



UPTIVITY DISCOVER QUALITY MANAGEMENT MANUAL, V5.6

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UPTIVITY DISCOVER QUALITY MANAGEMENT MANUAL, V5.6

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About inContact: inContact (NASDAQ: [SAAS](#)) is the cloud contact center software leader, helping organizations around the globe create high quality customer experiences with a complete workforce optimization portfolio (WFO). **Uptivity WFO** is part of the inContact portfolio and is a comprehensive WFO solution offering a powerful choice of deployment options. The portfolio also includes the WFO Suite powered by Verint[®], ECHO[™] Customer Feedback Survey, inView[™] Performance Dashboard.

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Introduction

Audience

This document provides information and procedures for using the quality management (QM) features accessed via the Discover Coaching and Interactions List tabs. This functionality includes creating evaluation forms, performing evaluations, setting up content libraries, establishing achievement awards for agents, and running various reports.

Readers should have a basic level of familiarity with contact center quality assurance concepts, usage of a PC and its peripherals, the Windows operating system, and the Discover Web Portal.

Goals

The goal of this document is to provide knowledge, reference, and procedural information necessary to use Uptivity Discover Quality Management as part of your daily work. The document is NOT intended as a specific system or network design document, nor is it designed to educate the reader on contact center quality assurance concepts or best practices.

Assumptions

This document assumes that Uptivity Discover has been installed and integrated with your PBX if applicable. It also assumes that your application administrator has configured the application for use based on your business rules and environment.

Need-to-Knows

The *Uptivity Discover User Manual* contains general knowledge and procedures related to the Web Portal, and may prove a helpful reference.

Tasks described in this manual may be limited by permissions. If you need to perform a task and are unable to do so, see your supervisor or Discover WFO administrator.

Discover 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.

Several Discover features use pop-up menus and other windows that may be considered as “pop-ups” by some browsers. inContact recommends that you configure your browser to allow pop-ups for the Discover site.

Discover supports standard Windows methods for selecting multiple items in a list: press and hold the Shift key while clicking to select consecutive items or press and hold the CTRL key while clicking to select non-consecutive items.

In some cases, Discover provides more than one way to accomplish a task or access a feature. The procedures in this manual explain the primary method, but also note the **Alternative** where applicable.

What's New in this Version

- Users can now filter by agent status when searching QA evaluations, QA acknowledgments, and content acknowledgments. See [View Completed or In-Progress Evaluations](#), [View QA Acknowledgments](#), and [View Content Acknowledgments](#).
- Completed evaluation forms now show the date and time when the evaluation was completed. See [View Completed or In-Progress Evaluations](#).
- When agents view their completed evaluations, they will not be able to see the name of the evaluator unless they have specific permission to do so. For more information on this new permission, see the *Uptivity Discover Administration Manual v5.6* or talk to your Discover administrator.
- QM administrators can now have multiple evaluations completed for the same recorded interaction for purposes of calibration. Calibration evaluations do not affect agent and group scores and trending, and can be reported on separately. See [Managing Calibration](#).

Managing QA Evaluation Forms

i This section is designed for Discover users who are creating evaluation forms, but who may or may not be performing evaluations.

QA Evaluation Forms Overview

Quality Assurance (QA) evaluation forms are used to review the work of agents, including how they handle calls. Discover makes it easy for you to evaluate recorded calls, but you can also use QA forms to evaluate non-call performance. You can even build forms for non-agent employees. Authorized users/evaluators use the forms in the Discover Interactions List and Coaching tabs to record scores and comments. Score data collected from the forms is used for reporting.

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.

Before creating a form, you should:

- Review this manual to understand what types of questions and responses can be used.
- Write the evaluation questions, responses, and possible points in a document. This approach allows you 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.
- Promote consistent scoring across forms by creating a question points/value schema that is easy to track and that is used by all form creators.

Remember these points when creating a form:

- Save a QA form before switching to another tab. If you change tabs without saving your form, all changes will be lost.
- 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 for an evaluation, you cannot change it. This applies even if the evaluation has been deleted. **Do not use** the form until you are certain you have added all the sections and questions necessary.
- You can use an existing form (used or unused) as the basis for a new 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, 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.
- Uptivity Discover 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.




QA Evaluation Form Design

QA evaluation forms are built in the QA Form Editor window and include the following items:

- Assigned groups.
- Acknowledgment and arbitration workflow (optional).
- One or more sections.
- One or more question(s) and response(s).

Understanding these items and how they affect evaluations will help you efficiently create targeted forms for the various departments and teams in your organization.

You can use the sequence buttons  to set the order of sections, questions and responses within a QA Form.

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

Assigned Groups

QA evaluation forms are assigned to one or more of the Discover Groups that administrators create and to which agents can be assigned. These groups usually represent business organizational units or projects. For more information, see the *Uptivity Discover User Manual* and *Uptivity Discover WFO Administration Manual*.

Agents must be in Discover Groups to be evaluated, and forms must be attached to Discover Groups to be used.

To help ensure historical accuracy and continuity in reporting, a form cannot be edited once it has been used. This includes removing the attachment for 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.

Sections

Sections organize a form. They usually follow the type of call flow that occurs. For example, for a technical support QA form, logical sections might be "Greeting," "Soft Skills," "Use of Desktop Tools," or "Call Closing." A form must have at least one section. All questions can be placed in one section.

Questions & Responses

Evaluators use questions to score the call. Discover supports five question types:

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

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

Each question can have an unlimited number of responses. The following settings are available for every response, and can either be used or left blank:

- **Auto-fail:** You can designate an Auto-Fail response for questions so important that failing them should result in the agent failing either 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 checkbox 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, 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.

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

You can associate points with a Not Applicable response and that point value is counted towards the section and form totals if the evaluator types NA in the Possible Points field. However, assigning Not Applicable questions the highest possible value will have no effect on the agent's final score.

Dropdown

With this question type, 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 QA Form Editor like this:

The screenshot shows the QA Form Editor interface for a Dropdown question type. At the top, the "Question Type" is set to "Dropdown" and the "Critical" checkbox is unchecked. Below this, the "Question:" field contains the text "Dropdown question text goes here." The interface lists three response options, each with a "Response" field, a "Possible Points" field, an "Auto Fail" dropdown, and a "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 appears like this in the completed form:

The screenshot shows the completed form with a dropdown menu open. The question text "Dropdown question text goes here." is visible in the background. The dropdown menu is currently set to "Exceeds Expectations" and shows the following options:

- Select
- Exceeds Expectations
- Meets Expectations
- Failed Expectations

Horizontal Button

With this question type, responses appear on the form as circular buttons displayed in a horizontal line.

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

The screenshot shows the Form Editor interface for a "Horizontal Radio Buttons" question type. The question text is "Horizontal Radio question text is entered here." The question is set to "Critical" (checkbox unchecked). There are three response options:

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

This example appears like this in the completed form:

The completed form shows the question text "Horizontal Radio question text is entered here." followed by three radio button options: Yes No Not Applicable.

Vertical Button

With this question type, responses appear on the form as circular buttons displayed in a vertical column.

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

The screenshot shows the Form Editor interface for a "Vertical Radio Buttons" question. The question text is "Vertical Radio question text is entered here." Below the question, there are three response options: "None", "One", and "Two". Each response option has a "Possible Points" field, an "Auto Fail" dropdown menu, and a "Default" checkbox. The "None" response has 5 possible points, "One" has 3, and "Two" has 1. All "Auto Fail" dropdowns are set to "None".

| 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 appears like this in the completed form:

The screenshot shows the completed form for the "Vertical Radio Buttons" question. The question text is "Vertical Radio question text is entered here." To the right of the question text, there are three radio buttons labeled "None", "One", and "Two".

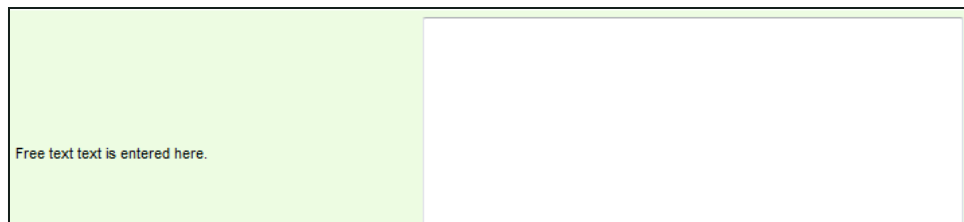
Free Text

With this question type, the form displays a free text field that the evaluator can use to give a descriptive analysis or type comments. You cannot associate points with a Free Text response, so these questions are considered non-scoring. You have the option to require a response with Free Text. If this checkbox is selected, at least one character (and up to 1024 characters, including spaces) must be placed in the field. Free Text questions would appear like this in the Form Editor:



The screenshot shows the Form Editor interface 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, the text "Question Type:" is followed by a dropdown menu showing "Free Text". Further to the right, the text "Response required:" is followed by an unchecked checkbox. Below this, the text "Question:" is followed by a large white text input field containing the placeholder text "Free Text text is entered here." The entire interface is set against a light green background.

