uptivity
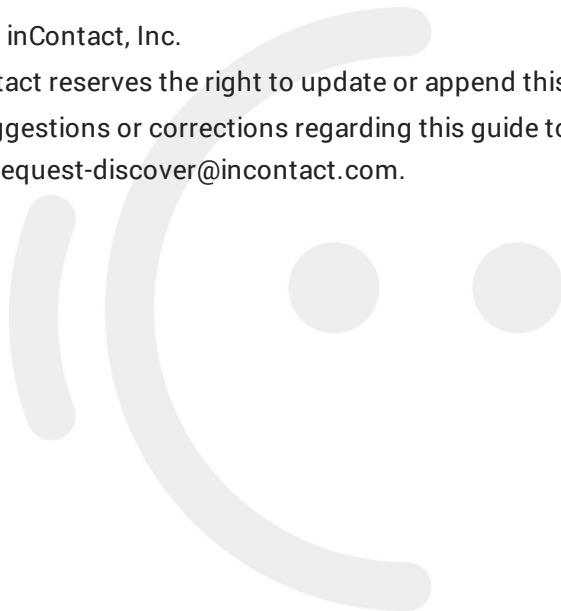by inContact.

on Premises

Uptivity WFO QM Manual v5.7

Uptivity WFO QM Manual

- **Version** — v5.7
- **Last Revision** — September 2015
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Table of Contents

Introduction

Audience

This document provides information and procedures for using the quality management (QM) features accessed via the **Coaching** and **Interactions List** tabs in the Discover Web Portal. 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 WFO 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 WFO has been installed and integrated with your 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 WFO User Manual* contains general knowledge and procedures related to the Discover 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 Uptivity WFO administrator.

Uptivity WFO allows administrators to customize field names and terminology in the Discover 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 Uptivity WFO features use pop-up menus and other windows that may be considered "pop-ups" by some browsers. inContact recommends that you configure your browser to allow pop-ups for the Uptivity WFO site.

Uptivity WFO supports standard Windows methods for selecting multiple items in a list: to select consecutive items, press and hold the Shift key; to select non-consecutive items, press and hold the CTRL key.

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

Managing QA Evaluation Forms

This section is designed for Uptivity WFO users who create evaluation forms, but who may or may not perform evaluations.

Creating QA Evaluation Forms Overview

Quality Assurance (QA) evaluation forms are used to review the work of agents, including how they handle calls. Uptivity WFO 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 Uptivity WFO **Interactions List** and **Coaching** tabs to record scores and comments. Score data collected from the forms is used for reporting.

Before creating a form, you should:

- Review this manual topic, as well as related task and reference topics,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, Uptivity WFO 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 WFO 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.

ASSIGNED GROUPS

QA evaluation forms are assigned to one or more of the Uptivity 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 WFO User Manual and Uptivity WFO Administration Manual.

Agents must be in Uptivity Groups to be evaluated, and forms must be attached to Uptivity 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. Uptivity WFO supports five question types:

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

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.

RELATED TASKS

- **Creating a QA Evaluation Form**
- **Adding a Question**
- **Adding a Response**
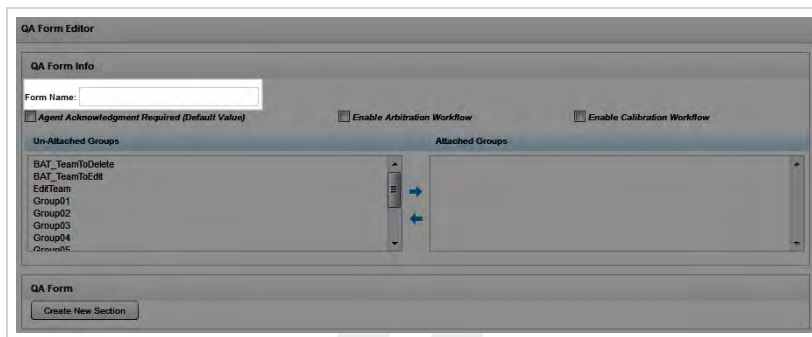
RELATED REFERENCES

- **QA Form Editor Reference**

Creating a QA Evaluation Form

Quality Assurance (QA) evaluation forms are used to review the work of agents, including how they handle calls. This topic explains how to create a new evaluation form.
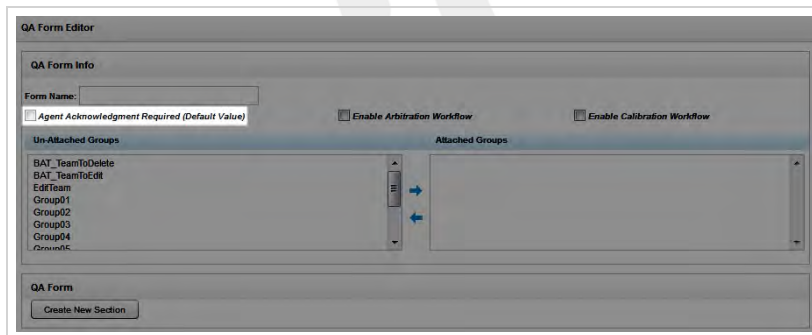
For more information, see Creating QA Evaluation Forms Overview.

1. In the Discover Web Portal, click **Coaching ➔ Quality Assurance ➔ Create a Form**.

2. Type a unique identifier in **Form Name** (50 characters max).

3. Select **Agent Acknowledgment Required** if agents should acknowledge they have reviewed their evaluations. You should always require agent acknowledgment if you are using the Arbitration workflow. For more information, see QA Review Process Overview.

4. Select **Enable Arbitration Workflow** if desired. For more information, see QA Review Process Overview.

5. Select **Enable Calibration Workflow** if desired. For more information, see Calibration Overview.

6. Click any Uptivity Groups you want to assign 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 name in **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 7 and 8 as needed until you have added all desired sections.

10. Reorder the sections if desired and then click **Save**.

SEE ALSO

- **Add a Question** — for details on adding a question to a new or existing form
- **Add a Response** — for details on adding a response to a new or existing form
- **QA Form Editor Reference** — for details on fields used in designing QA evaluation forms

Adding a Question

Questions and responses are the basis of all QA evaluation forms. This topic covers how to add a question to a form.

For more information on creating QA evaluation forms, see Creating QA Evaluation Forms Overview.

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. If you are adding a question during initial form creation, begin with step 4.

1. Follow the procedure for View QA Evaluation Forms.
2. Locate the desired form in the list and click **Edit**.
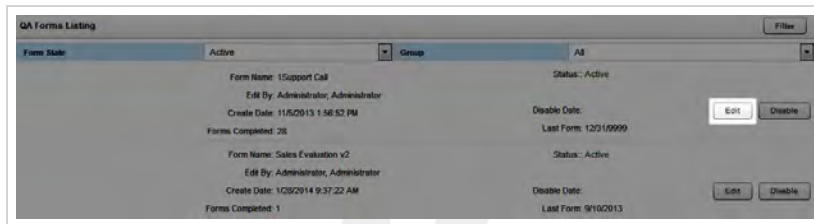
3. Locate the desired section, or click **Create New Section**, and type a unique name in **Section Title** (50 characters max).
4. Click **Add New Question**.

