

cc: Discover QA Coaching Manual, v5.3

December 2013

Reference Guide

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Revision History		
Revision	Change Description	Effective Date
0	<p>Updated the "QA Acknowledgments" section to clarify the definition of the Acknowledgment Required search filter.</p> <p>Renamed the "Review QA Evaluations" section to "Modify or Complete QA Evaluations." Renamed the "Locate Completed Evaluations" section to "Search for Completed or In-Progress Evaluations."</p> <p>Updated the "Perform Evaluations" and "Modify or Complete QA Evaluations" sections to add new functionality for saving and completing in-progress evaluations.</p> <p>In "Search for Completed or In-Progress Evaluations," updated QA Score to be expressed as a percentage rounded to the nearest hundredth rather than a number of points.</p> <p>Added the "Manage Achievements" section.</p>	2013-12-06

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Introduction

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, establishing achievement awards for agents, 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 contact your system administrator for the cc: Discover Web Portal URL and for access permissions to the necessary functions.

Note The cc: Discover platform allows administrators to customize field names and terminology in the Web Portal to fit your unique environment. Therefore, screen examples and field names used in this manual may differ from those seen in your implementation.

Create a QA Evaluation Form

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.

Before creating a form, CallCopy recommends:

- Reviewing this document to understand what types of questions and responses can be used.
- Writing the evaluation questions, responses, and possible points in a document. This approach allows users to share the evaluation questions with other managers, and it separates the process of writing the evaluation content from the process of creating the evaluation form.
- Promoting consistent scoring across forms by creating a question points/value schema that is easy to track and used by all form creators.

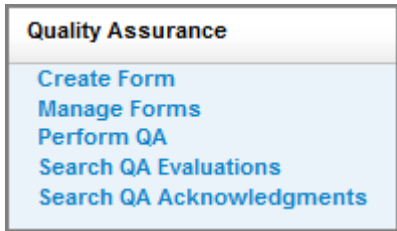
Remember these points when creating a form:

- Save a QA form before switching to another tab. Changing tabs without saving will cause all changes to be lost.
- Do not use the form until you are certain you have added all the sections and questions necessary. Forms cannot be changed after they are used for an evaluation. A new form can be created from a used form.
- Groups can be added to and removed from a used form.
- The number of elements that can be in a single QA form is determined by the number of controls the environment and browser allow. By default, cc: Discover allows 2000 controls to be displayed in a single form. When this limit is reached, no more sections, questions, or responses can be added without removing others first.
- CallCopy software considers angled brackets (< >) in QA forms to be HTML, which is not supported. If these characters are used in a form or response, the form will not save. Use square brackets [] or braces { } instead.

To create a QA evaluation, complete these steps:

1. Name and assign groups to the form.
2. Add a section.
3. Add a question to the form.
4. Add responses to the question. Steps 2, 3 and 4 are repeated as necessary.
5. Move questions and responses as needed.
6. Save the form.

Step 1: Name and Assign Groups



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**.

Form Name

In the QA Form Editor, type a unique and descriptive name in the "Form Name" field (50 characters max). In the example below the name is "Customer Service Evaluation." To help ensure historical accuracy and continuity in reporting, a form cannot be edited once it has been used. However, you can alter a scored form and then save it as a new form. Therefore, a best practice is to include a version number in the form name, so that new versions of forms can be easily identified.

Acknowledgment

Select the **Agent Acknowledgment Required** option if agents must acknowledge that they have reviewed their evaluations. If agents can login to cc: Discover, they will receive evaluation 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.

Note This is the evaluation email-notification text: "A Quality Assurance Evaluation has been completed and Assignment Request has been sent to you. Please review your Assignment Inbox." Server administrators can edit this text and the email subject line in the Web.config file's QAMailSubject and QAMailBody keys. (Go to Program Files > CallCopy > WebPortal.) Changing other settings in this file can negatively affect cc: Discover.

Create a QA Evaluation Form

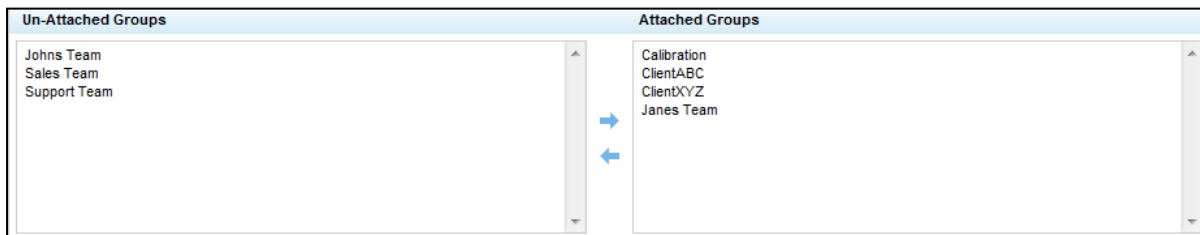
Groups

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 Manual* and *cc: Discover Administration Manual*.)

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.

To help ensure historical accuracy and continuity in reporting, a form cannot be edited once it has been used. This includes unattaching groups whose members have been scored using the form. If you need to remove a group from a previously-scored form, create a new version of the form. For details, see [Form Name](#).



Step 2: Add a Section

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." A form must have at least one section. All questions can be placed in one section.

To create a section, click [Create New Section](#).

Add a unique name in the Section Title field (50 characters max).



The screenshot shows a text input field with the label "Section Title:" to its left. The input field is empty and has a light blue border. To the left of the input field are three small icons: a blue arrow pointing right, a blue arrow pointing left, and a red 'X' icon.

Step 3: Add a Question Type

The form will probably need multiple questions. Repeat steps 2 and 3 for each question.

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 (1024 characters max). For example, the question can be "Did the agent use the standard greeting?"



The screenshot shows a form for adding a new question. At the top left, there are three window control icons (minimize, maximize, close). The form has a light green background. The 'Question Type:' field is a dropdown menu with 'Dropdown' selected. To the right of this field is a 'Critical:' checkbox. Below these fields is a large text area 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:

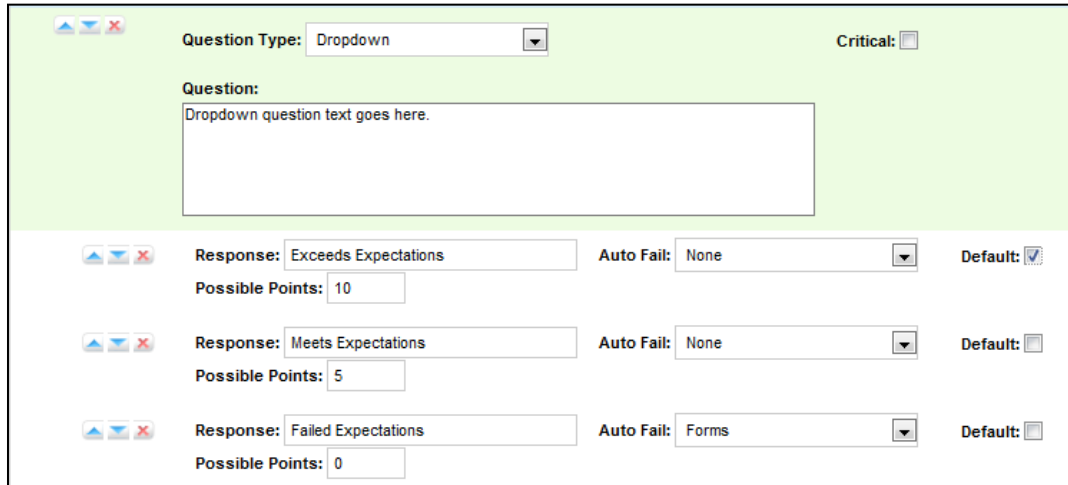
- Dropdown (Scoring)
- Horizontal Radio (Scoring)
- Vertical Radio (Scoring)
- Free Text (Non-Scoring)
- Comment (Non-Scoring)

Create a QA Evaluation Form

Dropdown

Responses appear in a drop down menu, and the evaluator can select one.

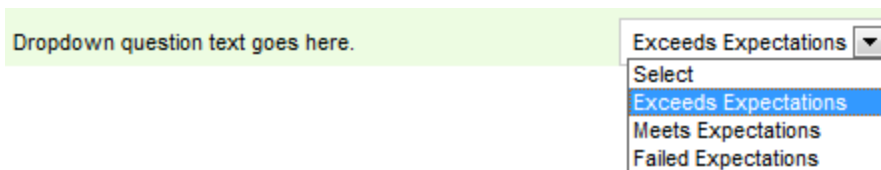
For example, a question with responses ranging from "Exceeds Expectations" to "Fails Expectations" with point values ranging from ten (10) for "Exceeds Expectations" to zero (0) for "Fails Expectations" would appear in the Form Creator like this:



The screenshot shows the Form Creator interface for a dropdown question. At the top, the "Question Type" is set to "Dropdown" and the "Critical" checkbox is unchecked. Below this is a text box for the question text, containing the placeholder "Dropdown question text goes here." The main configuration area contains three response options, each with a "Response" field, "Possible Points" field, "Auto Fail" dropdown, and "Default" checkbox:

Response	Possible Points	Auto Fail	Default
Exceeds Expectations	10	None	<input checked="" type="checkbox"/>
Meets Expectations	5	None	<input type="checkbox"/>
Failed Expectations	0	Forms	<input type="checkbox"/>

This example will appear like this in the completed form:



The screenshot shows the completed form. The question text "Dropdown question text goes here." is displayed in a light green box. To the right of the text is a dropdown menu with the following options:

- Exceeds Expectations (selected)
- Select
- Exceeds Expectations
- Meets Expectations
- Failed Expectations

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:

The screenshot shows the configuration for a 'Horizontal Radio Buttons' question. The question text is 'Horizontal Radio question text is entered here.' Below the question, there are three response options:

- Response: Yes**: Possible Points: 5, Auto Fail: None, Default:
- Response: No**: Possible Points: 0, Auto Fail: None, Default:
- Response: Not Applicable**: Possible Points: NA, Auto Fail: None, Default:

This example will appear like this in the completed form:

The completed form displays the question text 'Horizontal Radio question text is entered here.' followed by three radio button options: 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:

The screenshot shows the Form Creator interface for a "Vertical Radio Buttons" question. At the top, the "Question Type" is set to "Vertical Radio Buttons" and there is a "Critical" checkbox. Below this is a text box for the question text, containing "Vertical Radio question text is entered here." The bottom section contains three response options, each with a "Response" field, "Possible Points" field, "Auto Fail" dropdown, and "Default" checkbox:

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

This example will appear like this in the completed form:

The screenshot shows the completed form for the "Vertical Radio" question. The question text "Vertical Radio question text is entered here." is displayed in a box. To the right of the text, three radio buttons are arranged vertically, labeled "None", "One", and "Two".

