluations do not count towards any reports unless otherwise indicated in Properties.



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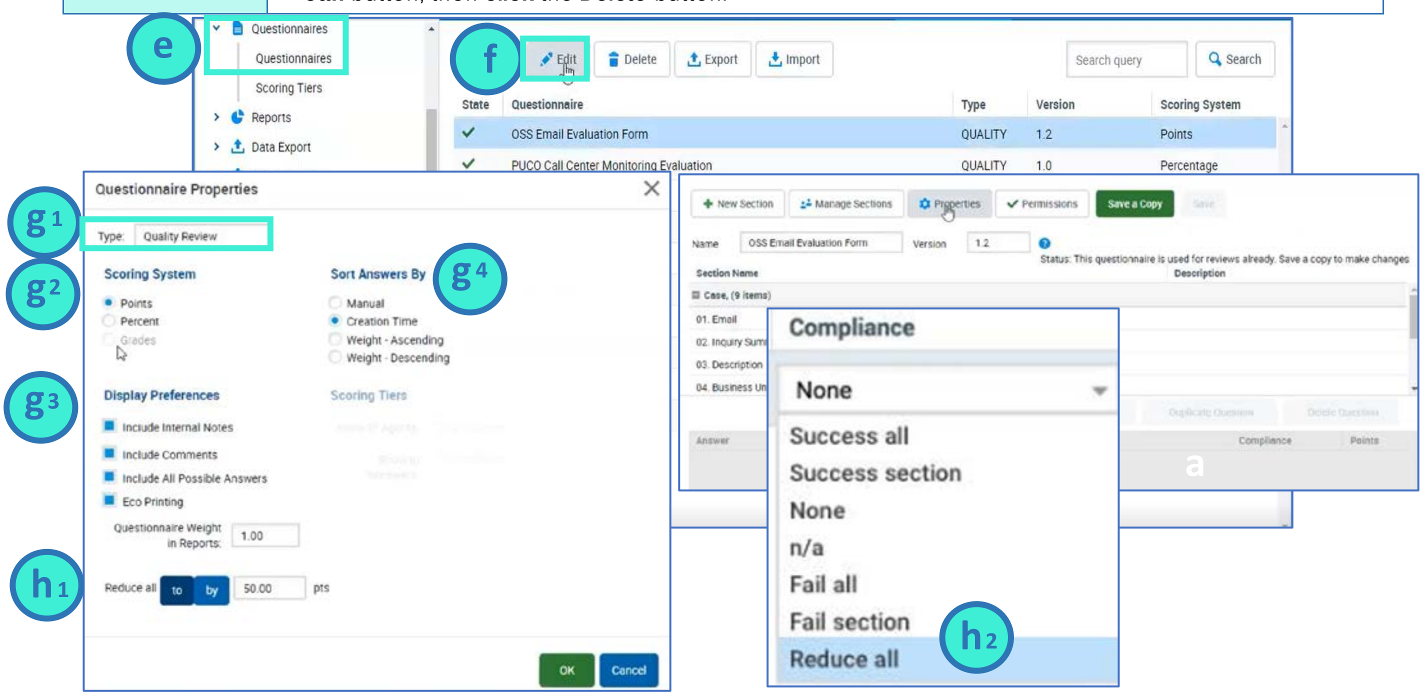
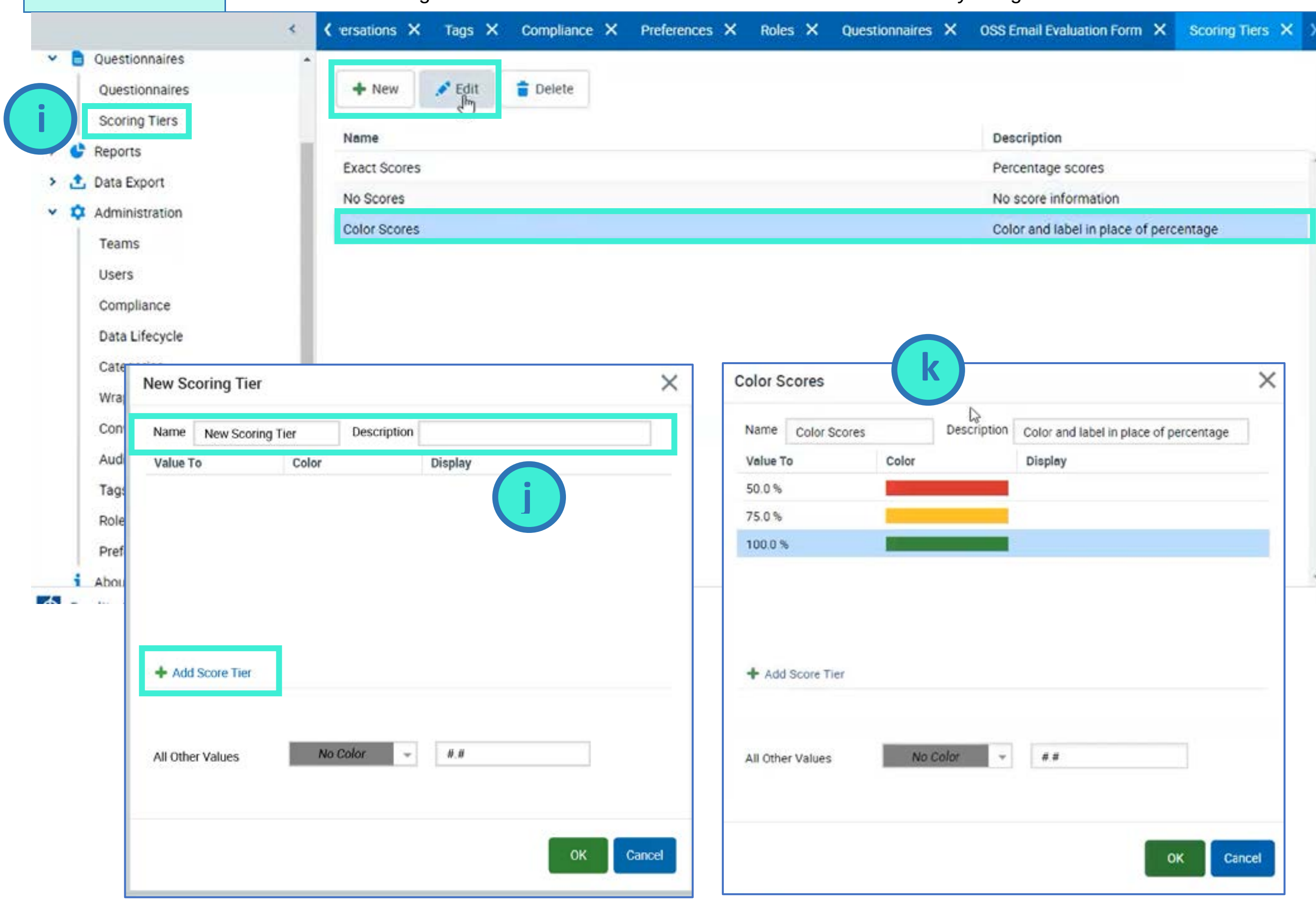
6. QM – CONVERSATIONS SCREEN – ADDING TAGS	
Z – Add Tag button	▪ You have the option to tag any selected conversation to find it easily in the future. **Select** a **conversation** and **click** the **Add Tag** button.
a – Available Tags	▪ **Click** the **Add Tag** button to show the preset Flag tag. You may **add** a **comment** not exceeding 1000 **Add Tag Flag** characters.
b – Adding Comments	▪ You can choose from the available tags, one at a time, and optionally type a comment. If you choose the **Comment tag** , entering a comment is mandatory. **Click** the **Save** button.
c – Comments in Conversation Details Window	▪ The tags will also be visible within the **Conversation Details** window. **Click** the **Details** button to extend the window and to see the tag(s). ▪ Tagged conversations will display a general tag icon . Hover over the icon to see the exact tag(s) with any comments that were added.
d – Editing & Deleting Tags	▪ To **search** for a specific tag, **enter** a word/phrase, such as **Test comment,** in the **search field.** As you will see in the above example, the conversation with the Test Comment is displayed. ▪ You can **edit existing tags**. **Click** the general **tag** icon and **click** to choose another tag option or to add/update a comment. Once a change is made, **click** the **Save** button. ▪ You can also **delete** a **tag**. **Click** on the **conversation**, **hover** over the **tag** icon and **click** on the **trash can** button, then **click** the **Delete** button.