5. Select the desired **Question Type**.
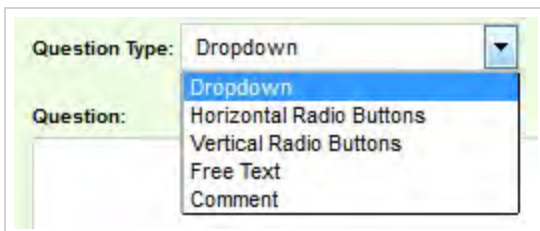
6. Select **Critical** if desired.
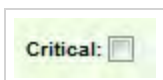
7. In **Question**, type the text of the question as it will appear to the evaluator.
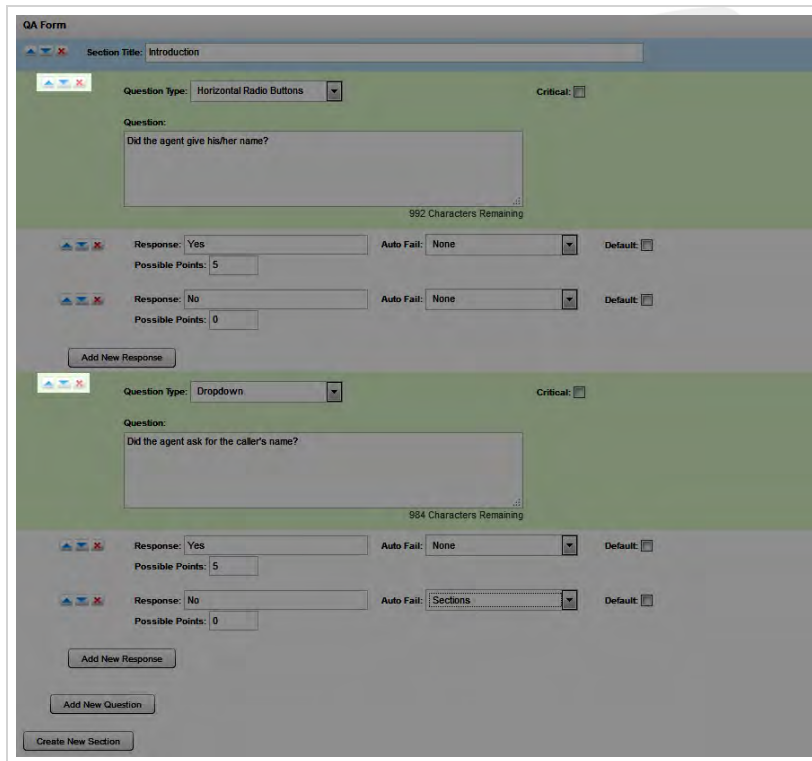
8. Follow the steps in the Adding a Response procedure.

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 Creating a QA Evaluation Form procedure or click **Save**.

SEE ALSO

- **Creating a QA Evaluation Form** — for details on creating a new form
- **Viewing QA Evaluation Forms** — for details on searching for and viewing specific forms
- **Adding a Response** — for details on adding responses to your question
- **QA Form Editor Reference** — for details on the fields available when designing a QA evaluation form

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Adding a Response

Questions and responses form the basis of a QA evaluation form. This topic covers how to add a response to a form.

For more information on QA evaluation forms, see Creating QA Evaluation Forms Overview.

This procedure can be followed as part of the initial form set-up, to edit an unused form at a later time, or to add a response to a new version of a form. If you are adding a response during initial form creation, begin with step 4.

1. Follow the procedure for Viewing QA Evaluation Forms.

2. Locate the desired form in the list and click **Edit**.
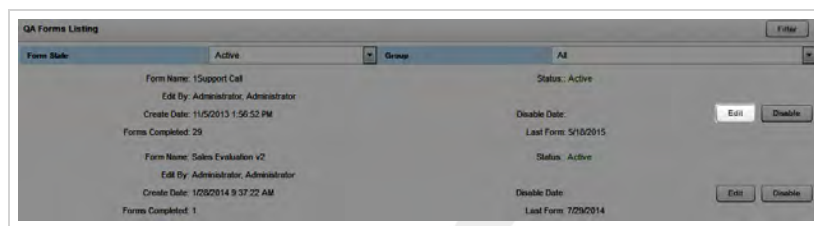
3. Locate the desired section, or click **Create New Section** and type a unique **Section Title** (50 characters max).

4. Locate the desired question, or follow the procedure for Adding a Question.

5. Click **Add New Response**.

6. In **Response** , type the text of the response as it will appear to the evaluator.

7. Select an **Auto-Fail** value if desired.

8. Select **Default** if you want Uptivity WFO to pre-populate the question with this response.
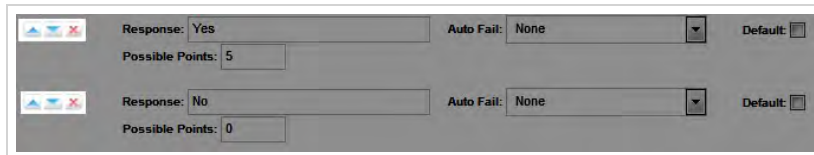
9. In **Possible Points**, type the maximum point value for this response.

10. Repeat steps 5-9 until you have added all desired responses to this question.

11. Reorder the responses if desired and then return to step 8 in the Adding a Question procedure or click **Save**.

SEE ALSO

- **Creating a QA Evaluation Form** — for details on creating a new form
- **Viewing QA Evaluation Forms** — for details on searching for and viewing specific forms
- **Adding a Question** — for details on adding questions to a form
- **QA Form Editor Reference** — for details on the fields available when designing a QA evaluation form

QA Form Editor Reference

The QA Form Editor page enables you to design new QA evaluation forms and make changes to existing forms. For more information, see Creating QA Evaluation Forms Overview.

QA Form Info Fields

Form Name

» Displays the name of the form assigned by its creator, which will appear on reports and in lists. inContact recommends including a version number in each form name.

Agent Acknowledgment Required

» Allows you to set all evaluations submitted using this form to require agent acknowledgment as default behavior. Evaluators can override this setting on a per-evaluation basis. For more information, see QA Review Process Overview.

Enable Arbitration Workflow

» Allows you to enable all evaluations submitted using this form to use the Arbitration workflow. Evaluators will be required to designate one or more arbitrators when they begin an evaluation with this form. For more information, see QA Review Process Overview.

Enable Calibration Workflow

» Allows you to require all evaluations submitted using this form to use the Calibration workflow. For more information, see Calibration Overview.

Unattached Groups

» Shows all groups that are not currently associated with this form. To be used, QA evaluation forms must be associated with one or more Uptivity Groups. To associate a group with the form, click the group name in this column and then click the right arrow to move it to the next column.

Attached Groups

» Shows any Uptivity Groups that are associated with this QA form. To remove a group's association with the form, click the group name in this column and then click the left arrow to move it to the previous column.

