



**CallCopy**<sup>®</sup>

Innovations in Call Recording  
and Contact Center Solutions

# cc: Discover QA Coaching Guide

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1.0	Initial Release	Matt Madzia	5/18/2011
2	Corrected QA Forms search instructions. Cannot select multiple forms, agents, etc., only one or all.	JThomas	11/08/2011

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# Chapter 1: Introduction

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## **In this chapter we will cover:**

- ✓ Basic product overview

## Overview

This guide provides information and procedures for using quality assurance (QA) functions on cc: Discover's Coaching and Web Player tabs. Those functions include creating evaluation forms, performing evaluations, setting up content libraries, and running various reports.

The guide assumes that the user is familiar with

- Basic Quality Management (QM) concepts and processes.
- Basic Windows PC usage such as right and left clicking the mouse.
- Usage of the cc: Discover Web Portal.

Please see your system administrator for the cc: Discover Web Portal URL and for access permissions to the necessary functions.

# Chapter 2: Web Portal Basics

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## In this chapter we will cover:

- ✓ Requirements to run the cc: Discover Suite
- ✓ Logging in and out of the systems and log in errors
- ✓ Forgotten passwords
- ✓ Version number
- ✓ Basic Web Portal navigation
- ✓ Logging out
- ✓ Changing passwords

## Requirements

The cc: Discover suite includes a Web Portal and a Web Player. The Web Portal has a light-weight administrative system. The Web Player component has minimum system requirements due to the processing required for full audio and video playback. With those tasks in mind, CallCopy recommends exceeding the minimum system requirements listed below.

- Microsoft Windows XP/2003/Vista/2008/7
- Internet Explorer 7; Firefox 3.0
- Microsoft Silverlight browser plug-in, v4.0 or higher
- 2.0 Ghz Processor
- 1GB RAM
- 1280 x 800 screen resolution at 16 bit color depth

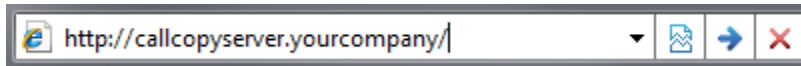


## Logging In

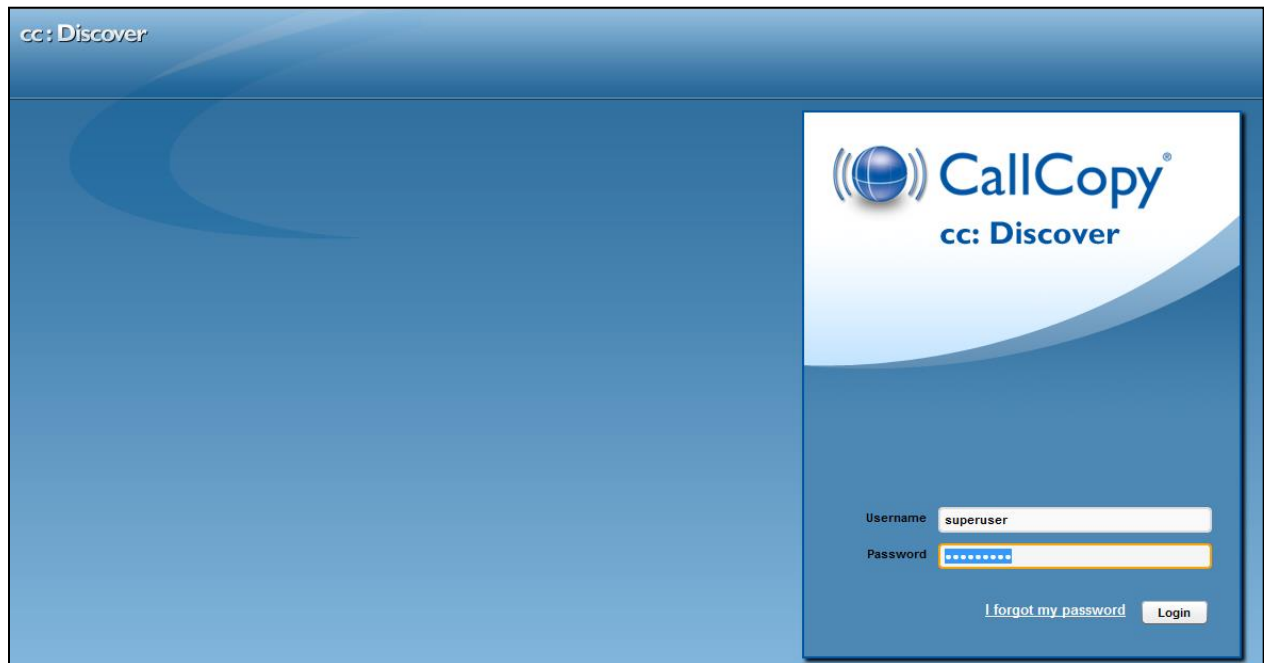
The CallCopy Installation team will provide you with a user account with system administrator level privileges during installation and Administrator training. Your User account will consist of a Username and Password.

It is recommended you change your password from the default provided as soon as possible.

Additionally, a hostname or IP address for the server will be established so that you may access the web-based administration interface.



Type in the hostname or IP address for your server into your browser's address bar (http://callcopyserver.yourcompany in the example above). You will be presented with a login page similar to the one displayed below.



## Login Screen Fields

**Login Mode:** There are two authentication modes available.

*Database mode* utilizes cc: Discover's internal user database that has been populated from manually entered user accounts.

*Active Directory Mode* is available only if the Active Directory Sync module is enabled and configured in the cc: Discover software. This mode uses Kerberos authentication to validate an Active Directory user is logged in and a member of the proper AD groups to access cc: Discover. With this mode, entering a username and password is not necessary as the user is already logged into the computer with their domain credentials.

**Username:** Enter your CallCopy username

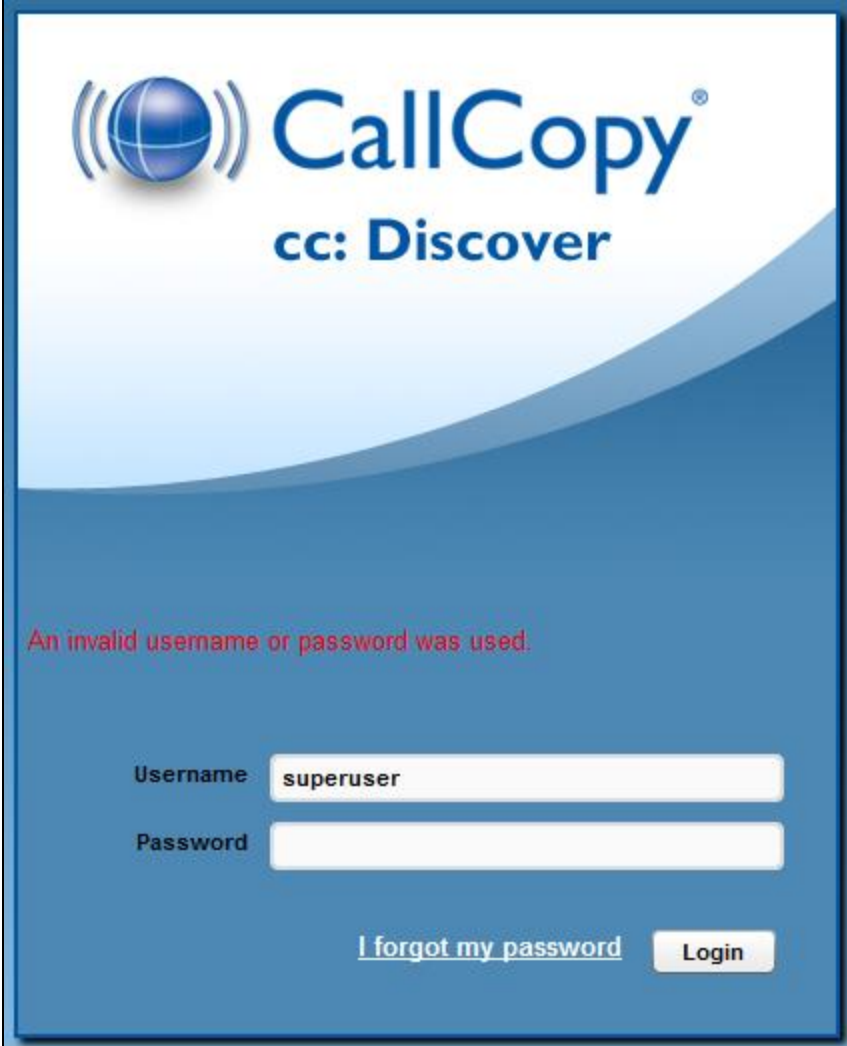
**Password:** Enter your CallCopy password

Fill in the listed field and click the '**Login**' button to continue.

## Login Errors

If your login fails you will be presented with the following error:

***"Username or password is incorrect."***



The screenshot shows the CallCopy cc: Discover login interface. At the top left is the CallCopy logo, a blue globe with signal waves, followed by the text "CallCopy" in a large blue font and "cc: Discover" in a smaller blue font below it. The background is a gradient of light blue at the top to a darker blue at the bottom. A red error message reads "An invalid username or password was used." Below this, there are two input fields: "Username" with the text "superuser" and "Password" which is empty. At the bottom, there is a link that says "I forgot my password" and a "Login" button.

