Innovations in Call Recording
and Contact Center Solutions

cc: Discover QA Coaching Guide

Version 4.5

May 2011

callcopy.com

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Distribution: Approved internal CallCopy staff only and licensed CallCopy customers

Note: Applicable non-disclosure agreements must be in force for authorization.

Revision History			
Revision	**Change Description**	**Author**	**Effective Date**
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

Table of Contents

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Chapter 1: Introduction

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

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

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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

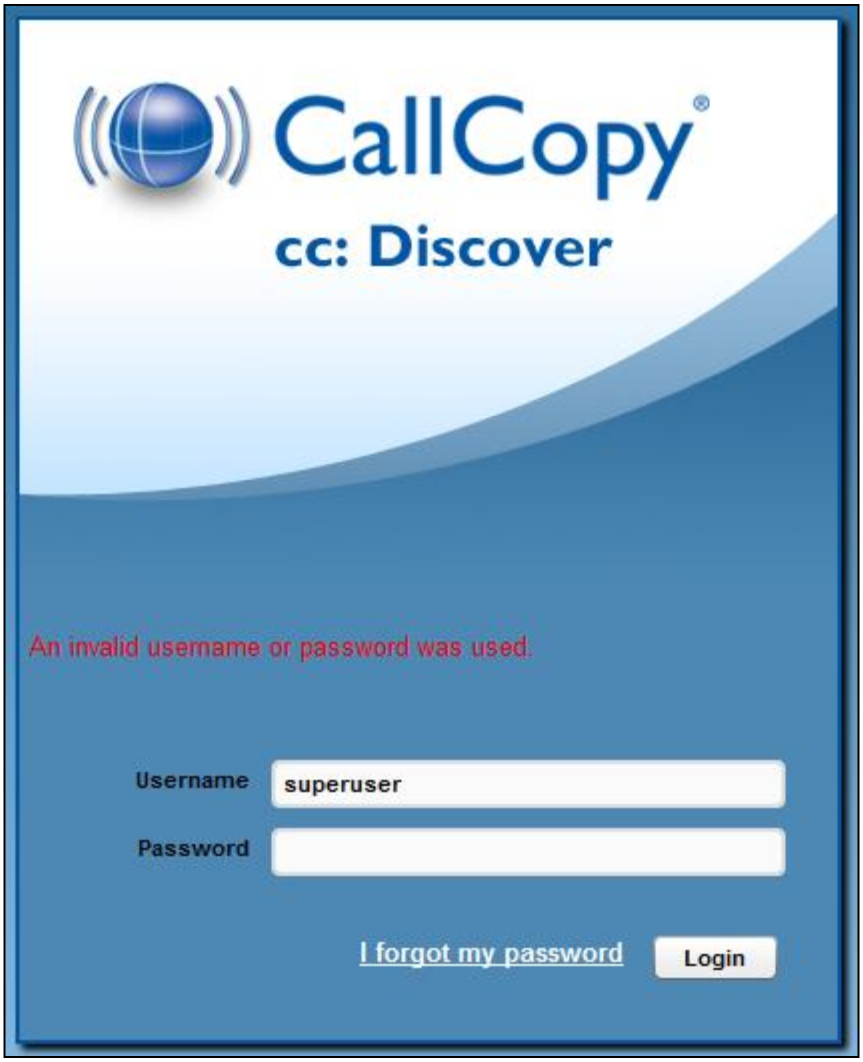
Password: Enter your CallCopy password

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."



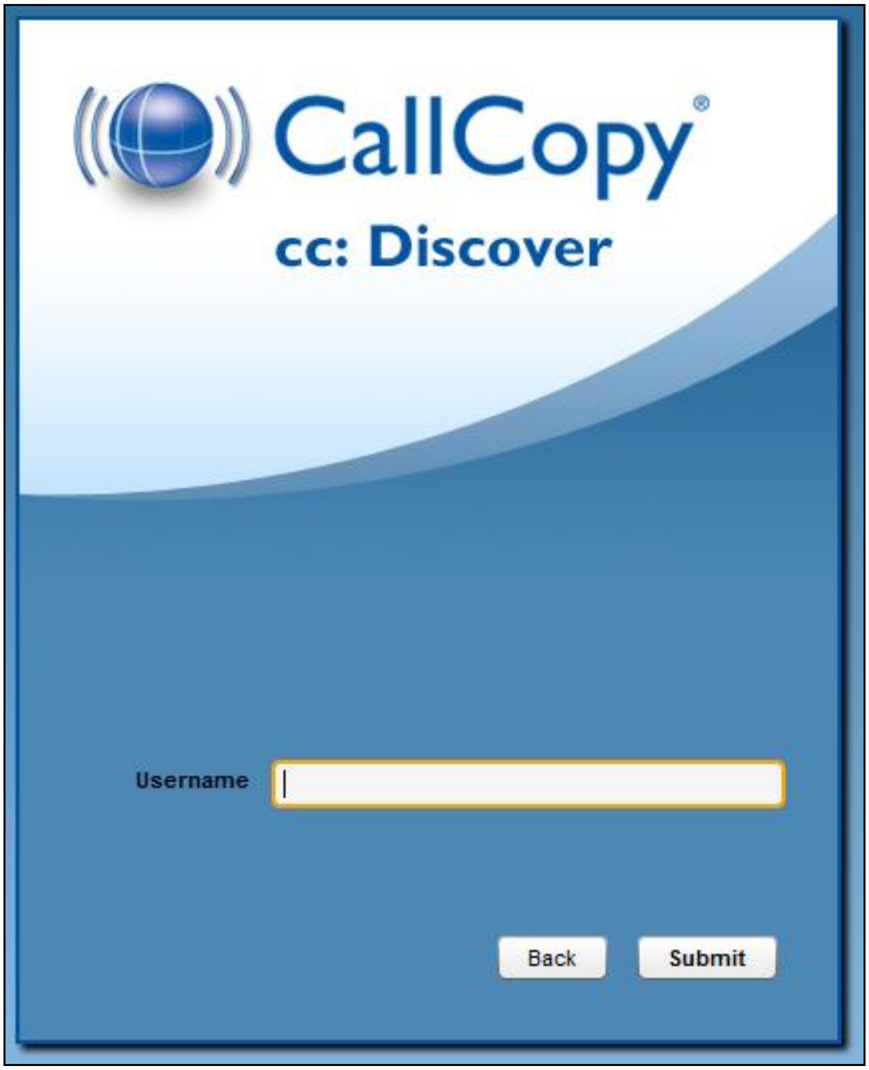
Note: *Passwords are case sensitive. If you are unable to login using the username and password you believe to be correct, please contact your CallCopy Support provider.*

"Forgot Password" Reset

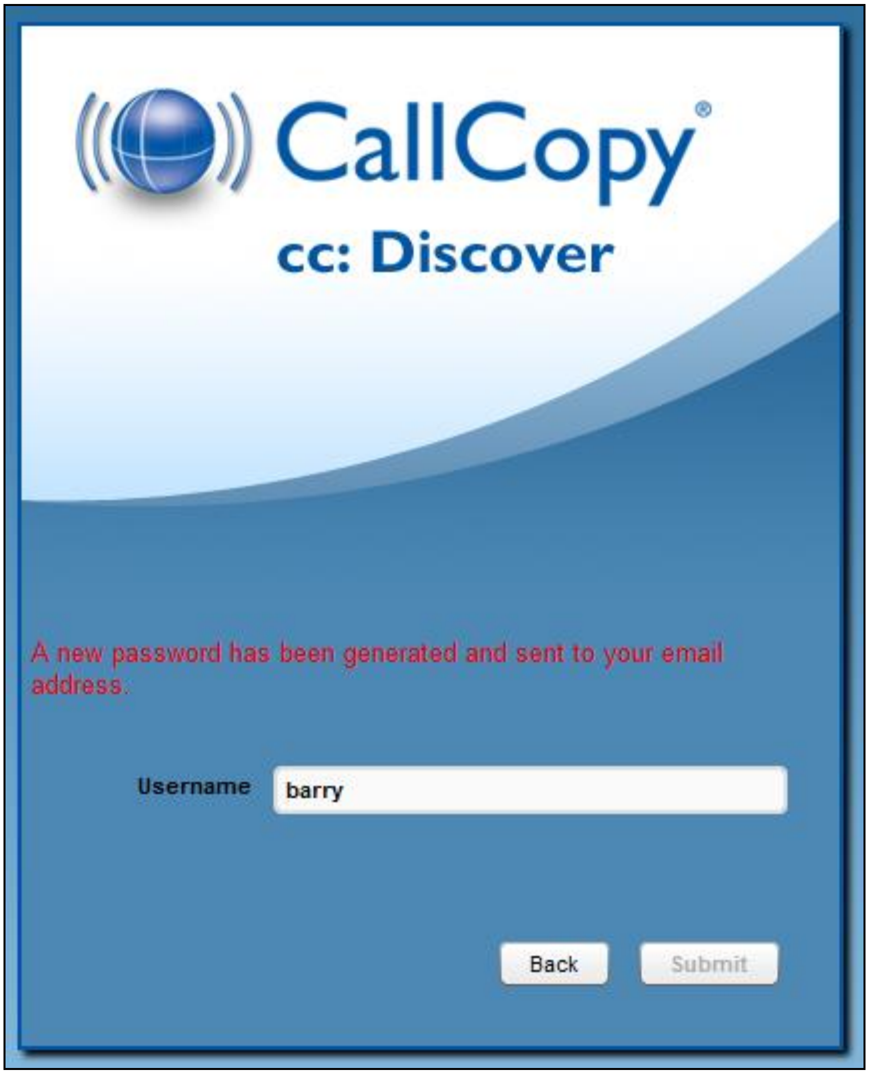
If you are unsure of or have forgotten your password, you can use the "Forgot Password" function on the login page. Your password will be reset and a temporary password will be e-mailed to you if you use this option.

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'**.