QA Form

Sequence Buttons

» Allow you to reorder sections, questions, and responses within a QA evaluation form. The upward-pointing triangle moves the selected item up. The downward-pointing triangle moves the selected item down. The x deletes the item.

Section Title

» Displays the user-created identifier for this section. Sections organize a form and usually follow the call flow. 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.

Question Type

» Allows you to select the type of question from a drop-down list. For more information, see Question Types.

Critical

» Allows you to designate the question 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.

Question

» Allows you to type your question as you want it to appear on the form. There is no limit to the number of questions on a form or in a section.

Response

» Allows you to type a possible response to the question as you want it to appear on the form. There is no limit to the number of responses for a question.

Auto Fail

» Allows you to 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. The default value for this field is None.

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Default

» Enables you to cause the response text to appear in the question's response field on the form. The evaluator can override the response.

Possible Points

» Provides a score for the response. During evaluation and scoring, Uptivity WFO 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.

Add New Response

» Allows you to create an additional response for the current question.

Add New Question

» Allows you to create an additional question in the current section.

Create New Section

» Allows you to create an additional section in the current form.

Question Types

DROPDOWN

With this question type, responses appear in a drop-down menu, and the evaluator can select one. Dropdown questions can be designated as critical. This example shows 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."

Here is how the example appears in the completed form:

HORIZONTAL BUTTON

With this question type, responses appear on the form as circular buttons displayed in a horizontal line. Horizontal button questions can be designated as critical. This example shows a question with responses of "Yes," "No," and "Not Applicable."

Here is how the example appears in the completed form:

VERTICAL BUTTON

With this question type, responses appear on the form as circular buttons displayed in a vertical column. Vertical button questions can be designated as critical. This example shows a question with responses of "None," "One," and "Two."

Here is how the example appears in the completed form:

FREE TEXT

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

Here is how the example appears in the completed form:

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.

Here is how comments appear in the completed form:

Comment text is entered here and will appear in italics.

RELATED TASKS

- **Creating a QA Evaluation Form**
- **Adding A Question**
- **Adding a Response**
- **Editing QA Evaluation Forms**

QA Evaluation Forms Overview

Quality Assurance (QA) evaluation forms are used to review the work of agents, including how they handle calls. QA scores and other data collected from the forms is used for reporting. To learn more about creating new QA evaluation forms, see Create a QA Evaluation Form.

To help ensure historical accuracy and continuity in reporting, a form cannot be edited or deleted once it has been used. 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. The only change you can make to an existing form that has already been used is to attach additional Uptivity Groups.

If a form has been used, and you then determine that changes are needed, you can edit and 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.

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. There is no limit to the number of times a form can be disabled and re-enabled. You can still edit or complete evaluations based on a form after it has been disabled.

From time to time, inContact and members of the Uptivity WFO 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. Past documents have included:

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

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

Uptivity WFO also allows you to export QA evaluation forms in XML format for use outside the system.

RELATED TASKS

- **Create a QA Evaluation Form**
- **Add a Question**
- **Add a Response**
- **View QA Evaluation Forms**
- **Edit or Disable a QA Evaluation Form**
- **Import and Export QA Evaluation Forms**

RELATED REFERENCES

- **QA Forms Listing Reference**
- **QA Form Editor Reference**

View QA Evaluation Forms

This topic covers how to search for and view existing QA Evaluation forms.

For more information, see QA Evaluation Forms Overview.

1. In the Discover Web Portal, click **Coaching ➜ Quality Assurance ➜ Manage Forms**.

2. Make selections for **Form State**, **Group**, or both if desired.
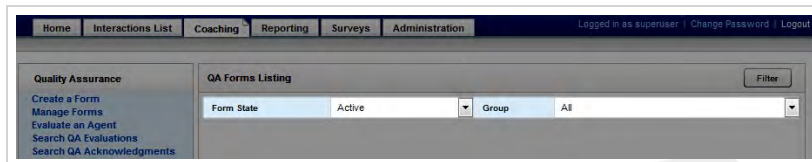
3. Click **Filter**.
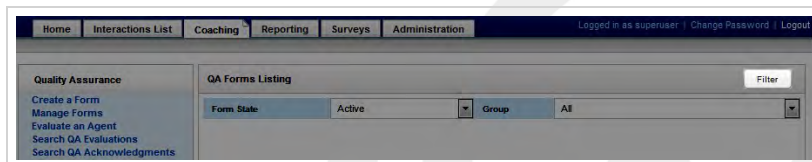
4. Locate the form and click **Edit** to open it.
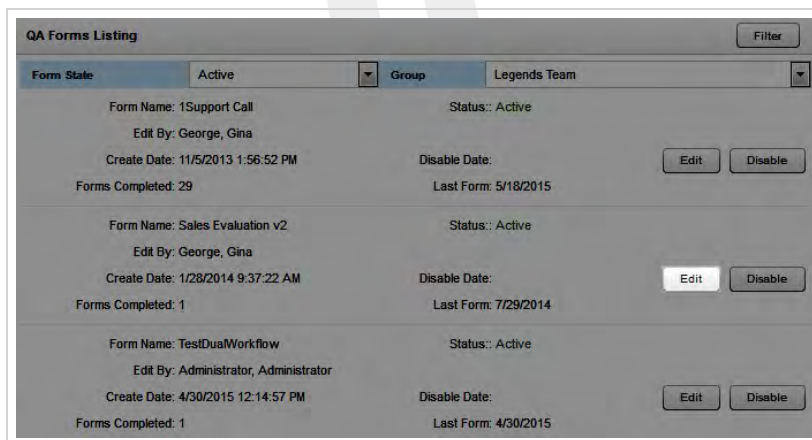
SEE ALSO

- **QA Forms Listing Reference** — for information on the interface elements and form information fields shown in the QA Forms Listing

QA Forms Listing Reference

The **QA Forms Listing** page enables you to search for and find existing forms.

For more information, see QA Evaluation Forms Overview.

Page Control Fields

Filter

» Enables you to limit the forms shown based on your selections.

Form State

» Allows you to view All forms or filter the list based on whether forms are Active or Disabled. The default is Active.

Group

» Allows you to view All forms or display only those forms associated with specific Uptivity Groups. The default is All.

Edit

» Enables you to edit the form.

Disable

» Allows you to disable the form. If the form is already disabled, this control will say Enable instead.

Form Information Fields

Form Name

» Displays the name assigned to the form by its creator.

Status

» Denotes whether the form is active or disabled.

Edit By

» Displays the username of the last person to save the form in the **QA Form Editor**.

Create Date

» Displays the date the form was originally created.

Disable Date

» Displays the date the form was last disabled. Forms can be disabled and enabled multiple times. If a form has never been disabled,

Forms Completed

» Denotes the number of times an evaluation has been submitted with this particular form.

Last Form

» Displays the submission date of the last evaluation completed with this form. If the form has never been used for a submitted evaluation, this field displays "12/31/9999."