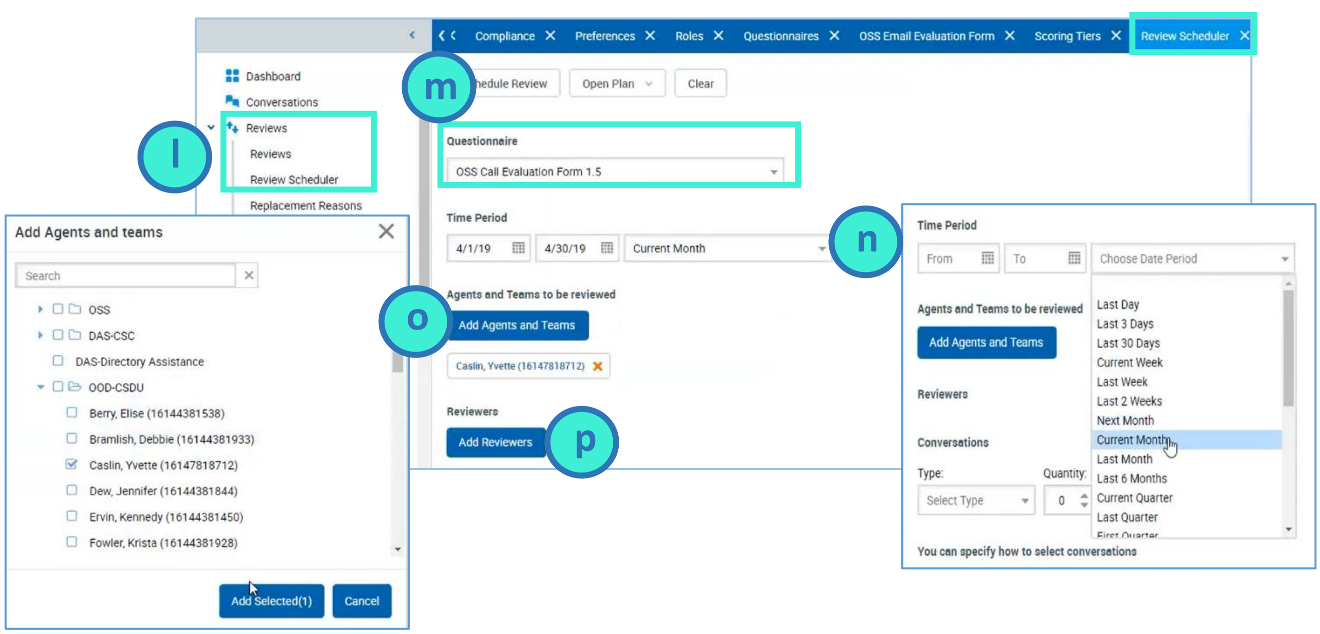


7. QUESTIONNAIRES SCREEN – GENERAL INFO AND UPDATES	
Questionnaire - Major Changes	▪ There are several big changes with Questionnaires. o **Modify existing Questionnaires** - You can now make any cosmetic changes to an active or inactive questionnaire (e.g. wording, grammar, etc.) at any time without having to rename or change the version as long as the modification does not impact the score.