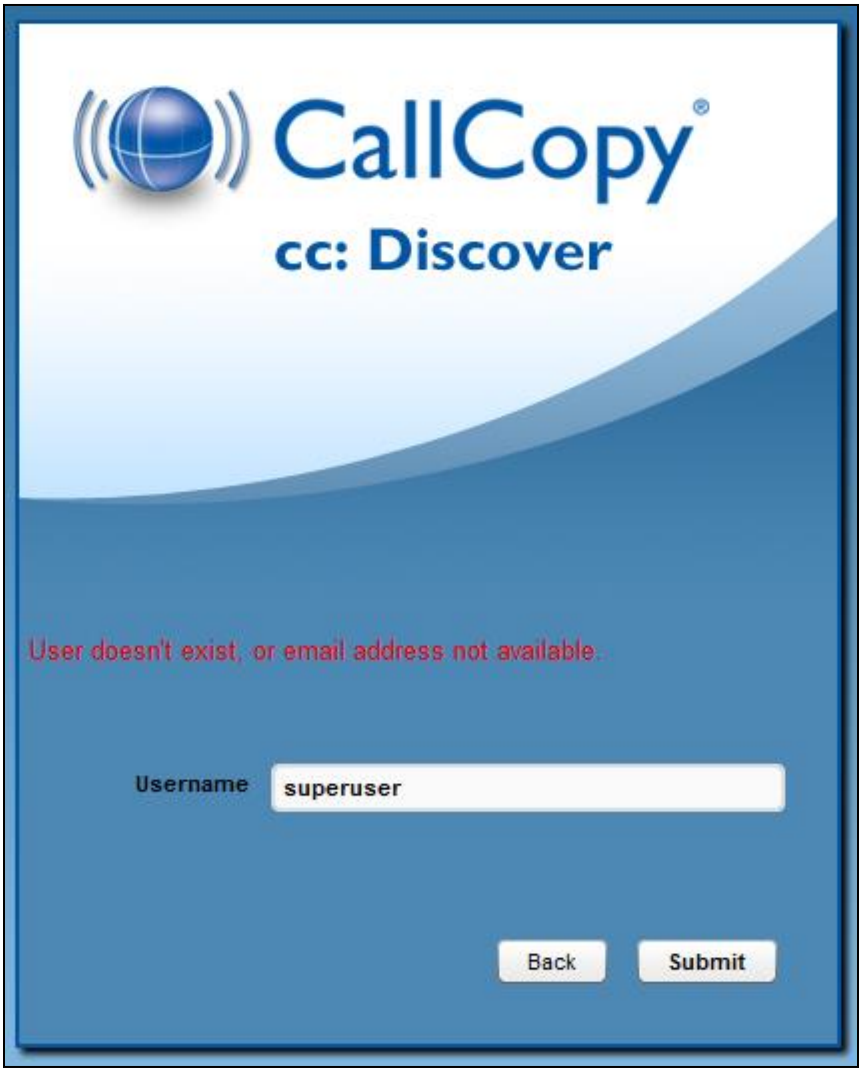


If successful, you will see the following message:



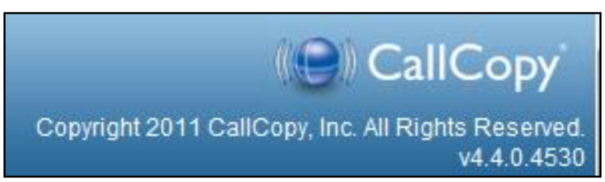
A randomly generated password will be sent to the email address associated with your username. Once you have logged into the system you will be able to change your password.

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

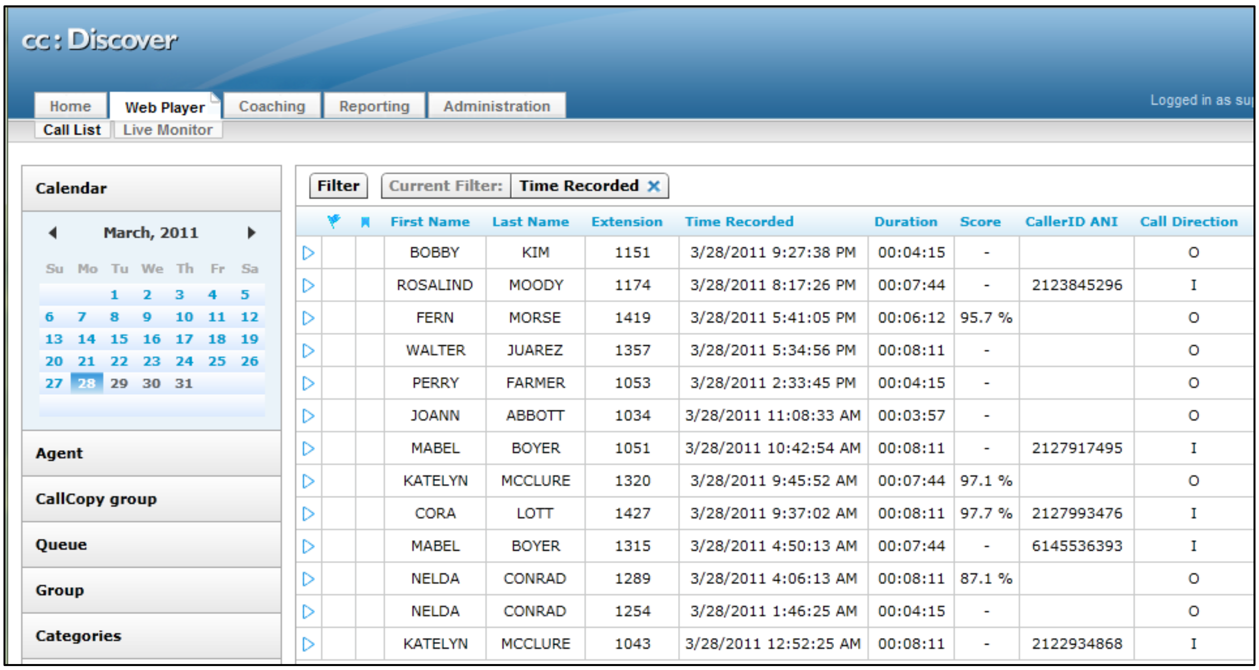
The version number for your cc: Discover software is displayed in the upper-right corner of the login page. This version number can be useful for locating correct documentation for your software and when obtaining support for your system.



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.

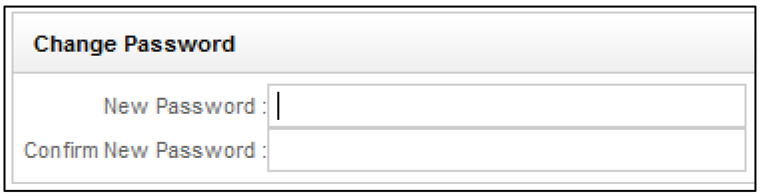


Logging Out

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.



Chapter 3: Manage QA Evaluation Forms

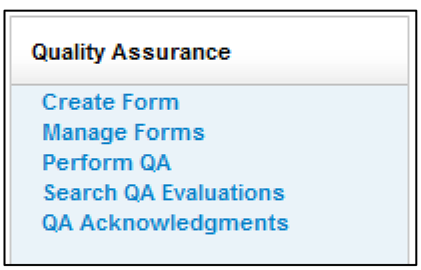
In this chapter we will cover:

- ✓ 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.

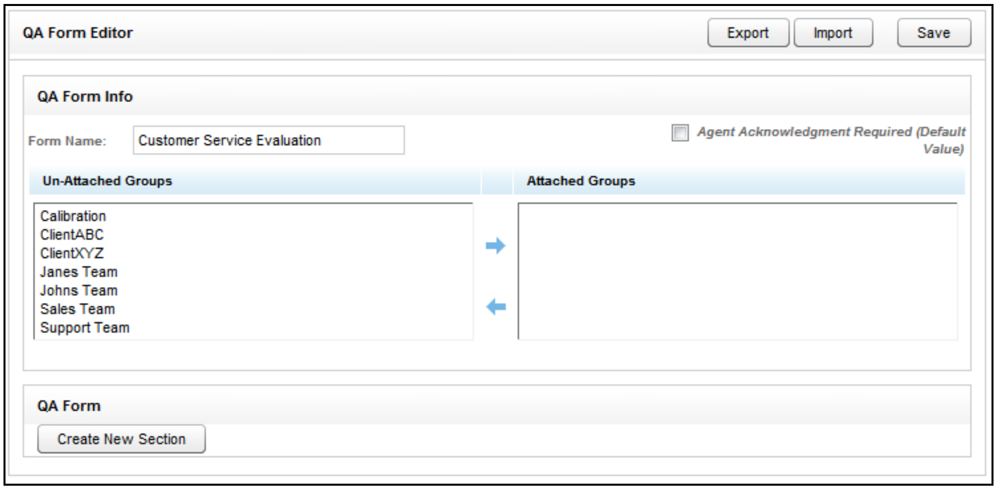
NOTE: *Save a QA form before switching to another tab. Changing tabs without saving will cause all changes to be lost.*

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.



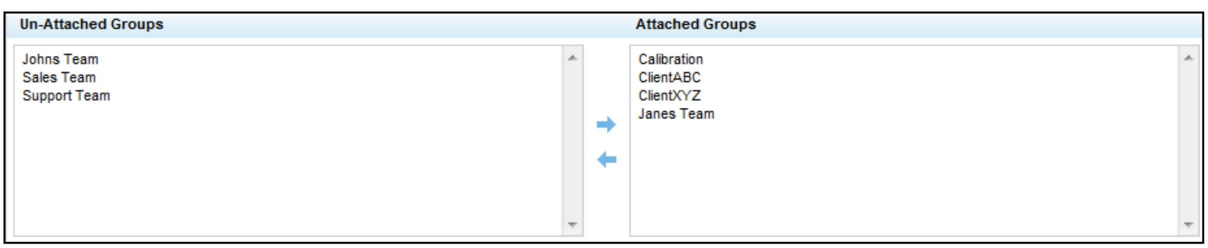
Groups

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.

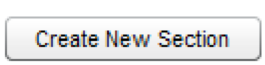
In the Un-Attached Groups list, click one or more groups that may use the form, and then click the right arrow. Reversing the procedure un-attaches groups.

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.



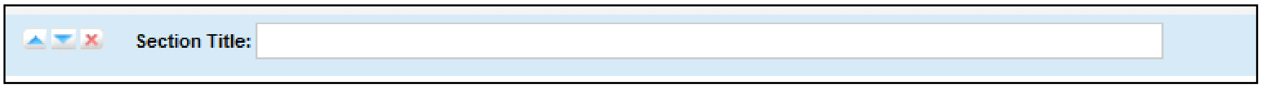
Sections

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.



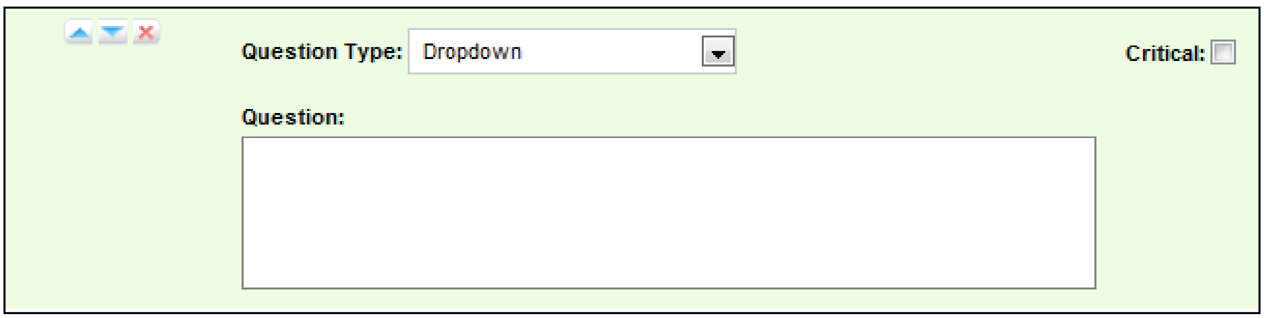
Questions

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

To create a question, click 

.

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?"