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, including spaces) be placed in the field.

The screenshot shows a configuration window for a 'Free Text' question. At the top left, there are three small icons: a blue triangle pointing up, a blue triangle pointing down, and a red 'X'. To the right of these icons is a dropdown menu labeled 'Question Type:' with 'Free Text' selected. Further right is a checkbox labeled 'Response required:' which is currently unchecked. Below this is a label 'Question:' followed by a large white text input area containing the placeholder text 'Free Text text is entered here.' The entire configuration area has a light green background.

This example will appear like this in the completed form:

The screenshot shows the completed form. On the left, there is a light green rectangular area containing the text 'Free text text is entered here.' To the right of this area is a large white rectangular input field, which is currently 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. Max 220 characters, including spaces.

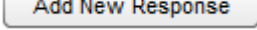
The screenshot shows a configuration window for a 'Comment' question. At the top left, there are three small icons: a blue triangle pointing up, a blue triangle pointing down, and a red 'X'. To the right of these icons is a dropdown menu labeled 'Question Type:' with 'Comment' selected. Below this is a label 'Comment:' followed by a large white text input area containing the placeholder text 'Comment text is entered here and will appear in italics.' The entire configuration area has a light green background.

This example will appear like this in the completed form:

The screenshot shows the completed form. It consists of a single white rectangular box containing the text 'Comment text is entered here and will appear in italics.' The text is rendered in an italicized font.

Step 4: Add Responses

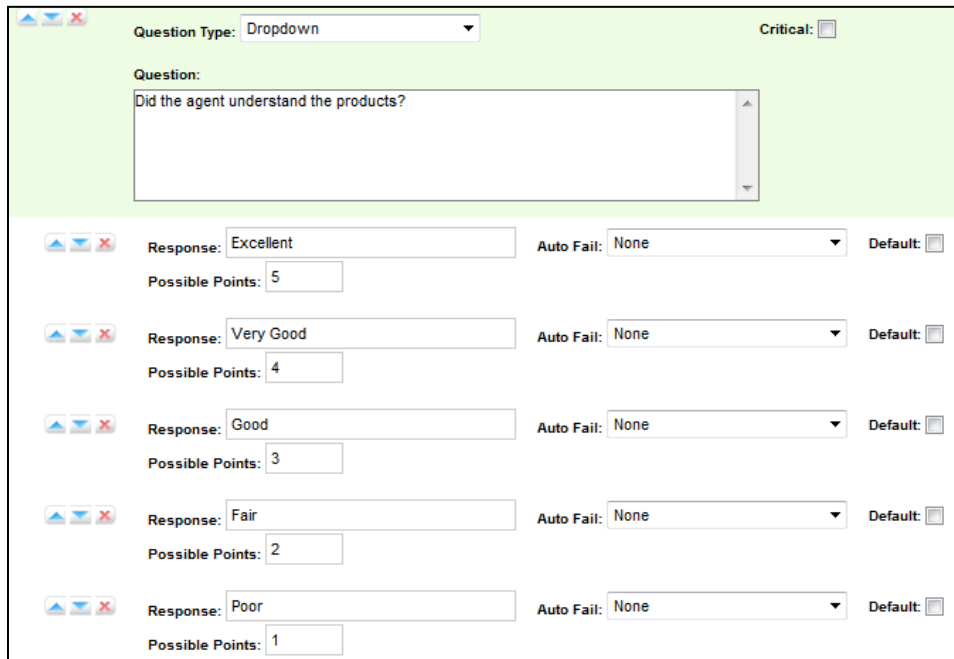
Note Questions can have an unlimited number of responses. You have to repeat this task for each response.

To specify the responses an evaluator can provide, click .

Enter an option in the Response text field.

These settings can be used or left blank:

- **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.
- **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. Responses that are specified as Auto Fail **MUST** have a Possible Points value of 0.



The screenshot shows the configuration interface 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 the question, there are five response options, each with a 'Response' text field, 'Possible Points' input, 'Auto Fail' dropdown, and '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 effect on the agent's final score.

Question : Horizontal Radio question text is entered here.		Type : Horizontal Radio	
Response : Yes	Possible Points : 5	Auto Fail : None	Default : <input type="checkbox"/>
Response : No	Possible Points : 0	Auto Fail : None	Default : <input type="checkbox"/>
Response : Not Applicable	Possible Points : na	Auto Fail : None	Default : <input type="checkbox"/>

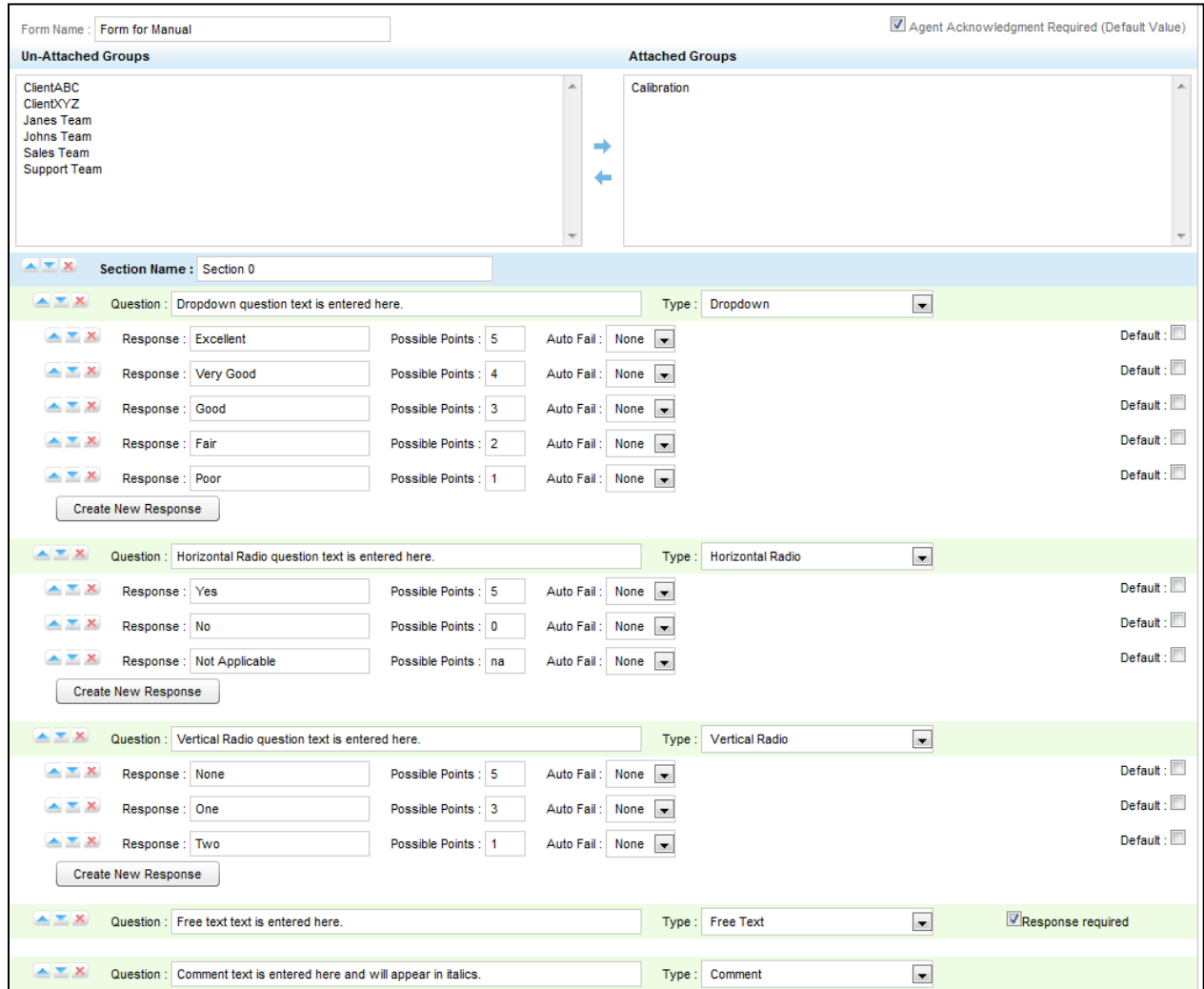
Create a QA Evaluation Form

Step 5: Move Form Items

Use the sequence 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"/>	<input type="text" value="5"/>	<input type="text" value="None"/>	<input type="checkbox"/>
<input type="text" value="Very Good"/>	<input type="text" value="4"/>	<input type="text" value="None"/>	<input type="checkbox"/>
<input type="text" value="Good"/>	<input type="text" value="3"/>	<input type="text" value="None"/>	<input type="checkbox"/>
<input type="text" value="Fair"/>	<input type="text" value="2"/>	<input type="text" value="None"/>	<input type="checkbox"/>
<input type="text" value="Poor"/>	<input type="text" value="1"/>	<input type="text" value="None"/>	<input type="checkbox"/>

Question : Type :

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

Question : Type :

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

Question : Type : Response required

Question : Type :

Step 6: Save a Form

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

If the form needs changes, click **Manage Forms** under the Quality Assurance menu. The QA Forms Listing page opens. The form must be retrieved using the Filter. For details, see [Manage QA Forms](#).

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.

QA Form Editor

Form for Manual

Section 0

Dropdown question text goes here. Exceeds Expectations ▾

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

Vertical Radio question text is entered here. None
 One
 Two

Free Text text is entered here.

Comment text is entered here and will appear in italics.

Manage QA Forms

Search for Existing QA Forms

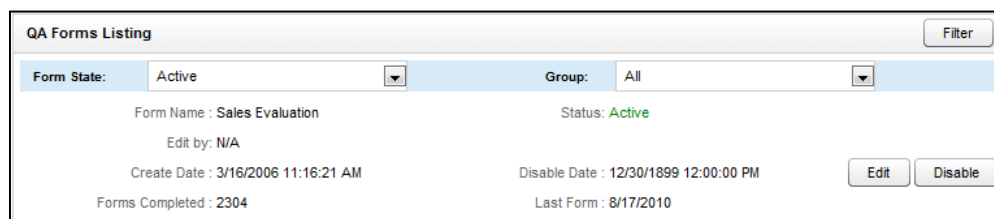
The Manage Forms menu allows you to view Quality Assurance forms already added to the system.

1. On the Coaching tab's Quality Assurance menu, click **Manage Forms**.
2. On the QA Forms Listing page, select the search criteria.
 - **Form State:** 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:** (Optional) Groups are the CallCopy groups that administrators can create and to which agents can be assigned. They usually represent business organizational units or projects.