RELATED TASKS

- **View QA Evaluation Forms**
- **Edit QA Evaluation Forms**
- **Add Groups to QA Evaluation Forms**
- **Disable QA Evaluation Forms**
- **Enable QA Evaluation Forms**
- **Import QA Evaluation Forms**
- **Export QA Evaluation Forms**

Edit QA Evaluation Forms

Uptivity WFO strictly limits editing of QA evaluation forms. This topic explains how to use the Edit functionality to create a new form based on an existing form.

For more information, see QA Evaluation Forms Overview.

1. In the Discover Web Portal, click **Coaching → Quality Assurance → Manage Forms**.

2. Make selections for **Form State**, **Group**, or both if desired.
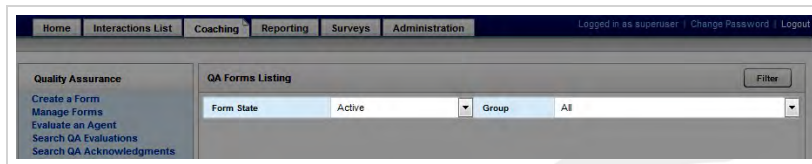
3. Click **Filter**.
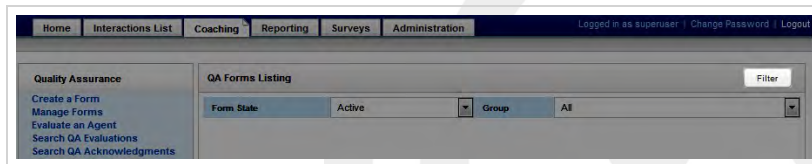
4. Locate the form and click **Edit** to open it.

5. Click **Alter Scored Form** to access the sections, questions and responses.

6. Edit the form as needed.

7. Click **Save** .

8. Type a new **Form Name** when prompted.

9. Click **Save**.

SEE ALSO

- **Add a Question** — for information on adding questions to a form
- **Add a Response** — for information on adding responses to a form
- **QA Forms Listing Reference** — for information on the interface elements and form information fields shown in the QA Forms Listing
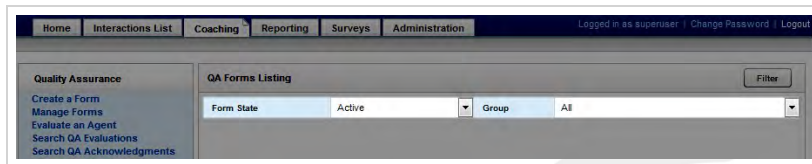
Add Groups to QA Evaluation Forms
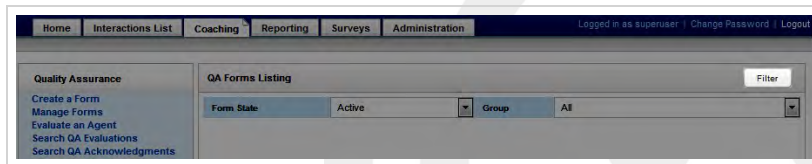
Uptivity WFO strictly limits editing of QA evaluation forms. This topic explains how to associate additional Uptivity Groups with an existing form.

For more information, see QA Evaluation Forms Overview.

1. In the Discover Web Portal, click **Coaching** ➜ **Quality Assurance** ➜ **Manage Forms**.

2. Make selections for **Form State**, **Group**, or both if desired.

3. Click **Filter**.

4. Locate the form and click **Edit** to open it.

5. Click the desired group(s) under **Unattached Groups** and then click the right arrow to move them to **Attached Groups**.
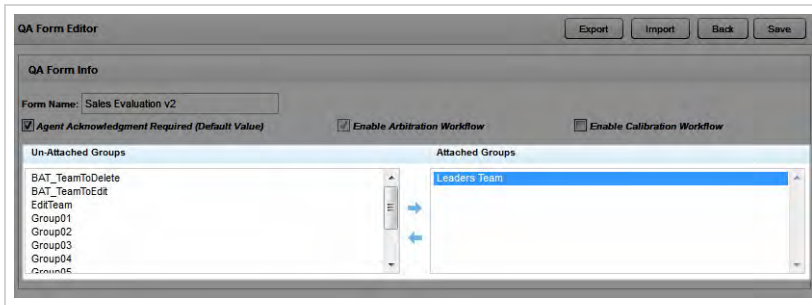
6. Click **Save** .
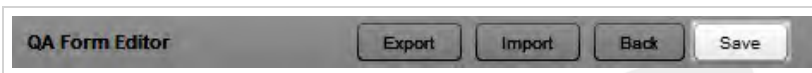
SEE ALSO

- **QA Forms Listing Reference** — for information on the interface elements and form information fields shown in the QA Forms Listing

Enable QA Evaluation Forms

To help ensure historical accuracy and continuity in reporting, Uptivity WFO does not allow forms to be deleted once they have been used. However, they can be disabled. This topic explains how to enable a form that was previously disabled. There is no limit to the number of times a form can be disabled and reenabled.

For more information, see QA Evaluation Forms Overview.

1. In the Discover Web Portal, click **Coaching → Quality Assurance → Manage Forms**.

2. For **Form State**, select either *Disabled* or *All*. By default, the **QA Forms Listing** shows only active forms.
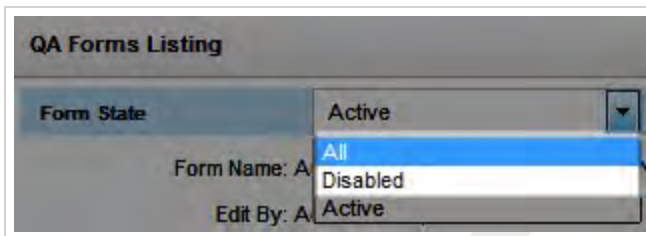
3. Click **Filter**.
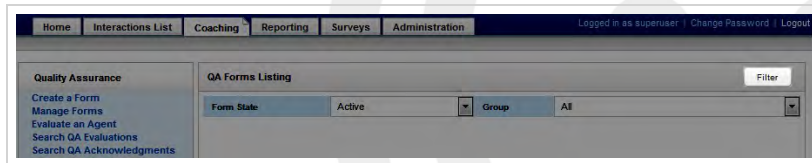
4. Locate the form and click **Enable** .
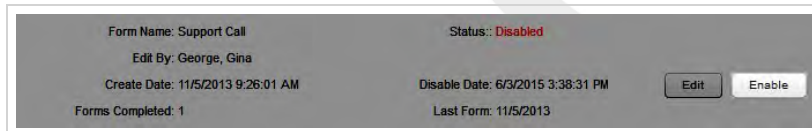
SEE ALSO

- **QA Forms Listing Reference** — for information on the interface elements and form information fields shown in the QA Forms Listing

Disable QA Evaluation Forms

To help ensure historical accuracy and continuity in reporting, Uptivity WFO does not allow forms to be deleted once they have been used. This topic explains how to disable a form.