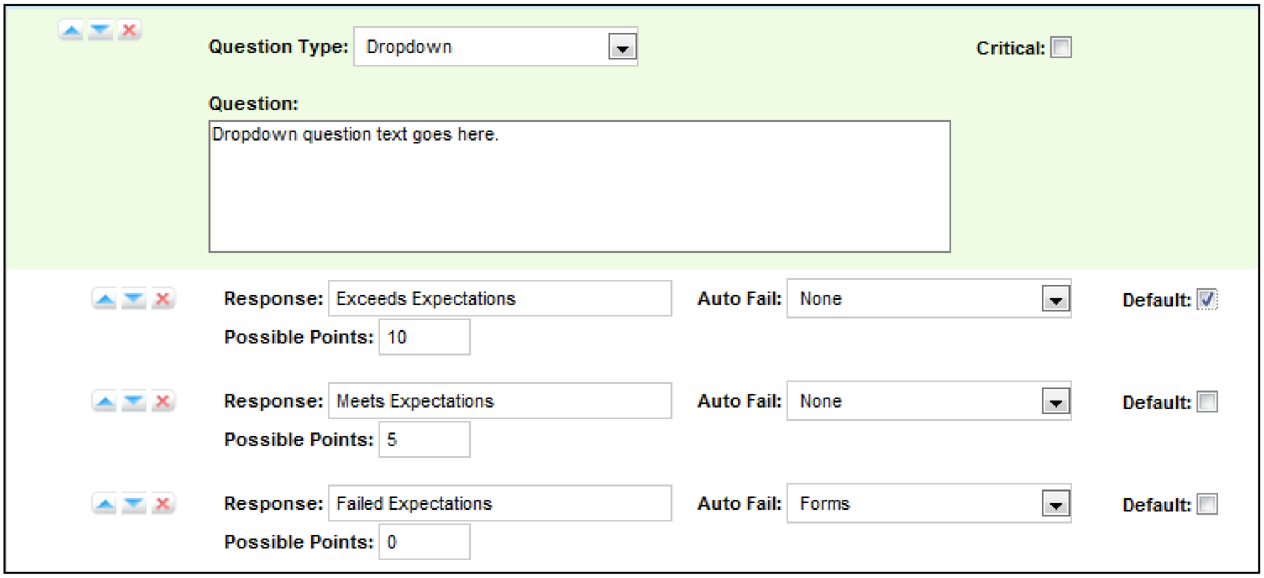
One question on a form can be designated as Critical. Responses to and scores on this question are tracked by the Critical Question Detail and Critical Question Summary reports. For example, critical question could track if the agent asked for the customer's email address to support future marketing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

Select the question type. There are five types:

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

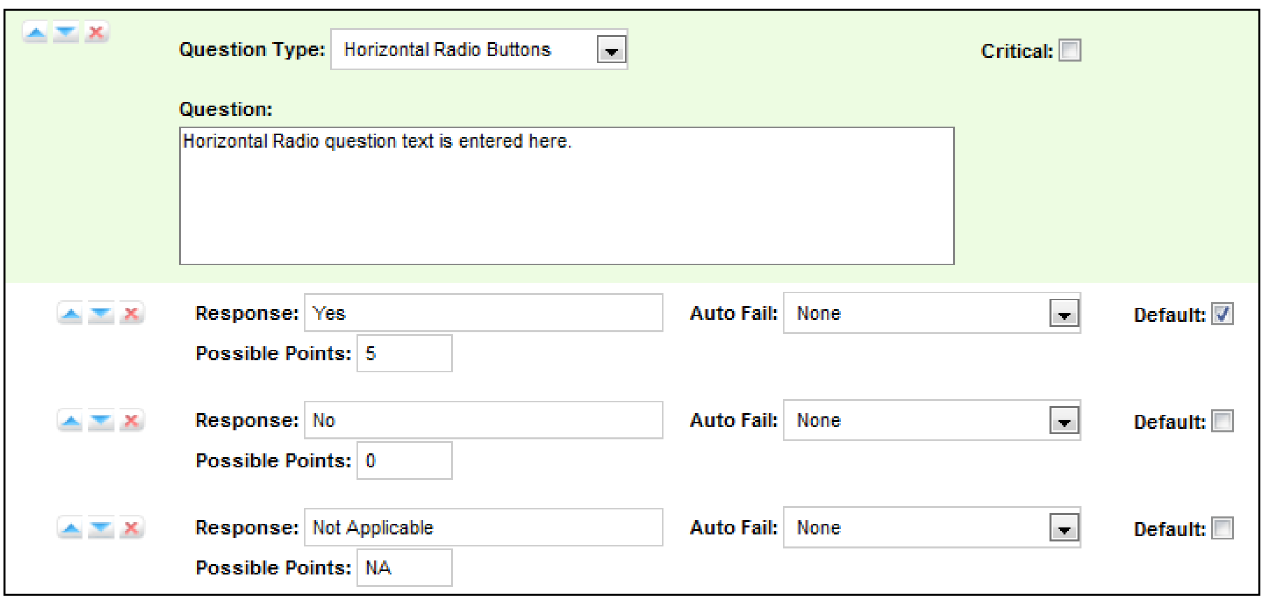
Dropdown: Responses appear in a drop down menu, and the reviewing user can select one.

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:

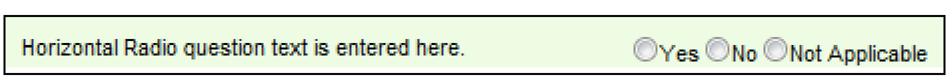


Horizontal Radio: Responses appear on the form as circular Radio buttons displayed in a horizontal line.

For example, a question with responses of "Yes," "No," and "Not Applicable" would appear in the Form Creator like this:

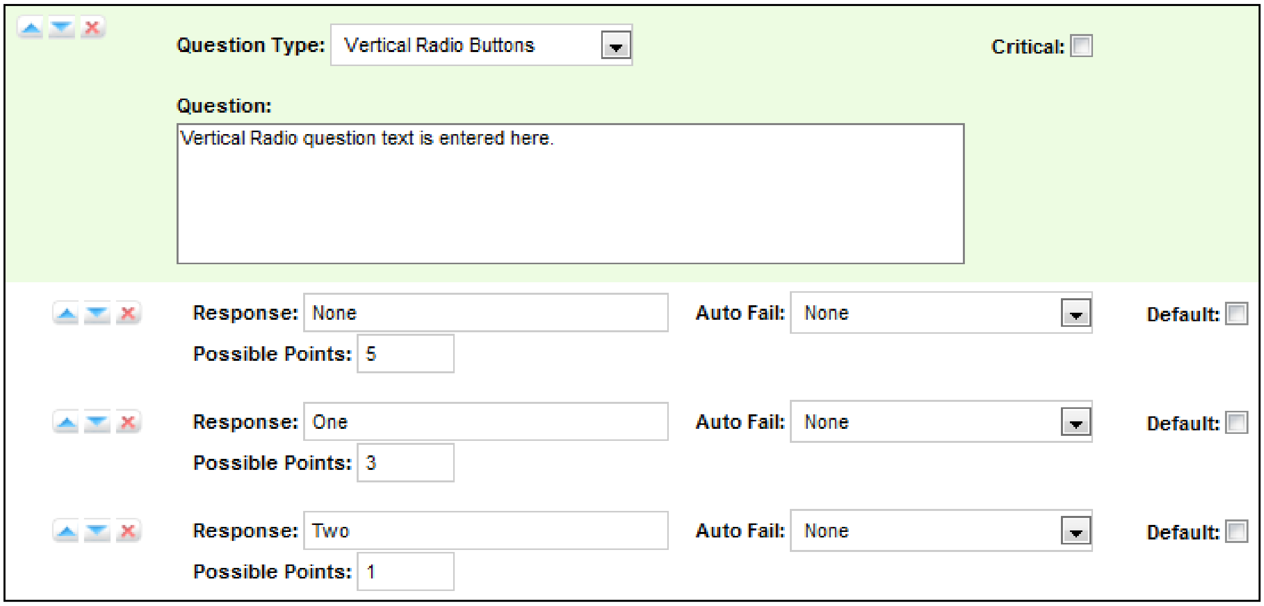


This example will appear like this in the completed form:

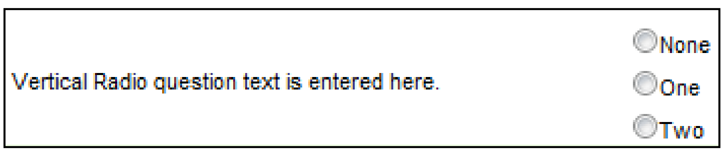


Vertical Radio: Responses appear on the form as circular Radio buttons displayed in a vertical column.

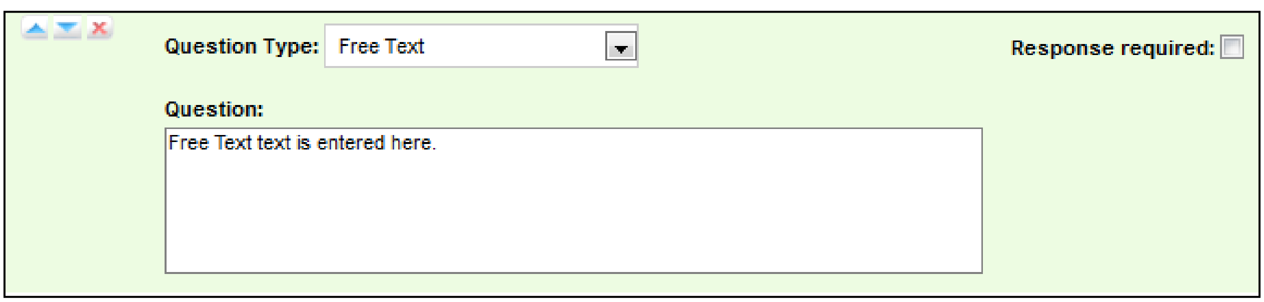
For example, a question with responses of "None," "One," and "Two" would appear in the Form Creator like this:



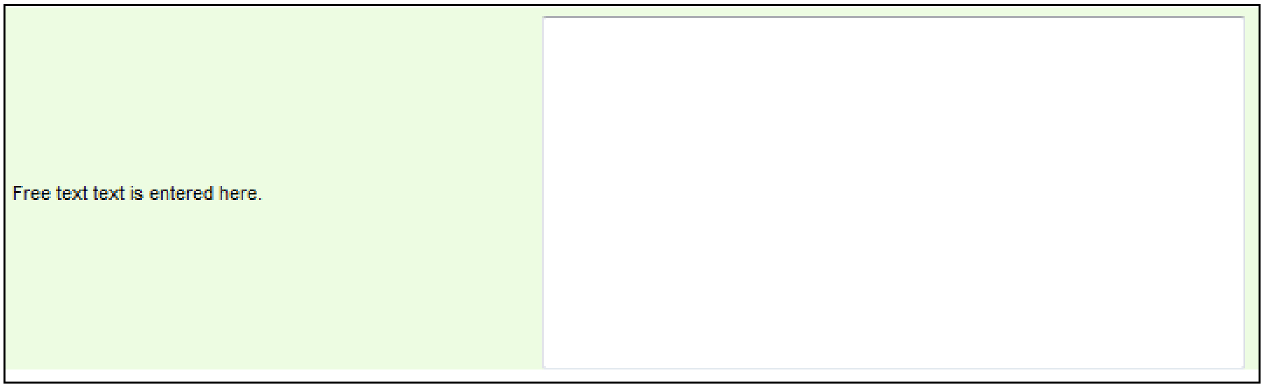
This example will appear like this in the completed form:



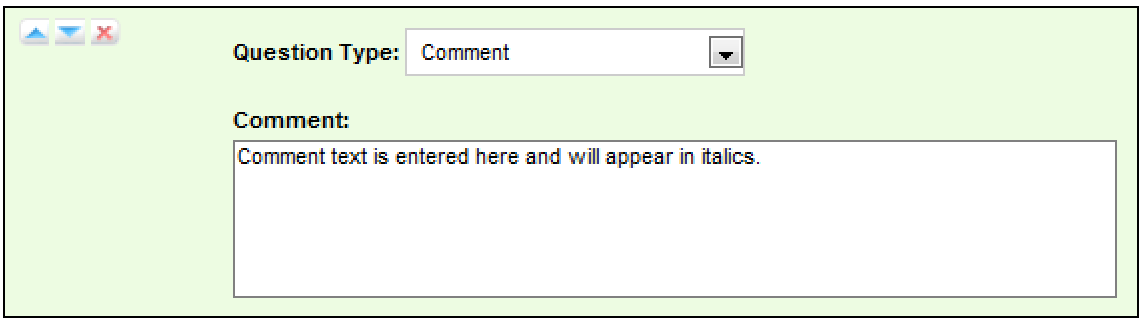
Free Text: This is general free text field that the evaluator can use to give a descriptive analysis. Point values cannot be associated with a Free Text response, so responses to questions of this type do not apply to the overall percentage score of the form. You will have the option to require a response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



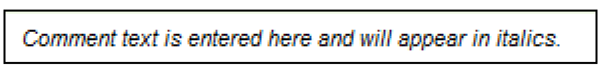
This example will appear like this in the completed form:



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.



This example will appear like this in the completed form:



Responses

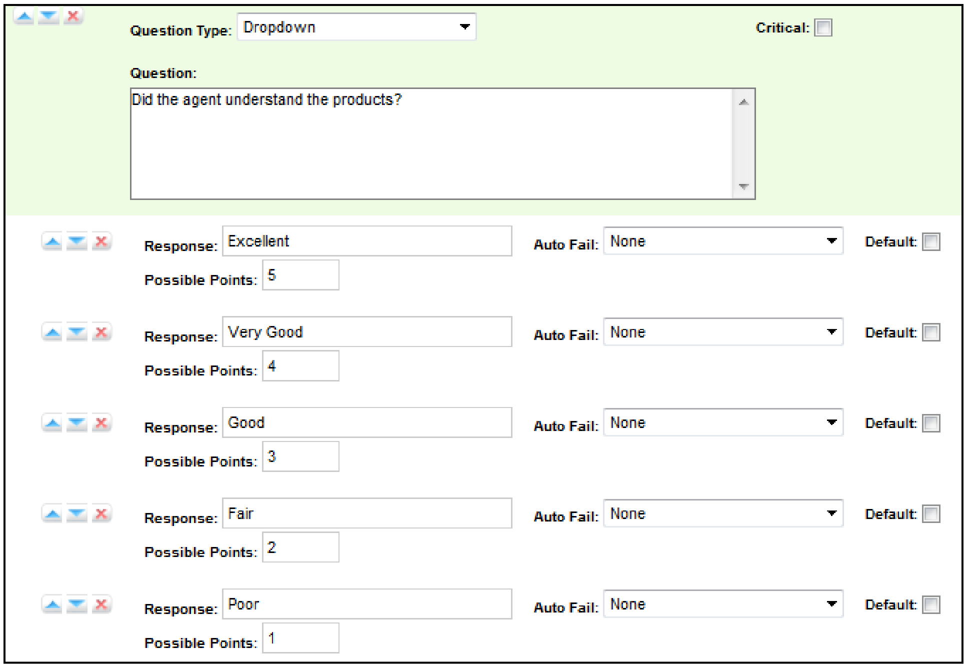
To specify the responses an evaluator can provide, click Add New Response.

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.*

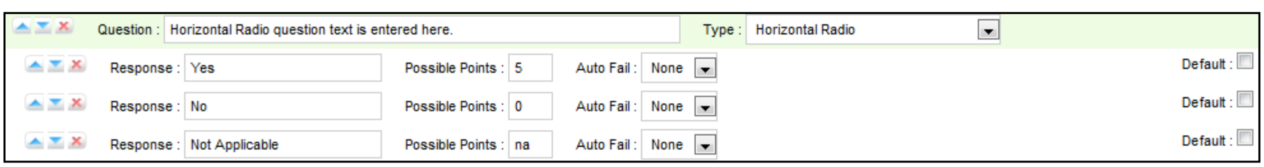


In the example above, the question is set to “Dropdown,” so on the form the possible responses will be seen as options in a dropdown menu.

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.*



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.

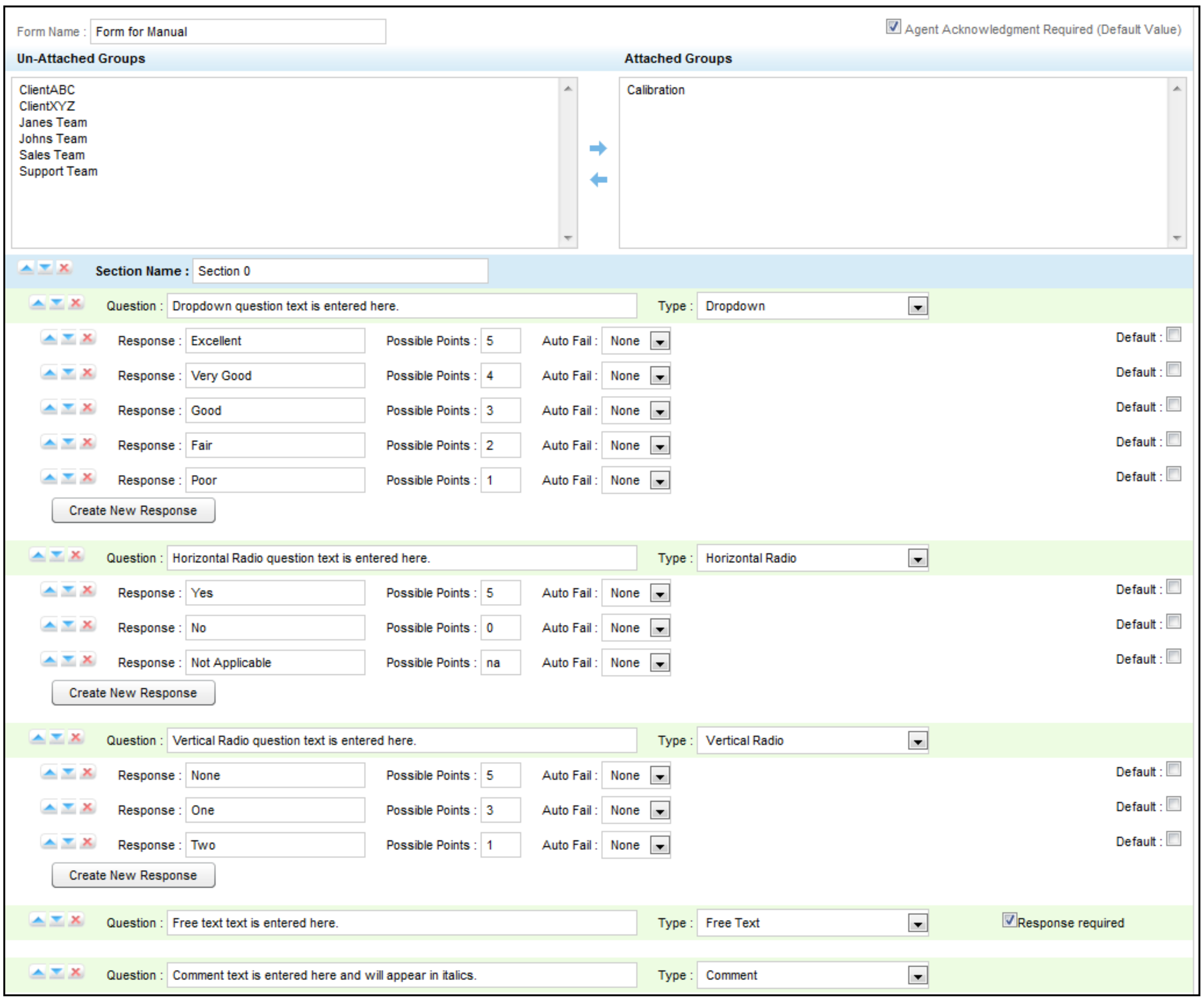
Default: Selecting the Default option causes the response text to appear in the question’s response field on the form.

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:



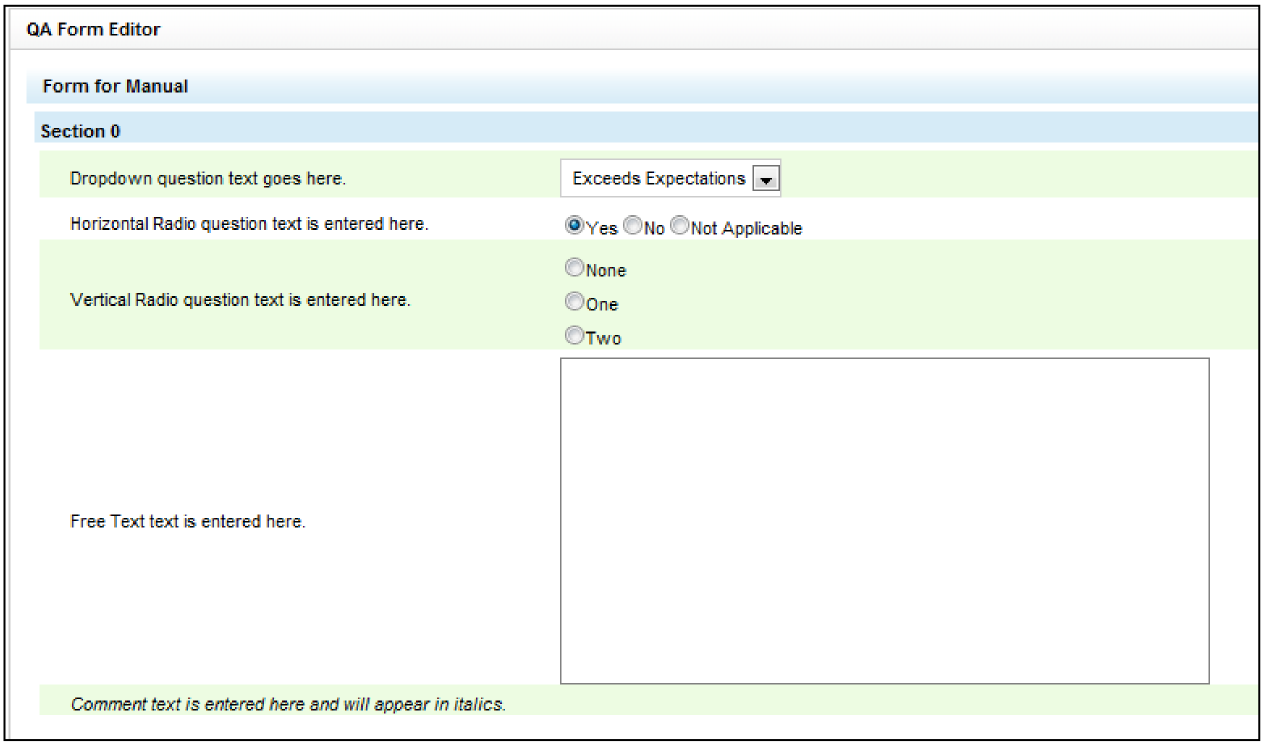
Save a Form

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.