The screenshot shows the 'QA Forms Listing' search interface. It features a title bar with a 'Filter' button on the right. Below the title bar, there are two dropdown menus: 'Form State:' with 'All' selected and 'Group:' with 'All' selected.

3. Click **Filter**. A list of forms appears. Forms are listed by their creation date.



The screenshot shows a single form entry in the 'QA Forms Listing' interface. The 'Form State:' dropdown is set to 'Active' and the 'Group:' dropdown is set to 'All'. The form details are as follows:

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

At the bottom right of the entry, there are two buttons: 'Edit' and 'Disable'.

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

- **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 QA form:

- Cannot be edited if it ever was used to evaluate an agent, even if the evaluation has since been deleted. This applies to both completed and in-progress evaluations. Changing a form used for an evaluation 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 attached to CallCopy groups, even after the form has been used. Once it has been used, it cannot be un-attached from its existing groups. If the form has not been used, un-attaching a group prevents users from evaluating that group with the form.

Change Group Attachments

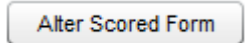
You can edit an existing QA form to attach or un-attach groups from the form. Once the form has been used to evaluate agents, new groups can be attached but existing groups cannot be un-attached.

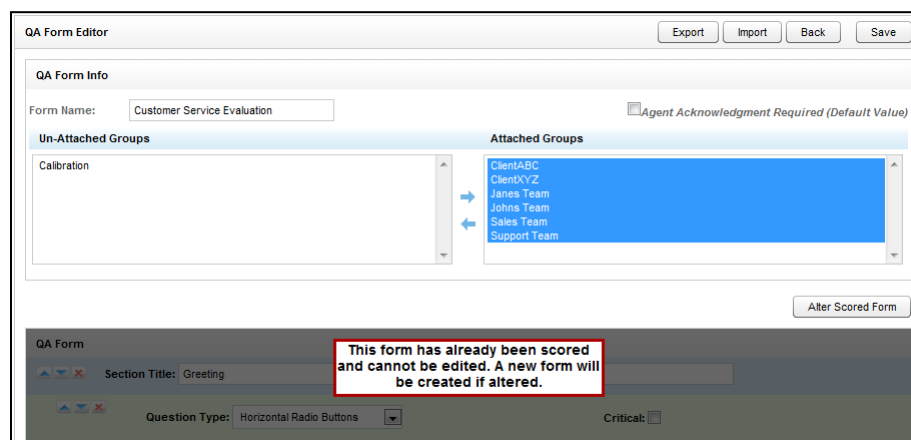
To edit an existing form in the QA Form Editor, locate the form and click . Make the necessary changes and click **Save**.

Create a New Form from an Existing Form

You can create a new form from a form that has previously been used to score agents or calls. A new form cannot be created from a form that has not yet been used.

Follow these steps:

1. Locate the form using the QA Form Editor and click **Edit**.
2. Change the name of the form.
3. Click .



The screenshot shows the QA Form Editor interface. At the top, there are buttons for 'Export', 'Import', 'Back', and 'Save'. The main area is titled 'QA Form Info' and contains a 'Form Name' field with the value 'Customer Service Evaluation' and a checkbox for 'Agent Acknowledgment Required (Default Value)'. Below this, there are two columns: 'Un-Attached Groups' (containing 'Calibration') and 'Attached Groups' (containing 'ClientABC', 'ClientXYZ', 'Janes Team', 'Johns Team', 'Sales Team', and 'Support Team'). A red box highlights a warning message: 'This form has already been scored and cannot be edited. A new form will be created if altered.' At the bottom right of the form editor, there is a button labeled 'Alter Scored Form'.

4. 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. Disabling a form assures that it is not accidentally used and makes the forms list shorter.

A disabled form cannot be used to perform a new evaluation. However, if a form is used to perform a completed or in-progress evaluation and the form is later disabled, the evaluation can still be edited or completed.

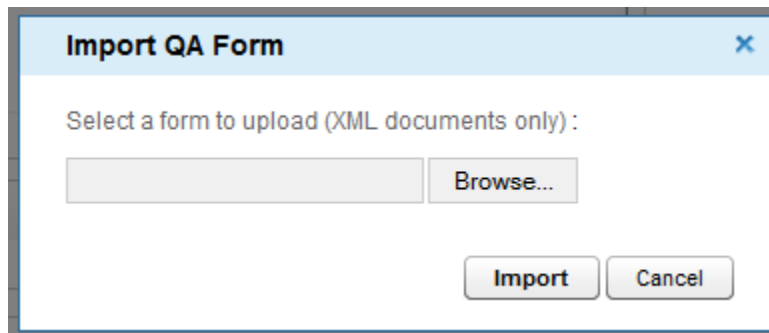
To disable a form, find the form on the QA Forms listing and click **Disable**. The form's Status field changes from Active (green) to Disabled (red). To enable a form, reverse these steps.

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.)

Follow these steps to import an XML document:

1. Download the CallCopy XML form template to your PC.
2. On the Coaching tab, click **Create Form** in the Quality Assurance menu.
3. In the QA Form Editor, name the form and attach any groups that will be evaluated using the form.
4. Click **Import**. Click **Browse** and navigate to the XML file.



5. Select it and click **Open**. Click **Import**.
6. 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.

Perform Evaluations

An evaluator can perform an evaluation on a call record made by an agent or on an agent's non-call work. While performing an evaluation, the evaluator can save an incomplete evaluation to be completed at a later time.

Incomplete evaluations are saved with a status of *In Progress*. An in-progress evaluation can be edited and saved multiple times before submitting the completed evaluation. In-progress evaluations cannot be sent to the agent for acknowledgment and do not appear in the Assignment Inbox or on widgets until they are completed.

To perform QA evaluations, an evaluator must have Coaching Permissions, access to the CallCopy group attached to the QA form used for the evaluation, and permissions for the cc: Discover Web Player. These permissions are set by the cc: Discover administrator and are explained in the *cc: Discover Administration Manual*.

Evaluate a Call Record

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

1. Select the calls to be evaluated using the filtering tools.
2. On the call record to be evaluated, right-click and select the **Evaluate this Agent** option from the Context Menu.
3. 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.

1212	RENE	RILEY	0	-	1/24/2013 5:13:23 I
1:			0	-	1/24/2013 5:11:25 I
1:			0	-	1/24/2013 5:09:10 I
1:			0	-	1/24/2013 5:08:53 I
1:			0	-	1/24/2013 5:07:12 I
1:			2	100.0 %	1/24/2013 5:07:12 I
1:			0	-	1/24/2013 5:03:18 I
1:			3	91.0 %	1/24/2013 5:02:53 I
1:			0	-	1/24/2013 5:01:38 I
1:			2	93.0 %	1/24/2013 5:01:35 I
1:			0	-	1/24/2013 5:00:44 I
1:			0	-	1/24/2013 4:59:25 I
1303	NICHOLAS	MTILED	0	-	1/24/2013 4:58:56 I

▶	Play	▶
▶	Flag	
▶	Export Selected	
▶	Export Call List	
▶	Evaluate this Agent	▶
▶	View Completed Evaluations	▶
▶	View Completed Survey	
▶	Bookmark	
▶	Archive Options	
▶	Categorize	▶
▶	Edit Call	
▶	Copy Call Link	
▶	Delete Call	

▶	In Current Window	▶
▶	In New Window	▶
		▶
		With Video
		Without Video

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.

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 main components of the QA evaluation interface:

- Agent Forms Listing:** A table with columns for Form Name, Group Name, and Create Date. It lists various evaluation forms such as 'Customer Service Evaluation' and 'Sales Evaluation Form' associated with groups like 'ClientABC', 'Sales Team', and 'Support Team'.
- Web Player:** A window showing a recording of a call. It includes a 'Screen Capture' area, a 'Zoom Panel' displaying the 'BBCS Tech CRM - Mozilla Firefox' browser window, and a 'Tags' table. The 'Tags' table lists specific points in the recording with associated scores and categories.


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

- From the **Select at least one Arbitrator** drop-down list, select an arbitrator for the evaluation and click the plus sign (+). The selected arbitrator is displayed in the text box above the drop-down list. You can repeat this step to select up to three arbitrators from the drop-down list. When you are finished selecting arbitrators, click **Next**.

Note The Arbitrators drop-down list includes only arbitrators who have permission to evaluate the agent. If the selected arbitrator changes roles/permissions, disputed evaluations can become stranded. To avoid this problem, you can select more than one arbitrator.

- The evaluation form appears in the window. The Call Information section displays the names of the Evaluator, Arbitrator (first and last name if disputed, or "No Dispute" if this is the initial evaluation), number of score changes, and the agent's name.
- 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.

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

Note A  appears beside responses that were specified Auto-fail by the form creator.

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

Perform QA Play Call Back Save 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

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

BBCS Tech CRM - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://sugar.bt

BBCS Tech CRM

SAVEWITHINSULATION.COM

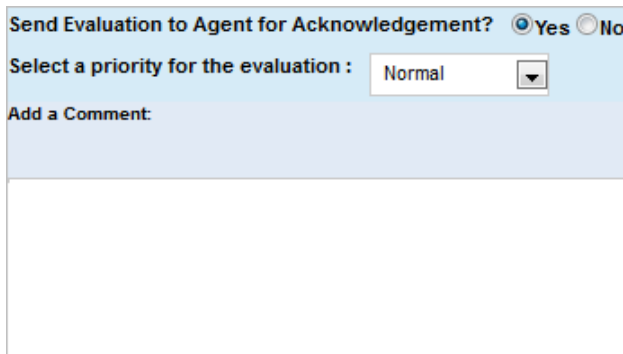
PATRICE AC
Customer

00:04 / 03:57

Perform Evaluations

10. Select a setting for the **Send Evaluation to Agent for Acknowledgement?** option to indicate if you want to send the completed evaluation to the agent to review and acknowledge, review and question, or review and dispute.

Note If the Agent does not have access to the cc: Discover Web Portal, this option is not available.



Select a setting as follows:

- If set to **Yes**, a text box opens where you can add comments or directions to the agent, and the evaluation will be sent to the agent for review when the completed evaluation is submitted.
 - Note** If the QA form being used required agent acknowledgment, **Yes** is the default setting; if desired, you can change the setting to **No**.
 - If set to **No**, the completed evaluation will be submitted without being sent to the agent for review. The evaluation will not appear in the agent's Assignment Inbox or in the Search QA Acknowledgments results; however, it will appear in the Search QA Evaluations results.
11. Assign a priority for the evaluation from the drop-down list. The options are Low, Normal, and High, with Normal being the default.
 12. Do one of the following:
 - To save an incomplete QA form to finish later, click **Save**. The evaluation is saved with a status of *In Progress*. In-progress evaluations are not sent to the agent for review.
 - If you have completed the QA form, click **Submit QA Review**.