	▪ Because reports are trending from one period to the next, a new version of the questionnaire will need to be created when any changes that impacts a questionnaire's scoring. o **Grades** no longer exist. Previously created questionnaires with grades are grandfathered in and may continue to be used o **Fail all** - This option assigns the lowest available numerical score to each question in the questionnaire. In previous versions, a zero grade, percentage, etc. could not be assigned. In version 6.4, **zero can be assigned to one question that will result in failure of the entire questionnaire.** ▪ A **'Fail all'** question is often 'validation' related to authenticating the caller which is an essential part of than agent's job o **Reduce all** - This option allows you to set the whole questionnaire score **reduction to or by 50%.** This answer can only be used once in a questionnaire and only in dedicated section without any other questions in that section – this is the only situation when at least 2 questions are not required in a section.
e – Navigation Tree	▪ Expand the **Questionnaires folder** and **select Questionnaires**
f - Questionnaire Screen	▪ Select the **Questionnaire** you want to modify. **Click** the **Edit** button to open the Questionnaire Properties window
g – Questionnaire Properties	▪ **Type of Questionnaire** (g1) defaults to **Quality Review**. 'Review' replaces 'Evaluation' in version 6.4 ▪ **Scoring System** (g2)– **Click** on **Percentages** (default option) or **Points**; Grades are no longer an option ▪ **Display Preferences** (g3)– You can now choose which options will be visible on the **Review Detail Report.** ▪ **Sort by Answers** (g4)– Select **Manual** for the ability to change order of answers by using the drag & drop feature
h – Fail all & Reduce all	▪ **Fail all & Reduce all** - **Enter** an **Answer name**, **select** the **Compliance Answer** of **Fail All or Reduce All** to take advantage of the new features as described above. You may assign 0% to one answer

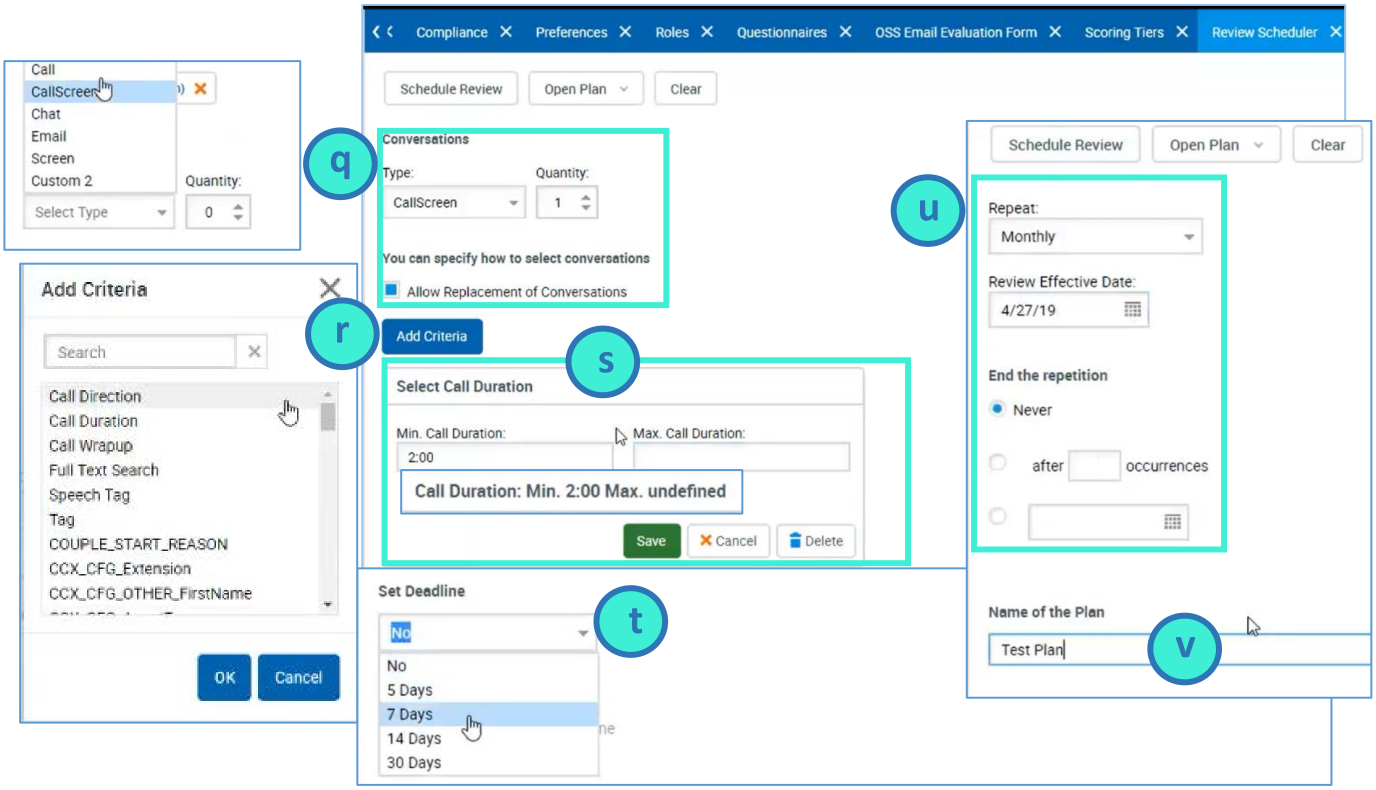


8. Quesionnaires - Scoring Tiers Screen	
Major Change	▪ A new option was added to Scoring Tiers for Questionnaires. Instead of showing exact scores as percentages, you also have the ability to create scores that are **text-based** and **color-coded**. This allows you to take the focus off of actual scores and display the different colors and/or text that represent the percentage or points scores. Scoring Tiers are assigned on the Questionnaire, Properties screen.
i – Navigation Tree	▪ **Select Scoring Tiers** under the Questionnaire folder