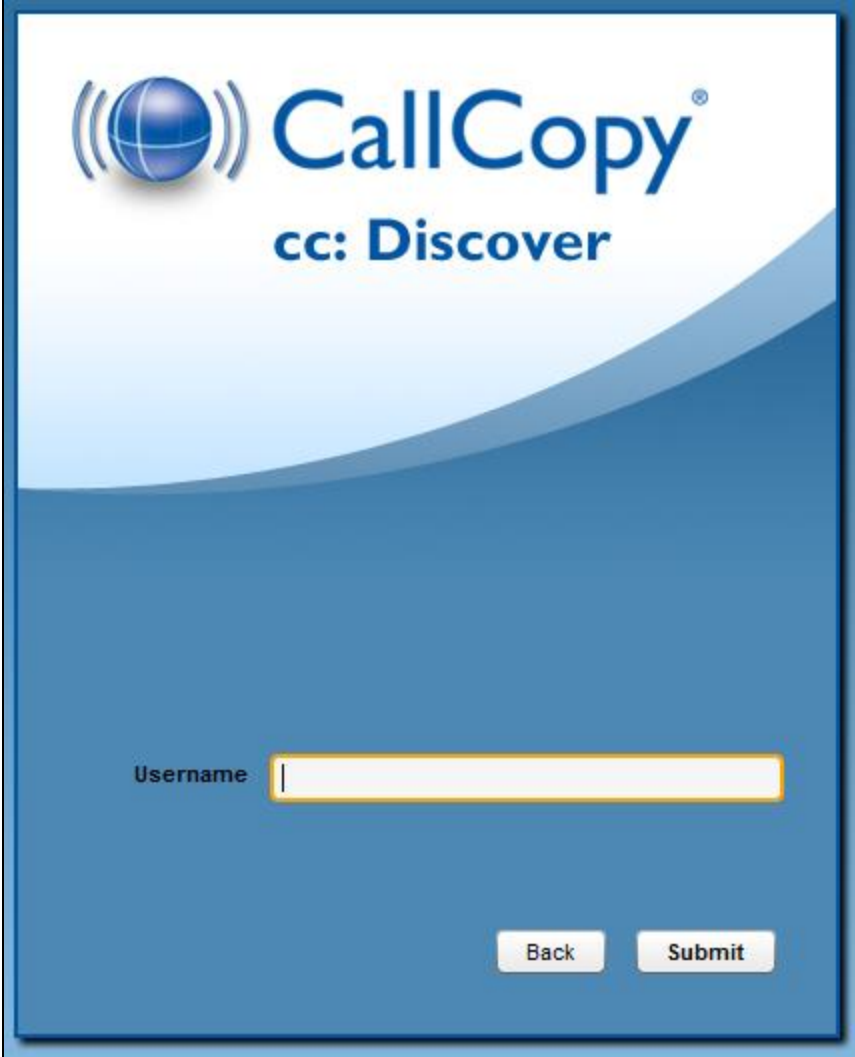
**Note:** Passwords are case sensitive. If you are unable to login using the username and password you believe to be correct, please contact your CallCopy Support provider.

## “Forgot Password” Reset

If you are unsure of or have forgotten your password, you can use the “Forgot Password” function on the login page. Your password will be reset and a temporary password will be e-mailed to you if you use this option.

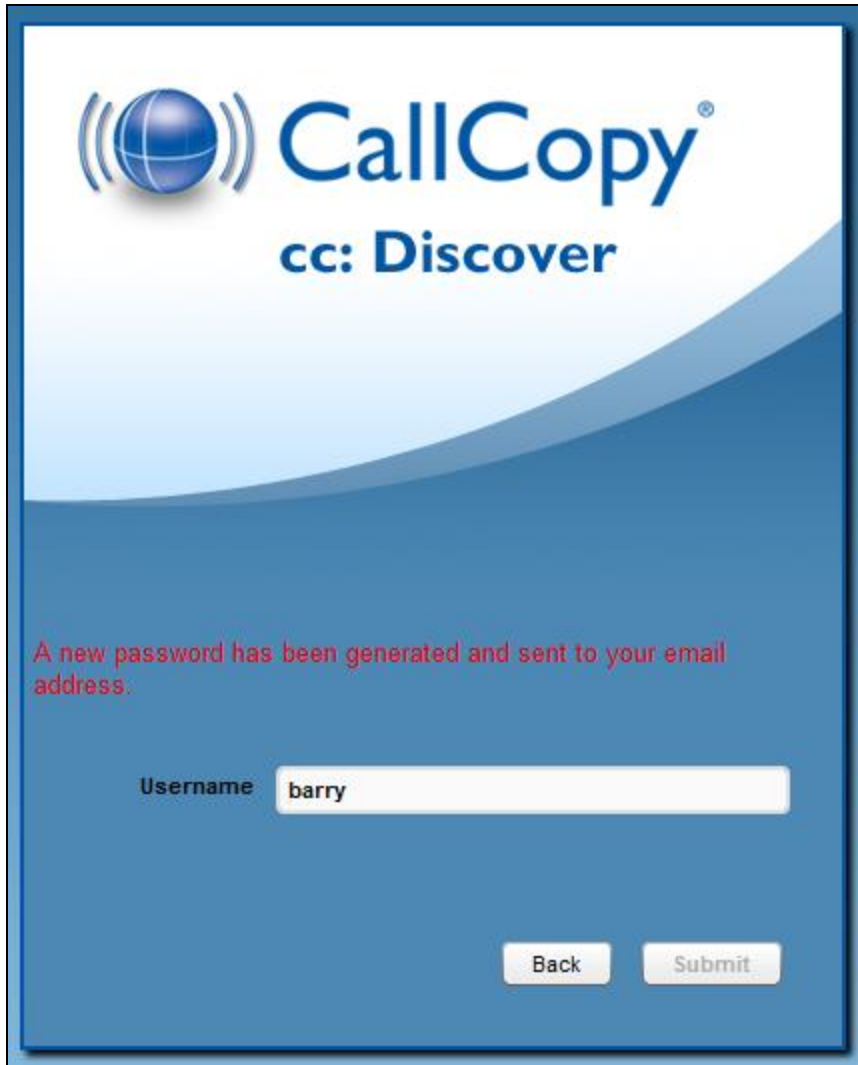
To use the feature, first click the **‘I forgot my password’** link on the login screen.

You will be taken to a page asking for the username that you wish to reset the password for. Enter the username and click **‘Submit’**.



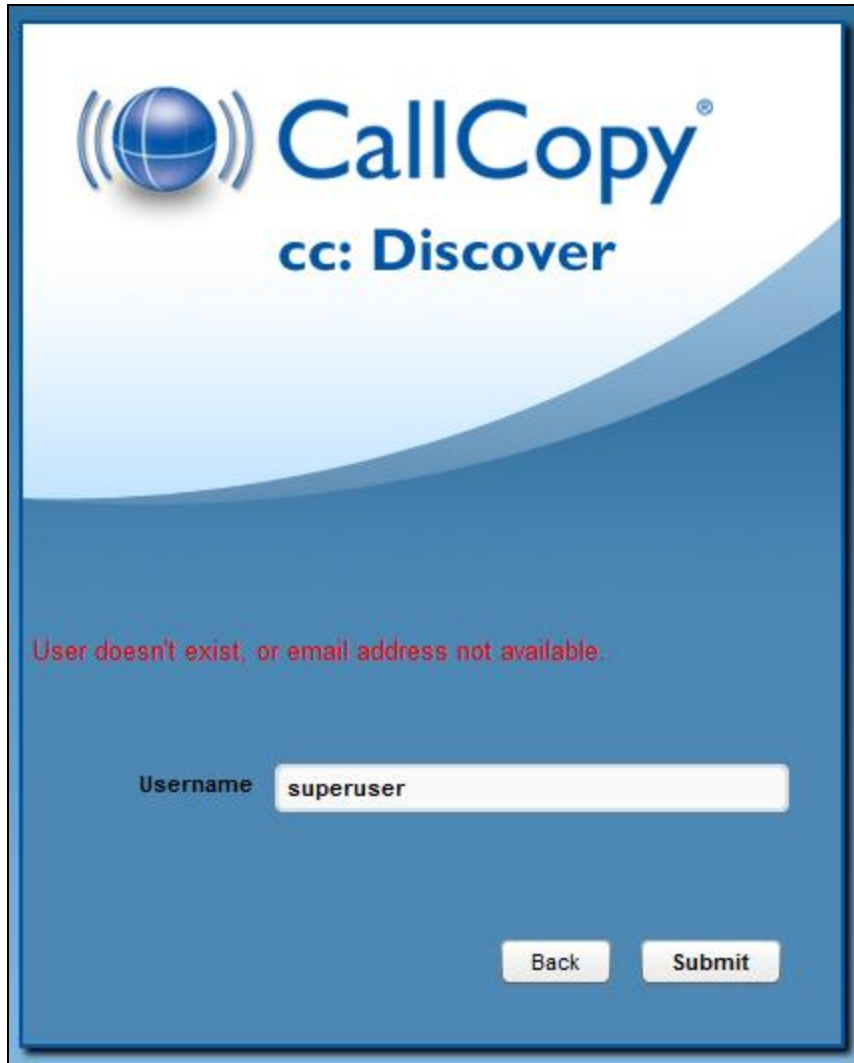
The image shows a login form for CallCopy. At the top left is the CallCopy logo, which consists of a blue globe with white lines and two sets of white curved lines on either side, resembling a signal or broadcast. To the right of the logo, the text "CallCopy" is written in a large, blue, sans-serif font, with a registered trademark symbol (®) to its upper right. Below "CallCopy", the text "cc: Discover" is written in a smaller, blue, sans-serif font. The background of the form is a gradient of blue, starting with a lighter shade at the top and becoming darker towards the bottom. In the lower-left area, the label "Username" is positioned to the left of a white rectangular input field with a thin yellow border. At the bottom right of the form, there are two buttons: "Back" and "Submit", both with a light gray background and a thin border.