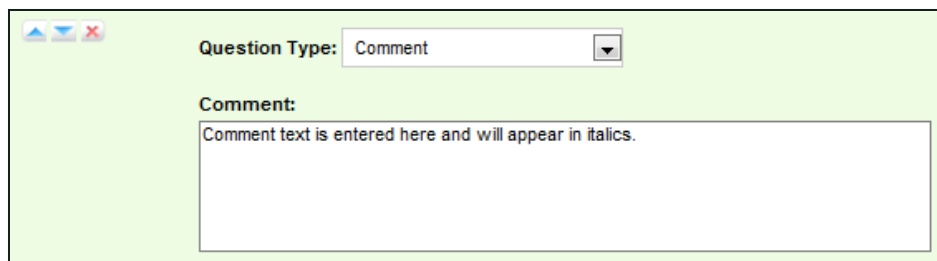
This example appears like this in the completed form:



The screenshot shows the completed form for a Free Text question. It consists of a light green rectangular area on the left and a larger white rectangular area on the right. The text "Free text text is entered here." is displayed in the light green area.

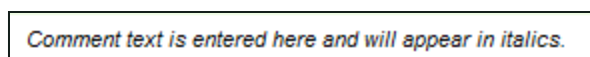
Comment

This question type allows you to add a note to the form to describe the question or provide extra instructions or details for the evaluator's benefit. Although they are listed as a question type, comments are not really questions and so there are no responses associated with them. Each comment can be a maximum of 220 characters, including spaces. Comments appear like this in the Form Editor:



The screenshot shows the Form Editor interface 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, the text "Question Type:" is followed by a dropdown menu showing "Comment". Below this, the text "Comment:" is followed by a large white text input field containing the placeholder text "Comment text is entered here and will appear in italics." The entire interface is set against a light green background.

This example appears like this in the completed form:



The screenshot shows the completed form for a Comment question. It consists of a single white rectangular box containing the text "Comment text is entered here and will appear in italics." in italics.

Create a QA Evaluation Form

🔗 If you need to create a form that is very similar to an existing form, you can save time by following the [Edit QA Evaluation Forms](#) procedure and saving the edited form under a new name.

To create a new QA Evaluation Form:

1. Click the **Coaching** tab in the Discover Web Portal, then expand **Quality Assurance** in the left navigation menu and click **Create a Form**.
2. Type a **Form Name** (50 characters max).
3. Select the **Agent Acknowledgment Required** checkbox if agents should acknowledge that they have reviewed their evaluations. You should always require agent acknowledgment if you are using the Arbitration workflow. For related information, see [Managing the QA Review Process](#).
4. Select the **Enable Arbitration Workflow** checkbox if desired. For more information, see [Managing the QA Review Process](#).
5. Select the **Enable Calibration Workflow** checkbox if desired. For more information, see [Managing Calibration](#).
6. Click the Discover Group(s) assigned to this form under **Un-Attached Groups** and then click the right arrow button to move them to **Attached Groups**.
7. Click **Create New Section** and type a unique **Section Title** (50 characters max).
8. Follow the steps in the [Add a Question](#) and the [Add a Response](#) procedures for each question in the section.
9. Repeat steps 6 and 7 as needed until you have added all desired sections.
10. Reorder the sections if desired and then click **Save**.

Add a Question

This procedure can be followed as part of the initial QA evaluation form set-up, to edit an unused form at a later time, or to add a question to a new version of a form. To add a question (if you are adding a question during initial form creation, begin with step 4):

1. Follow the procedure to [View QA Evaluation Forms](#).
2. Locate the desired form in the list and click **Edit**.
3. Locate the desired section, or click **Create New Section** and type a unique **Section Title** (50 characters max).

4. Click **Add New Question**.
5. Select the **Question** Type from the drop-down list.
6. Select the **Critical** checkbox if desired.
7. In the **Question** field, type the text of the question as it will appear to the evaluator.
8. Follow the steps in the [Add a Response](#) procedure.
9. Repeat steps 4-8 until you have added all desired questions and responses to this section.
10. Reorder the questions if desired and then return to step 7 in the [Create a QA Evaluation Form](#) procedure or click **Save**.

Add a Response

This procedure can be followed as part of creating a question in the initial QA evaluation form set-up, when you are editing an unused form at a later time, or when you are adding a question to a new version of a form. To add a response (if you are adding a response during initial form creation, begin with step 4):

1. Follow the procedure to [View QA Evaluation Forms](#).
2. Locate the desired form in the list and click **Edit**.
3. Locate the desired section, or click **Create New Section** and type a unique **Section Title** (50 characters max).
4. Locate the desired question and click **Add New Response**.
5. In the **Response** field, type the text of the response as it will appear to the evaluator.
6. Select an **Auto-Fail** value from the drop-down list if desired.
7. Select the **Default** checkbox if you want Discover to pre-populate the question with this response.
8. In the **Possible Points** field, type the maximum point value for this response.
9. Repeat steps 4-8 until you have added all desired responses to this question.
10. Reorder the responses if desired and then return to step 8 in the [Add a Question](#) procedure or click **Save**.

View QA Evaluation Forms

You can search for and view existing QA forms. Two criteria are available to help you target a search for a specific form:

- **Form State:** The options for Form State are All, Active, and Disabled. For related information, see [Disable QA Evaluation Forms](#).
- **Groups:** This list includes all Discover Groups that have been assigned to a QA evaluation form.

If you do not select any criteria, Discover will return a list of all QA evaluation forms in the system in order of their creation date. The following information is displayed for each form:

- **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 (green) or Disabled (red).
- **Disable Date:** Date the form was last disabled. If the form has never been disabled, the field says "12/31/9999".
- **Last Form:** The last time the form was used to evaluate an agent.

To view QA evaluation forms:

1. Click the **Coaching** tab in the Discover Web Portal and expand **Quality Assurance** in the left navigation menu.
2. Click **Manage Forms**.
3. Make selections from the **Form State** and/or **Group** drop-down menus if desired.
4. Click **Filter**.
5. Locate the form and click **Edit**.

Disable QA Evaluation Forms

If a form is no longer needed, you can disable it. This prevents it from being used by accident. It also allows you to shorten a lengthy form list since you can filter out disabled forms. 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 ensure the integrity of historical reporting, you cannot delete QA evaluation forms that have been used.

To disable a QA evaluation form:

- Follow the procedure to [View QA Evaluation Forms](#) but click **Disable** instead of **Edit**.

There is no limit to the number of times a form can be disabled and re-enabled. Disabled forms display on the QA Forms Listing with an Enable button (instead of Disable), and can be re-enabled if necessary by following this procedure and clicking **Enable**.

Edit QA Evaluation Forms

Discover strictly limits the ways in which a QA evaluation form can be edited. This safeguard is in place to ensure the integrity of historical reporting. A form cannot be edited if it was *ever* used to evaluate an agent, even if the evaluation has since been deleted. This applies to both completed and in-progress evaluations.

If a form has been used, and you then determine that changes are needed, you can save the existing form as a new version. You can also use the Edit functionality to create a new form based on an existing form. The only change you can make to an existing form that has already been used is to attach additional Discover Groups.

To edit a QA evaluation form (subject to these limitations):

1. Follow the procedure to [View QA Evaluation Forms](#).
2. To attach a new group to the form, click the desired group under **Un-Attached Groups** and then click the right arrow button to move them to **Attached Groups**.
3. Make any other changes desired. If the form has previously been used, click **Alter Scored** Form to access the sections, questions and responses.
4. Click **Save** (if you have altered a scored form, you will be prompted to give the form a new name).

Import and Export QA Forms

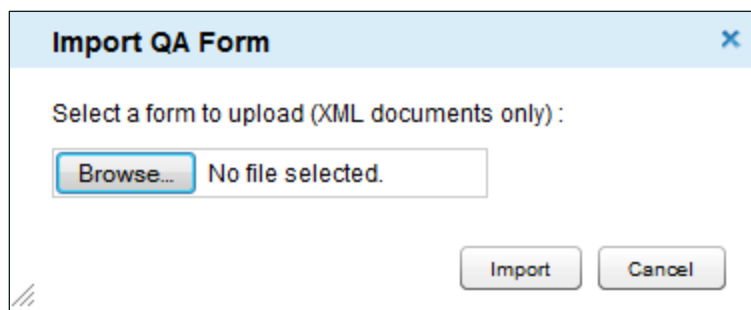
From time to time, inContact and the members of our user community provide XML documents that can be imported to create QA forms. These customizable documents serve as templates with standard questions, responses, and point values. Documents provided in the past have included:

- Healthcare QA Evaluation
- Performance Review
- Sales Evaluation
- Technical Support Evaluation

To learn more about the user community, contact your Account Manager.

To create a QA form by importing an XML document:

1. Follow the procedure to [Create a QA Evaluation Form](#) through attaching the desired Discover Groups.
2. Click **Import**, then click **Browse** and navigate to the XML file (resize the dialog box if needed by clicking and dragging the icon in the lower left corner).



3. Select the desired file and click **Open**, then click **Import**.
4. Click **Save** to use the imported form without changes, or return to the [Create a QA Evaluation Form](#) procedure to modify, add to, or remove items from the form.