Messages appear indicating if the evaluation was saved/submitted successfully or requires additional information. Follow the instructions in the message as necessary. When the evaluation is saved or submitted, options appear at the top of the page that allow you to modify the completed evaluation or complete an in-progress evaluation. For details about these options, see [Modify or Complete QA Evaluations](#). For details about a completed evaluation sent to the agent for acknowledgment, see [QA Review Process](#).

Evaluate an Agent

QA forms for evaluating agents' non-call work are scored on the Coaching tab.

1. In the Quality Assurance menu, click **Perform QA**.
2. The Agent Listing shows all the agents you can evaluate. Double-click the agent to be evaluated.

Agent Listing	
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

3. The Agents Forms Listing shows all the active QA forms attached to groups of which the selected agent is a member. Double-click the appropriate form.

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

Agent Forms Listing		
Form Name	Group Name	Create Date
Customer Service Evaluation	ClientVZ	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	ClientVZ	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	ClientVZ	3/16/2006 11:16:21 AM
Sales Evaluation	Support Team	3/16/2006 11:16:21 AM


Pages: 1 of 1 Go To Page: 1 of 1

4. From the **Select at least one Arbitrator** drop-down list, select an arbitrator for the evaluation and click the plus sign (+). The selected arbitrator is displayed in the text box above the drop-down list. You can repeat this step to select up to three arbitrators from the drop-down list. When you are finished selecting arbitrators, click **Next**.

Note The drop-down list includes only arbitrators who have permission to evaluate the agent. If the selected arbitrator changes roles/permissions, disputed evaluations can become stranded. To avoid this problem, you can select more than one arbitrator.

Perform Evaluations

- The evaluation form will appear in the window. Enter responses for each question on the form and notes in the Evaluator Comments field.

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.

Perform QA Back Save Submit QA Review

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 %)

6. Select a setting for the **Send Evaluation to Agent for Acknowledgement?** option to indicate if you want to send the completed evaluation to the agent to review and acknowledge, review and question, or review and dispute.

Note If the Agent does not have access to the cc: Discover Web Portal, this option is not available.

Select a setting as follows:

- If set to **Yes**, a text box opens where you can add comments or directions to the agent, and the evaluation is sent to the agent for review when the completed evaluation is submitted.
 - Note** If the evaluation used a QA form that required agent acknowledgment, this is the default setting. If desired, you can change the setting to **No**.
 - If set to **No**, the completed evaluation is submitted without being sent to the agent for review. The evaluation will not appear in the agent's Assignment Inbox or in the Search QA Acknowledgments results; however, it will appear in the Search QA Evaluations results.
7. Assign a priority for the evaluation from the drop-down list. The options are Low, Normal, and High, with Normal being the default.
8. Do one of the following:
- To save an incomplete QA form to finish later, click **Save**. The evaluation is saved with a status of *In Progress*. In-progress evaluations are not sent to the agent for review.
 - If you have completed the QA form, click **Submit QA Review**.

Messages appear indicating if the evaluation was saved/submitted successfully or requires additional information. Follow the instructions in the message as necessary. When the evaluation is saved or submitted, options appear at the top of the page that allow you to modify the completed evaluation or complete an in-progress evaluation. For details about these options, see [Modify or Complete QA Evaluations](#). For details about a completed evaluation sent to the agent for acknowledgment, see [QA Review Process](#).

Modify or Complete QA Evaluations

After you perform an evaluation on an agent's call record or non-call work, you can perform additional actions to modify a completed evaluation or complete an in-progress evaluation. To modify or complete an evaluation, you must first use the Coaching tab to search for the evaluation to be updated.

Accessing an existing completed or in-progress evaluation requires permissions to view QA evaluations. You can access only evaluations for groups to which you are assigned. Additional permissions are needed to edit, delete, or complete an existing evaluation.

Note Be aware that if a call is deleted from the server, whether manually or via an archive action, the QA Evaluations performed on that call will remain in the database for historical searching and review. Please refer to the *cc: Discover Administration Manual* for more information on call archiving.

Search for Completed or In-Progress Evaluations

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

Search QA Evaluation

▲ Save Search Criteria
▼ Search Criteria

Form : <input type="text" value="All"/>	Agent : <input type="text" value="All"/>	Group : <input type="text" value="All"/>	Evaluator : <input type="text" value="All"/>
Start Date : <input type="text"/>	End Date : <input type="text"/>	QA Recording ID : <input type="text"/>	Recording ID : <input type="text"/>
QA Score : <input type="text" value="All"/>	QA Status : <input type="text" value="All"/>	<input type="button" value="Save Criteria"/> <input type="button" value="Reset"/> <input type="button" value="Search"/>	

QA Record ID	Agent	QA Form	Evaluator	Group Name	QA Score	Call Date	QA Start Date	QA Completion Date	QA Status	Call Recording ID
20698	JUAREZ, ERIK	Sales Evaluation	Bob Smith	Calibration	75	05/15/2012	8/14/2012	8/14/2012	Completed	36554
20700	JUAREZ, ERIK	Sales Evaluation	CallCopy Administrator	Support Team	70	05/15/2012	8/14/2012	8/14/2012	Completed	36554

2. Enter 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. Applies to evaluation date, not the call recording date.
- **End Date:** Pick an ending date as part of a date range. Applies to evaluation date, not the call recording date.
- **QA Record ID:** Number identifying the QA evaluation.
- **Recording ID:** Find an evaluation for a call based on the call's record ID number in the system.
- **QA Score:** Locate evaluations based on these operators: Equal to, Less than, Greater than, Equal to or Less than, Equal to or Greater than. Scores entered in this field may have up to two decimal places and should equal to the percent (%) score desired. For example, if you're searching for a score of 85.71%, entering 85 in this field with the "Equal to" operator will only return evaluations with an exact score of 85%.
- **QA Status:** Choose whether to search for evaluations that are In Progress or Completed, in Question or Dispute status, or All (default).

3. Once you have made your appropriate selections, click **Search**. A list of evaluations matching the criteria appears in the window. To clear all selected criteria, click **Reset**. To save this filter, click **Save Criteria**. For details about saving custom search filters, see [Saveable Search Filters](#).

Search QA Evaluation

▼ Save Search Criteria

Name	Default	Type	Creator	Date Created	Actions
Jane		Public	superuser	4/29/2013	<input type="button" value="Apply"/> <input type="button" value="Delete"/>
John Doe	X	Private	superuser	4/29/2013	<input type="button" value="Apply"/> <input type="button" value="Delete"/>
Reggie		Private	superuser	4/29/2013	<input type="button" value="Apply"/> <input type="button" value="Delete"/>

▼ Search Criteria

Form :

Agent :

Group :

Evaluator :

Start Date :

End Date :

QA Recording ID :

Recording ID :

QA Score :

QA Status :

QA Record ID	Agent	QA Form	Evaluator	Group Name	QA Score	Call Date	QA Start Date	QA Completion Date	QA Status	Call Recording ID
20698	JUAREZ, ERIK	Sales Evaluation	Bob Smith	Calibration	75	05/15/2012	8/14/2012	8/14/2012	Completed	36554
20700	JUAREZ, ERIK	Sales Evaluation	CallCopy Administrator	Support Team	70	05/15/2012	8/14/2012	8/14/2012	Completed	36554
8605	FLETCHER, TINA	Customer Service Evaluation	Sue Smith	Johns Team	122	05/15/2012	8/14/2012	8/14/2012	Completed	15220
1115	WINTERS, LARRY	Customer Service Evaluation	John Doe	Support Team	93	05/15/2012	8/14/2012	8/14/2012	Completed	2018
1116	WINTERS, LARRY	Sales Evaluation	Sue Smith	Calibration	55	05/15/2012	8/14/2012	8/14/2012	Completed	2018

Modify or Complete QA Evaluations

- To access a particular completed or in-progress evaluation, double-click it. The 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?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Did the Agent state his/her name?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Did the agent verify the promo code?	<input checked="" type="radio"/> Yes <input type="radio"/> No

Agent should validate code against screen pop

Sales Skills

Was sale closed?	<input checked="" type="radio"/> Yes <input type="radio"/> No
What objections were given?	Price <input type="button" value="v"/>
	<input type="radio"/> None
How many rebuttals were used?	<input type="radio"/> 1
	<input checked="" type="radio"/> 2

Notes / Tips

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

Documentation

Was proper closing code used?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Were notes concise and professional?	Good <input type="button" value="v"/>

Total : 70 / 75 (93.3 %)

Sent Agent Acknowledgement

Saveable Search Filters

When searching for evaluations, custom search filters can be built and saved so users do not need to enter criteria every time they want to conduct a search.

To save a custom filter, select the necessary criteria, then click **Save Criteria**. A dialog will prompt for a name for the filter, whether access to the filter is public or private, whether this should be set as the user's default filter, and whether the filter should be saved over the currently applied filter or as a new filter. An existing filter can be used to create a new entry by applying the entry and changing the search values. Then click Save Criteria to save a new entry. If the old entry is not needed, it can be deleted.

Private filters may only be viewed, edited, and deleted by the user who created them. Public filters may be viewed by all users with permissions to search for QA evaluations, but can only be edited or deleted by the user who created them. The current default filter is denoted in the list of saved filters by an X in its row under the default column. The default filter will load automatically when this page opens. If a default filter is set and it's necessary to search without filtering results or to start building a new set of criteria, click **Reset**. The default filter is overridden when viewing QA evaluations directly from the Web Player Call List.

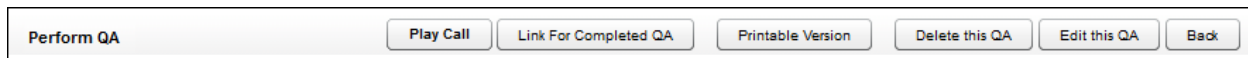
To apply a filter from the list, click **Apply**. To remove a filter from the system, click **Delete**.