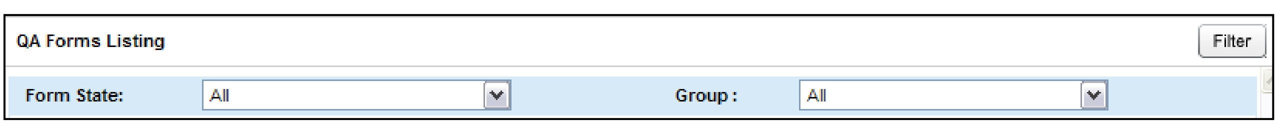
NOTE: *You can alter a form once it is saved and before it has been used in evaluating a call, but once the form has been used, it will be locked from editing. Do not use the form until you are certain you have added all the sections and questions necessary.*



View Existing QA Forms

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

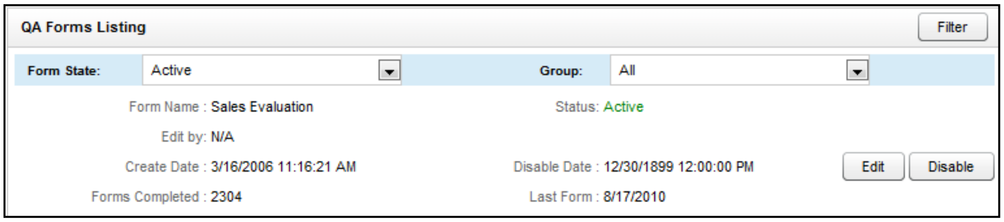
On the Coaching tab, click Manage Forms.



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.

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



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

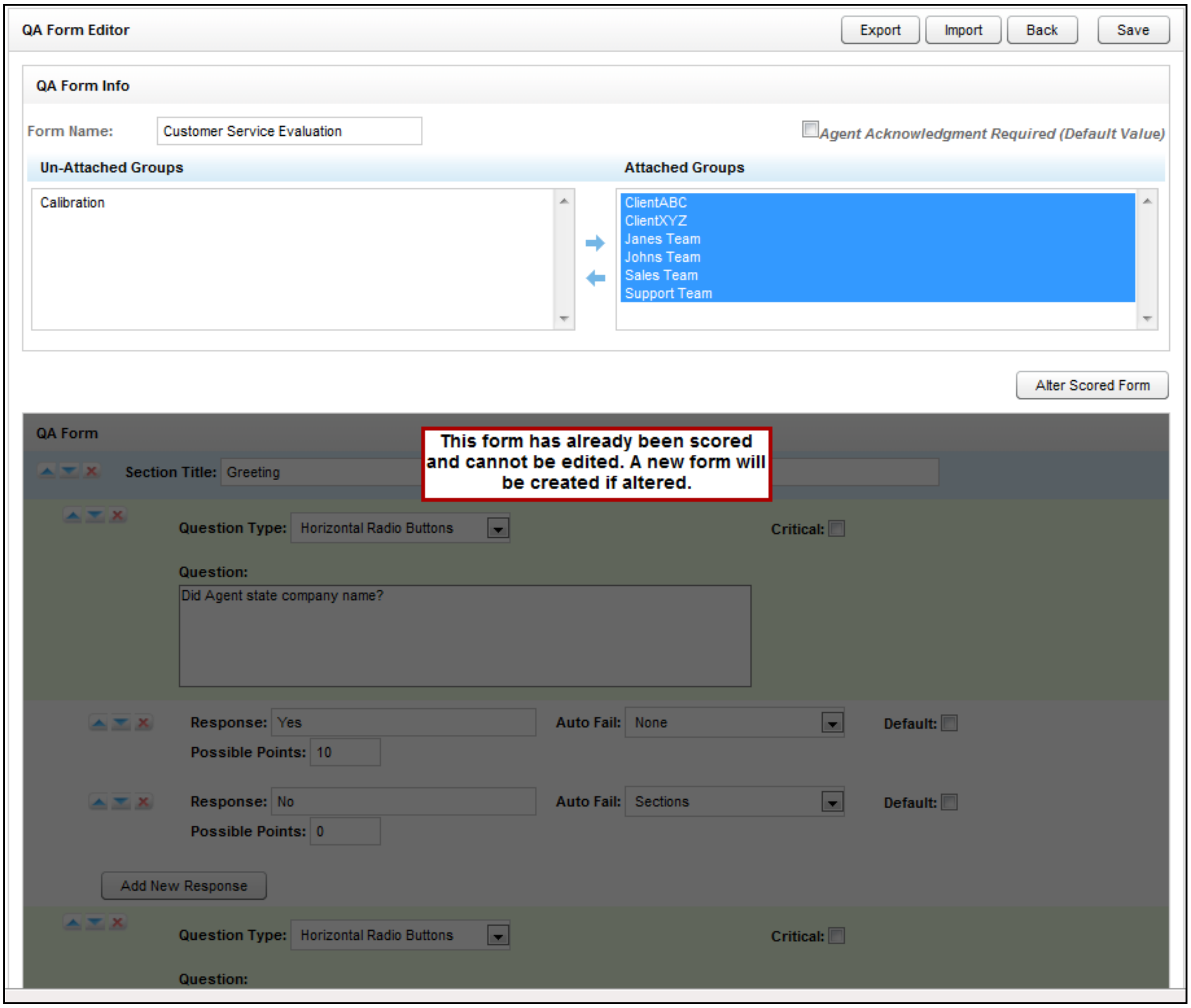
- CANNOT be changed if it has ever been used to evaluate an agent. Changing a form would alter any reporting based off of it.
- Can be saved as a new version if it has been used to evaluate agents.
- Can be changed if it has NEVER been used to evaluate an agent.
- Can be attached or un-attached to CallCopy 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 Edit.

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 Alter Scored Form.



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

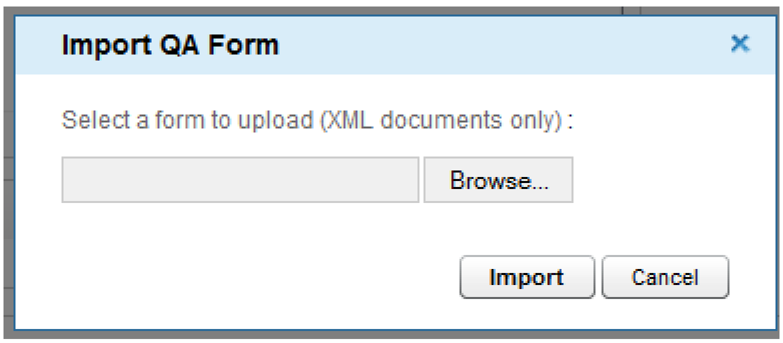
The CallCopy user community provides XML documents that can be imported to create QA forms. These customizable documents serve as templates with standard questions, responses, and point values. Some documents include Healthcare QA Evaluation, Performance Review, Sales Evaluation, and Technical Support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

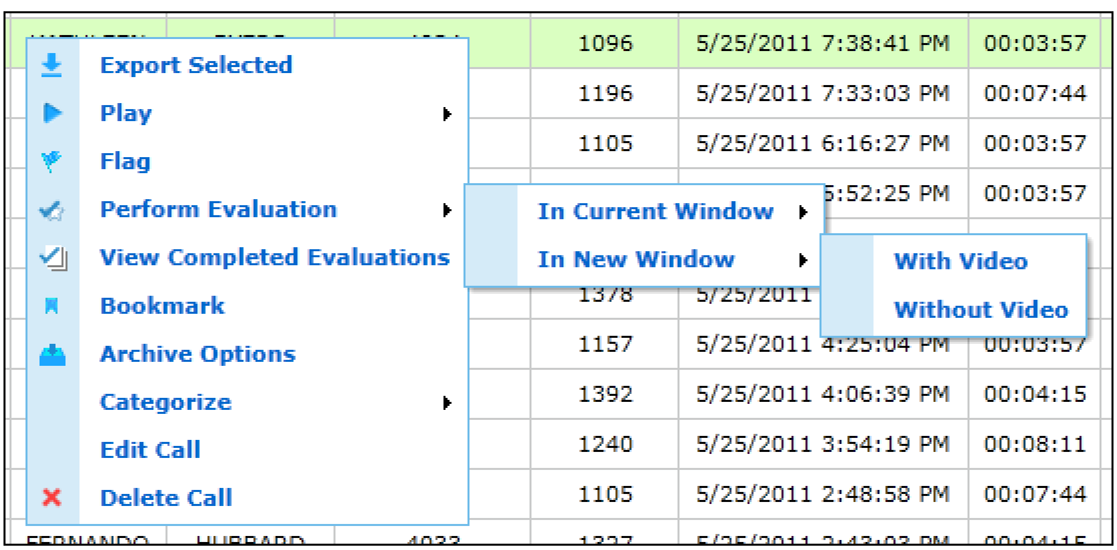
These permissions are set by the cc: Discover administrator and explained in the *cc: Discover Administration Guide*.