If successful, you will see the following message:



A randomly generated password will be sent to the email address associated with your username. Once you have logged into the system you will be able to change your password.

If there was an issue locating your username, or if your user account does not have an e-mail address associated with it, you will see the following message. Please contact your cc: Discover system administrator to resolve this issue.



## Locating Version Number

The version number for your cc: Discover software is displayed in the upper-right corner of the login page. This version number can be useful for locating correct documentation for your software and when obtaining support for your system.



## Navigating the Web Portal

Web Portal navigation is achieved by functional tabs and menus. The tabs available depend on the user's security permissions and the cc: Discover modules purchased. The navigation menu for a functional tab is on the left side of the page.

On the navigation menu, pages are organized under menu headers. Clicking a menu header will display the list of page links, menu items, or other content. When you click on a header to display its content, any other open sections of the menu will collapse. You can expand that section again by clicking on its header.

The screenshot displays the cc: Discover web portal interface. At the top, there are navigation tabs: Home, Web Player (selected), Coaching, Reporting, and Administration. Below these are sub-tabs: Call List and Live Monitor. The main content area is divided into a left sidebar and a main table.

**Calendar:** Shows March 2011 with the 28th selected.

**Agent:** MABEL

**CallCopy group:** MABEL

**Queue:** MABEL

**Group:** MABEL

**Categories:** MABEL

**Filter:** Current Filter: Time Recorded X

	First Name	Last Name	Extension	Time Recorded	Duration	Score	CallerID ANI	Call Direction
▶	BOBBY	KIM	1151	3/28/2011 9:27:38 PM	00:04:15	-		O
▶	ROSALIND	MOODY	1174	3/28/2011 8:17:26 PM	00:07:44	-	2123845296	I
▶	FERN	MORSE	1419	3/28/2011 5:41:05 PM	00:06:12	95.7 %		O
▶	WALTER	JUAREZ	1357	3/28/2011 5:34:56 PM	00:08:11	-		O
▶	PERRY	FARMER	1053	3/28/2011 2:33:45 PM	00:04:15	-		O
▶	JOANN	ABBOTT	1034	3/28/2011 11:08:33 AM	00:03:57	-		O
▶	MABEL	BOYER	1051	3/28/2011 10:42:54 AM	00:08:11	-	2127917495	I
▶	KATELYN	MCCLURE	1320	3/28/2011 9:45:52 AM	00:07:44	97.1 %		O
▶	CORA	LOTT	1427	3/28/2011 9:37:02 AM	00:08:11	97.7 %	2127993476	I
▶	MABEL	BOYER	1315	3/28/2011 4:50:13 AM	00:07:44	-	6145536393	I
▶	NELDA	CONRAD	1289	3/28/2011 4:06:13 AM	00:08:11	87.1 %		O
▶	NELDA	CONRAD	1254	3/28/2011 1:46:25 AM	00:04:15	-		O
▶	KATELYN	MCCLURE	1043	3/28/2011 12:52:25 AM	00:08:11	-	2122934868	I

## Logging Out

Once you have completed your session, it is very important to log out, for security purposes. To logout, simply click the **'Logout'** link located at the top-right of every page. Once you have successfully logged out, you will be returned to the login window.



## Changing Your Password

Clicking on the 'Change Password' link in the upper right-hand corner of every page will direct you to a page that prompts you to enter a new password, and then confirm the password you have just entered. After you have entered your new password, click the Save button to save the new password.



Change Password	
New Password:	<input type="text"/>
Confirm New Password:	<input type="text"/>



# Chapter 3: Manage QA Evaluation Forms

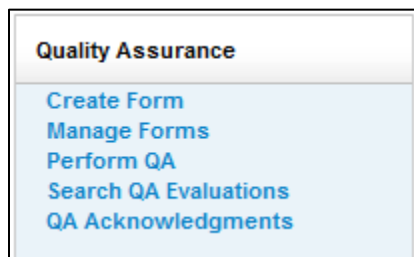
## In this chapter we will cover:

- ✓ Quality Assurance form usage
- ✓ Creating a form
- ✓ Viewing forms
- ✓ Editing forms
- ✓ Disabling and enabling form
- ✓ Importing and exporting XML documents

## QA Form Usage

This section explains how to create Quality Assurance (QA) evaluation forms for reviewing the work of agents including how they handle calls. Authorized users/evaluators use the forms in the cc: Discover Web Player and Coaching tabs to record scores and comments. Score data collected from the forms is used for reporting.

## Create a QA Form



In the cc: Discover Web Portal, click the Coaching tab. The Quality Assurance menu appears on the left side of the page.

In the Quality Assurance menu, click Create Form.

**NOTE:** Save a QA form before switching to another tab. Changing tabs without saving will cause all changes to be lost.

Use the Back button to close a form.

## Form Name

In the QA Form Editor, type a unique and descriptive name in the “Form Name” field. In the example below the name is “Customer Service Evaluation.”

Select the Agent Acknowledgement Required option if agents must be notified that they are being evaluated using this form. If agents are also cc: Discover users, they will receive evaluations notices on the Home tab. If agents have email addresses recorded in cc: Discover, they will receive notices at that address. If this option is not selected, evaluators still have the option when performing reviews whether to notify agents.

## Groups

Groups are the CallCopy groups that administrators create and to which agents can be assigned. They usually represent business organizational units or projects. (CallCopy Groups are covered in the *cc: Discover Web Player Guide* and *cc: Discover Administration Guide*.)

Agents have to be in groups to be evaluated, and forms have to be attached to groups to be used.

In the Un-Attached Groups list, click one or more groups that may use the form, and then click the right arrow. Reversing the procedure un-attaches groups.

Group attachments do not have to be permanent. If a form is no longer needed for a group, the group can be un-attached after evaluations are completed.

## Sections

Sections organize a form. They usually follow the type of call flow that occurs. For example, for a technical support QA form, logical sections might be "Greeting," "Soft Skills," "Use of Desktop Tools," or "Call Closing."

To create a section, click .

Add a unique name in the Section Title field.


 A screenshot of a form creator interface showing a text input field labeled "Section Title:". The field is empty and is part of a light blue header bar. There are small navigation icons (up, down, close) to the left of the label.

## Questions

Evaluators use questions to score the call. Questions have responses assigned to them.

To create a question, click [Add New Question](#).

A question text and type object will appear. Type the question text. For example, the question can be "Did the agent use the standard greeting?"


 A screenshot of the question creation form in the form creator interface. The form has a light green background. At the top left, there are navigation icons (up, down, close). The "Question Type:" field is a dropdown menu currently set to "Dropdown". To the right, there is a "Critical:" checkbox which is currently unchecked. Below these fields is a large text input field labeled "Question:".

One question on a form can be designated as Critical. Responses to and scores on this question are tracked by the Critical Question Detail and Critical Question Summary reports. For example, critical question could track if the agent asked for the customer's email address to support future marketing efforts.

Select the question type. There are five types:

- Dropdown (Scoring)
- Horizontal Radio (Scoring)
- Vertical Radio (Scoring)
- Free Text (Non-Scoring)
- Comment (Non-Scoring)

**Dropdown:** Responses appear in a drop down menu, and the reviewing user can select one.

For example, a question with responses ranging from "Exceeds Expectations" to "Fails Expectations" with point values ranging from ten (10) for "Exceeds Expectations" to zero (0) for "Fails Expectations" would appear in the Form Creator like this:

Question Type:  Critical:

Question:  
Dropdown question text goes here.

Response:  Auto Fail:  Default:   
Possible Points:

Response:  Auto Fail:  Default:   
Possible Points:

Response:  Auto Fail:  Default:   
Possible Points:

**Horizontal Radio:** Responses appear on the form as circular Radio buttons displayed in a horizontal line. For example, a question with responses of “Yes,” “No,” and “Not Applicable” would appear in the Form Creator like this:

Question Type:  Critical:

Question:  
Horizontal Radio question text is entered here.

Response:  Auto Fail:  Default:   
Possible Points:

Response:  Auto Fail:  Default:   
Possible Points:

Response:  Auto Fail:  Default:   
Possible Points:

This example will appear like this in the completed form:

Horizontal Radio question text is entered here.  Yes  No  Not Applicable

**Vertical Radio:** Responses appear on the form as circular Radio buttons displayed in a vertical column. For example, a question with responses of “None,” “One,” and “Two” would appear in the Form Creator like this:

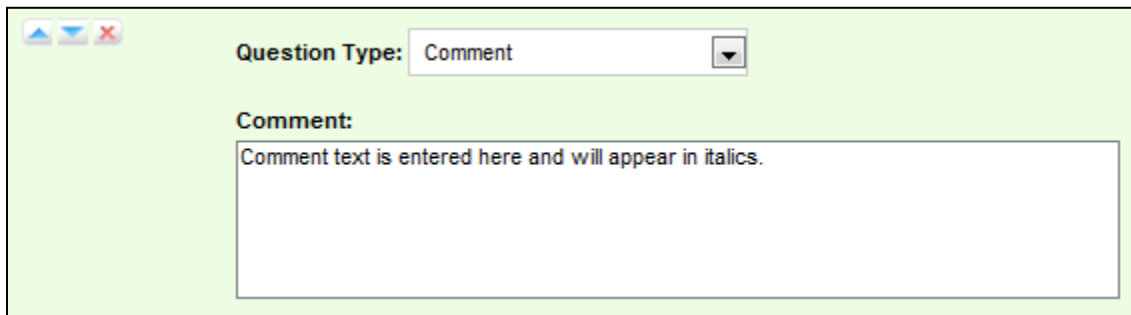
This example will appear like this in the completed form:

**Free Text:** This is general free text field that the evaluator can use to give a descriptive analysis. Point values cannot be associated with a Free Text response, so responses to questions of this type do not apply to the overall percentage score of the form. You will have the option to require a response with Free Text, which requires that at least one character (and up to 1024 characters) be placed in the field.