j – Scoring Tiers Screen	▪ **Select** the **New** button to create Scoring Tiers ▪ **Click** the **Edit** button to update an existing Scoring Tier. ▪ **Select** the **Delete** button to remove Scoring Tiers no longer needed ▪ When creating new Scoring Tiers, **Select Color Score,** then **Add Score Tier. Assign** a **value, color** and **text.** ▪ **Click** the **+Add Score Tier** to add tiers as needed.
k – Color Scores	▪ To **update** existing Scoring Tiers, click the **Edit** button. ▪ The above example shows 3 tiers created at 100%, 75% and 50%. Within each tier, the following breakdown was defined: o Green = 76-100% o Yellow = 51-75% o Red = 0-50% ▪ **Text** can be added for display. ▪ **Additional tiers** can be added by **clicking** the **+ Add Score Tier.** ▪ In the Edit screen, you can also **update colors** and **text displays** and **add** or **remove tiers.**

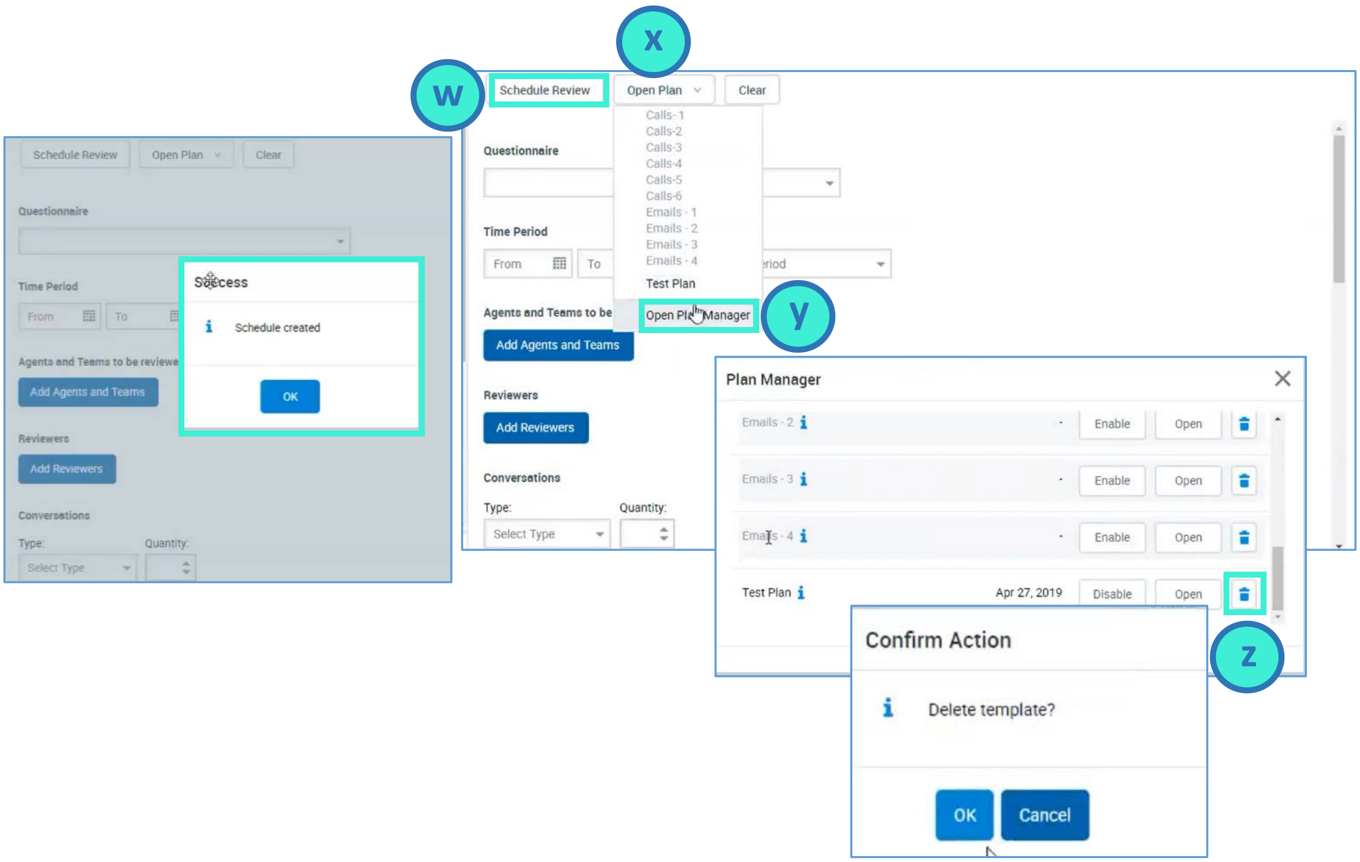


9. REVIEWS - REVIEW SCHEDULER SCREEN

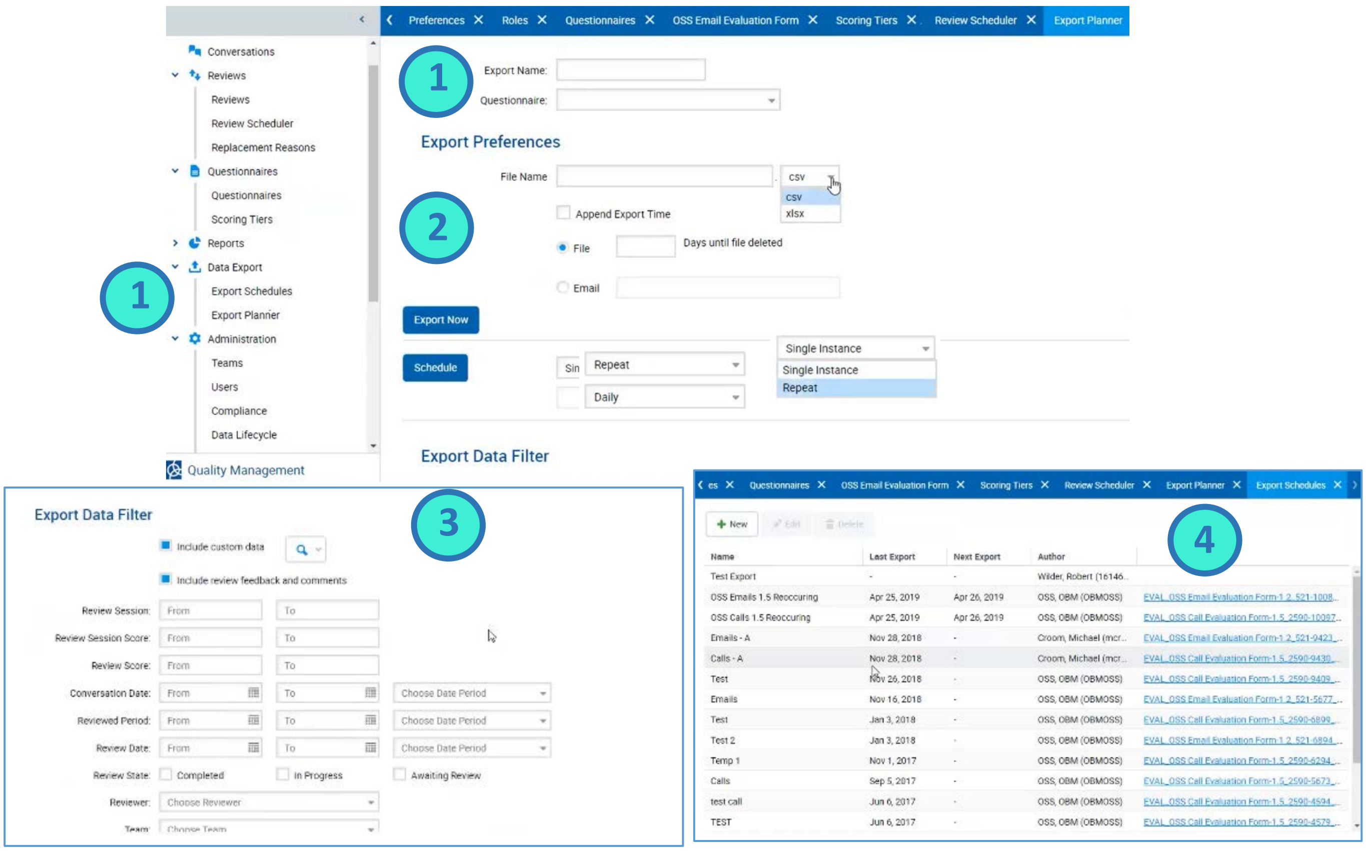
General Info	▪ A big change in version 6.4 is the Review Scheduler – it's streamlined, much easier to use and runs automatically. Also, **Reviews** is the new term for **Evaluations** in previous versions ▪ This update eliminates the need to pull in a template, load the template and select the template to pull in random evaluation. You can create a **plan** to use on an ad hoc basis or run automatically on a set basis (e.g., monthly, weekly, etc.) and as often as you want. ▪ **Email notifications** are now available to remind Reviewers that there are evals waiting in the review queue that need to be completed by a specific date.
l – Review Scheduler	▪ In the Navigation Panel, under the **Reviews** folder, click on the **Review Scheduler** sub-folder
m – Questionnaire and Time Period	▪ Select a **Questionnaire** from the drop-down list.
n – Time Period	▪ Select a **Time Period** for the Review Scheduler. Use the **Calendar From** and **To** fields or **click** on the drop-down list to select a **pre-set date range**.
o – Add Agents and Teams to be reviewed	▪ When adding agents and teams, remember that supervisors can be included from the list. **Click** the **Add Agents and Teams button** to display a list of teams and assigned agents. ▪ **Click** the **checkboxes** for the agent(s) to be reviewed ▪ Once an agent(s) is selected, **click** the **Add Selected** button – it will darken and show the number of agents selected.
p – Add Reviewers	▪ **Click** the **Add Reviewers** and **click** the **checkbox(s)** for the **reviewer(s)** you want added to the Reviewer Schedule ▪ Once the reviewer(s) is selected, **click** the **Add Selected** button – it will darken and show the number of reviewers selected.