Evaluate a Call Record

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

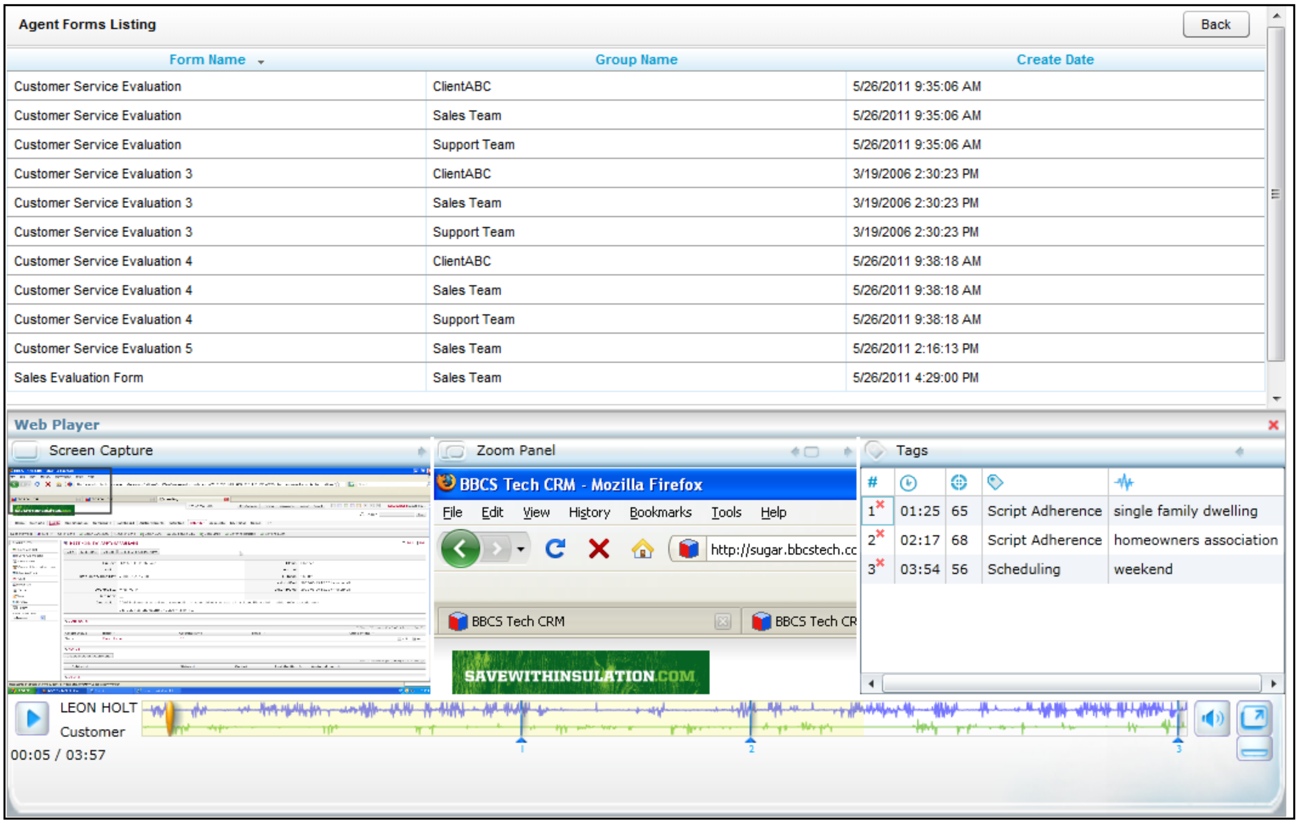
Select the calls to be evaluated using the filtering tools.

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.



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.*



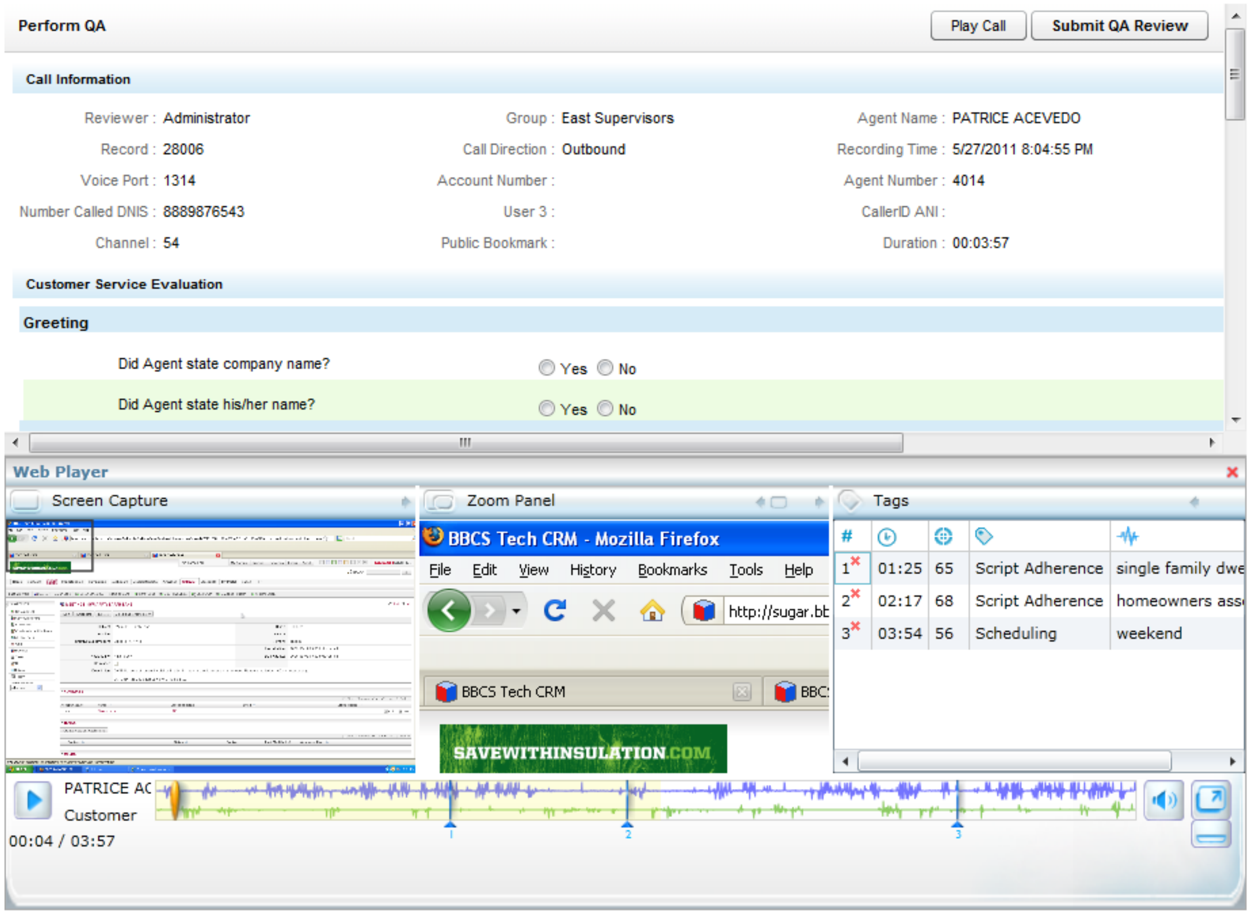
Review the form to see what items are being evaluated.

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.

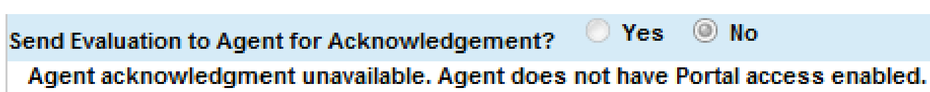
Enter information into the QA form while reviewing the call record.

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 %).



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.

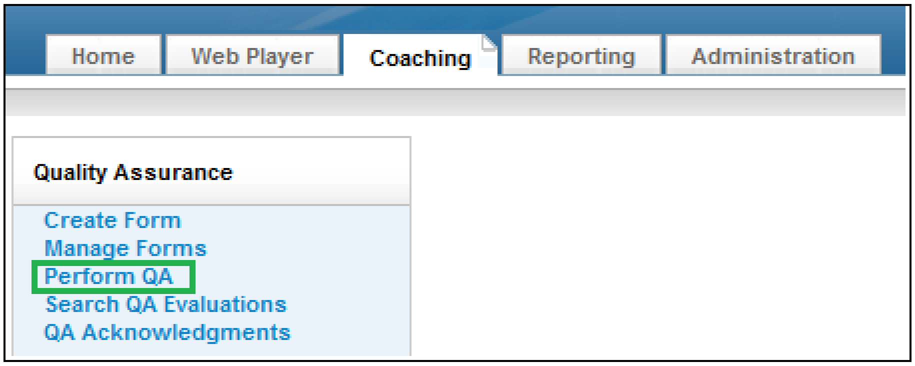


When you have completed the QA form, click **Submit QA Review**.

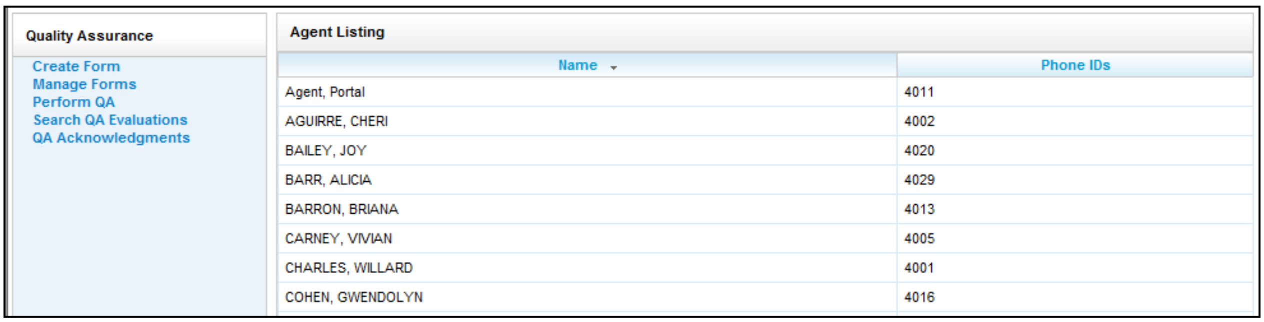
Messages will appear indicating if the evaluation was saved successfully or requires additional information. Follow the instructions in the message as necessary. When the evaluation is saved, review options will appear at the top of the page. These options are explained in the *Review QA Evaluations*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

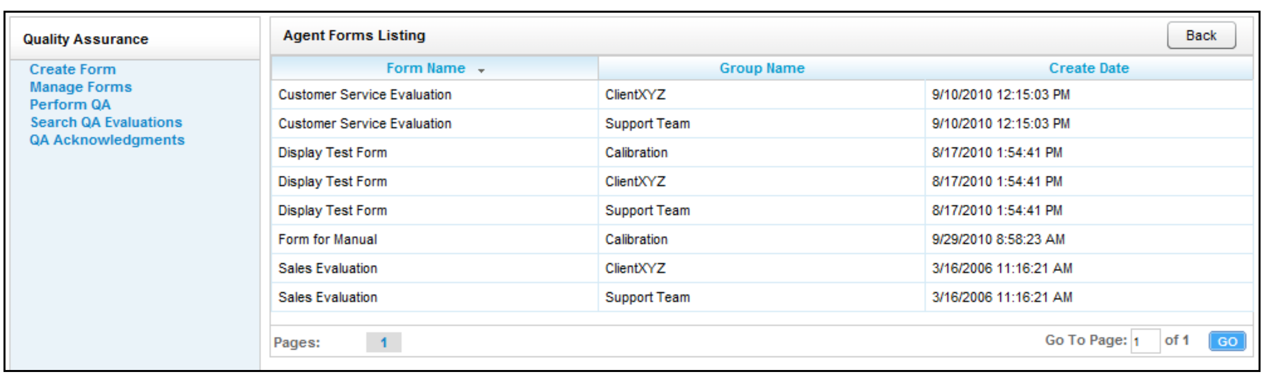


The Agent Listing shows all the agents you can evaluate. Click the agent to be evaluated.