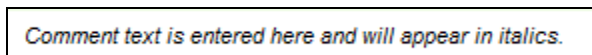
This example will appear like this in the completed form:

A screenshot of a form with a light green background. On the left side, there is a text input field containing the placeholder text "Free text text is entered here." The right side of the form is empty.

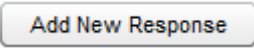
**Comment:** This is a note that can be left on the form to describe the question or provide extra instructions or details. This is not a question, but rather informative text that appears on the QA form for the evaluator's benefit.

A screenshot of a form with a light green background. At the top left, there are three small icons: a blue up arrow, a blue down arrow, and a red X. To the right of these icons is a label "Question Type:" followed by a dropdown menu showing "Comment". Below this is a label "Comment:" followed by a text input field containing the placeholder text "Comment text is entered here and will appear in italics." The rest of the form is empty.

This example will appear like this in the completed form:

A screenshot of a completed form element. It consists of a rectangular box with a thin black border containing the text "Comment text is entered here and will appear in italics." in an italicized font.

## Responses

To specify the responses an evaluator can provide, click .

Enter a response option in the text field.

Questions can have an unlimited number of responses.

**Possible points:** This value provides a score for the response. During evaluation and scoring, cc: Discover adds the points scored on each question and divides that value by the total of the highest possible points for all applicable questions. This calculation generates a percentage score for a form.

**NOTE:** For consistent scoring across forms, users should create a question points/value schema that is easy to track and used by all form creators.

The screenshot shows a configuration window for a 'Dropdown' question. At the top, 'Question Type' is set to 'Dropdown' and 'Critical' is unchecked. The question text is 'Did the agent understand the products?'. Below this, five response options are listed, each with a 'Response' field, 'Possible Points' field, 'Auto Fail' dropdown (all set to 'None'), and a 'Default' checkbox.

Response	Possible Points	Auto Fail	Default
Excellent	5	None	<input type="checkbox"/>
Very Good	4	None	<input type="checkbox"/>
Good	3	None	<input type="checkbox"/>
Fair	2	None	<input type="checkbox"/>
Poor	1	None	<input type="checkbox"/>

In the example above, the question is set to “Dropdown,” so on the form the possible responses will be seen as options in a dropdown menu.

If the response is “Excellent,” the evaluation will have five points added to the total score. A response of “Very Good” will earn four points, “Good” will earn three points, “Fair” will earn two points, and “Poor” will earn one point.

If a question may not be applicable to all calls, include a ‘Not Applicable’ response option. If the evaluator selects this option, and enters NA or na in the Possible Points field, the question’s available points will not be counted toward the section or form totals.

**NOTE:** *Not Applicable questions can be assigned a point value. That value can affect the final score because it is counted towards the section and form totals. However, assigning Not Applicable questions the highest possible value will have no affect on the agent’s final score.*

The screenshot shows a configuration window for a 'Horizontal Radio' question. The question text is 'Horizontal Radio question text is entered here.' and 'Type' is set to 'Horizontal Radio'. Three response options are listed, each with a 'Response' field, 'Possible Points' field, 'Auto Fail' dropdown (all set to 'None'), and a 'Default' checkbox.




Response	Possible Points	Auto Fail	Default
Yes	5	None	<input type="checkbox"/>
No	0	None	<input type="checkbox"/>
Not Applicable	na	None	<input type="checkbox"/>

**Auto-fail:** If the evaluator selects a response designated as Auto Fail, then the agent fails the Section or the entire Form. This setting is typically used to enforce service-affecting protocol, such as security verifications or adherence to scripts with legal disclaimers.

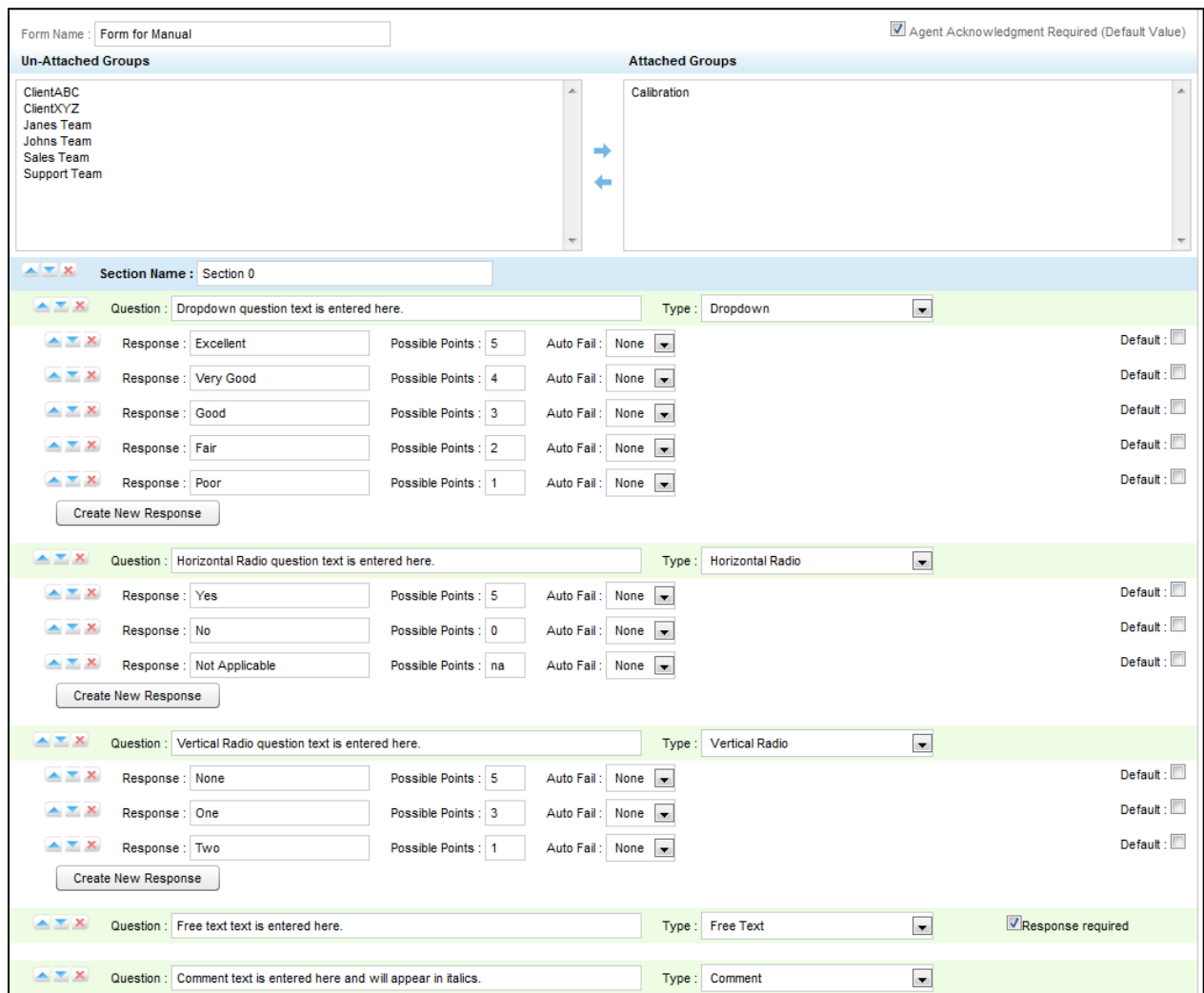
**Default:** Selecting the Default option causes the response text to appear in the question’s response field on the form.

## Move Form Items

Use the navigation menu buttons  to set the order of QA Form items:

-  Moves the selected item up.
-  Moves the selected item down.
-  Removes the item entirely.