To export a form from your Discover system as an XML document:

1. Follow the procedure to [View QA Evaluation Forms](#).
2. Click **Export**.
3. In the dialog box, click **Save File** and then click **OK**.

Managing QA Evaluations

 This section is designed for Discover users who perform evaluations.


QA Evaluations Overview

You can use Discover to evaluate a call (that is, an agent's performance on a call) or to evaluate an agent (that is, an agent's performance of non-call work). To perform either type of QA evaluation, you must have Coaching Permissions, access to the Discover Group attached to the QA form used for the evaluation, and permissions for the Discover Web Player. If you need to perform evaluations and are unable to do so, see your Discover administrator.

You can save an unfinished evaluation to be completed at a later time. Incomplete evaluations are saved with a status of *In Progress*. You can edit and save an in-progress evaluation multiple times before submitting the completed evaluation. In-progress evaluations cannot be sent to the agent for acknowledgment (for details, see [Managing the QA Review Process](#)). They also do not appear in the Assignment Inbox or on widgets until they are completed. For related information, see the "Managing Your Home Tab" section in the *Uptivity Discover User Manual*.

If your organization uses the Arbitration Workflow and it has been enabled for the evaluation form you are using, you will be required to select at least one Arbitrator for the evaluation. There is no limit to the number of arbitrators you can designate but you can only select arbitrators who also have permission to evaluate the agent. If the selected arbitrator changes roles/permissions, disputed evaluations can become stranded. Selecting more than one arbitrator solves this problem.

Discover displays the entire selected evaluation form so that you can review it prior to completing it. As you complete the evaluation, Discover displays a running total of possible points, awarded points and the percentage score in the bottom right corner of the evaluation.

A  icon appears beside responses that were specified as Auto-Fail by the creator of the form.

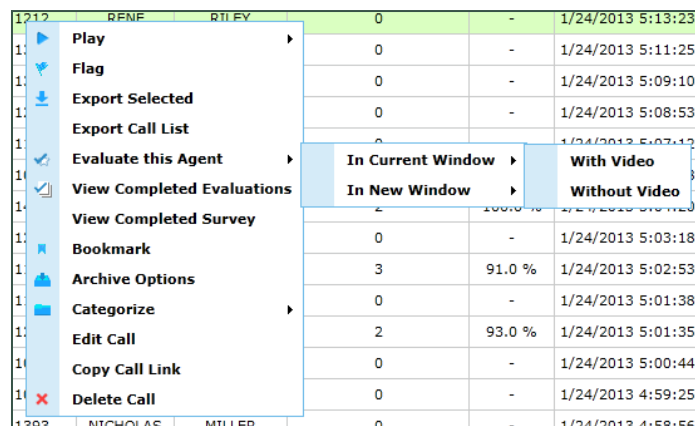
Completed evaluations can optionally be sent to the agent for acknowledgment. Your organization must grant agent access to the Discover Web Portal to use this feature. Acknowledgment can be used as an independent feature or as part of the Arbitration Workflow. Agent acknowledgment can be "required" during creation of a QA evaluation form; however, this setting can be overridden by the evaluator.

Acknowledgment should always be required when the Arbitration workflow is used. If agent acknowledgment is not required, 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.

Call Evaluations Overview

You evaluate calls using the Discover Call List, and you need to understand how to use the List and Web Player to filter, select and play calls. The procedures in this section assume you have a basic level of familiarity with the Call List and its menus. For more information, see the *Uptivity Discover User Manual*.

Select a Call for Evaluation



To select a call for evaluation:

1. Click the **Interactions List** tab in the Discover Web Portal and then click the **Call List** sub-tab.
2. Select the call to be evaluated using the Call List filtering tools.
3. Right-click the record and select **Evaluate this Agent** from the pop-up menu.
4. Select **In Current Window** or **In New Window** from the second level of the pop-up menu.

i If your system is configured to support call segments, and you want Discover to automatically move between segments during playback, you must select **In Current Window**. For more information, see the *Uptivity Discover User Manual* or talk to your Discover administrator.

5. If there is a screen capture associated with the call, select **With Video** or **Without Video** from the third level of the pop-up menu.

Evaluate a Call

Once you have selected a call, Discover shows you a list of evaluation forms from which to choose. The agent who conducted a call may be in multiple groups, and one form may be attached to multiple groups. Therefore, the same form may be displayed under several different Groups. Make sure you select the form with the appropriate Group. Form and Group selections affect reporting.

Preceding the QA evaluation form, you'll see a Call Information section which displays all metadata associated with the call, as well as the Evaluator Name, Arbitrator Name (if applicable), number of score changes, and Agent Name.

To evaluate a call that you have selected in the Web Portal:

1. Double-click the form you want to use to score the recording.
2. If applicable, from the **Select at least one Arbitrator** drop-down list, select an arbitrator for the evaluation and click the plus sign (+). Repeat if desired to select as many arbitrators as you'd like from the drop-down list.
3. Click **Next**.
4. Use the Web Player controls to review the audio and/or video content as you type information into the QA evaluation form.

i If your system is configured to support call segments, you can use the Previous and Next controls to move between segments as you would in the Interactions List. For more information, see the *Uptivity Discover User Manual*.

5. If applicable, select an option for **Send Evaluation to Agent for Acknowledgment?** If you select **Yes**, type any desired comments or agent directions in the textbox.
6. **Select a priority for the evaluation** (Low, Normal, or High) from the drop-down list.
7. Click **Save as Draft** if you need to leave the evaluation in-progress or, if you have completed the QA form, click **Submit Q.A. Review**.

Messages indicate whether 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 [Complete an In-Progress Evaluation](#) or [Edit a QA Evaluation](#). For details about a completed evaluation sent to the agent for acknowledgment, see [Managing the QA Review Process](#).

Agent Evaluations Overview

You can perform agent evaluations by accessing QA forms directly from the Coaching tab. This allows you to evaluate an agent's handling of alternative channels, like chat or email. You can also use this feature to evaluate employees who do not take calls, such as HR representatives or field technicians. If you want to evaluate how an agent performed on a call, you should follow the procedure to [Select a Call for Evaluation](#) instead.

Evaluate an Agent

To evaluate an agent:

1. Click the **Coaching** tab in the Discover Web Portal and expand **Quality Assurance** in the left navigation menu.
2. Click **Evaluate an Agent**.
3. Double-click the agent you want to evaluate on the Agent Listing.
4. Double-click the QA evaluation form you want to use.
5. If applicable, from the **Select at least one Arbitrator** drop-down list, select an arbitrator for the evaluation and click the plus sign (+). Repeat if desired to select as many arbitrators as you'd like from the drop-down list.
6. Click **Next**.
7. Complete the evaluation.
8. If applicable, select an option for **Send Evaluation to Agent for Acknowledgment?** If you select **Yes**, type any desired comments or agent directions in the textbox.
9. **Select a priority for the evaluation** (Low, Normal, or High) from the drop-down list.
10. Click **Save as Draft** if you need to leave the evaluation in-progress or, if you have completed the QA form, click **Submit Q.A. Review**.

Messages indicate whether 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 [Complete an In-Progress Evaluation](#) or [Edit a QA Evaluation](#). For details about a completed evaluation sent to the agent for acknowledgment, see [Managing the QA Review Process](#).

View Completed or In-Progress Evaluations

Search QA Evaluation

▶ Saved Search Criteria

▼ Search Criteria

Form: Agent: Group: Evaluator:

Start Date: End Date: QA Recording ID: Recording ID:

QA Score (%): QA Status: Agent 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 |
|--------------|---------------|---------------|--------------|--------------|--------------|------------|---------------|--------------------|-----------|-------------------|
| 78 | Ayala, Daniel | 1Support Call | George, Gina | Legends Team | 65.00 % | -- | 11/5/2013 | 11/5/2013 | Completed | -- |
| 87 | Ayala, Daniel | 1Support Call | George, Gina | Legends Team | 50.00 % | 01/22/2013 | 2/4/2014 | 2/4/2014 | Dispute | 1773 |
| 88 | Ayala, Daniel | 1Support Call | George, Gina | Legends Team | 50.00 % | 01/22/2013 | 2/4/2014 | 2/4/2014 | Dispute | 1772 |
| 89 | Ayala, Daniel | 1Support Call | George, Gina | Legends Team | 70.00 % | 01/22/2013 | 2/4/2014 | 2/4/2014 | Dispute | 1747 |

You can perform additional actions to modify a completed evaluation or complete an in-progress evaluation. 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.

i If a call is deleted from the server, whether manually or via an archive action, any QA evaluations performed on that call remain in the database for historical searching and review. For additional information, refer to the *Uptivity Discover WFO Administration Manual*.

A variety of criteria can be used to search for evaluations, alone or in combination. Criteria selections can be saved for future use. For details, see [Save a Search Criteria Set](#). Available criteria include:

- **Form:** Select a particular form or all forms.
- **Agent:** Select a particular agent or all agents.
- **Group:** Select a particular group or all groups (Discover 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:** Select a call record ID number to find evaluations for that call.