Search QA Evaluation						
Save Search Criteria						
Name	Default	Type	Creator	Date Created	Actions	
Jane		Public	superuser	4/29/2013	Apply	Delete
John Doe	X	Private	superuser	4/29/2013	Apply	Delete
Reggie		Private	superuser	4/29/2013	Apply	Delete

Search Criteria						
Form :	Agent :	Group :	Evaluator :			
<input type="text" value="All"/>	<input type="text" value="Doe, Jane"/>	<input type="text" value="All"/>	<input type="text" value="All"/>			
Start Date :	End Date :	Record ID :	Recording ID :			
<input type="text" value="8/15/2012"/>	<input type="text" value="9/5/2012"/>	<input type="text"/>	<input type="text"/>			
QA Score :	QA Status :					
<input type="text" value="All"/>	<input type="text" value="All"/>					
		<input type="button" value="Save Criteria"/>	<input type="button" value="Reset"/>	<input type="button" value="Search"/>		

Additional Functions

After you have searched for and opened a completed or in-progress evaluation, additional options are available to allow you to perform several actions on the evaluation. Some of these options require added Coaching permissions in addition to permission to view QA evaluations.



- **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. This option is useful if referencing a completed QA in an email.
- **Printable Version:** Opens the evaluation in PDF format that you can then save or print. The printable PDF includes the fields Agent, Evaluator, Arbitrator, Evaluation Form, Date of Evaluation, Date of Recording, and Call ID.
- **Delete this QA:** Deletes the evaluation from the system. You will be prompted to enter a reason for the deletion and confirm the deletion request.

Note If more than one user opens the same completed or in-progress evaluation

The following permissions are required:

- Permission to allow deletion of completed evaluations. Very few users should be given this permission. This permission does not apply to in-progress evaluations.
- Permission to allow performing of evaluations. This permission is required for editing and deleting of in-progress evaluations but is not needed for deletion of completed evaluations.
- **Edit this QA:** Allows you to update a completed evaluation or complete an in-progress evaluation, as follows:
 - For a completed evaluation, make any necessary updates and click **Submit QA Review**. The original version of the evaluation is not retained in the system. Requires permission to allow editing of completed evaluations.
 - For an in-progress evaluation, you can make all changes needed to complete and submit the evaluation or you can make some changes and save the evaluation to complete later. To submit the completed evaluation, click **Submit QA Review**. To save the incomplete evaluation to finish later, click **Save**. Requires permission to allow performing of evaluations.

Note Deleting or editing completed QA forms affects reporting.

QA Acknowledgments

If, during your evaluation of agents, you require them to acknowledge their completed forms, they will review and acknowledge the evaluation on the cc: Discover Home tab. (See the *cc: Discover Web Player Manual* for additional information.)

To determine which agents have acknowledged their evaluations, you can perform a search from the Coaching tab. In the Quality Assurance menu, click **Search QA Acknowledgments**.

Agent Name	QA Form	Evaluator	Arbitrator	Group	Evaluation Date	Acknowledgment Date	Status	Acknowledgment Required
Doe, John	Sales Evaluation	Smith, Jane	N/A	Team A	9/10/2013	N/A	Unacknowledged	Yes

The Search QA Acknowledgments page allows 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 Evaluation Date range. The start date will automatically default to a week prior to today's date.
- **End Date:** Allows you to pick an ending Evaluation Date range. The end date will automatically default to today's date.
- **Acknowledgment Required:** Allows you to search for evaluations based on whether the QA form creator required agent acknowledgment. The search finds only evaluations where the evaluator selected to send the evaluation to the agent for acknowledgment.
 - If set to "Yes," finds evaluations where the QA form required agent acknowledgment and the evaluation was also sent to an agent for acknowledgment.
 - If set to "No," finds evaluations where the QA form did not require an acknowledgment but the evaluation was sent to an agent for acknowledgment.
 - If set to "All," finds all evaluations sent to an agent for acknowledgment, regardless of whether the QA form required agent acknowledgment.
- **Evaluation/Acknowledgment Status:** Allows you to search for evaluations with a status of Acknowledged, Unacknowledged, Question, or Dispute.

Click **Search** to generate a list of acknowledged or unacknowledged evaluations, based on your selection criteria. The results display only groups and agents with the same roles as the logged-in user.

QA Review Process

After a QA evaluation has been completed for an agent, the agent receives an email notification or sees the envelope icon at the top of the Web Portal, and can do three things: review and acknowledge, review and question, or review and dispute. Agents have the option to question or dispute QA evaluations if they disagree with or need clarification on the score received. QA evaluations awaiting review appear in a user's New Assignments section under the Home Tab > Assignment Inbox. QA Evaluations are denoted by a check in the box in the Type column. The New Assignments, Pending Assignments, and Reviewed Assignments sections are explained in greater detail in the *cc: Discover Web Player Manual's* "Web Portal Basics > Home Tab" section.

Note The Agent/Evaluator/Arbitrator Comments fields:

- Are limited to 1500 characters (including spaces) per field.
- Allow percent signs (%), parentheses, hyphens, commas, and periods, but no other special characters.

If either of these limitations is violated, when the form is submitted, an error message will appear. These comments also appear when an evaluation is converted to a PDF for printing. When an evaluation is in acknowledged, question, or dispute status, agents cannot interact with any buttons on the evaluation or add additional questions or comments.

Acknowledge an Evaluation

This is the most common interaction. A user accepts the score and information provided in the evaluation by clicking **Acknowledge**. This moves it to the Reviewed Assignments section.

1. In *cc: Discover*, an agent clicks Home tab > Assignment Inbox > New Assignments to view the list of evaluations and documents awaiting attention.
2. The agent clicks an evaluation to open it.
3. After reviewing the evaluation, the agent can acknowledge the evaluation two different but equivalent ways:
 - Enter comments in the Agent Comments field and click **Acknowledge** to agree with the evaluation score and evaluator's comments.
 - Click **Back** and then click **Done** next to the item in the New Assignments list.
4. The evaluation is moved to the agent's Reviewed Assignments section.
5. The evaluator can now search for the evaluation on the Coaching tab by using the Search QA Acknowledgments menu. The status of the evaluation is "Acknowledged" and Acknowledgment Date is the current date.

Question an Evaluation

If an agent has a question about an evaluation – anything from why they received the given score to seeking clarification on the evaluator's comments – they can utilize the **Question** function to communicate with the evaluator.

1. In cc: Discover, an agent clicks Home tab > Assignment Inbox > New Assignments to view the list of evaluations and documents awaiting attention.
2. The agent clicks an evaluation to open it.
3. After reviewing the evaluation, the agent enters a question in the Agent Comments text field (required) and clicks **Question**.
4. The evaluation moves to the agent's Pending Assignments section with a status of "Question."
5. The evaluator can now search for and open the evaluation on the Coaching tab by using the Search QA Acknowledgments menu.
6. In the open evaluation, the evaluator clicks **Edit this QA** and responds to the agent's questions by adding comments in the Evaluator Comments text field.
7. The evaluator clicks **Submit QA Review**.
8. The updated evaluation moves to the agent's New Assignments section on the Home tab, and the system sends an email notification to the agent about the response. The envelope icon appears at the top of the web portal.
9. The agent reviews the evaluator's comments and performs one of the following actions:
 - **Acknowledge:** The agent enters comments if necessary and clicks **Acknowledge**.
 - **Question:** If the agent has additional questions, those questions are entered in the Agent Comments field and the agent clicks **Question**.
 - **Dispute:** If the agent disagrees with the evaluation, comments are entered in the Agent Comments field and the agent clicks **Dispute**.

An evaluation can be questioned and moved back and forth between the agent and the evaluator an unlimited number of times until a satisfactory resolution is reached. All comments are retained on the evaluation throughout this process.

Dispute an Evaluation

If an agent disagrees with the score given to an evaluation, they can utilize the **Dispute** function to communicate with up to three dispute arbitrators. If an evaluation is in dispute status, only an arbitrator can edit it. If more than one arbitrator is assigned to an evaluation, the first arbitrator to open and view (even if not editing or rescoring) the evaluation is designated as the arbitrator for that evaluation. Any attempts by other arbitrators to make changes after that will display a message indicating another arbitrator has already rescored the evaluation and that no new changes have or can be saved.

1. In cc: Discover, an agent clicks Home tab > Assignment Inbox > New Assignments to view the list of evaluations and documents awaiting attention.
2. The agent clicks an evaluation to open it.
3. After reviewing the evaluation, the agent enters a comment in the Agent Comments text field (required), then clicks **Dispute**.
4. The evaluation moves to the agent's Pending Assignments section with a status of "Dispute."
5. The system sends an email to each of the arbitrators (persons selected to review disputed evaluations) notifying them that an evaluation is being disputed.
6. An arbitrator can now search for and open the evaluation on the Coaching tab by using the Search QA Acknowledgments menu.

Note The original evaluator can see that the evaluation is being disputed, but cannot change anything on the evaluation unless they are specified as an arbitrator for that evaluation.

7. In the open evaluation, the arbitrator clicks **Edit this QA**, re-scores the evaluation, and responds to the agent's comments by adding comments in the Arbitrator Comments text field.
8. The arbitrator clicks **Submit QA Review**.
9. The updated evaluation moves to the agent's New Assignments section on the Home tab, and the system sends an email notification to the agent about the response. The envelope icon appears at the top of the web portal.
10. The evaluator or arbitrator can now search for the evaluation with a status of "Unacknowledged," and the arbitrator's name now appears on the evaluation form.
11. The agent reviews the arbitrator's comments and performs one of the following actions:
 - **Acknowledge:** The agent enters comments if necessary and clicks **Acknowledge**.
 - **Question:** If the agent has additional questions, those questions are entered in the Agent Comments field and the agent clicks **Question**.
 - **Dispute:** If the agent disagrees with the evaluation, comments are entered in the Agent Comments field and the agent clicks **Dispute**.

An evaluation can be disputed and moved back and forth between the agent and the arbitrator an unlimited number of times until a satisfactory resolution is reached. All comments are retained on the evaluation throughout this process.

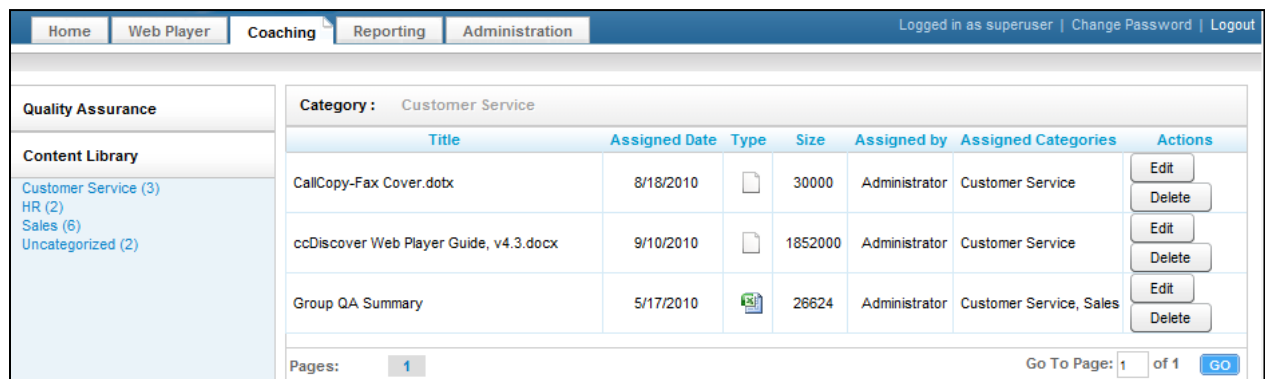
Content Library

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, QA evaluations, and calls exported from cc: Discover.