### Example Form:



Form Name :   Agent Acknowledgment Required (Default Value)

**Un-Attached Groups**

- ClientABC
- ClientXYZ
- Janes Team
- Johns Team
- Sales Team
- Support Team

**Attached Groups**

- Calibration

**Section Name :**

**Question :**  **Type :**

Response	Possible Points	Auto Fail	Default
<input type="text" value="Excellent"/>	5	<input type="text" value="None"/>	<input type="checkbox"/>
<input type="text" value="Very Good"/>	4	<input type="text" value="None"/>	<input type="checkbox"/>
<input type="text" value="Good"/>	3	<input type="text" value="None"/>	<input type="checkbox"/>
<input type="text" value="Fair"/>	2	<input type="text" value="None"/>	<input type="checkbox"/>
<input type="text" value="Poor"/>	1	<input type="text" value="None"/>	<input type="checkbox"/>

**Question :**  **Type :**

Response	Possible Points	Auto Fail	Default
<input type="text" value="Yes"/>	5	<input type="text" value="None"/>	<input type="checkbox"/>
<input type="text" value="No"/>	0	<input type="text" value="None"/>	<input type="checkbox"/>
<input type="text" value="Not Applicable"/>	na	<input type="text" value="None"/>	<input type="checkbox"/>

**Question :**  **Type :**

Response	Possible Points	Auto Fail	Default
<input type="text" value="None"/>	5	<input type="text" value="None"/>	<input type="checkbox"/>
<input type="text" value="One"/>	3	<input type="text" value="None"/>	<input type="checkbox"/>
<input type="text" value="Two"/>	1	<input type="text" value="None"/>	<input type="checkbox"/>

**Question :**  **Type :**   Response required

**Question :**  **Type :**

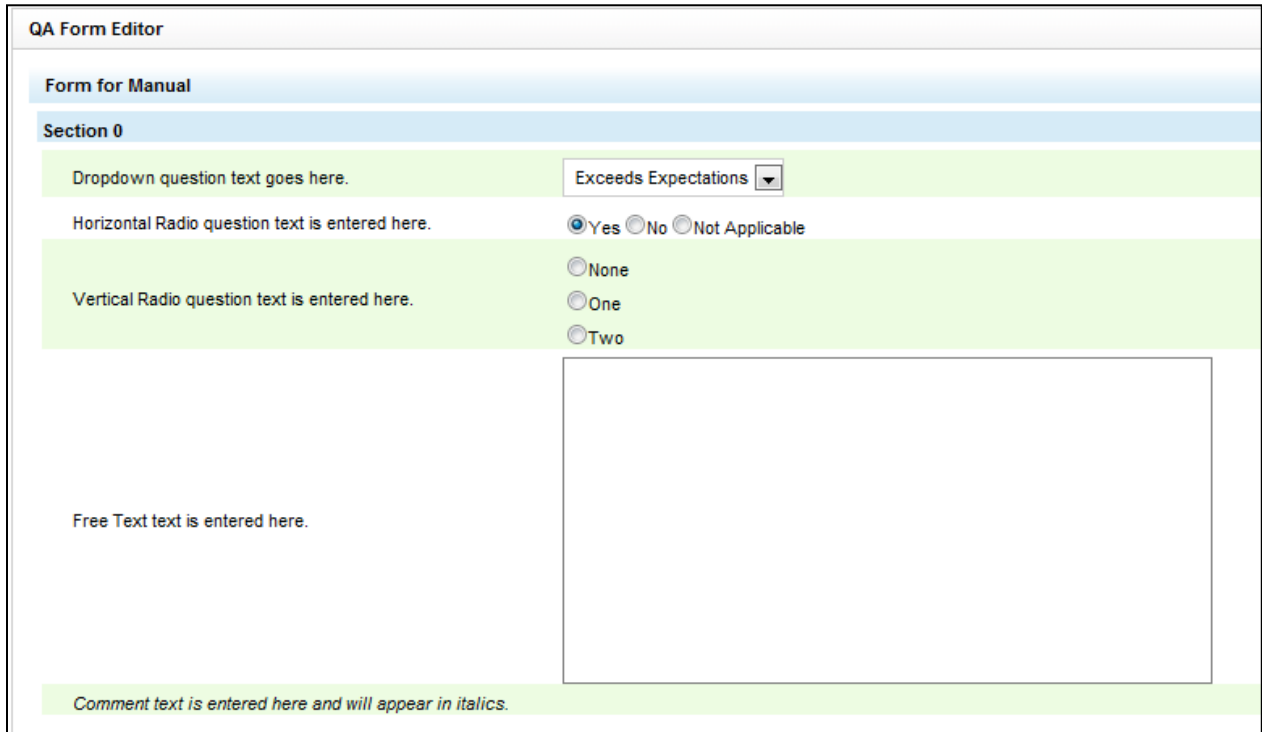


## Save a Form

To finish building a form, click . A preview of the form will appear.

If the form needs changes, it must be edited from the Manage Forms page.

**NOTE:** *You can alter a form once it is saved and before it has been used in evaluating a call, but once the form has been used, it will be locked from editing. Do not use the form until you are certain you have added all the sections and questions necessary.*



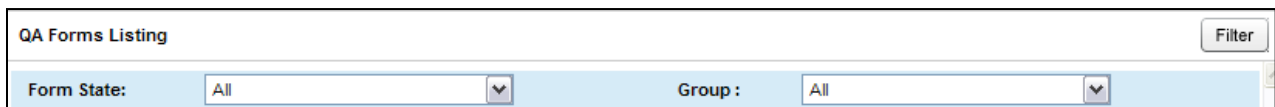
The screenshot shows the 'QA Form Editor' interface. At the top, there is a header 'QA Form Editor' and a sub-header 'Form for Manual'. Below this, a section titled 'Section 0' contains several question types:

- Dropdown question:** 'Dropdown question text goes here.' with a dropdown menu set to 'Exceeds Expectations'.
- Horizontal Radio question:** 'Horizontal Radio question text is entered here.' with radio buttons for 'Yes' (selected), 'No', and 'Not Applicable'.
- Vertical Radio question:** 'Vertical Radio question text is entered here.' with radio buttons for 'None', 'One', and 'Two'.
- Free Text question:** 'Free Text text is entered here.' with a large text input area.
- Comment:** 'Comment text is entered here and will appear in italics.' in a light green box at the bottom.

## View Existing QA Forms

The Manage Forms menu allows you to view Quality Assurance forms already added to the system.

On the Coaching tab, click Manage Forms.



The screenshot shows the 'QA Forms Listing' page. It features a header 'QA Forms Listing' and a 'Filter' button. Below the header, there are two dropdown menus: 'Form State:' set to 'All' and 'Group:' set to 'All'.

On the QA Forms Listing page, select the Form State and the Group. Then click Filter.

The options for Form State are All, Active, and Disabled. Active forms are available to users who have permissions to perform QA evaluations. Disabled forms are not currently used to perform evaluations.

## Chapter 3: Manage QA Evaluation Forms

Groups are the CallCopy groups that administrators can create and to which agents can be assigned. They usually represent business organizational units or projects.

Form State:	Active	Group:	All
Form Name :	Sales Evaluation	Status:	Active
Edit by:	N/A		
Create Date :	3/16/2006 11:16:21 AM	Disable Date :	12/30/1899 12:00:00 PM
Forms Completed :	2304	Last Form :	8/17/2010


For each form listed, the following summary information is provided:

- Form Name: Name of the form assigned in the QA Form editor.
- Edit by: User name of the last person to change the form.
- Create Date: Date the form was created.
- Forms Completed: Number of times an evaluation has been submitted with this particular form.
- Status: Active or Disable.
- Disable Date: Date the form was last disabled. (If it has never been disabled, the field says '12/31/9999').
- Last Form: The last time the form was used to evaluate an agent.

## Edit Existing Forms

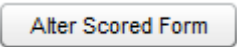
An existing form

- CANNOT be changed if it has ever been used to evaluate an agent. Changing a form would alter any reporting based off of it.
- Can be saved as a new version if it has been used to evaluate agents.
- Can be changed if it has NEVER been used to evaluate an agent.
- Can be attached or un-attached to CallCopy groups regardless of whether it has been used. Un-attaching a group prevents users from evaluating that group with the form.

To edit an existing form in the QA Form Editor, locate the form and click .

If the form has never been used for scoring or only Group attachments need change, make the necessary changes and click Save.

In order to edit a form that has previously been used to score agents or calls, change the name of the form.

Click .

**QA Form Editor** [Export] [Import] [Back] [Save]

**QA Form Info**

Form Name:   Agent Acknowledgment Required (Default Value)

**Un-Attached Groups** **Attached Groups**

Calibration

ClientABC  
ClientXYZ  
James Team  
Johns Team  
Sales Team  
Support Team

[Alter Scored Form]

**QA Form**

Section Title:

Question Type:  Critical:

Question:

Response:  Auto Fail:  Default:

Possible Points:

Response:  Auto Fail:  Default:

Possible Points:

[Add New Response]

Question Type:  Critical:

Question:

**This form has already been scored and cannot be edited. A new form will be created if altered.**

Make the necessary changes to the form. Click Save.

The new form will not save if a different name has not been entered in the Form Name field.

## Disable/Enable Forms

Active forms are available to users who have permissions to perform QA evaluations. Disabled forms are not currently used to perform evaluations. A form can be disabled and enabled an unlimited number of times. Forms cannot be deleted.

To disable a form, find the form on the QA Forms listing and click Disable. The form's Status field changes from Active (green) to Disabled (red). To enable a form, reverse these steps.

## Import/Export Forms

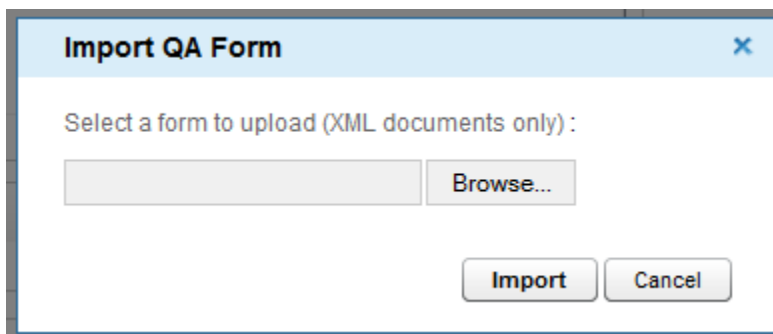
The CallCopy user community provides XML documents that can be imported to create QA forms. These customizable documents serve as templates with standard questions, responses, and point values. Some documents include Healthcare QA Evaluation, Performance Review, Sales Evaluation, and Technical Support Evaluation. (Clients can access the user community through the CallCopy Web site.)