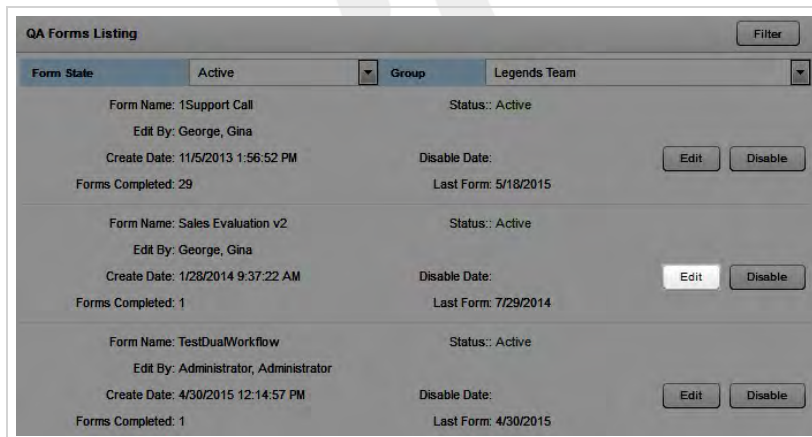For more information, see QA Evaluation Forms Overview.

1. In the Discover Web Portal, click **Coaching** ➔ **Quality Assurance** ➔ **Manage Forms**.

2. Make selections for **Form State**, **Group**, or both if desired.
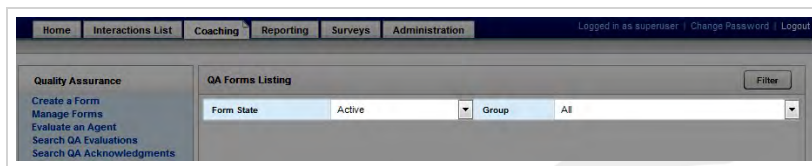
3. Click **Filter**.
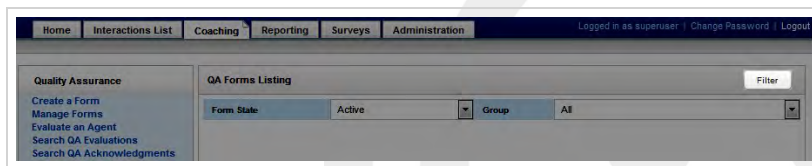
4. Click **Disable** .
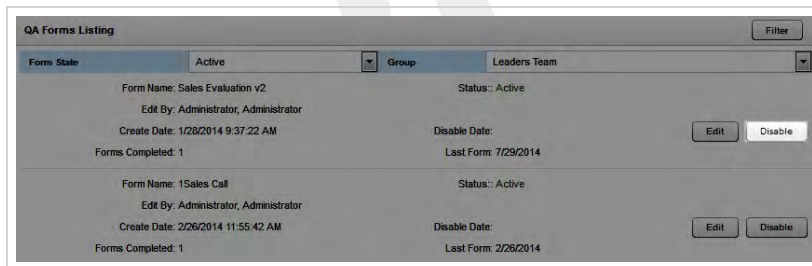
SEE ALSO

- **QA Forms Listing Reference** — for information on the interface elements and form information fields shown in the QA Forms Listing

Import QA Forms

This topic covers how to import an XML document you want to use as a QA evaluation form to Uptivity WFO.

Once you have imported a QA form, you can modify it using regular Uptivity WFO procedures.

1. In the Discover Web Portal, click **Coaching** → **Quality Assurance** → **Create a Form**.

2. Type a unique identifier in **Form Name** (50 characters max).

3. Select **Agent Acknowledgment Required** if agents should acknowledge they have reviewed their evaluations. You should always require agent acknowledgment if you are using the Arbitration workflow. For more information, see QA Review Process Overview.

4. Select **Enable Arbitration Workflow** if desired. For more information, see <u>QA Review Process Overview</u>.

5. Select **Enable Calibration Workflow** if desired. For more information, see <u>Calibration Overview</u>.

6. Click any Uptivity Groups you want to assign to this form under **Un-Attached Groups** and then click the right arrow button to move them to **Attached Groups**.

7. 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).
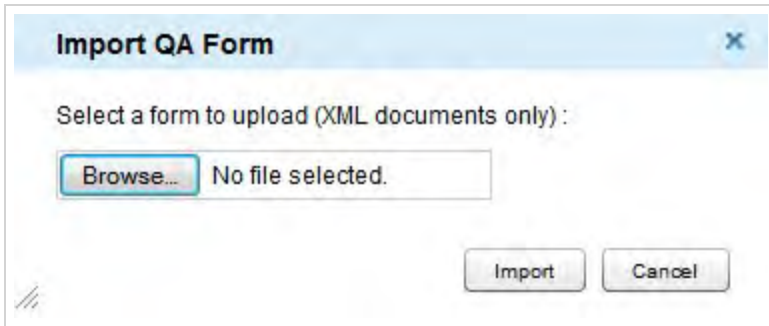
8. Select the desired file and click **Open**, then click **Import**.

9. Click **Save** .

SEE ALSO

- **Edit QA Evaluation Forms** — for information on editing an evaluation form
- **View QA Evaluation Forms** — for information on finding and viewing specific forms

Export QA Forms

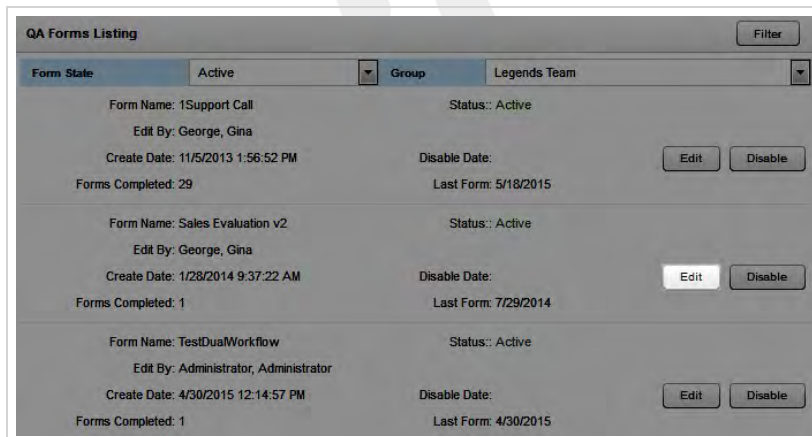This topic covers how to export a QA evaluation form from Uptivity WFO as an XML document.