- **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 typed in this field may have up to two decimal places and should equal the percent (%) score desired. For example, if you're searching for a score of 85.71%, typing 85 in this field with the "Equal to" operator will only return evaluations with an exact score of 85%.
- **QA Status:** Select Calibration, Calibration In Progress, In Progress, Completed, Question, Dispute, or All (default).
- **Agent Status:** Select Active, Inactive, or All (default).

To search for a QA evaluation:

1. Click the **Coaching** Tab and expand **Quality Assurance** in the left navigation menu.
2. Click **Search QA Evaluations**.
3. Set your desired search criteria and click **Search**.
4. Double-click the desired evaluation to open it.

You can also view completed evaluations for a specific call directly from the Call List:

1. Click the **Interactions List** tab in the Discover Web Portal and then click the **Call List** sub-tab.
2. Right-click the desired call record and select **View Completed Evaluations** from the pop-up menu. A new window will open containing the Search QA Evaluations page, with any evaluations for the selected call listed at the bottom of the window.
3. Double-click any evaluation to open it.

Perform Q.A. Play Call Link For Completed QA Printable Version Delete this QA Edit this QA Back

▼ Call Information

| | | | |
|------------------------------|---------------------------|---------------------------------------|--|
| Evaluator : Gina George | Group : 30 | Agent Name : Daniel Ayala | ACD Gate : 12 |
| Record : 1774 | Call Direction : Outbound | Recording Time : 1/22/2013 5:24:48 PM | Screen Capture : No |
| Device ID : 7504 | Customer Number : u1-1000 | Device Alias : | User2 : u2-2000 |
| Dialed Number : 912032998003 | User3 : u3-8000 | CallerID : 7504 | User4 : u4-3000 |
| Channel : 1 | User5 : u15-6000 | Duration : 00:00:43 | Evaluation Date : 2014/7/29 8:49:20 AM |
| Arbitrator : No Dispute | Score Changes : 0 | | |

▼ 1 Support Call

▼ Opening

Proper introduction? Yes No

Ask for caller's name? Yes No

Restate problem to ensure understanding? Yes No

Comments:

▼ Communication Skills

Technical language at caller's level of understanding? Yes No

Pace and enunciation clear and understandable? Yes No

Patient and empathetic tone? Yes No

Comments:

▼ Technical Skills

Application UI knowledge and proficiency Excellent Acceptable Unacceptable

Underlying system knowledge and proficiency (DB, OS, scripts, etc.) Excellent Acceptable Unacceptable

Overall technical speed and proficiency (moving through screens, using tools, etc.) Excellent Acceptable Unacceptable

Comments:

▼ Closing

Clarify and communicate next steps? Yes No

Thank caller? Yes No

▼ Bonus

Total: 75.00/ 100.00 (75.00 %)

Select a priority for the evaluation :

Daniel Ayala added a comment - 2/4/2014 9:53:02 AM
What could I have done to improve my tone?

Gina George added a comment - 7/29/2014 8:49:21 AM
Try to listen more actively so you get an idea of the caller's level of technical expertise. In this case, the caller was technical, just not familiar with our app. Because you didn't pick up on that, you sounded somewhat condescending. We can work on this through some role-playing if you like; stop by my office one day next week.

Once you have located and opened the desired evaluation, you can:

- Generate a printable PDF version (not available for calibration evaluations).
- Play the associated call recording (if applicable).
- Display and copy a URL which can be used to provide others with access to the evaluation (completed evaluations only).
- Continue to work on or [Complete an In-Progress Evaluation](#).
- [Edit a QA Evaluation](#) or [Delete a QA Evaluation](#).

Save a Search Criteria Set

The screenshot displays the 'Search QA Evaluation' window. At the top, there is a section for 'Save Search Criteria' which contains a table with the following data:

| 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 |

Below the table is a section for 'Search Criteria' with the following fields and controls:

- Form: All (dropdown)
- Agent: Doe, Jane (dropdown)
- Group: All (dropdown)
- Evaluator: All (dropdown)
- Start Date: 8/15/2012 (calendar)
- End Date: 9/5/2012 (calendar)
- Record ID: (text input)
- Recording ID: (text input)
- QA Score: All (dropdown)
- QA Status: All (dropdown)
- Buttons: Save Criteria, Reset, Search

When you search for evaluations, you can save criteria selections for future use. These saved criteria sets appear at the top of the Search QA Evaluations window. Sets can be either public or private.

Private criteria sets may only be viewed, edited, and deleted by the user who created them. Public sets may be viewed by all users with permissions to search for QA evaluations. However, only the user who created the set can edit or delete it.

You can designate a set of saved search criteria as your default, and it will load automatically when you click Search QA Evaluations. If you need to search without filtering results or want to start building a new set of criteria, click **Reset**. The default criteria set is overridden when you view QA evaluations from the Call List.

To save a search criteria set:

1. Click the **Coaching** tab and expand **Quality Assurance** in the left navigation menu.
2. Click **Search QA Evaluations**.
3. Set the desired search criteria and then click **Save Criteria**.
4. Type a name for your criteria set and select **Private** or **Public** from the **Access** drop-down list.
5. Select the checkbox if you want to save this set of criteria as your default set.
6. To save this set of criteria over the currently-applied filter, click **Save**. To save it as a new criteria set, click **Save as New**.

To apply a set of criteria from the list of Saved Search Criteria:

1. Click the **Coaching** tab and expand **Quality Assurance** in the left navigation menu.
2. Click **Search QA Evaluations**.
3. Click **Apply** on the line for the desired criteria set.

To remove a set of criteria from the list of Saved Search Criteria:

1. Click the **Coaching** tab and expand **Quality Assurance** in the left navigation menu.
2. Click **Search QA Evaluations**.
3. Click **Delete** on the line for the desired criteria set.

Complete an In-Progress Evaluation

In-progress evaluations can be edited or deleted by users with permissions to perform QA evaluations. To continue work on or complete an in-progress evaluation:

1. Follow the [View Completed or In-Progress Evaluations](#) procedure.
2. Click **Edit this QA**.
3. Make any desired changes or updates.
4. Click **Save as Draft** if you need to leave the evaluation in-progress or, if you have completed the QA form, click **Submit Q.A. Review**.

Edit a QA Evaluation

Editing completed QA evaluations affects reporting and requires individual permission typically granted to very few users. To edit a completed QA evaluation:

1. Follow the [View Completed or In-Progress Evaluations](#) procedure.
2. Click **Edit this QA**.
3. Make any desired changes or updates.
4. Click **Submit Q.A. Review**. The original evaluation is not retained in the system.

Delete a QA Evaluation

Deleting completed QA evaluations affects reporting and requires individual permission typically granted to very few users. To delete a completed QA evaluation:

1. Follow the [View Completed or In-Progress Evaluations](#) procedure.
2. Click **Delete this QA**.
3. Type a reason for the deletion in the pop-up textbox.
4. Click **Confirm Deletion**.

Managing the QA Review Process

This section explains the QA review process as well as the applicable procedures for all participants in the process: agents, evaluators, and arbitrators.

QA Review Process Overview for Evaluators

Discover provides an interactive process for agents and evaluators to review and agree upon completed evaluations. The process consists of two components: Acknowledgment and/or Arbitration. Organizations can decide whether to use Acknowledgment only, Acknowledgment and Arbitration together, or neither component, depending on their needs.

When an Acknowledgment-only workflow is chosen, the process looks like this:

- The evaluator designates the completed evaluation as "Agent Acknowledgment Required".
- The evaluation is added to the agent's Assignment Inbox as a New Assignment and a "new messages" envelope icon appears at the top of the agent's Web Portal. Depending on your system, the agent may also be notified via email about the evaluation.
- After reviewing the completed evaluation, and adding comments if desired, the agent can either acknowledge or question the evaluation. These choices result in different workflows:
 - If the agent acknowledges the evaluation, it moves to Reviewed Assignments in the agent's Assignment Inbox and is flagged as Acknowledged in the list of QA Acknowledgments.
 - If the agent questions the evaluation, it moves to Pending Assignments and is flagged as Question in the list of QA Acknowledgments. The evaluator can search for this status and reply to the question. Once the evaluator has replied, the evaluation moves back to the agent's New Assignments. This Q&A loop may be repeated as necessary until the agent acknowledges the evaluation.

When Arbitration workflow is chosen, the process changes to allow for a third-party review of disputed evaluations:

- The creator of the evaluation form designates that it should be subject to Arbitration workflow. This workflow is enabled on a form-by-form basis.