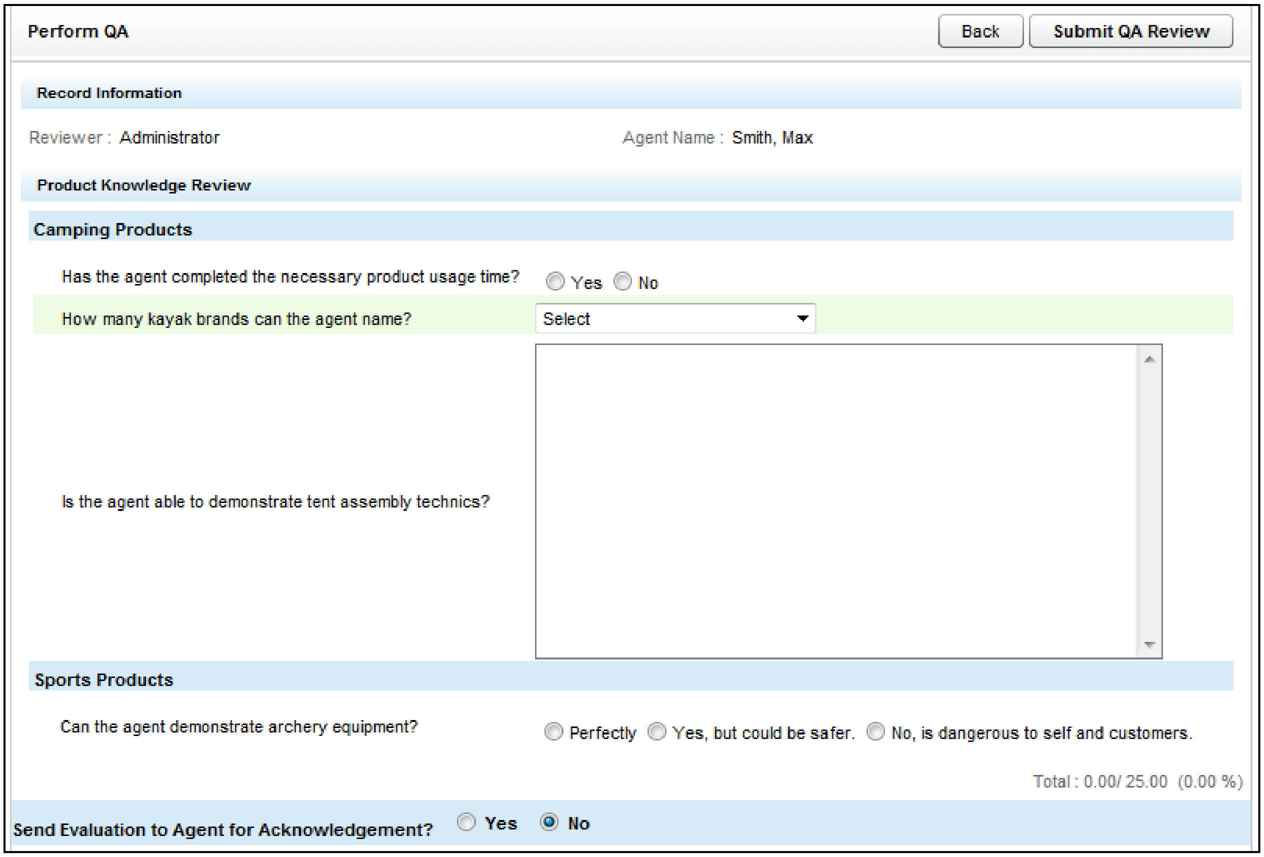


The Agents Forms Listing shows all the QA forms attached to groups of which the selected agent is a member. Click the appropriate form.

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



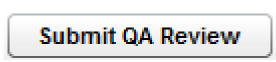
Enter responses for each question on the form.



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 

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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.

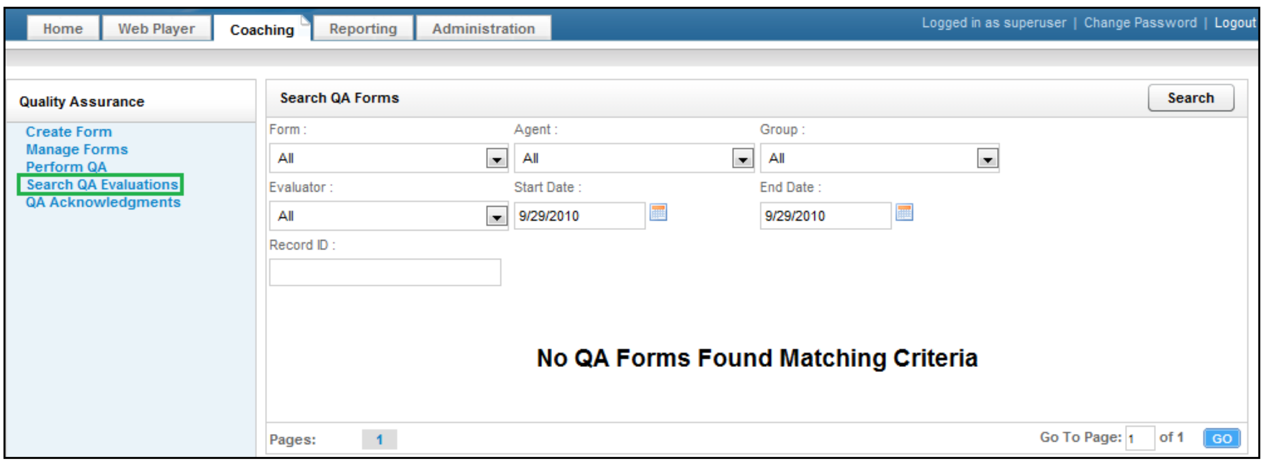
Chapter 5: Review QA Evaluations

In this chapter we will cover:

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

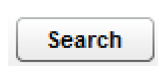
Locate Completed Evaluations

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

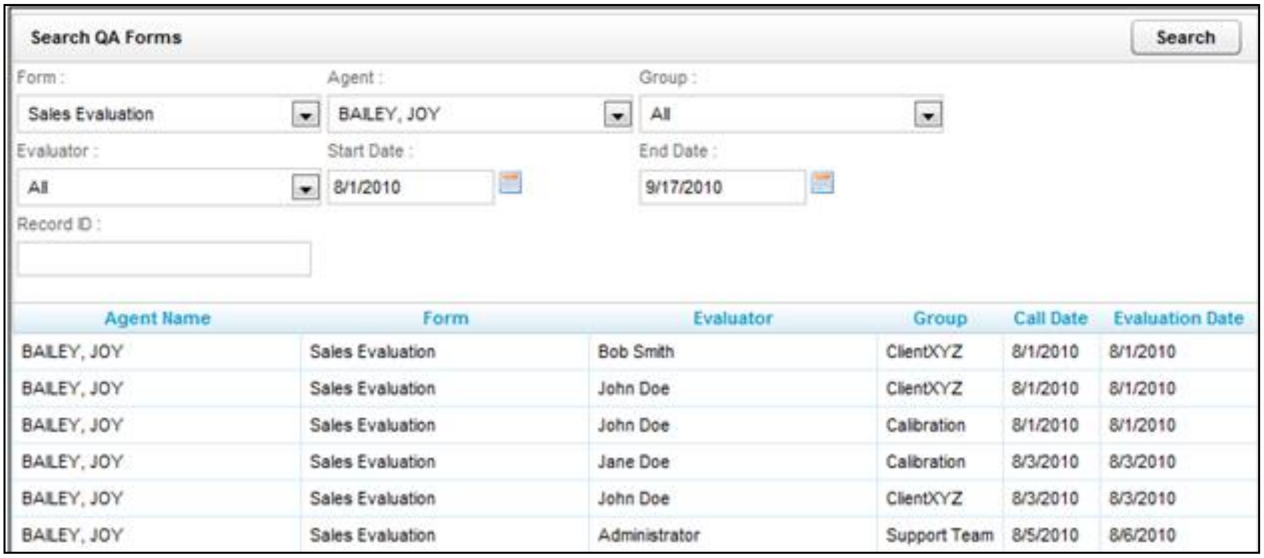


This will allow you to search for a completed evaluation using a combination of search criteria:

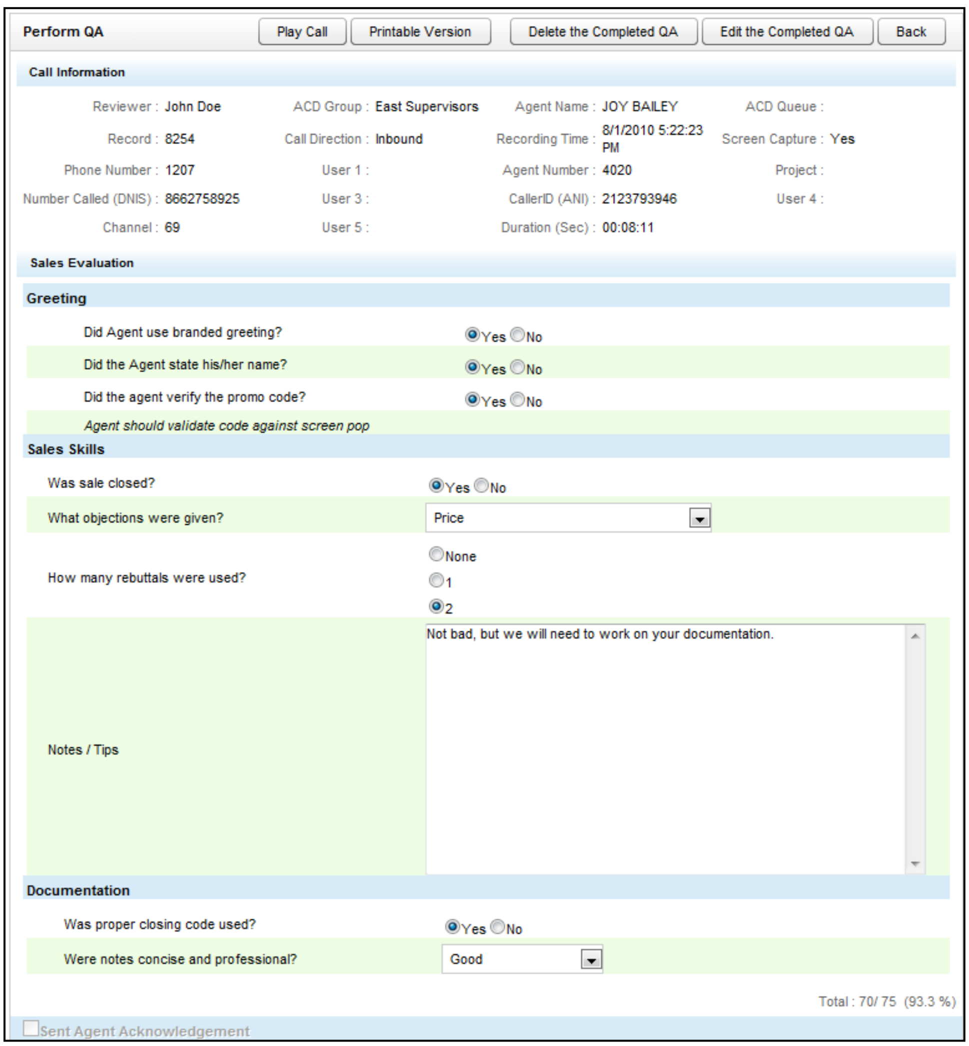
- **Form:** Select a particular form or all forms.
- **Agent:** Select a particular agent or all agents.
- **Group:** Select a particular group or all groups.
- **Evaluator:** Select a particular evaluator or all evaluators.
- **Start Date:** Pick a starting date as part of a date range.
- **End Date:** 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.