To import an XML document, download the CallCopy XML form template to your PC.

On the Coaching tab, click Create Form in the Quality Assurance menu.

In the QA Form Editor, name the form and attach any groups that will be evaluated using the form.

Click Import. Click Browse and navigate to the XML file.



Select it and click Open. Click Import.

The form will be created. Edit it as needed and click Save.

To export an existing form as an XML document, click Manage Forms. Find the form and click Edit. When the form opens, click Export. Save the form, making sure that it is saved as File Type XML.

# Chapter 4: Perform Evaluations

## In this chapter we will cover:

- ✓ Who can perform QA evaluations
- ✓ Evaluate a call record
- ✓ Evaluate an agent

## Who Can Perform QA Evaluations

To perform QA evaluations, a user must have Coaching Permissions, access to the CallCopy group attached to the QA form and being evaluated, and permissions for the cc: Discover Web Player.

These permissions are set by the cc: Discover administrator and explained in the cc: *Discover Administration Guide*.

## Evaluate a Call Record

Call record evaluations are done on the cc: Discover Web Player tab.

Select the calls to be evaluated using the filtering tools.

Click a record. Then right-click it and select the Perform Evaluation option from the Context Menu. Select whether you want the web player to open up in a standalone window or at the bottom of the pane. Also select whether you want the web player to display video (i.e., screen capture information) if it is available.

			1096	5/25/2011 7:38:41 PM	00:03:57
			1196	5/25/2011 7:33:03 PM	00:07:44
			1105	5/25/2011 6:16:27 PM	00:03:57
				5:52:25 PM	00:03:57
			1378	5/25/2011	
			1157	5/25/2011 4:25:04 PM	00:03:57
			1392	5/25/2011 4:06:39 PM	00:04:15
			1240	5/25/2011 3:54:19 PM	00:08:11
			1105	5/25/2011 2:48:58 PM	00:07:44
FERNANDO	HUBBARD	4033	1337	5/25/2011 2:42:03 PM	00:04:15

## Chapter 4: Perform Evaluations

A listing of the QA forms attached to the CallCopy Group(s) associated with the record will appear. Double-click the form you want to use to score the recording. The form will appear in the window.

**NOTE:** *The agent who conducted a call may be in multiple groups, and one form may be attached to several groups. Therefore, the same form may be available under several different Groups. Make sure you select the form with the appropriate Group. Form and Group selections will affect reporting.*

The screenshot displays two windows from a software application. The top window, titled "Agent Forms Listing", contains a table with the following data:

Form Name	Group Name	Create Date
Customer Service Evaluation	ClientABC	5/26/2011 9:35:06 AM
Customer Service Evaluation	Sales Team	5/26/2011 9:35:06 AM
Customer Service Evaluation	Support Team	5/26/2011 9:35:06 AM
Customer Service Evaluation 3	ClientABC	3/19/2006 2:30:23 PM
Customer Service Evaluation 3	Sales Team	3/19/2006 2:30:23 PM
Customer Service Evaluation 3	Support Team	3/19/2006 2:30:23 PM
Customer Service Evaluation 4	ClientABC	5/26/2011 9:38:18 AM
Customer Service Evaluation 4	Sales Team	5/26/2011 9:38:18 AM
Customer Service Evaluation 4	Support Team	5/26/2011 9:38:18 AM
Customer Service Evaluation 5	Sales Team	5/26/2011 2:16:13 PM
Sales Evaluation Form	Sales Team	5/26/2011 4:29:00 PM


The bottom window, titled "Web Player", shows a call recording interface. It includes a "Screen Capture" window displaying a Mozilla Firefox browser window with the address "http://sugar.bbcstech.cc". Below the browser is a "Zoom Panel" showing "BBCS Tech CRM" and a "SAVEWITHINSULATION.COM" banner. At the bottom, there is an audio waveform player for "LEON HOLT Customer" with a duration of "00:05 / 03:57". To the right of the player is a "Tags" table:

#	Time	Score	Category	Value
1*	01:25	65	Script Adherence	single family dwelling
2*	02:17	68	Script Adherence	homeowners association
3*	03:54	56	Scheduling	weekend

Review the form to see what items are being evaluated.

Use the playback controls to review the audio and/or video content. You can use the playback controls as needed to pause, fast forward, or rewind the recording to help in your evaluation.

Enter information into the QA form while reviewing the call record.

**NOTE:** A  appears besides responses that were specified Auto-fail by the form creator.

**NOTE:** An evaluation's score appears in the lower right corner of the page: **Total : 67.00/ 140.00 (47.86 %)**.

**Perform QA** Play Call Submit QA Review

---

**Call Information**

Reviewer : Administrator	Group : East Supervisors	Agent Name : PATRICE ACEVEDO
Record : 28006	Call Direction : Outbound	Recording Time : 5/27/2011 8:04:55 PM
Voice Port : 1314	Account Number :	Agent Number : 4014
Number Called DNIS : 8889876543	User 3 :	CallerID ANI :
Channel : 54	Public Bookmark :	Duration : 00:03:57

---

**Customer Service Evaluation**

**Greeting**

Did Agent state company name?  Yes  No

Did Agent state his/her name?  Yes  No

---

**Web Player**

Screen Capture Zoom Panel Tags

BBCS Tech CRM - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://sugar.bt

BBCS Tech CRM

SAVEWITHINSULATION.COM

#	Start	End	Category	Notes
1*	01:25	65	Script Adherence	single family dwe
2*	02:17	68	Script Adherence	homeowners ass
3*	03:54	56	Scheduling	weekend

PATRICE AC  
Customer  
00:04 / 03:57

The evaluation can be sent to the agent for review and acknowledgement. If the Agent does not have access to the cc: Discover Web Portal, this option is not available.

Send Evaluation to Agent for Acknowledgement?  Yes  No  
**Agent acknowledgment unavailable. Agent does not have Portal access enabled.**

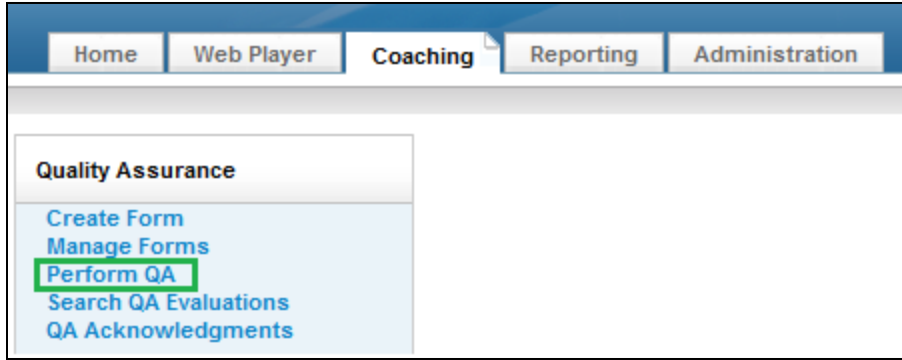
When you have completed the QA form, click Submit QA Review.

Messages will appear indicating if the evaluation was saved successfully or requires additional information. Follow the instructions in the message as necessary. When the evaluation is saved, review options will appear at the top of the page. These options are explained in the *Review QA Evaluations* section of this guide.

## Evaluate an Agent

QA forms for evaluating agents' non-call work are scored on the Coaching tab. In the Quality Assurance menu, click Perform QA.

## Chapter 4: Perform Evaluations



The Agent Listing shows all the agents you can evaluate. Click the agent to be evaluated.

Quality Assurance		Agent Listing	
<a href="#">Create Form</a> <a href="#">Manage Forms</a> <a href="#">Perform QA</a> <a href="#">Search QA Evaluations</a> <a href="#">QA Acknowledgments</a>	Name	Phone IDs	
	Agent, Portal	4011	
	AGUIRRE, CHERI	4002	
	BAILEY, JOY	4020	
	BARR, ALICIA	4029	
	BARRON, BRIANA	4013	
	CARNEY, VIVIAN	4005	
	CHARLES, WILLARD	4001	
	COHEN, GWENDOLYN	4016	

The Agents Forms Listing shows all the QA forms attached to groups of which the selected agent is a member. Click the appropriate form.

**NOTE:** Make sure you select the form with the appropriate Group. Form and Group selections will affect reporting.

Quality Assurance		Agent Forms Listing			Back
<a href="#">Create Form</a> <a href="#">Manage Forms</a> <a href="#">Perform QA</a> <a href="#">Search QA Evaluations</a> <a href="#">QA Acknowledgments</a>	Form Name	Group Name	Create Date		
	Customer Service Evaluation	ClientXYZ	9/10/2010 12:15:03 PM		
	Customer Service Evaluation	Support Team	9/10/2010 12:15:03 PM		
	Display Test Form	Calibration	8/17/2010 1:54:41 PM		
	Display Test Form	ClientXYZ	8/17/2010 1:54:41 PM		
	Display Test Form	Support Team	8/17/2010 1:54:41 PM		
	Form for Manual	Calibration	9/29/2010 8:58:23 AM		
	Sales Evaluation	ClientXYZ	3/16/2006 11:16:21 AM		
	Sales Evaluation	Support Team	3/16/2006 11:16:21 AM		

Pages: 1 of 1

Enter responses for each question on the form.