See the *cc: Discover Web Player Manual* for how to use the Home tab.

Tip Distribute the cc: Discover manuals to the appropriate users via the Content Library. Doing this ensures that users always have access to the manuals when they are in the application, and it can reduce the number of questions to system administrators. Separate categories can be created for different types of users, such as Help for agents or supervisors and Admin Help for system administrators.

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. Click on a category to display the documents in that category.



The screenshot shows a web application interface with a navigation bar at the top containing tabs for Home, Web Player, Coaching (selected), Reporting, and Administration. The user is logged in as 'superuser'. The main content area displays a 'Content Library' section with a sidebar on the left listing categories: Customer Service (3), HR (2), Sales (6), and Uncategorized (2). The main table shows documents assigned to the 'Customer Service' category. The table has columns for Title, Assigned Date, Type, Size, Assigned by, Assigned Categories, and Actions. The actions column contains 'Edit' and 'Delete' buttons for each document.

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

Pages: 1 of 1 Go To Page: 1 of 1 GO

For each document, the following information is displayed:

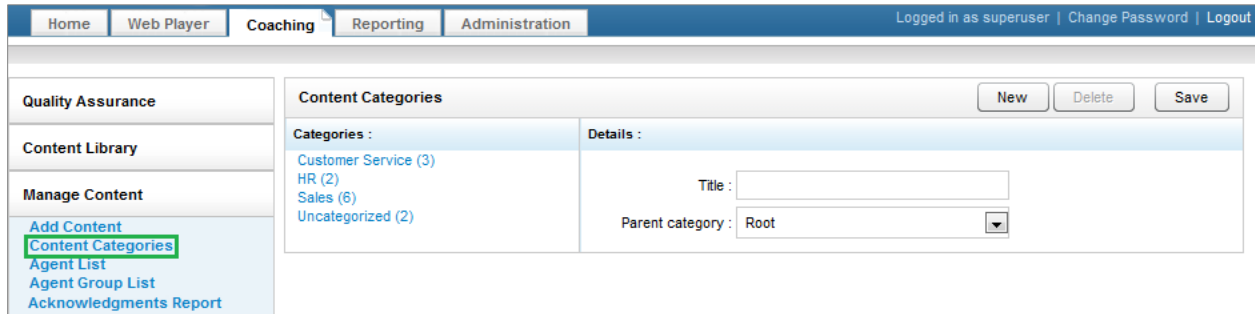
- **Title:** The name of the file.
- **Assigned Date:** The date the content was uploaded and assigned.
- **Type:** Displays graphically the file type (Word, Excel, Power Point, etc.).
- **Size:** The size of the document/content.
- **Assigned By:** The user who uploaded and assigned the content.
- **Assigned 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.

Note Deleting items from the Content Library removes the entry on the Web Portal but not the uploaded content file on the CallCopy server. To help with disk space management issues, you may want to inform your system administrator when you delete items from the Content 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.

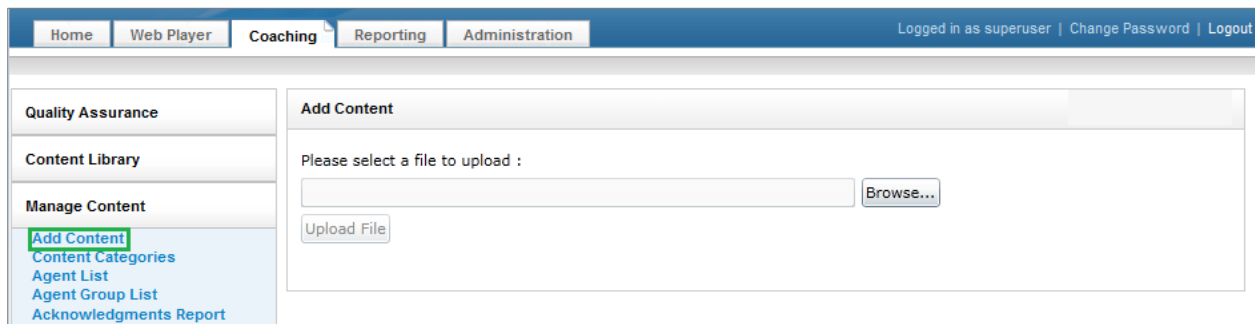
To delete a category, select it from the Categories list, and click **Delete**.

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

Add Content

Follow these steps to add content into the library:

1. On the Coaching tab, click the Manage Content menu and then click **Add Content**. The Add Content page is displayed:



2. Click **Browse** and navigate to the file you want to upload into the library.

3. Once your file is populated in the upload field, click **Upload File**. Additional fields are displayed, where you can specify details about the uploaded file.
4. Complete the following information:
 - **Title:** The name displayed in the Content Library for the file. This field defaults to the filename of the uploaded file. You can edit this field to change the name.
 - **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:** Indicates the categories in which the file will appear in the Content Library. Select one or more categories from the Unassigned Categories list, and click the arrow to move them to the Assigned Categories list. If no category is selected, the file appears in the Uncategorized list in the Content Library.
 - **Unassigned/Assigned Groups:** Indicates which CallCopy groups have permissions to view the file in the Content Library on the Coaching tab and in the New Assignments list on the Home tab.

File type and File size are identified by the system and cannot be changed.

Add Content
Back Save

Title :	Priority :	Duration (HH:MM:SS) :
<input type="text" value="Federal Sales Training Guide 2011.docx"/>	<input type="text" value="Low"/>	<input type="text" value="00"/> : <input type="text" value="00"/> : <input type="text" value="00"/>

File Type :	File Size :
<input type="text" value="application/octet-stream"/>	<input type="text" value="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 :
---	--------	--------------------------

5. Click **Save**. A confirmation message appears if the save was successful. An email is sent to users in the assigned groups. An envelope icon appears at the top of the Web Portal when the user logs into cc: Discover.

Agent List/Agent Group List

The Agent List shows each agent, the number of groups to which he belongs, and the number of documents assigned to the agent. The Agent Group List shows each CallCopy group to which agents can be assigned and the number of agents in that group.

This information may be useful for tracking the total docs assigned to an agent who is part of multiple groups or if loading multiple documents for a group.

Acknowledgments Report

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 Acknowledgments Report link under the Coaching tab, in the Manage Content area.

This will allow you to search for acknowledgments of completed assignments 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.

Manage Achievements

About Achievements

cc: Discover provides the ability to establish a system for awarding points to agents who have achieved certain pre-defined goals. Identifying and rewarding clearly defined goals can lead to improved agent performance and productivity, as well as creating a positive way to promote competition among agents.

In cc: Discover, the Achievements functionality allows you to:

- Create custom achievements that can be awarded to individual agents or particular CallCopy groups.
- Award points based on an agent's performance on QA evaluations or other goals defined by your organization.
- Track achievements that have been awarded, along with the total points awarded to each agent.
- Set a date when an achievement can no longer be awarded or when its points expire.
- Automatically notify agents about their own achievements as well as achievements awarded to other agents.

Achievement Types

Accomplishments to be awarded are created in cc: Discover as *achievement types*. Achievement types can be:

- Based on QA evaluation scores. These achievements are awarded automatically by the system as soon as an agent receives the required score on the specified number of QA evaluations.
- Defined *ad hoc* according to your organization's needs. Ad hoc achievements are awarded manually when an agent or CallCopy group accomplishes a pre-defined goal. These goals can be based on any factors or behavior your organization wants to reward, such as survey results, customer feedback, attendance, average handle time, or script adherence.

Each achievement type must specify the number of points to be awarded and the individual agents or CallCopy groups eligible to receive the achievement award. An achievement type can also have specific start and end dates that indicate when the achievement can be awarded. Points can be set up to expire in a specified number of days after being awarded or by an expiration date. Expired points are automatically removed from an agent's total point count.

Notification of Achievement Awards

When agents are awarded achievement points, either by meeting the scoring criteria for evaluations or by receiving an ad hoc achievement award, they can be notified by any of the following notification methods:

- Email
- News widget
- Achievement widget

Each achievement type must be set up with one or more of these notification methods.

Email Notification

When an agent is notified by email that an achievement was awarded, the email includes the following text:

Email subject: **Congratulations on Your Achievement!**

Email body text:

You have been awarded this achievement:

Name: <achievement type name>

Points: <number of points awarded for this achievement>

Expiration: <expiration date for points>

To receive an email notification, agents must have an email address specified in their cc: Discover user account.

Widgets

The Achievement widget is automatically available to be added to a user's dashboard on the Home tab. With this widget, agents can view information about achievements awarded to them as well as to other agents. Managers and supervisors, as well as agents, can also use this widget to view a list of high-scoring agents and newly added achievement types.

The News widget displays a posting to all users each time an achievement is awarded. The text of this posting is: <agent name> received a <achievement type name> achievement.

For more details about the information displayed on these widgets, see the cc: *Discover Widget Administration Manual*.

Achievement Icons

Achievement awards can be represented with an icon image that is displayed when the achievement appears in the Achievement widget. The following five standard icons are preloaded in cc: Discover and are available to be selected when the achievement type is added or edited:



Custom icons can also be loaded to use instead of one of the standard icons. Custom icons have the following format requirements:

- File size: 105 x 105 pixels
- File type: PNG

Guidelines for Awarding Achievements

When awarding achievements, the following guidelines apply:

- For achievements based on QA evaluation scores:
 - Achievements cannot be awarded for QA evaluations performed in the past.
 - A QA-based achievement cannot be awarded multiple times for the same evaluation. If an evaluation is re-scored, the achievement is not awarded even if the new score qualifies for an achievement.
 - Changes to a QA evaluation form do not affect achievements that have already been awarded.
- For ad hoc achievements:
 - The same achievement type can be awarded more than once to the same agents or CallCopy groups, until the achievement end date is reached.
 - If an achievement is awarded to multiple CallCopy groups and an agent belongs to more than one of those groups, the agent is awarded the achievement only once.
 - You may want to base ad hoc awards on metrics obtained from cc:Discover reports, such as agent ranking, script adherence, average handle time, or improvement in evaluation scores.