- When performing the evaluation, the evaluator designates one or more evaluators to serve as arbitrators if the evaluation is disputed. There is no limit to the number of arbitrators per evaluation, but only evaluators with appropriate permissions for the agent, group and form may be selected. The evaluator should also ensure that the evaluation is sent to the agent for acknowledgment.
- When complete, the evaluation is added to the agent's Assignment Inbox as a New Assignment and a "new messages" envelope icon appears at the top of the agent's Web Portal. Depending on your system, the agent may also be notified via email about the evaluation.
- After reviewing the completed evaluation, and adding comments if desired, the agent can either acknowledge, question, or dispute the evaluation. These choices result in different workflows:
 - If the agent acknowledges the evaluation, it moves to Reviewed Assignments in the agent's Assignment Inbox and is flagged as Acknowledged in the list of QA Acknowledgments.
 - If the agent questions the evaluation, it moves to Pending Assignments and is flagged as Question in the list of QA Acknowledgments. The evaluator can search for this status and reply to the question. Once the evaluator has replied, the evaluation moves back to the agent's New Assignments. This Q&A loop may be repeated as necessary until the agent acknowledges the evaluation.
 - If the agent disputes the evaluation, it moves to Pending Assignments and is flagged as Dispute in the list of QA Acknowledgments. Evaluators and arbitrators can search for this status and see that the evaluation was disputed, but only an arbitrator can respond to the dispute. If more than one arbitrator is assigned to an evaluation, the first arbitrator to open and view (even if not editing or rescored) 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. Once the arbitrator has replied, the evaluation's status changes to Unacknowledged, it moves back to the agent's New Assignments and the agent's original three choices (acknowledge, question and dispute) are once again available. This loop may be repeated as necessary until the agent acknowledges the evaluation.

Evaluations include Comments fields for the agent, evaluator, and/or arbitrator to use during the review process. All comments are retained on the evaluation throughout this process. These comments also appear when an evaluation is converted to a PDF for printing. The 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, an error message will appear when the form is submitted.

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.

Agents are notified about the status of their evaluations, and can access these from their Assignment Inbox. However, evaluators and arbitrators do not receive notifications when an agent questions or disputes an evaluation. inContact recommends that agents and evaluators [View QA Acknowledgments](#) on a regular basis to ensure they are responding in a timely manner.

Acknowledge a QA Evaluation

To acknowledge an evaluation as an agent:

1. Click the **Home** tab in the Discover Web Portal and expand **Assignment Inbox** in the left navigation menu.
2. Click **New Assignments**.
3. Click the desired evaluation to open it.
4. Review the evaluation and type **Comments** if desired.
5. Click **Acknowledge** at the bottom of the evaluation.

Alternative: Click **Back** and then click **Done** for that evaluation in the **New Assignments** list.

Question a QA Evaluation

To question an evaluation as an agent:

1. Click the **Home** tab in the Discover Web Portal and expand **Assignment Inbox** in the left navigation menu.
2. Click **New Assignments**.
3. Click the desired evaluation to open it.
4. Review the evaluation and type **Comments** (this field is required for Questioned evaluations).
5. Click **Question** at the bottom of the evaluation.

After the evaluator has responded to your question, you may repeat this process if necessary or [Acknowledge a QA Evaluation](#). If your organization uses the Arbitration workflow, you may also [Dispute a QA Evaluation](#).

Dispute a QA Evaluation

If your organization uses the Arbitration workflow and it has been enabled for an evaluation form, you can dispute the evaluation.

To dispute an evaluation as an agent:

1. Click the **Home** tab in the Discover Web Portal and expand **Assignment Inbox** in the left navigation menu.
2. Click **New Assignments**.
3. Click the desired evaluation to open it.
4. Review the evaluation and type **Comments** (this field is required for Disputed evaluations).
5. Click **Dispute** at the bottom of the evaluation.

After the arbitrator has responded to your dispute, you may repeat this process if necessary, [Question a QA Evaluation](#), or [Acknowledge a QA Evaluation](#).

View QA Acknowledgments

Evaluators and arbitrators can search QA Acknowledgments to determine status of individual evaluations, and find those evaluations which need further action. Search results include only those agents, groups and forms to which you have access.

i You can also [View Completed or In-Progress Evaluations](#) to see evaluations in a Question or Dispute status. However, this search will not show you whether or not an evaluation has been acknowledged.

The screenshot shows a search interface for QA Acknowledgments. It includes several filter fields: QA Form (All), Agent (All), Agent Status (Active), Evaluator (George, Gina), Arbitrator (All), Group (All), Acknowledgment Required (All), Evaluation/Acknowledgment Status (All), Start Date (01/01/2013), and End Date (03/18/2015). Below the filters is a table with the following data:

| Agent Name | QA Form | Evaluator | Arbitrator | Group | Evaluation Date | Acknowledgment Date | Status | Acknowledgment Required |
|---------------|---------------|--------------|------------|--------------|-----------------|---------------------|----------------|-------------------------|
| Ayala, Daniel | 1Support Call | George, Gina | N/A | Legends Team | 2/4/2014 | N/A | Dispute | No |
| Ayala, Daniel | 1Support Call | George, Gina | N/A | Legends Team | 2/4/2014 | N/A | Dispute | No |
| Ayala, Daniel | 1Support Call | George, Gina | N/A | Legends Team | 2/4/2014 | N/A | Dispute | No |
| Ayala, Daniel | 1Support Call | George, Gina | N/A | Legends Team | 7/29/2014 | 7/29/2014 | Acknowledged | No |
| Ayala, Daniel | 1Support Call | George, Gina | Ward, Rae | Legends Team | 7/29/2014 | N/A | Unacknowledged | No |

You can narrow your search using any or all of these criteria:

- **Form:** Select a particular form or all forms.
- **Agent:** Select a particular agent or all agents.
- **Agent Status:** Select Active, Inactive, or All.
- **Group:** Select a particular group or all groups (Discover Groups).
- **Evaluator:** Select a particular evaluator or all evaluators.
- **Start Date:** Pick a starting date as part of a date range (for evaluation date, not call recording date). The default value is a week prior to today's date.
- **End Date:** Pick an ending date as part of a date range (for evaluation date, not call recording date).
- **Acknowledgment Required:** Select Yes, No, or All. "Yes" finds evaluations where the QA form required agent acknowledgment *and* the evaluator sent the evaluation to an agent for acknowledgment. "No" finds evaluations where the QA form did not require an acknowledgment but the evaluator chose to send the evaluation to an agent for acknowledgment. "All" finds all evaluations sent to an agent for acknowledgment, regardless of whether the QA form required agent acknowledgment. For related information, see [QA Evaluations Overview](#).
- **Evaluation/Acknowledgment Status:** Select Acknowledged, Unacknowledged, Question, or Dispute.

To search for and view QA acknowledgments:

1. Click the **Coaching** tab in the Discover Web Portal and expand **Quality Assurance** in the left navigation menu.
2. Click **Search QA Acknowledgments**.
3. Select any desired criteria and click **Search**.

Respond to a Questioned QA Evaluation

To respond to a questioned evaluation as an evaluator:

1. [View QA Acknowledgments](#) and double-click a questioned evaluation to open it.
2. Click **Edit this QA**.
3. Type comments in the **Evaluator Comments** field to respond to the agent's question(s).
4. Click **Submit QA Review**.

Respond to a Disputed QA Evaluation

If your organization uses the Arbitration workflow, evaluators may be designated as arbitrators for any agents, groups and forms to which they have access. While multiple potential arbitrators may be designated by the evaluator, the first to respond becomes the official arbitrator for that evaluation.

To locate and respond to disputed evaluations where you have been named as an arbitrator:

1. [View QA Acknowledgments](#) and double-click a disputed evaluation to open it.
2. Click **Edit this QA**. If another arbitrator has already responded, you will see a message to that effect.
3. Review the evaluation, changing scores if applicable. For related information, see [Evaluate a Call](#) or [Evaluate an Agent](#).
4. In the **Comments** field, type any explanations or other pertinent information about your review.
5. Click **Submit QA Review**.

Managing Calibration

Calibration Overview

Calibration is a process that helps ensure all evaluators in your organization score calls consistently and fairly, following any established standards, rules, and best practices. When agents receive feedback and direction based on consistent scoring, the results include higher-quality customer service, reduced agent confusion and frustration, and improved employee morale.

Discover supports the calibration process by means of calibration evaluations. When your organization chooses to use calibration evaluations, the process looks like this:

- A manager or administrator selects the call and QA form to be used.
- They notify evaluators to perform a calibration evaluation on the selected recording using the designated form by a specific date.
- Evaluators individually score the call using the designated QA form.

The manager or administrator reviews the completed calibration evaluations and then coaches the evaluators as needed to ensure consistent scoring. For additional information, see [View Completed or In-Progress Evaluations](#).

The following considerations apply to calibration evaluations in Discover:

- Managers/administrators must manually notify evaluators when a calibration evaluation is to be performed. This can be done either outside the Discover system, or by creating a document with the details, uploading it to the Content Library, and assigning it to a group containing the evaluators who are to participate. For additional information, see [Add an Item to the Content Library](#).
- Any user with permission to evaluate calls can complete a calibration evaluation. If the user is limited in the calls they can normally evaluate (for example, to a specific team or group), those limits also apply to calibration evaluations.
- The QA Review Process cannot be used with calibration evaluations. Arbitrators cannot be assigned and the evaluation cannot be sent to an agent for acknowledgment.
- Completed calibration evaluations are not available to the reviewed agent in either the Assignment Inbox or the Assignment Inbox widget.