**Perform QA**

---

**Record Information**

Reviewer : Administrator Agent Name : Smith, Max

**Product Knowledge Review**

**Camping Products**

Has the agent completed the necessary product usage time?  Yes  No

How many kayak brands can the agent name?


Is the agent able to demonstrate tent assembly technics?

**Sports Products**

Can the agent demonstrate archery equipment?  Perfectly  Yes, but could be safer.  No, is dangerous to self and customers.

Total : 0.00/ 25.00 (0.00 %)

Send Evaluation to Agent for Acknowledgement?  Yes  No

**NOTE:** A  appears besides responses that were specified Auto-fail by the form creator.

**NOTE:** An evaluation's score appears in the lower right corner of the page.

The evaluation can be sent to the agent for review and acknowledgement. If the Agent does not have access to the cc: Discover Web Portal, this option is not available.

When you have completed the QA form, click  .

Messages will appear indicating if the evaluation was saved successfully or requires additional information. Follow the instructions in the message as necessary. When the evaluation is saved, review options will appear at the top of the page. These options are explained in the *Review QA Evaluations* section of this guide.

# Chapter 5: Review QA Evaluations

## In this chapter we will cover:

- ✓ Locating completed evaluations
- ✓ Functions that can be performed with a completed evaluation


## Locate Completed Evaluations

On the Coaching Tab, in the Quality Assurance menu click Search QA Evaluations.

The screenshot shows a web application interface with a navigation bar at the top containing 'Home', 'Web Player', 'Coaching', 'Reporting', and 'Administration'. The 'Coaching' tab is active. On the right side of the navigation bar, it says 'Logged in as superuser | Change Password | Logout'. Below the navigation bar is a 'Quality Assurance' sidebar with a menu containing 'Create Form', 'Manage Forms', 'Perform QA', 'Search QA Evaluations' (highlighted with a green box), and 'QA Acknowledgments'. The main content area is titled 'Search QA Forms' and contains a search form with the following fields: 'Form:' (dropdown menu set to 'All'), 'Agent:' (dropdown menu set to 'All'), 'Group:' (dropdown menu set to 'All'), 'Evaluator:' (dropdown menu set to 'All'), 'Start Date:' (text input with '9/29/2010' and a calendar icon), and 'End Date:' (text input with '9/29/2010' and a calendar icon). There is also a 'Record ID:' text input field. A 'Search' button is located at the top right of the search form. Below the search form, the text 'No QA Forms Found Matching Criteria' is displayed. At the bottom of the search form, there is a 'Pages:' section with '1' and a 'Go To Page:' section with '1 of 1' and a 'GO' button.

This will allow you to search for a completed evaluation using a combination of search criteria:

- **Form:** Select a particular form or all forms.
- **Agent:** Select a particular agent or all agents.
- **Group:** Select a particular group or all groups.
- **Evaluator:** Select a particular evaluator or all evaluators.
- **Start Date:** Pick a starting date as part of a date range.
- **End Date:** Pick an ending date as part of a date range.
- **Record ID:** Find a completed evaluation for a call based on the call's record ID number in the system.

Once you have made your appropriate selections, click . A list of evaluations matching the criteria appears in the window.

Search QA Forms					
Form :	Agent :	Group :			
Sales Evaluation	BAILEY, JOY	All			
Evaluator :	Start Date :	End Date :			
All	8/1/2010	9/17/2010			
Record ID :					
Agent Name	Form	Evaluator	Group	Call Date	Evaluation Date
BAILEY, JOY	Sales Evaluation	Bob Smith	ClientXYZ	8/1/2010	8/1/2010
BAILEY, JOY	Sales Evaluation	John Doe	ClientXYZ	8/1/2010	8/1/2010
BAILEY, JOY	Sales Evaluation	John Doe	Calibration	8/1/2010	8/1/2010
BAILEY, JOY	Sales Evaluation	Jane Doe	Calibration	8/3/2010	8/3/2010
BAILEY, JOY	Sales Evaluation	John Doe	ClientXYZ	8/3/2010	8/3/2010
BAILEY, JOY	Sales Evaluation	Administrator	Support Team	8/5/2010	8/6/2010

To access a particular evaluation, double-click it. The completed evaluation opens in the window.

**Perform QA**

**Call Information**

Reviewer : John Doe	ACD Group : East Supervisors	Agent Name : JOY BAILEY	ACD Queue :
Record : 8254	Call Direction : Inbound	Recording Time : 8/1/2010 5:22:23 PM	Screen Capture : Yes
Phone Number : 1207	User 1 :	Agent Number : 4020	Project :
Number Called (DNIS) : 8662758925	User 3 :	CallerID (ANI) : 2123793946	User 4 :
Channel : 69	User 5 :	Duration (Sec) : 00:08:11	

**Sales Evaluation**

**Greeting**

Did Agent use branded greeting?  Yes  No

Did the Agent state his/her name?  Yes  No

Did the agent verify the promo code?  Yes  No

*Agent should validate code against screen pop*

**Sales Skills**

Was sale closed?  Yes  No

What objections were given? Price

How many rebuttals were used?

None

1

2

Notes / Tips

Not bad, but we will need to work on your documentation.

**Documentation**

Was proper closing code used?  Yes  No

Were notes concise and professional? Good

Total : 70 / 75 (93.3 %)

Sent Agent Acknowledgement

## Additional Functions

Based on your individual permission settings, you can perform several actions on a scored evaluation.



- **Play Call:** Plays the call for which this particular evaluation was completed.
- **Link for Completed QA:** Displays the URL of an evaluation in a popup window.
- **Printable Version:** Opens the completed evaluation in PDF format that you can then save or print.
- **Delete the Completed QA:** Deletes the completed evaluation from the system. Very few users should be given this permission.
- **Edit the Completed QA:** Allows you access to update the form with any necessary changes. After your edits are complete, click the Submit QA Button to update the evaluation. The original version of the evaluation is not retained in the system.

# Chapter 6: QA Acknowledgements

If, during your evaluation of agents, you require them to acknowledge their completed forms, you can report on who has or has not acknowledged the evaluation. On the Coaching tab, in the Quality Assurance menu, click QA Acknowledgements.

The screenshot shows a web application interface for searching pending acknowledgments. The top navigation bar includes 'Home', 'Web Player', 'Coaching', 'Reporting', and 'Administration'. The user is logged in as 'superuser'. The 'Coaching' tab is active, and the 'QA Acknowledgements' link is highlighted in the left sidebar. The search form is titled 'Search Pending Acknowledgments' and includes a 'Search' button. The form fields are as follows:

- Form:** All
- Agent:** All
- Group:** All
- Evaluator:** All
- Start Date:** 9/22/2010
- End Date:** 9/29/2010
- Acknowledgement Required:** Yes
- Status:** Unacknowledged

The search results area displays the message: **No QA Acknowledgments Found Matching Criteria**. The page number is 1 of 1.

This will allow you to search for a completed evaluation using a combination of search criteria:

- **Form:** Allows you to select a particular form or all forms.
- **Agent:** Allows you to select a particular agent or all agents.
- **Group:** Allows you to select a particular group or all groups.
- **Evaluator:** Allows you to select a particular evaluator or all evaluators.
- **Start Date:** Allows you to pick a starting date range. The start date will automatically default to a week prior to today's date.
- **End Date:** Allows you to pick an ending date range. The end date will automatically default to today's date.
- **Acknowledgement Required:** Allows you to search for evaluations based on whether or not your initially required agent acknowledgement.
- **Status:** Allows you to search for Unacknowledged or Acknowledge Evaluations.

Click the Search button to generate your list of acknowledged or unacknowledged evaluations, based on your selection criteria.

# Chapter 7: Content Library

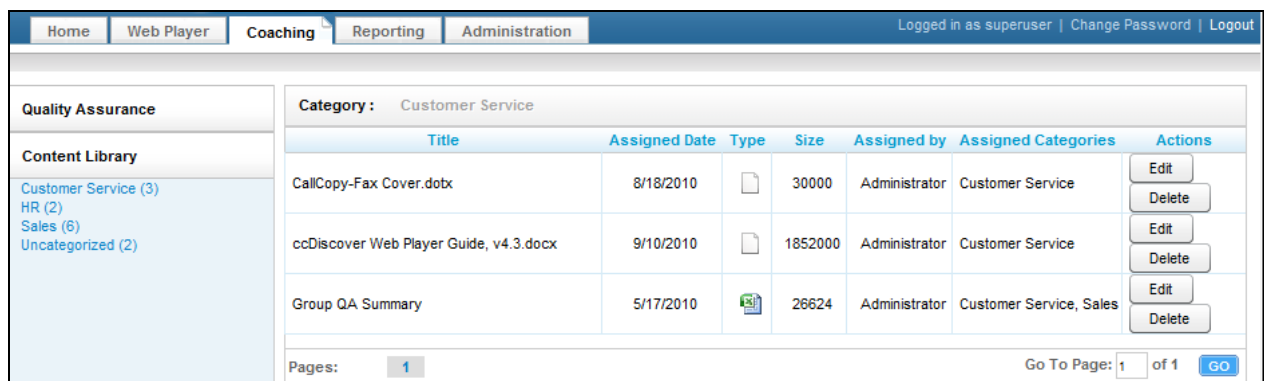
## In this chapter we will cover:

- ✓ An overview of the library
- ✓ Managing categories
- ✓ Adding and assigning content
- ✓ Content Acknowledgement Reports

## Overview

The Content Library enables users to upload files that can be shared with agents who have access to the cc: Discover Home tab. Files that can be uploaded include Word files, PDFs, Web pages, and calls exported from cc: Discover.