User Permissions

To perform activities related to setting up an achievement award system, users must have been administered with the correct Coaching permissions. These activities include adding or editing an achievement type, awarding an ad hoc achievement, viewing or deleting awarded achievements, and uploading custom icons.

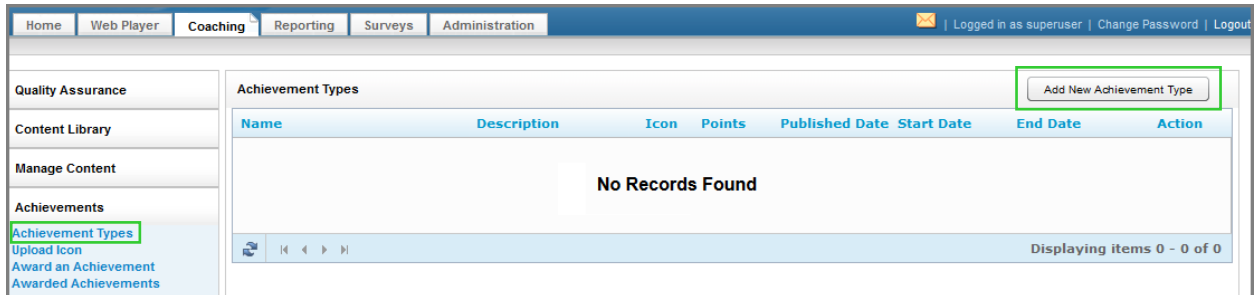
Depending on how your permissions are set, some of the achievement menus may not display. For assistance, contact your system administrator.

Add an Achievement Type

Before you can add an achievement type, you must have the **Allow Manage Achievements** Coaching permission. For assistance, contact your system administrator.

To add an achievement type, follow these steps:

1. On the Coaching tab, click the Achievements menu and then click **Achievement Types**.



2. Click **Add New Achievement Type**. The Achievement Type page is displayed.

A screenshot of the "Achievement Type" form. The form has a title "Achievement Type" and two buttons: "Cancel" and "Save". The form contains the following fields:

- Name:** A text input field.
- Description:** A larger text input field.
- Start Date:** A date input field with a calendar icon.
- End Date:** A date input field with a calendar icon.

3. Enter the following information:

- **Name:** The name of the achievement to be awarded. This is the display name used if the achievement is posted to the agent's email or widgets.
- **Description:** A description of the achievement, up to 150 characters. This description is not displayed to agents. This field is optional.
- **Start Date:** The first date that this achievement type can be awarded, either automatically or ad hoc. This date must be today's date or later.
- **End Date:** The last date that this achievement type can be awarded. If no date is specified, the achievement is open-ended.

4. Specify the CallCopy groups or specific agents eligible to be awarded this achievement, as follows:

Award to Either:

CallCopy group
 Agent

Select to add: All | None

- Group01
- Group02
- Group03
- Group04
- Group05

Add

Remove

Select to remove: All | None

- a. Select one of the following options:
 - **CallCopy group:** Allows you to select one or more groups from a list of all available groups.
 - **Agent:** Allows you to select one or more agents from a list of all active agents.
- b. Depending on the option selected above, select one or more agents or groups by clicking its check box (or click **All** to select all possible agents or groups), and click **Add**.

Note When an ad hoc achievement is manually awarded, users will be able to award only the agents or groups they have permission to access.

5. For **Criteria**, select one of the following:
 - **Ad hoc:** Indicates that the achievement can be manually awarded ad hoc. This is the default value. Skip to step 7.
 - **QA:** Indicates that the achievement can be awarded automatically based on the agent's QA evaluation scores. When you select this option, additional fields display that allow you to define the scoring criteria. Go to the next step.

Criteria:

QA

This achievement is awarded to agents who have

Number of evaluation:
1

Evaluation form:

Score:
Less Than %

Manage Achievements

6. Complete the following criteria required for the achievement to be awarded based on QA evaluation scores:
 - **Number of evaluation:** Enter the number of evaluations, from 1 to 999, for which the agent must receive the specified score in order to be awarded the achievement. The default value is 1.
 - **Evaluation form:** Specify the QA evaluation form used to score the evaluations. You can select from a list of active QA forms assigned to the agents or groups previously selected.

Note If this list is blank, one or more of the selected agents or groups were not assigned to a QA form.
 - **Score:** Indicate the score the agent must receive on the specified number of evaluations to be awarded the achievement, as follows:
 - Enter the score as a percentage (whole numbers only).
 - Indicate if the score received must be less than, equal to, greater than, less than or equal to, or greater than or equal to the specified percentage score.

Note You cannot add more than one achievement type for the same agents or CallCopy group, using the same QA form, that has overlapping start and end dates.
7. For **Points**, type the number of points to be awarded for the achievement. You must enter a number from 0 to 999.
8. For **Points Expiration**, if desired, you can indicate when the points for this achievement will expire and be removed from the agent's total points. This option applies only if an end date was specified for this achievement type. Select one of the following:
 - **Date:** Select a date on or after **End Date**.
 - **Number of days:** Type the number of days after the achievement is awarded that the points will expire.
9. If desired, you can change the icon displayed when the agent is notified about the achievement award, as follows:
 - a. Click the icon currently displayed. A popup opens with all available icons, including any custom icons previously uploaded.
 - b. Click the desired icon.
 - c. Click **OK**.
10. For **Post To**, select the notification method for informing agents that this achievement type was awarded. You must select one or more of the following methods:
 - Email
 - News widget
 - Achievement widget
11. Click **Save**.

The Achievement Types page is displayed, listing the new achievement type, and the achievement is now available to be awarded. Achievements based on QA evaluation scores are awarded automatically when the agent completes the required number of evaluations that meet the scoring criteria. Ad hoc achievements can be awarded manually after the start date for the achievement is reached.

View or Edit Existing Achievement Types

Before you can view or edit existing achievement type, you must have the **Allow Manage Achievements** Coaching permission. For assistance, contact your system administrator.

To view or edit existing achievement types, follow these steps:

1. On the Coaching tab, click the Achievements menu and then click **Achievement Types**. A list of all added achievement types is displayed.

Name	Description	Icon	Points	Published Date	Start Date	End Date	Action
High Scores for the Month	Awarded to agents who score at least 90% on 3 evaluations for the month.	🏆	10	10/21/2013	11/01/2013	11/30/2013	Edit
Correctly Used New Greeting Proto...	The agent correctly used the new company greeting.	👋	5	10/18/2013	10/18/2013	11/16/2013	Edit

2. For each achievement type listed, you can view the following summary information:
 - **Name:** The name given the achievement when it was added.
 - **Description:** The description, if any, given the achievement when it was added.
 - **Icon:** The icon displayed when the agent is notified of the awarded achievement by widget.
 - **Points:** The number of points the agent receives when the achievement is awarded.
 - **Published Date:** The date the achievement type was added. If the achievement type is edited, this date is updated.
 - **Start Date:** The first date that this achievement type can be awarded, either automatically or ad hoc.
 - **End Date:** The last date that this achievement type can be awarded, either automatically or ad hoc.
3. To edit the achievement type, click **Edit**. You can update any of the achievement type fields, even if this achievement has already been awarded to agents. Whenever you edit an achievement, you must change the start date to be today or later and the end date, if any, to be after the start date. When you are done making changes, click **Save**.

Note Use caution when editing achievement types. If an agent receives the same ad hoc achievement award more than once, it may be confusing if details such as the number of points awarded or the expiration date have changed. Edits to an achievement type do not affect achievements that have already been awarded.

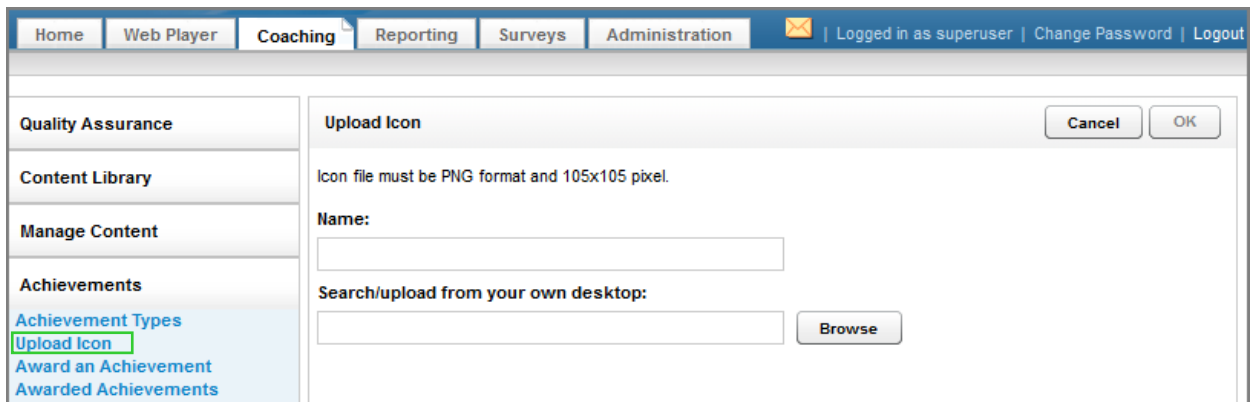
Upload a Custom Icon

Before you can upload a custom icon:

- You must have created the .PNG file containing the icon image in a location you can access. The file size is restricted to 105 x 105 pixels.
- You must have the **Allow Manage Achievements** Coaching permission. For assistance, contact your system administrator.

To upload a custom icon, follow these steps:

1. On the Coaching tab, click the Achievements menu and then click **Upload Icon**.



The screenshot shows a web application interface with a navigation bar at the top containing tabs for Home, Web Player, Coaching, Reporting, Surveys, and Administration. The user is logged in as 'superuser'. The main content area is divided into a left sidebar and a right main panel. The sidebar has a menu with 'Achievements' expanded, showing 'Achievement Types', 'Upload Icon' (highlighted with a green box), 'Award an Achievement', and 'Awarded Achievements'. The main panel is titled 'Upload Icon' and contains the following text: 'Icon file must be PNG format and 105x105 pixel.', a 'Name:' label followed by an empty text input field, and a 'Search/upload from your own desktop:' label followed by another empty text input field and a 'Browse' button. There are 'Cancel' and 'OK' buttons in the top right corner of the dialog.

2. For **Name**, type a name for the icon.
3. Click **Browse** and select the file to be uploaded.
4. Click **OK**. The custom icon is now available to be selected when adding or editing an achievement type.