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



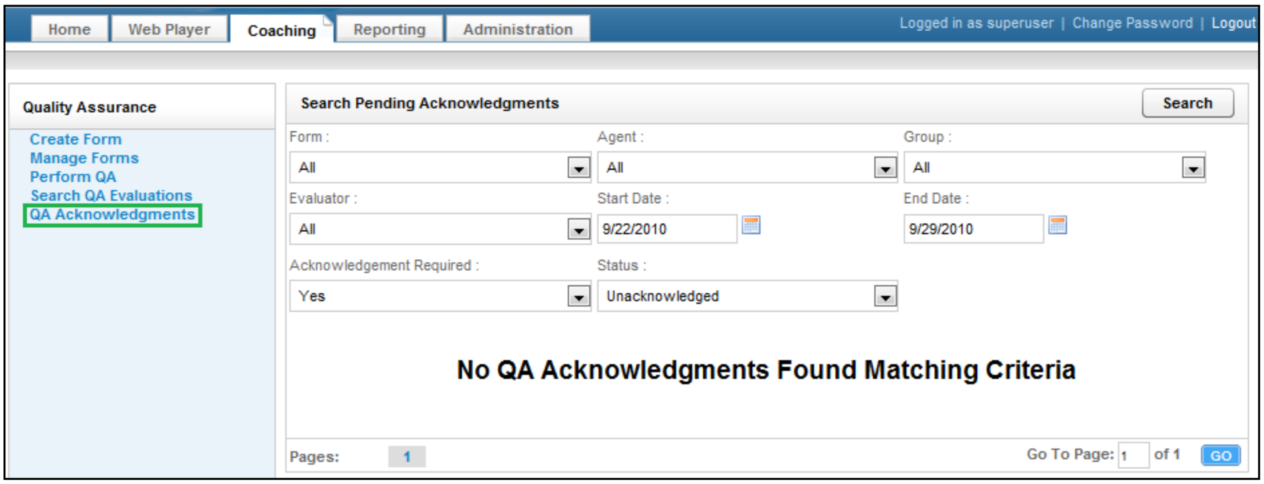
Additional Functions

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.



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

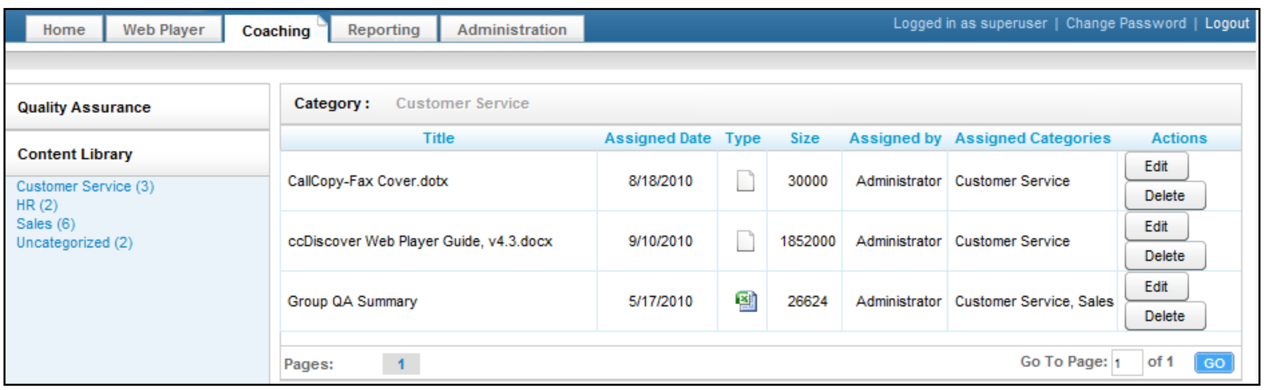
In this chapter we will cover:

- ✓ 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.



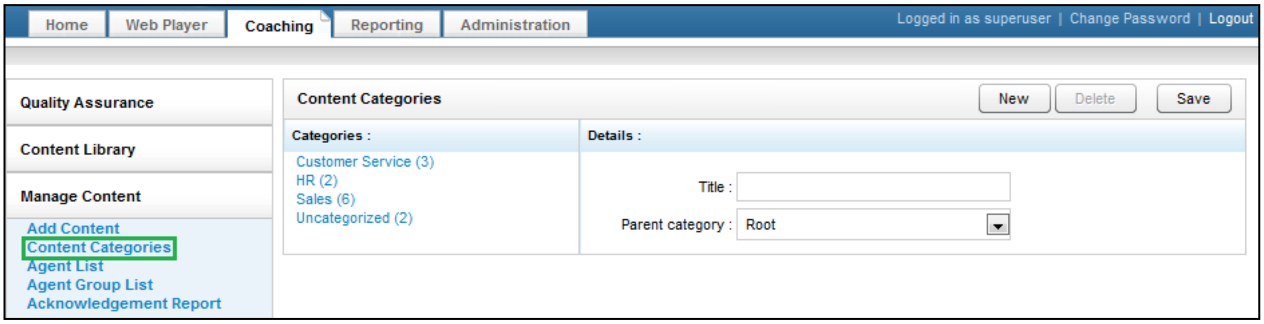
You will see:

- **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.



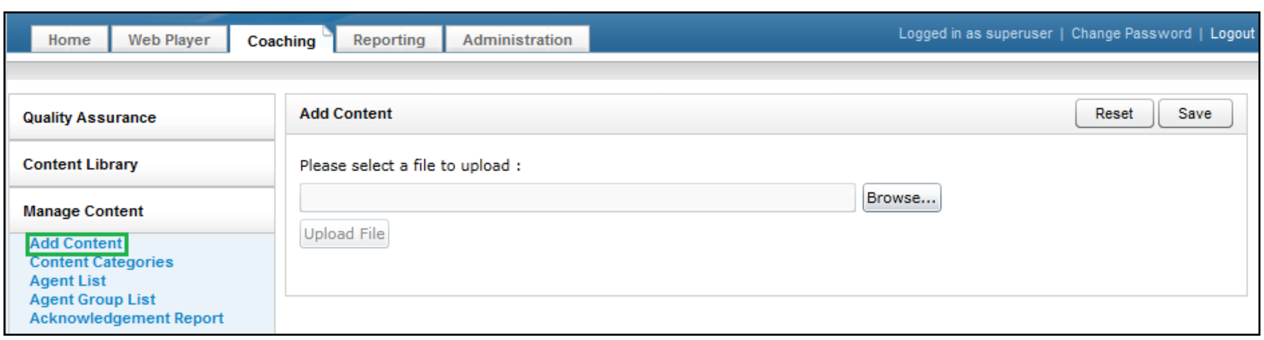
To create a new Category, on the Coaching tab, in the Manage Content menu, click Content Categories. In the Details section, enter a name for the category in the Title field. In the Parent Category list, select an existing category if you would like the new Category to become a child of it. Otherwise,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

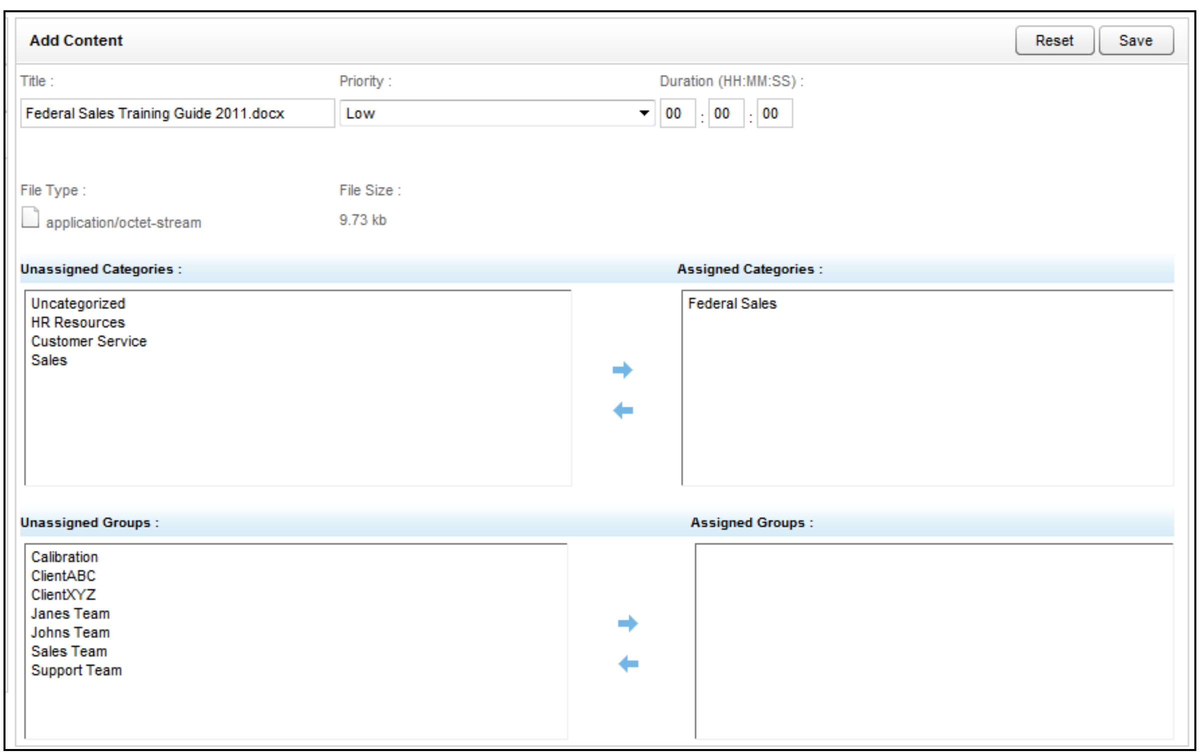
To add content to the Content Library, click the Add Content link under the Coaching tab on the Manage Content menu.



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

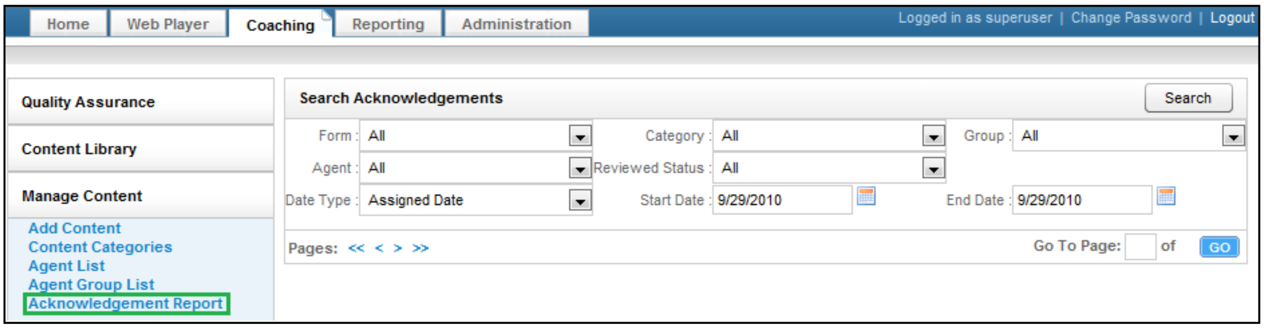
Once your file is populated in the upload field, click the Upload File button, and you will be taken to the property and assignment page. From this page you can:

- **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.



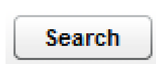
Content Acknowledgement Reports

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.



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 statues, 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.

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