- You can enable calibration on a per-form basis or a per-evaluation basis. If you select the **Enable Calibration Workflow** checkbox when you create a form, *all* evaluations that use that form will be treated as calibration evaluations. This means that, by default, they will be excluded from standard QA reports and included in Calibration reports. Also, the step to select one or more arbitrators will be skipped when this workflow is enabled.
- To use the same form for both standard and calibration evaluations, do not enable calibration workflow. Instead, instruct evaluators to select the **Calibration Evaluation** checkbox when they start their evaluation. For more information, see [Create a QA Evaluation Form](#) and [Perform a Calibration Evaluation](#).
- As an alternative, you can create two versions of the same form that are identical in content, but include "Calibration" in the title of one of the forms. You can then enable calibration at the form level for the calibration version, ensuring that the calibration evaluations are excluded from standard QA reports and included in Calibration reports. This approach would be useful if you think evaluators may not remember to select the **Calibration Evaluation** checkbox before starting an evaluation.
- If you plan to use the arbitration workflow, do not enable calibration workflow at the form level. Selecting **Enable Calibration Workflow** disables the arbitration workflow by design. Instead, use evaluation-level calibration by instructing evaluators to select the **Calibration Evaluation** checkbox when they start their evaluation.
- Calibration evaluation scores are not included in either standard or ad hoc reports of agent, group and organizational performance. However, the following calibration-specific reports are available:
 - Calibration Agent QA Summary
 - Calibration Evaluator Comparison Report
 - Calibration Evaluator QA Summary
 - Calibration Group Summary
 - Calibration Report
 - QA Calibration Trending Report

Calibration-specific parameters can also be used to create ad hoc reports. For additional information, see the *Uptivity Discover Reporting Manual*.

Perform a Calibration Evaluation

To perform a calibration evaluation:

1. Click the **Interactions List** tab and then click the **Call List** sub-tab.
2. Locate the designated call.
3. Right-click the call and select **Evaluate This Agent** (either in the current window or a new window).
4. Select the **Calibration Evaluation** checkbox in the upper right corner.
5. Double-click the form you want to use to score the recording and then click **Next**.
6. Use the Web Player controls to review the audio and/or video content as you type information into the QA evaluation form.

i If your system is configured to support call segments, you can use **Previous** and **Next** controls to move between segments as you normally would in the **Interactions List**. For more information, see the *Uptivity Discover User Manual*.

7. Click **Save as Draft** if you need to leave the evaluation in-progress or, if you have completed the calibration evaluation, click **Submit Q.A. Review**.

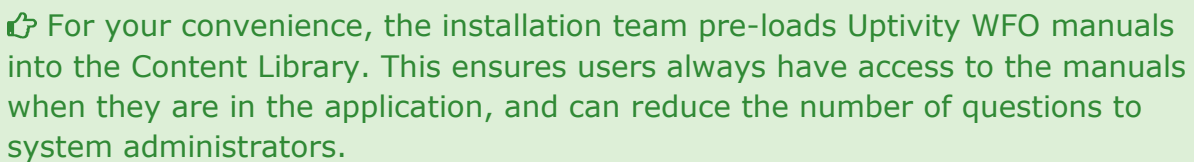
Messages indicate whether the evaluation was saved/submitted successfully or requires additional information. Follow the instructions in the message as necessary. When the evaluation is saved or submitted, options appear at the top of the page that allow you to modify the completed evaluation or complete an in-progress evaluation. For details about these options, see [Complete an In-Progress Evaluation](#) or [Edit a QA Evaluation](#).

Managing the Content Library

Content Library Overview

The Content Library enables users to upload files that can be shared with agents who have access to the Discover Web Portal. A wide variety of files and file types can be uploaded to the Content Library. Here are just a few examples of content you might consider including:




- MS Word files, such as templates for email or chat contacts,
- PDF documents, such as the user manuals and guides for the Discover Software Suite,
- Saved Web pages which can serve as links to your organization's website, blog, or knowledgebase,
- Powerpoint files, such as training or product presentations, or
- Call recordings exported from Discover that exemplify positive (or negative) call handling.

 For your convenience, the installation team pre-loads Uptivity WFO manuals into the Content Library. This ensures users always have access to the manuals when they are in the application, and can reduce the number of questions to system administrators.

No special permissions are required to view the Content Library, although you will only see those items assigned to the Discover Groups to which you belong. Permissions are required to add, edit or delete items within the library. If you need to manage the Content Library and are unable to do so, see your Discover administrator.

Content within the Content Library is organized into user-defined categories. The number of items in each category appears inside the parenthesis to the right of the name. Clicking on a category displays the items in that category.

When you add an item to the Content Library and assign it to a Discover Group, that item will also appear in the Assignment Inbox for agents who are members of that group. Those agents will see a "new message" envelope icon at the top of their Web Portal. Depending on your system configuration, the agent may also be notified via email about the new content.

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

Pages: 1 of 1

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:** The file type (Word, Excel, Power Point, and so forth), shown as an icon.
- **Size:** The size of the document/content. Individual files cannot exceed 10MB, and this limit can be lowered upon request by the Uptivity Discover Support team.
- **Assigned By:** The user who uploaded and assigned the content.
- **Assigned Categories:** All of the categories to which this document/content is assigned.

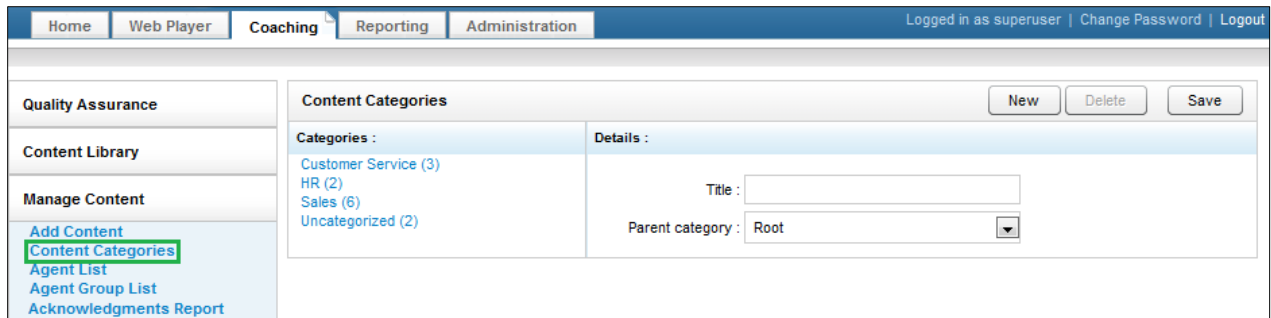
Access the Content Library

To access content within the Content Library:

1. Click the **Coaching** tab in the Discover Web Portal and expand **Content Library** in the left navigation menu.
2. Click the desired **Category**.
3. Click the desired item in the Category content list.
4. Select either **Open** or **Save** and then click **OK**.

Manage Content Library Categories

Content Categories allow you to assign library content to the appropriate users and make the content easy for them to find. inContact recommends planning the structure and categories for your Content Library on paper prior to setting up the library within Discover.



The screenshot shows the inContact Discover web portal interface. At the top, there are navigation tabs: Home, Web Player, Coaching, Reporting, and Administration. The user is logged in as 'superuser' and can click 'Change Password' or 'Logout'. The main content area is titled 'Content Categories' and includes 'New', 'Delete', and 'Save' buttons. On the left, a navigation menu is expanded to 'Manage Content', with 'Content Categories' highlighted. The main area is divided into two sections: 'Categories' and 'Details'. The 'Categories' section lists 'Customer Service (3)', 'HR (2)', 'Sales (6)', and 'Uncategorized (2)'. The 'Details' section has a 'Title' text input field and a 'Parent category' dropdown menu currently set to 'Root'.

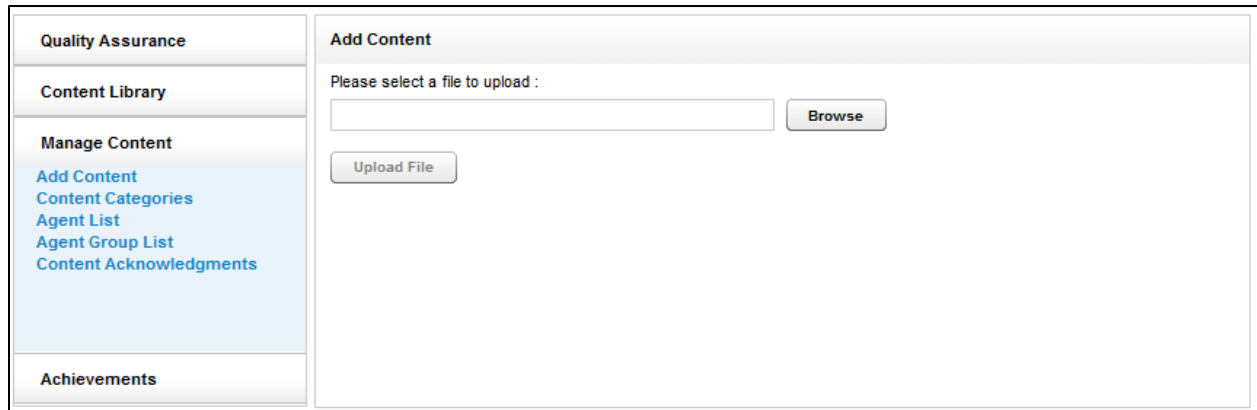
To create a new Category:

1. Click the **Coaching** tab in the Discover Web Portal and expand **Manage Content** in the left navigation menu.
2. Click **Content Categories**.
3. In the **Title** field, type a name for the new category.
4. From the **Parent Category** drop-down list, select an existing category if the new category is a child or sub-category. Otherwise, select **Root** from this list.
5. Click **Save**.