10. REVIEWS - REVIEW SCHEDULER SCREEN	
q - Conversations	▪ **Select** the **type of conversation** you want included in the **Review Scheduler** and **enter** the **quantity** ▪ **Click** the **checkbox** to **Allow Replacement of Conversations** if you want to remove any of the ones pulled to review. Otherwise, you won't be able to swap out conversations.
r – Add Criteria	▪ To pull 100% random calls, skip this step and do not click the Add Criteria button. ▪ However, to eliminate calls that are not beneficial to review, **click** the **Add Criteria** button **Scroll** through the drop-down list, **select** the **criteria** and **click** the **OK** button to specify the type of conversation, such as direction (inbound, outbound, internal, etc.) or duration (specific time frame), etc. to include in the Review Scheduler.
s – Select Call Duration	▪ When Call Direction is selected, **enter values** in the **Minimum Call Direction** and the **Maximum Call Duration fields** and **click** on the **Save** button. If you leave a field blank, **'undefined'** will appear once you save the entry as shown in the above example.
t – Set Deadline & Remind Reviewer	▪ Use the drop-down list to set a deadline for the review to be completed. ▪ **Click** the **checkbox** and **enter** the **number of days** to the Deadline to remind the Reviewer(s) of the Deadline date. Note: To use the reminder feature, the Reviewers' email addresses must be in the system.
u – Repeat & End of Repetition	▪ If you want to run an **ad hoc** review, leave the **Repeat** option as **Never** and **click** the **Schedule Review** button. ▪ To choose a specific time frame, **click** the **drop-down list** and **select how often** you want this review schedule to repeat, then **select** a **specific date** using the **calendar**. ▪ Default time for the scheduled review is 3 AM
v – Name of the Plan	▪ **Enter** the **name** of this plan



11. REVIEWS - REVIEW SCHEDULER SCREEN	
w – Schedule Review Button	▪ **Click** the **Schedule Review** and you will see a dialog box displaying a message, **Success** and **Schedule Created** ▪ **Click OK**
x – Open Plan Button	▪ To find a plan that's been created, **click** the **Open Plan** button and **select** the **Open Plan Manager** option.
y – Plan Manager	▪ Use the **scroll bar** to locate a plan, such as the **Test Plan** used in the above example. ▪ The **grayed plans** are **disabled;** to **activate, click** on the **Enable** button ▪ **Bolded plans** are **active;** to **deactivate, click** on the **Disable** button
z – Delete Plan	▪ To **delete** a **plan**, **click** on the **trash can** button and the **OK** button



12. DATA EXPORT – EXPORT PLANNER SCREEN	
General Information	▪ Data Export allows you to export your Reviews (Evaluations) into a CSV or Excel file. This allows you to manipulate the data in these formats or in other reporting systems or applications.
1 – Export Planner	▪ In the Navigation Panel under the **Data Export** folder, **click** on the **Export Planner** subfolder. ▪ **Enter** an **Export Name** and **select** a **Questionnaire** from the drop-down list.
2 – Export Preferences	▪ **Enter** a **file name** for the export and **select** a **csv or Excel format** from the drop-down list – The name must be unique and can be done by **clicking** the **checkbox** to **append export time.** ▪ **Click** the **File** radio button and **enter** the **number of days** until the file is deleted if you want to Export file to be stored in the Export Schedules folde.r ▪ **Click** the **Email** radio button and **enter** the **email address** to email the export file to the assigned reviewers. ▪ If you want the **Reviews** exported immediately**, click** the **Export Now Button.** ▪ If you want to **schedule** the export at a later time**, click** the drop-down lists for **selecting** either **Repeat or Single Instance** and the **recurring frequency – Daily, weekly, etc.**
3 – Export Data Filter	▪ The Export Data Filter allows you to include custom data. **Click** the **checkbox** and the **search drop-down list** and **select** the **data elements** to be included. ▪ **Click** the **Include review feedback and comments checkbox** to include this in the export. ▪ To eliminate all Reviews, **enter additional information** in the **fields** in this section to narrow down the Reviews being exports, such as specific dates, scores, review state, reviews, agents, etc.
4 – Export Schedules	▪ In the Navigation Panel, **click** on **Export Schedules**. This example displays export files previously created. ▪ When on the Export Schedules screen, **click** the **+New button** to create a new export file and follow the above steps.

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