1. In the Discover Web Portal, click **Coaching ➔ Quality Assurance ➔ Manage Forms**.

2. Make selections for **Form State**, **Group**, or both if desired.
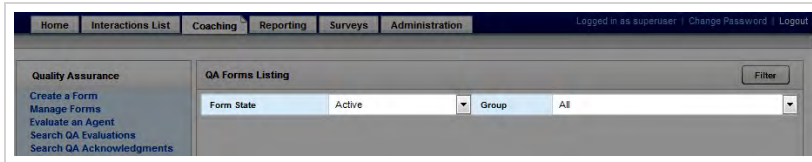
3. Click **Filter**.
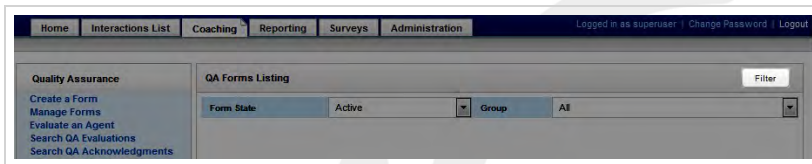
4. Locate the form and click **Edit** to open it.
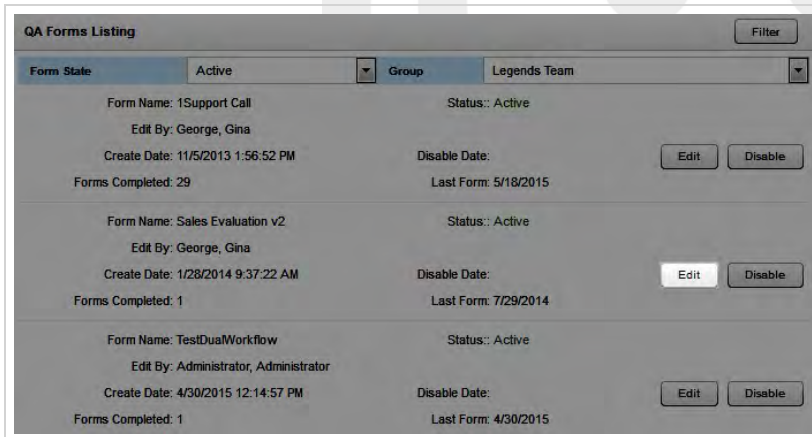
5. Click **Export** .
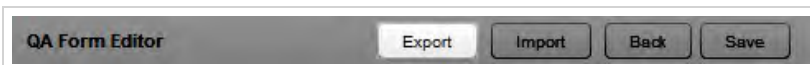
6. Save the file as directed by your web browser.

SEE ALSO

- **QA Forms Listing Reference** — for information on the interface elements and form information fields shown in the QA Forms Listing

Managing QA Evaluations

This section is designed for Uptivity WFO users who perform evaluations.

QA Evaluations Overview

You can use Uptivity WFO 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 work with QA evaluations, you must have the appropriate permissions and access to the Uptivity Groups attached to the QA form used for the evaluation. If you need to perform, view, edit, or otherwise work with QA evaluations and are unable to do so, see your Uptivity WFO administrator.

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

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

You can optionally choose to send completed evaluations 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 independ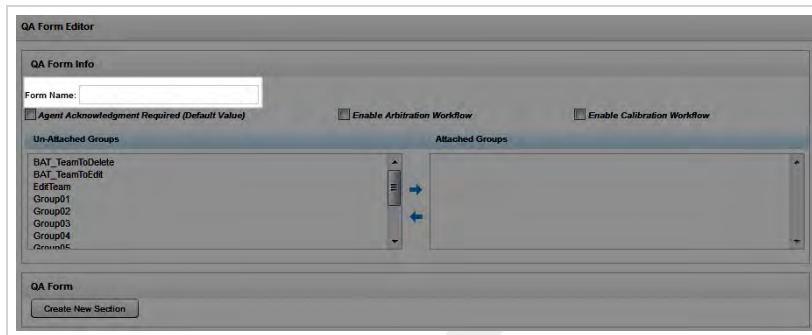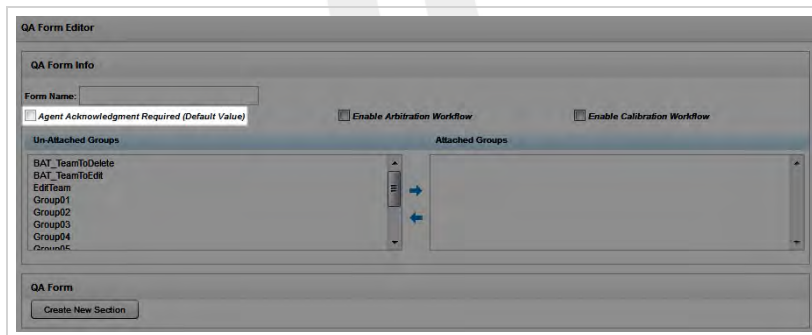ent feature or as part of the Arbitration Workflow. Agent acknowledgment can be "required" during creation of a QA evaluation form; however, evaluators can override this setting. You should always require agent acknowledgment when using the Arbitration Workflow.

If agent acknowledgment is not required, the completed evaluation is submitted without being sent to the agent for review. The evaluation will not appear in the agent's **Assignment Inbox** or in the **Search QA Acknowledgments** results; however, it will appear in the **Search QA Evaluations** results.

In-Progress Evaluations

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 QA Review Process Overview). Evaluations also do not appear in the Assignment Inbox or on widgets until they are completed. For related information, see Home Tab Overview[href]the "Home Tab Overview" section in the *Uptivity WFO User Manual*.

Completed Evaluations

You can edit or delete a completed evaluation. You can also generate a printable version of non-calibration evaluations, and you can copy a link that will provide evaluation access to someone else.

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.

Evaluation Search Criteria

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** page. 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**. When you view QA evaluations from the Call List, Uptivity WFO overrides your default criteria to present evaluations associated with a specific call.

RELATED TASKS

- **Evaluating an Agent**
- **Evaluating a Call**
- **Viewing Completed or In-Progress Evaluations**
- **Completing an In Progress Evaluation**
- **Editing a QA Evaluation**
- **Deleting a QA Evaluation**
- **Saving a Search Criteria Set**

RELATED REFERENCES

- **Search QA Evaluations Reference**
- **Perform QA Reference**
- **Agent Forms Listing Reference**

Evaluating an Agent

Uptivity WFO 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. This topic explains how to evaluate an agent. If you want to evaluate how an agent performed *on a call*, follow the procedure for Evaluating a Call.

For more information, see QA Evaluations Overview.

1. In the Discover Web Portal, click **Coaching ➜ Quality Assurance ➜ Evaluate an Agent**.

2. Double-click the agent you want to evaluate.
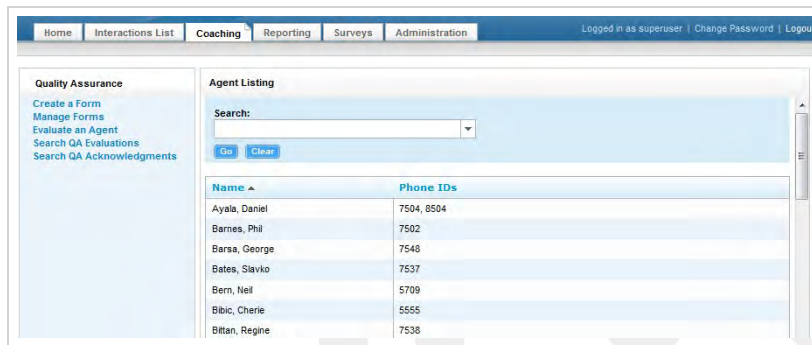
3. Double-click the QA evaluation form you want to use.