To edit or delete a category:

1. Click the **Coaching** tab in the Discover Web Portal and expand **Manage Content** in the left navigation menu.
2. Click **Content Categories**.
3. In the list under **Categories**, select the name of the desired category.
4. Edit the **Title** and/or **Parent Category** as desired and then click **Save**, or click **Delete** and then click **OK**.

Add an Item to the Content Library



| | |
|-------------------|---|
| Quality Assurance | Add Content |
| Content Library | Please select a file to upload : <input type="text"/> <input type="button" value="Browse"/> |
| Manage Content | <input type="button" value="Upload File"/> |
| Achievements | |

To add a new item to the Content Library:

1. Click the **Coaching** tab in the Discover Web Portal and expand **Manage Content** in the left navigation menu.
2. Click **Add Content**.
3. Click **Browse** and navigate to the file you want to add to the library.
4. Click **Upload File**.
5. Type a **Title**, which will be the name displayed for the item in the Content Library (this field defaults to the filename of the uploaded file).
6. Set a **Priority** if desired to communicate the relative importance of this item.
7. Type **Duration** if desired to indicate approximately how long it will take a user to review the item.
8. Select the category(ies) in which this item will appear under **Unassigned Categories** and then click the right arrow button to move them to **Assigned Categories**. If no category is assigned, the item will appear under Uncategorized in the Content Library list.
9. Select the Discover Group(s) which should have access to this item under **Unassigned Groups** and then click the right arrow button to move them to **Assigned Groups**.
10. Click **Save**.

View the Agent List/Agent Group List

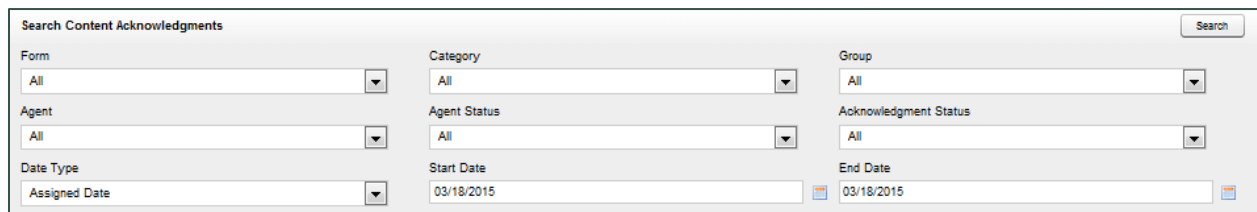
The Agent List shows each agent, the number of Discover Groups to which he belongs, and the number of documents assigned to the agent. The Agent Group List shows each Discover Group to which agents can be assigned and the number of agents in that group. This information may be useful if you need to track the total number of items assigned to an agent who is in multiple groups or if you need to load multiple documents for a group.

To view the Agent List or Agent Group List:

- Click the **Coaching** tab in the Discover Web Portal, expand **Manage Content** in the left navigation menu, and then click either **Agent List** or **Agent Group List**.

View Content Acknowledgments

You can search for and view agents in relation to the Content Library and see who has not reviewed or acknowledged their assigned content.



The screenshot shows a search form titled "Search Content Acknowledgments" with a "Search" button in the top right corner. The form is organized into three columns and four rows of search criteria:

| Form | Category | Group |
|---------------|--------------|-----------------------|
| All | All | All |
| Agent | Agent Status | Acknowledgment Status |
| All | All | All |
| Date Type | Start Date | End Date |
| Assigned Date | 03/18/2015 | 03/18/2015 |

You can narrow your search using any combination of these search criteria:

- **Form:** Select a particular piece of content or all content.
- **Category:** Select a particular category or all categories.
- **Group:** Select a particular Discover Group or all Discover Groups.
- **Agent:** Select a particular agent or all agents.
- **Agent Status:** Select Active, Inactive, or All.
- **Acknowledgment Status:** Select Pending, Reviewed, or All.
- **Date Type:** Select Assigned Date (the date the content was uploaded), Due Date or Reviewed Date.
- **Start Date:** Select a starting date for the search date range. The start date will automatically default to today's date.
- **End Date:** Select an ending date for the search date range. The end date will automatically default to today's date.

To search for and view Content Acknowledgments:

1. Click the **Coaching** tab in the Discover Web Portal and expand **Manage Content** in the left navigation menu.
2. Click **Content Acknowledgments**.
3. Specify any desired search criteria and then click **Search**.

Managing Achievements

Achievements Overview

Discover allows you 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 create a positive way to promote competition among agents.

With Discover Achievements, you can:

- Create custom achievements that can be awarded to individual agents or particular Discover 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 achievements can no longer be awarded or when points expire.
- Automatically notify agents about their own achievements as well as achievements awarded to other agents.

Achievement Types

Accomplishments in Discover are called *achievement types*, and 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 Discover 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 Discover Groups eligible to receive the 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 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 *Uptivity Discover User Manual*.

Achievement Icons

Achievement awards can be represented with an icon that is displayed when the achievement appears in the Achievement widget. The following five standard icons are preloaded in 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 based on QA evaluation scores, the following guidelines apply:

- 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.

When awarding ad hoc achievements, the following guidelines apply:

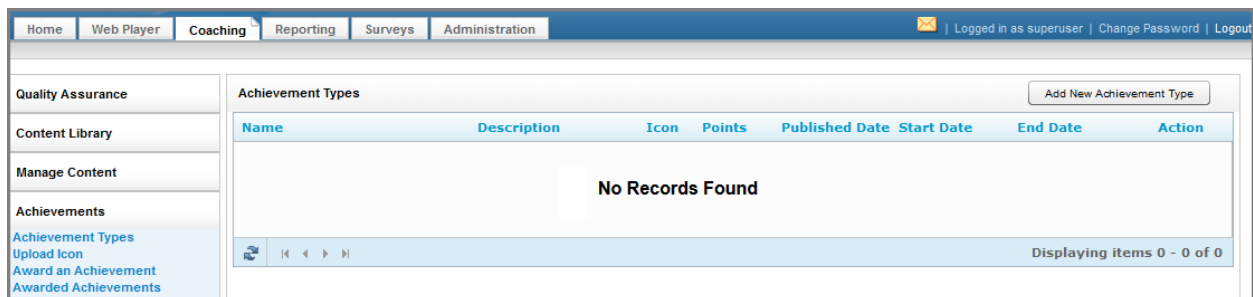
- The same achievement type can be awarded more than once to the same agents or Discover Groups, until the achievement end date is reached.
- If an achievement is awarded to multiple Discover Groups and an agent belongs to more than one of those groups, the agent is awarded the achievement only once.
- You may want to base ad hoc awards on metrics obtained from Discover reports, such as agent ranking, script adherence, average handle time, or improvement in evaluation scores.
- You can only award ad hoc achievements to users or Discover Groups you have permission to access.

User Permissions

To perform activities related to setting up an achievement award system, users must have the correct Coaching permissions. If you need to perform such activities and are unable to do so, see your Discover administrator.

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

Add an Achievement Type



You cannot add more than one achievement type for the same agents or Discover group, using the same QA form, that has overlapping start and end dates.

To add an achievement type:

1. Click the **Coaching** tab in the Discover Web Portal and expand **Achievements** in the left navigation menu.
2. Click **Achievement Types**.
3. Click **Add New Achievement Type**.
4. Type a **Name** for the achievement as it will display in an agent's email and/or widgets.
5. If desired, type a **Description** of the achievement, up to 150 characters. This description is not displayed to agents.
6. In the **Start Date** field, type the first date that this achievement type can be awarded, either automatically or ad hoc. This date must be today's date or later.
7. In the **End Date** field, type the last date that this achievement type can be awarded. If no date is specified, the achievement is open-ended.
8. Specify whether eligibility for this achievement is by **Discover Group** or individual **Agent**. Your selection here will determine whether you see a list of groups or agents in the selection columns, as shown in this image.

9. Select the checkbox(es) for one or more agents or Discover Groups (or click **All** to select all possible agents or groups), then click **Add**.
10. From the **Criteria** drop-down list, select either **Ad hoc** (the default value) or **QA**. If you select Ad hoc, skip to step 14.

11. In the **Number of evaluation:** field, type the number of evaluations (1 to 999) for which the agent must receive the specified score in order to be awarded the achievement. The default value is 1.
12. In the **Evaluation form:** field, select a QA evaluation form from the drop-down list. The list shows active QA forms assigned to the agents or groups previously selected. If this list is blank, one or more of the selected agents or groups were not assigned to a QA form.