The Content Library appears on the Coaching tab. Documents are organized into Content Categories. The number of items in each category appears inside the parenthesis to the right of the name.



The screenshot shows a web application interface with a navigation bar at the top containing 'Home', 'Web Player', 'Coaching', 'Reporting', and 'Administration'. The user is logged in as 'superuser'. The main content area is titled 'Quality Assurance' and 'Content Library'. A sidebar on the left lists categories: 'Customer Service (3)', 'HR (2)', 'Sales (6)', and 'Uncategorized (2)'. The main table displays files assigned to the 'Customer Service' category. The table has columns for Title, Assigned Date, Type, Size, Assigned by, Assigned Categories, and Actions. Three files are listed: 'CallCopy-Fax Cover.dotx', 'ccDiscover Web Player Guide, v4.3.docx', and 'Group QA Summary'. Each file has 'Edit' and 'Delete' buttons. At the bottom, there is a 'Pages: 1' indicator and a 'Go To Page: 1 of 1 GO' button.

Quality Assurance		Category : Customer Service						
Content Library		Title	Assigned Date	Type	Size	Assigned by	Assigned Categories	Actions
Customer Service (3) HR (2) Sales (6) Uncategorized (2)		CallCopy-Fax Cover.dotx	8/18/2010		30000	Administrator	Customer Service	Edit Delete
		ccDiscover Web Player Guide, v4.3.docx	9/10/2010		1852000	Administrator	Customer Service	Edit Delete
		Group QA Summary	5/17/2010		26624	Administrator	Customer Service, Sales	Edit Delete

You will see:

- **Title:** The name of the file.
- **Assigned Date:** The date the content was uploaded and assigned
- **Type:** Displays graphically the file type (Word, Excel, Power Point, etc.)
- **Size:** The size of the document/content
- **Assigned By:** The user who uploaded and assigned the content
- **Assigned Categories:** All of the categories that this document/content is assigned to
- **Actions:** Edit allows you to change content assignments. Delete removes the content from the library.

Content can be accessed by double-clicking the title of the content/document. You will be prompted to Open or Save the file.

## Manage Categories

Content Categories allow the user to organize and assign library content.

To create a new Category, on the Coaching tab, in the Manage Content menu, click Content Categories. In the Details section, enter a name for the category in the Title field. In the Parent Category list, select an existing category if you would like the new Category to become a child of it. Otherwise, select the Root option from this list.

To delete a category, select it from the Categories list, and click **Delete**.

To edit a category, select it from the Categories list. Edit the title or parent category and click **Save**.

## Add and Assign Content

To add content to the Content Library, click the Add Content link under the Coaching tab on the Manage Content menu.

## Chapter 7: Content Library

Click the **Browse...** button and navigate to the item you want to upload into the library.

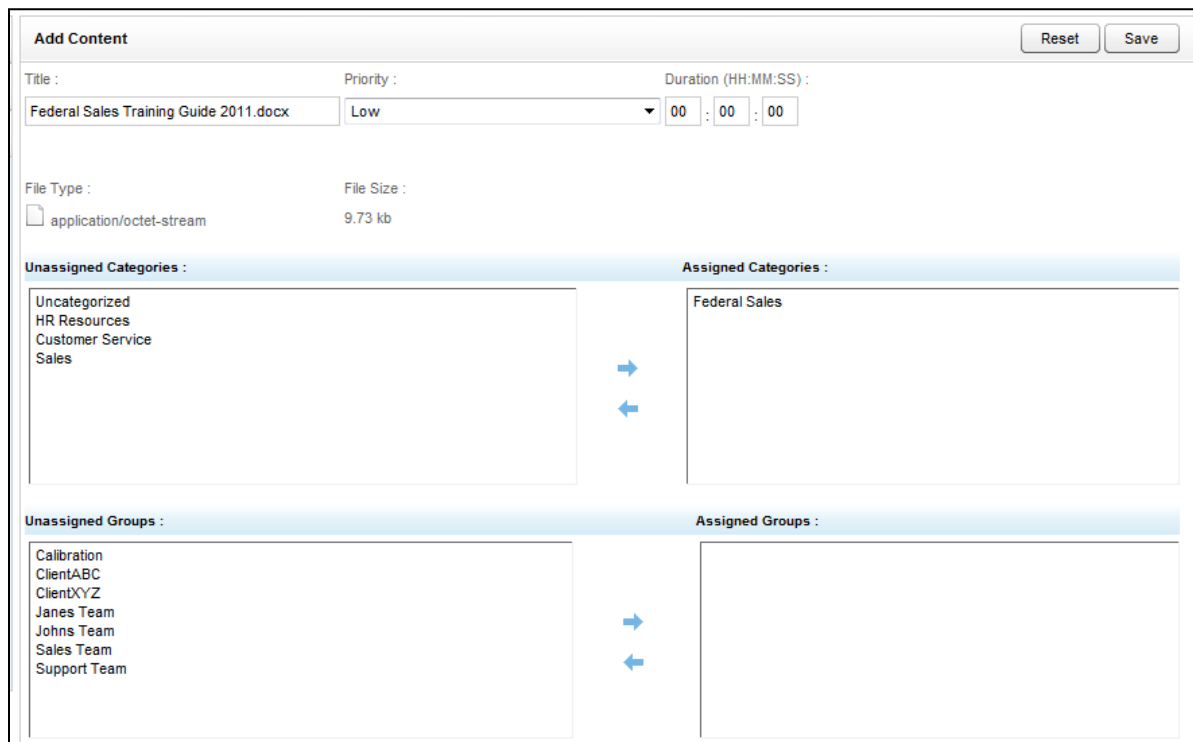


The screenshot shows the 'Add Content' form with the following elements:

- Add Content** (Title)
- Reset** and **Save** buttons (Top right)
- Please select a file to upload :
- Input field containing 'Federal Sales Training Guide 2011'
- Browse...** button (Next to the input field)
- Upload File** button (Below the input field)

Once your file is populated in the upload field, click the **Upload File** button, and you will be taken to the property and assignment page. From this page you can:

- **Title:** This value is the name of the uploaded file. The title in the library can be different.
- **Priority:** Agents see this value when they see the content on the Home tab. If agents have multiple items to review, this value communicates the importance of this item.
- **Duration:** An estimate of how long it takes to review a document.
- **Unassigned/Assigned Categories:** In order to be accessed by agents, library content must be assigned to content Categories or CallCopy groups. Any agent in the assigned category will inherit the content.
- **Unassigned/Assigned Groups:** These are CallCopy groups created by system administrators.



The screenshot shows the 'Add Content' form with the following elements:

- Add Content** (Title)
- Reset** and **Save** buttons (Top right)
- Title :** Federal Sales Training Guide 2011.docx
- Priority :** Low
- Duration (HH:MM:SS) :** 00 : 00 : 00
- File Type :** application/octet-stream
- File Size :** 9.73 kb
- Unassigned Categories :** Uncategorized, HR Resources, Customer Service, Sales
- Assigned Categories :** Federal Sales
- Unassigned Groups :** Calibration, ClientABC, ClientXYZ, Janes Team, Johns Team, Sales Team, Support Team
- Assigned Groups :** (Empty)



## Content Acknowledgement Reports

If you have assigned content to an agent, you can report on who has or has not reviewed/acknowledged that assigned content. Go to the Acknowledgements Reports link under the Coaching tab, in the Manage Content area.

The screenshot shows a web application interface with a navigation bar at the top containing 'Home', 'Web Player', 'Coaching', 'Reporting', and 'Administration'. The user is logged in as 'superuser'. On the left, a sidebar menu includes 'Quality Assurance', 'Content Library', and 'Manage Content', with 'Acknowledgement Report' highlighted. The main area is titled 'Search Acknowledgements' and contains several search criteria: 'Form' (All), 'Category' (All), 'Group' (All), 'Agent' (All), 'Reviewed Status' (All), 'Date Type' (Assigned Date), 'Start Date' (9/29/2010), and 'End Date' (9/29/2010). There is a 'Search' button, a 'Pages' indicator, and a 'Go To Page' field with a 'GO' button.

This will allow you to search for a completed evaluation using a combination of search criteria:

- **Form:** Allows you to select a particular piece of content or all content.
- **Category:** Allows you to select a particular category or all categories.
- **Group:** Allows you to select a particular CallCopy group or all groups.
- **Agent:** Allows you to select a particular agent or all agents.
- **Reviewed Status:** Allows you to select all statuses, pending status, or reviewed status.
- **Date Type:** Allows you to select from the Assigned Date, which is the date the content was uploaded.
- **Start Date:** Allows you to pick a starting date range. The start date will automatically default to today's date.
- **End Date:** Allows you to pick an ending date range. The end date will automatically default to today's date.

Once you have selected criteria, click  to generate your report.

# About CallCopy

CallCopy, a leading provider of innovative call recording and contact center solutions, is dedicated to ensuring the highest standards of customer and employee satisfaction. The award-winning, enterprise-proven cc: Discover suite delivers advanced call recording, screen capture, quality management, speech analytics, performance management, customer survey and workforce management capabilities to organizations of all sizes and industries across the globe.

CallCopy empowers these organizations to gather business intelligence, which is leveraged to maximize operational performance, reduce liability, achieve regulatory compliance and increase customer satisfaction.

For more information, visit [www.callcopy.com](http://www.callcopy.com).