4. If the form uses the Arbitration Workflow, select an arbitrator for the evaluation and click the plus sign. Repeat if desired to select additional arbitrators, and then click **Next**.
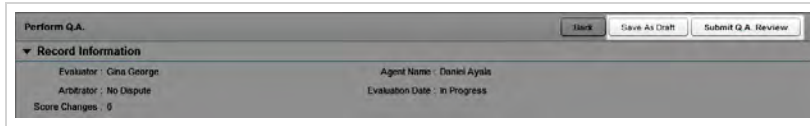
5. Complete the evaluation. For more information, see Perform QA Reference.

6. Select an option for **Send Evaluation to Agent for Acknowledgment?** If you select Yes, optionally type any desired comments or agent directions in the text box.

7. Select a priority for the evaluation.

8. 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 or submitted successfully, or whether additional information is required. 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.

SEE ALSO

- **Completing an In-Progress Evaluation** — for information on finishing an evaluation
- **Editing a QA Evaluation** — for information on editing a submitted evaluation
- **QA Review Process Overview** — for information on additional steps in the Acknowledgment and Arbitration Workflows
- **Agent Forms Listing Reference** — for information on how to select an evaluation form
- **Perform QA Reference** - for details on fields used in evaluating agent performance

Evaluating a Call

This topic explains how to evaluate an agent's performance on a call. If you want to evaluate how an agent's general performance, or performance on a non-call interaction, follow the procedure for Evaluating an Agent.

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

For more information, see QA Evaluations Overview.

> ⓘ Once you have selected a call, Uptivity WFO shows you a list of evaluation forms from which to choose. Make sure you select the form with the appropriate Group. Form and Group selections affect reporting.

1. In the Discover Web Portal, click **Interactions List → Call List**.

2. Select the call to be evaluated using **Call List** filtering tools.

3. Right-click the record and select **Evaluate this Agent**.
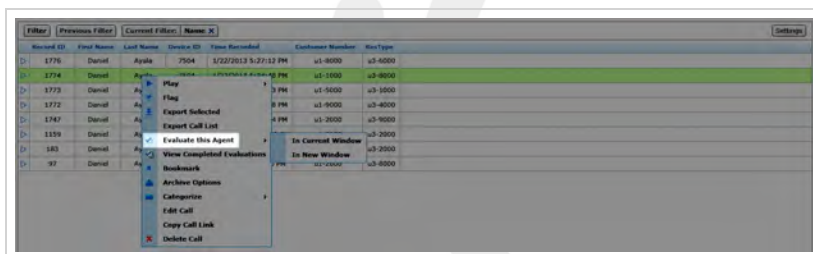
4. Select **In Current Window** or **In New Window** as desired.
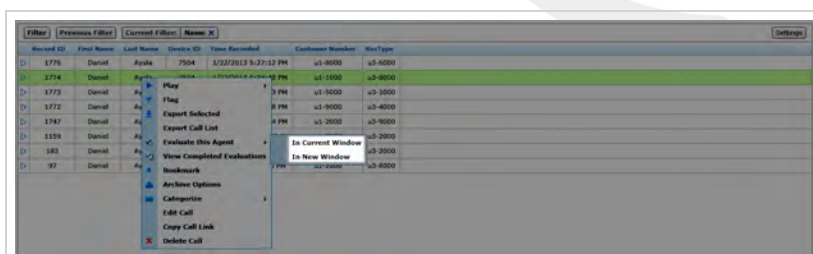
> ⓘ If your system is configured to support call segments, and you want Uptivity WFO to automatically move between segments during playback, you must select **In Current Window**.

5. If there is a screen capture associated with the call, select **With Video** or Without Video.
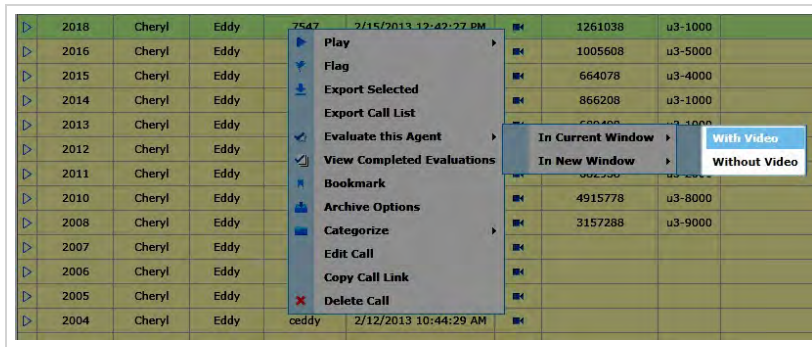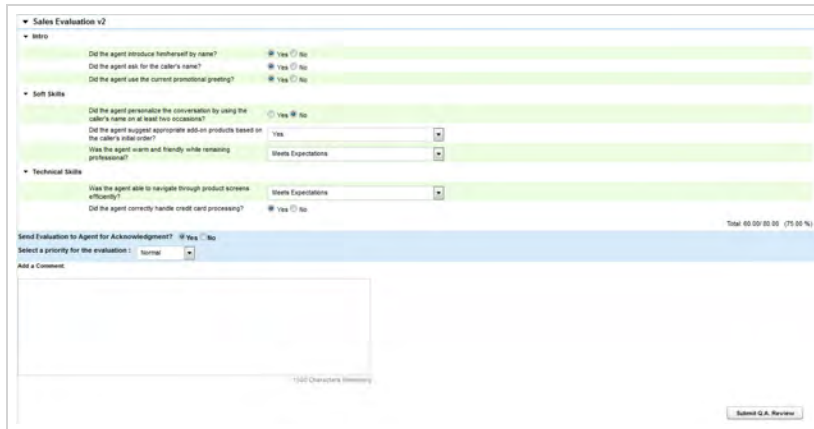
6. Double-click the form you want to use to score the recording.