13. In the **Score:** field, indicate the score the agent must receive on the specified number of evaluations to be awarded the achievement, as follows:
 - Type the score as a percentage (whole numbers only).
 - Indicate whether 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.
14. In the **Points** field, type the number of points (0-999) to be awarded for the achievement.
15. In the **Points Expiration** field, 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. You can select **Date** and use the date selector to specify a date on or after **End Date**, or you can select **Number of days** and type the number of days after the achievement is awarded that the points will expire.
16. If desired, click the icon currently displayed to change it. A window pops up with all available icons, including any custom icons previously uploaded. Click the desired icon and then click **OK**.
17. For **Post To**, select at least one notification method for informing agents that this achievement type was awarded.
18. Click **Save**.

View or Edit Existing Achievement Types

| 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 |

The Achievement Types list allows you to view the following information for each achievement:

- **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.

You can update or edit any of the achievement type fields, even if this achievement has already been awarded to agents. However, when 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.

⚠ 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.

To view or edit existing achievement types:

1. Click the **Coaching** tab in the Discover Web Portal and expand **Achievements** in the left navigation menu.
2. Click **Achievement Types**.
3. Click **Edit** and make any changes desired, then click **Save**.

Upload a Custom Icon

Before you can upload a custom icon, you must have created the .PNG file containing the icon image and saved it to a location you can access. The file size is restricted to 105 x 105 pixels.

The screenshot shows a web application interface with a navigation menu at the top containing 'Home', 'Web Player', 'Coaching', 'Reporting', 'Surveys', and 'Administration'. The 'Coaching' tab is active. On the right, there is a user status bar: 'Logged in as superuser | Change Password | Logout'. On the left, a sidebar menu lists 'Quality Assurance', 'Content Library', 'Manage Content', and 'Achievements'. Under 'Achievements', 'Upload Icon' is highlighted. The main content area displays a dialog box titled 'Upload Icon' with 'Cancel' and 'OK' buttons. The dialog text reads: 'Icon file must be PNG format and 105x105 pixel.' It includes a 'Name:' label with an empty text input field, and a 'Search/upload from your own desktop:' label with another empty text input field and a 'Browse' button.

To upload a custom icon:

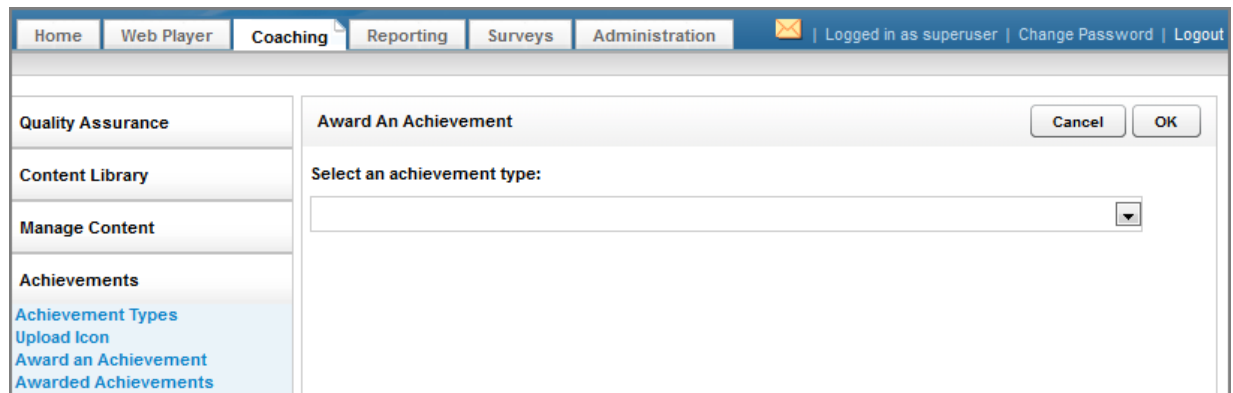
1. On the **Coaching** tab in the Discover Web Portal, expand **Achievements** in the left navigation menu.
2. Click **Upload Icon**.
3. In the **Name** field, type a name for the icon.
4. Click **Browse** and navigate to the file to be uploaded, then click **OK**.

For information on using the icon with an achievement type, see step 16 in [Add an Achievement Type](#) procedure.

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](#).

Upon completion of this procedure, 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 allowed for this achievement type.



To award an ad hoc achievement:

1. On the **Coaching** tab in the Discover Web Portal, expand **Achievements** in the left navigation menu.
2. Click **Award an Achievement**.
3. From the drop-down list, select the desired **Achievement Type**. 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 to Discover Groups.
4. Select the checkbox(es) for one or more agents or groups (based on the Achievement Type) and click **Add**. Click **All** to select all possible agents or groups. This list includes only agents and groups you have permission to access.
5. Click **OK** and then click **Yes** to confirm.

View Awarded Achievements

You can search for and view information about achievements awarded to agents and groups. Discover Groups are displayed with the name of the group in 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.

You can use the following criteria, alone or in combination, to narrow your search:

- **Group:** Select one or more Discover Groups, which restricts the **Agent** drop-down list to include only agents in those groups. If you do not further 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:** 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**.

🔗 Make your group selections before selecting agents. If you select agents and then select groups, the selected agents are cleared.

- **Agent Status:** Select Active, Inactive, or both (default) by leaving the field blank.
- **Awarded Start Date:** Select a starting date as part of a date range. 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:** Select an ending date as part of a date range. 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:** Indicate whether to include achievements for which the points have expired. Leave the field blank (the default) to include achievements with expired points. Select **Not Expired** to exclude achievements with expired points. Expired points are not included in the value for **Total Points**. If an agent only has achievements with expired points, the agent is not included in the search results.

| Agent | Agent Status | Discover Group | Total Points | Actions |
|-----------------|--------------|----------------|--------------|---------|
| Coscia, Sheryl | Active | Legends Team | 10 | Details |
| Cutting, Pietro | Active | Legends Team | 10 | Details |
| Brooker, Anders | Active | Legends Team | 10 | Details |
| Dimetrik, Kevin | Active | Legends Team | 10 | Details |
| Bern, Neil | Active | Legends Team | 10 | Details |
| Hattli, Zach | Active | Legends Team | 10 | Details |
| Ayala, Daniel | Active | Legends Team | 10 | Details |
| Fearnley, Henry | Active | Legends Team | 10 | Details |
| Chenier, Roy | Active | Legends Team | 10 | Details |

The Awarded Achievements list includes this summary information for each agent:

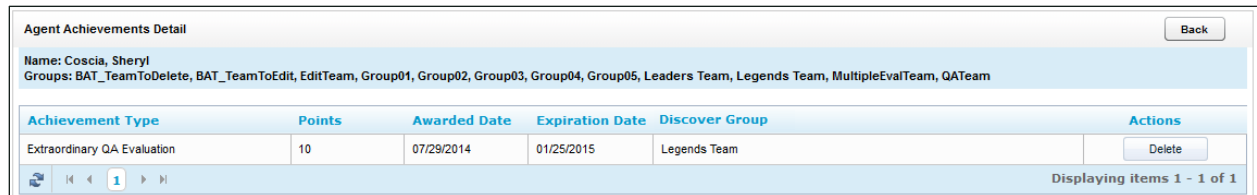
- **Agent:** The name of the agent.
- **Agent Status:** The status of the agent (active or inactive).
- **Discover Group:** All groups to which the agent belongs that were awarded achievements. If the search criteria exclude a group, that group is not included.
- **Total Points:** The total points awarded to the agent for all 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). If the number of total points displayed is 0 (zero), all achievements awarded to the agent within the specified date range have expired points.

To search for and view awarded achievements:

1. On the **Coaching** tab in the Discover Web Portal, expand **Achievements** in the left navigation menu.
2. Click **Awarded Achievements**.
3. Type any desired search criteria and click **Search**.

View or Delete an Agent's Awarded Achievements

The [View Awarded Achievements](#) procedure allows you to see summary information for each agent in regard to all awarded achievements. You can also view a detailed list of each achievement awarded to a particular agent.



| Achievement Type | Points | Awarded Date | Expiration Date | Discover Group | Actions |
|-----------------------------|--------|--------------|-----------------|----------------|---------|
| Extraordinary QA Evaluation | 10 | 07/29/2014 | 01/25/2015 | Legends Team | Delete |

The Agent Achievements Detail list includes the following information:

- **Achievement Type:** The name of the achievement.
- **Points:** The number of points awarded for that achievement.
- **Awarded Date:** The date the agent was awarded the points.
- **Expiration Date:** The date the points expire.
- **Discover 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.

At the top of this detail page, you will see a list of all the Discover Groups to which the selected agent belongs.

To view the Agent Achievement Detail list for an agent:

- Follow the [View Awarded Achievements](#) procedure and then click **Details** next to the desired agent.

To delete an agent's awarded achievement:

1. Follow the [View Awarded Achievements](#) procedure.
2. Click **Details** next to the desired agent.
3. Click **Delete** under **Actions** for the desired achievement.
4. Click **Yes** to confirm.

Document Revision History

| Revision | Change Description | Effective Date |
|----------|----------------------------------|----------------|
| 0 | Initial release for this version | 2015-04-30 |