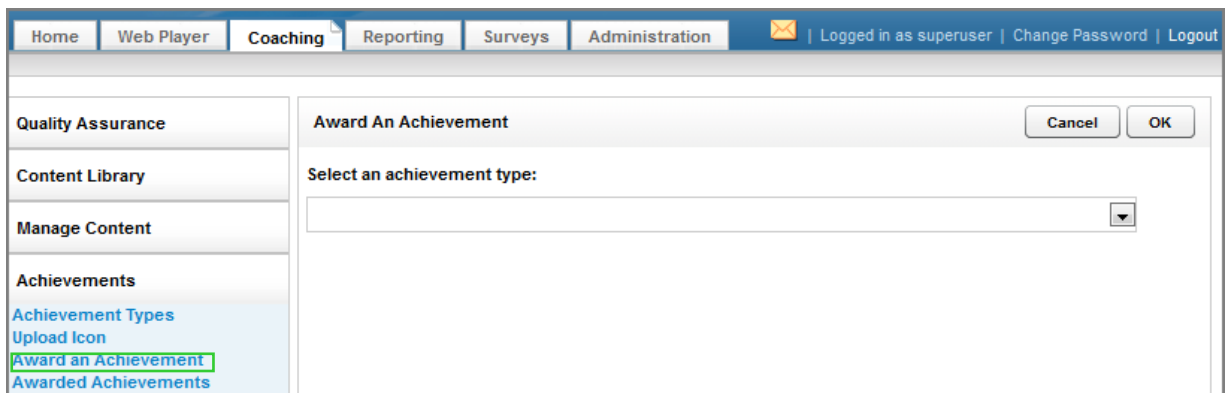
Award an Ad Hoc Achievement

Before you can award an ad hoc achievement:

- An achievement type for this award must have been added, where **Start Date** is today or later and **End Date** has not been reached. For details, see [Add an Achievement Type](#).
- You must have the **Allow Award Ad Hoc Achievements** Coaching permission and have access to the agents or groups receiving the achievement award. For assistance, contact your system administrator.

To award an ad hoc achievement, follow these steps:

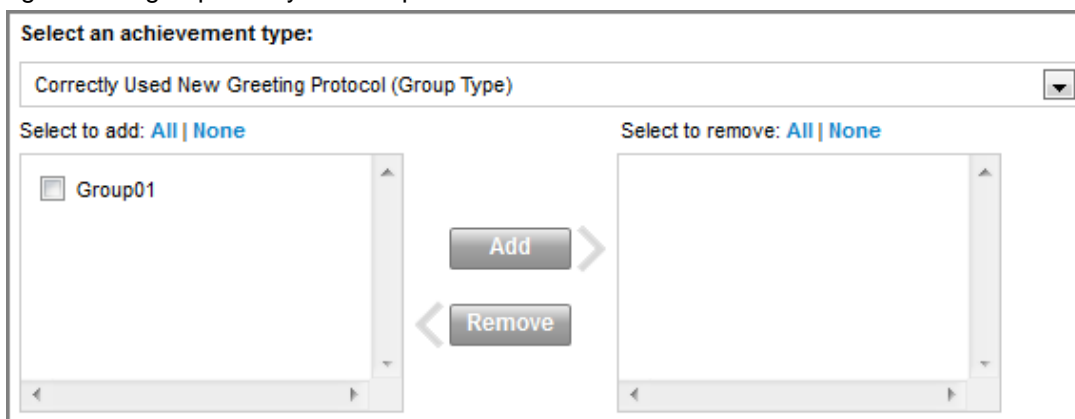
1. On the Coaching tab, click the Achievements menu and then click **Award an Achievement**.



2. From the drop-down list, select the achievement type that you want to award.

Note The name of each achievement type includes a label (*Agent Type* or *Group Type*) indicating whether the achievement can be awarded to individual agents or groups of agents.

A list of agents or groups eligible for the achievement award is displayed. This list includes only agents and groups that you have permission to access.



3. Select one or more agents or groups by clicking its check box (or click **All** to select all possible agents or groups), and click **Add**.

Manage Achievements

4. Click **OK**. You are prompted to confirm that you want to award the achievement to the specified agents or groups.

The achievement is awarded immediately to the specified agents or groups, and the list of agents awarded this achievement is displayed on the Awarded Achievements page on the Coaching tab. Agents receiving the award are notified depending on the type of notification (email, News widget, Achievements widget) allowed for this achievement type.

Awarded Achievements

After achievements have been awarded to agents, either ad hoc or automatically based on QA evaluation scores, you can display detailed information about all awarded achievements using the Awarded Achievements page.

Note To view or delete awarded achievements, you must have the **Allow Manage Achievements** Coaching permissions. For assistance, contact your system administrator.

You can use the Awarded Achievements page to:

- Search for agents who were awarded achievements, based on the agent's CallCopy groups, the date the achievement was awarded, the agent's status, and whether the achievements have expired points.
- View the total number of points currently awarded to an agent.
- View achievements for agents who have become inactive after being awarded points.
- View a list of all achievements awarded to a particular agent.
- View summary information about each awarded achievement, such as the date the achievement was awarded and the date an achievement's points will expire.
- Delete the points awarded for an achievement from an agent's total points.

Note CallCopy groups are displayed on the Awarded Achievements page with the name of the group in cc:Discover at the time the achievement was awarded. If this name is changed after the achievement is awarded, be aware that the achievement is still displayed with the old group name.

Search for Agents with Awarded Achievements

1. On the Coaching tab, click the Achievements menu and then click **Awarded Achievements**.

The Awarded Achievements page is displayed, listing all agents who were awarded achievements.

Agent	Agent Status	CallCopy Group	Total Points	Action
Cunningham, Richard	Active	Group02	17	View Details
Flanders, John	Active	Group03	3	View Details
Brooker, Anders	Active	Group01	5	View Details
Barnes, Phil	Active	Group01	10	View Details
Burke, Keith	Active	Group01	10	View Details
Francis, Connie	Active	Group03	3	View Details
Emerson, Andy	Active	Group03	3	View Details

2. You can filter the list to search for specific agents, using a combination of search criteria:
 - **Group:** Along with the **Agent** filter, allows you to select which agents are included in the search results. You can select one or more groups, which restricts the **Agent** drop-down list to include only agents in those groups. You can further filter the search results by selecting specific agents. If you do not filter by agent, all the agents in the selected groups are included in the search results. To select all groups in the drop-down list, click **All**; to clear the selected items, click **None**.
 - **Agent:** Along with the **Group** filter, allows you to select which agents are included in the search results. You can select one or more agents, depending on the groups previously selected. If no groups were selected, you can select from a list of all agents. If groups were selected, you can select only agents included in those groups. To select all agents in the drop-down list, click **All**; to clear the selected items, click **None**.

Note Make your group selections before selecting agents. If you select agents and then select groups, the selected agents are cleared.
 - **Agent Status:** Allows you to indicate if the search results include agents who are active, inactive, or both. The default is both (field left blank).
 - **Awarded Start Date:** Allows you to select a starting date as part of a range of dates. Agents who were awarded achievements within the specified date range are included in the search results. If you select a starting date for the range but no ending date, the search results include agents awarded achievements on or after the starting date.
 - **Awarded End Date:** Allows you to select an ending date as part of a range of dates. Agents who were awarded achievements within the specified date range are included in the search results. If you select an ending date for the range but no starting date, the search results include agents awarded achievements on or previous to the ending date.
 - **Points Expiration:** Allows you to indicate if the search includes achievements for which the points have expired, as follows:
 - Leave this field blank to include achievements with expired points. This is the default value. Expired points are not included in the value for **Total Points**.
 - Select **Not Expired** to exclude achievements with expired points. If all the achievements awarded the agent have expired points, the agent is not included in the search results.
3. Click **Search**. A list of agents meeting the search criteria is displayed. For each agent listed, the following summary information is displayed:
 - **Agent:** The name of the agent.
 - **Agent Status:** The status of the agent (active or inactive).
 - **CallCopy Group:** All groups to which the agent belongs that were awarded achievements. If the search criteria exclude a group, that group is not included.
 - **Total Points:** The total points awarded to the agent for all awarded achievements included in the search criteria. This total does *not* include:
 - Any expired points (even if achievements with expired points were included in the search).
 - Points awarded to a group excluded from the search.
 - Points awarded outside of the specified date range.

Note If the number of total points displayed is 0 (zero), all achievements awarded to the agent within the specified date range have expired points.

- For each agent, you can click **View Details** to display a list of all achievements awarded to that agent. For details, see [Search for Agents with Awarded Achievements](#).

View or Delete Awarded Achievements Per Agent

- On the Coaching tab, click the Achievements menu and then click **Awarded Achievements**.
- On the Awarded Achievements page, use the search filters to display the agents whose achievements you want to view or delete. For details, see [Search for Agents with Awarded Achievements](#).
- For the desired agent, click **View Details**. Depending on the search criteria used on the Awarded Achievements page, a list of achievements awarded to the agent is displayed, as follows:
 - Only achievements awarded within the specified date range are listed.
 - If you selected *Not Expired* for the **Points Expiration** filter, achievements with expired points are not listed.
 - If the **Points Expiration** filter was left blank, achievements with expired points are listed. The date that the points expired is displayed in the achievement details.
- You can view the following summary information for each awarded achievement:

Agent Achievements Detail Back					
Name: Burke, Keith					
Achievement Type	Points	Awarded Date	Expiration Date	CallCopy Group	Action
Correctly Used New Greeting Protocol	5	10/28/2013	01/26/2014	Group01	Delete
Team Competition	8	11/06/2013			Delete

Displaying items 1 - 2 of 2

- Achievement Type:** The name of the achievement type that was awarded.
 - Points:** The number of points awarded to the agent for this achievement.
 - Awarded Date:** The date on which the achievement was awarded.
 - Expiration Date:** The date, if any, that the awarded points expire.
 - CallCopy Group:** If the achievement was awarded based on the agent's QA evaluation scores, this field displays the agent's group assigned to the QA form used for the evaluations. If the achievement was awarded to one or more groups ad hoc, this field displays all the agent's groups awarded the achievement. If the achievement was awarded to individual agents, this field is left blank.
- To delete this achievement and subtract the points awarded for this achievement from the agent's total awarded points, click **Delete**. You are prompted to verify the deletion.

About Uptivity

What boosts the bottom line for any company with a contact center? How about getting the best that every agent can deliver from their first day on the job and constantly optimizing contact center management and performance? Only Uptivity gives you the tools you need to continuously improve every aspect of each step of every agent's life cycle and enhance customer satisfaction. You get exactly what you need thanks to a modern, integrated, and easy-to-use suite of tools that offers a unified system for performance management, workforce management, speech analytics, and call recording. Unparalleled customer service and support from our in-house staff combine with a better bundle for a better value, and a lower total cost of ownership.

Headquartered in Columbus, Ohio, and on the Web at www.uptivity.com.