7. If the form uses the Arbitration Workflow, select an arbitrator for the evaluation and click the plus sign. Repeat if desired to select additional arbitrators, and then click **Next**.
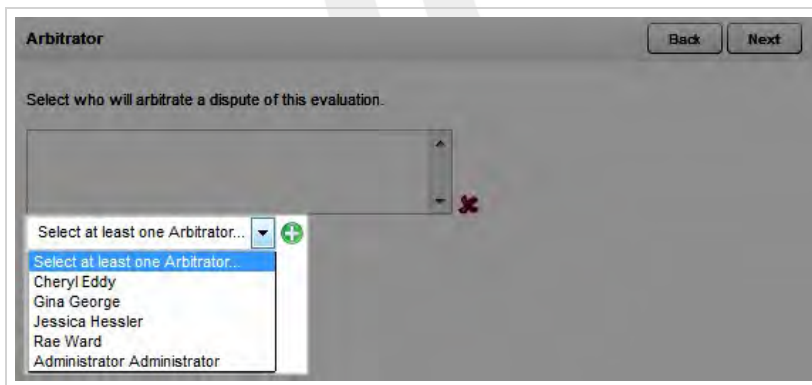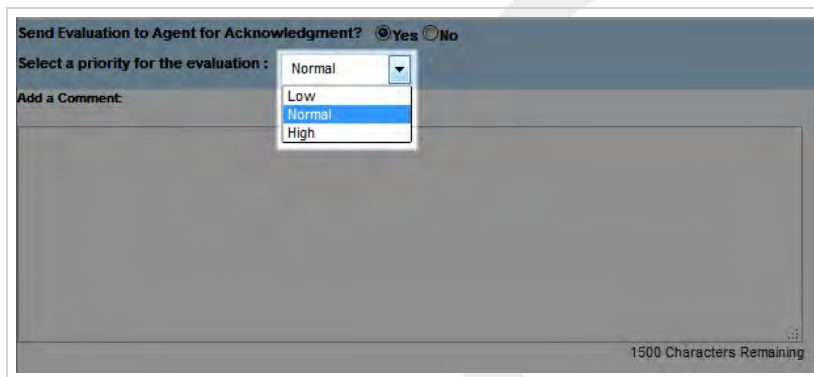
8. Use the **Web Player** controls to review the audio and/or video content as you type information into the QA evaluation form.

> ⓘ 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 Call List. For more information, see theUptivity WFO User Manual.
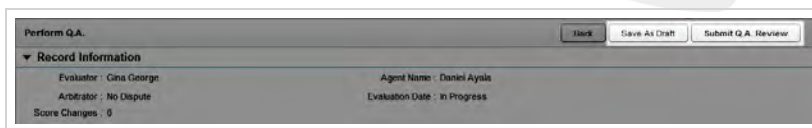
9. Select an option for **Send Evaluation to Agent for Acknowledgment?** If you select Yes, optionally type any desired comments or agent directions in the text box.

10. Select a priority for the evaluation.

11. 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 or submitted successfully, or whether additional information is required. 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.

SEE ALSO

- **Completing an In-Progress Evaluation** — for information on finishing an evaluation
- **Editing a QA Evaluation** — for information on editing a submitted evaluation

- **QA Review Process Overview** — for information on additional steps in the Acknowledgment and Arbitration Workflows
- **Perform QA Reference** - for details on fields used in evaluating agent performance

Agent Forms Listing Reference

The **Agent Forms Listing** page enables you to choose the QA form you will use to evaluate a specific agent or recorded interaction.

For more information, see QA Evaluations Overview.

The same form may appear multiple times in this list if the agent belongs to more than one Uptivity Group that uses that form.

You can sort the list by clicking on any column header.

Form Information Fields

Form Name

» Meaningful identifier assigned to the form during its creation.

Group Name

» Specifies the Uptivity Group to which this form is attached.

Create Date

» Displays the date the form was originally created.

RELATED TASKS

- **Evaluate a Call**
- **Evaluate an Agent**

Perform QA Reference

The Perform QA page enables you to evaluate an agent or a recorded interaction using a QA evaluation form you selected.

For more information, see QA Evaluations Overview.

Record Information Fields

If an evaluation is based on agent performance only (that is, not on a recorded interaction), the following fields appear in the Record Information section at the top of the Perform QA page. This section can be expanded or collapsed by clicking the triangle next to the section name.

Evaluator

» Specifies the evaluator who performed or is performing the evaluation.

Arbitrator

» If the evaluation has been disputed, this field displays the assigned arbitrator. Otherwise, the field displays "No Dispute."

Score Changes

» Specifies the number of times the score has been changed for the evaluation.

Agent Name

» Specifies the name of the agent for this evaluation.

Evaluation Date

» Specifies the date on which the evaluation was originally submitted. If this is a new evaluation, or one that was previously saved but not submitted, this field displays "In Progress."

Call Information Fields

When an evaluation is based on how an agent handled a recorded interaction (that is, a call), the following fields appear in the Call Information section at the top of the Perform QA page. This section can be expanded or collapsed by clicking the triangle next to the section name.

Evaluator

» Specifies the evaluator who performed or is performing the evaluation.

Record

» Specifies the unique identifier assigned to this recorded interaction by Uptivity WFO.

Device ID

» Specifies the physical device associated with the recorded interaction.

Dialed Number

» Applies only to telephone interactions. Displays either the number dialed by the agent (outbound calls) or the number the caller dialed to reach the agent (inbound calls).

Channel

» Specifies the Uptivity WFO channel on which the interaction was recorded.

Arbitrator

» If the evaluation has been disputed, this field displays the assigned arbitrator. Otherwise, the field displays "No Dispute."

Group

» Specifies the ACD group associated with the agent for this recorded interaction. Depending on your telephony environment, this setting may be called a hunt group, skill group, or ACD group.

Call Direction

» Applies only to telephone interactions. Specifies whether the call was inbound or outbound.

User1

» Displays the contents of this field in the recorded interaction record. If your organization uses these additional database fields, the label may be different (for example, in this image the field is called "Customer Number").

User3

» Displays the contents of this field in the recorded interaction record. If your organization uses these additional database fields, the label may be different (for example, in this image the field is called "ResType").

User5

» Displays the contents of this field in the recorded interaction record. If your organization uses these additional database fields, the label may be different.

Score Changes

» Specifies the number of times the score has been changed for the evaluation.

Agent Name

» Specifies the name of the agent for this evaluation.

Recording Time

» Displays the date and time the recorded interaction occurred.

Device Alias

» Displays the ACD/PBX identifier associated with the agent for this recorded interaction (such as an agent ID, login ID, or extension).

Caller ID

» Applies only to inbound telephone interactions. Specifies the number from which the call was received.

Duration

» Specifies the duration of the recorded interaction in the format of HH:MM:SS.

ACD Gate

» Specifies the call gate setting on your ACD/PBX for this recorded interaction. Depending on your telephony environment, this setting may be called a gate, queue, application, skill, or VDN.

Screen Capture

» Specifies whether or not this recorded interaction has an associated screen recording.

User2

» Displays the contents of this field in the recorded interaction record. If your organization uses these additional database fields, the label may be different.

User4

» Displays the contents of this field in the recorded interaction record. If your organization uses these additional database fields, the label may be different.

Evaluation Date

» Specifies the date on which the evaluation was originally submitted. If this is a new evaluation, or one that was previously saved but not submitted, this field displays "In Progress."

Evaluation Form Fields

This section contains the actual evaluation form. The fields in the form will vary, depending on the questions and response choices established when the form was created.

The entire form can be expanded or collapsed by clicking the triangle next to the section name. If the form has multiple sections, each section can be expanded or collapsed in the same way.

RELATED TASKS

- **Evaluate a Call**
- **Evaluate an Agent**
- **Complete an In-Progress Evaluation**
- **Edit a QA Evaluation**

Viewing Completed or In-Progress Evaluations

Uptivity WFO allows you to save unfinished evaluations for later completion, as well as edit or delete submitted evaluations if you have permissions to do so. This topic explains how to find and open an existing evaluation.

For more information, see QA Evaluations Overview.

VIEWING AN EVALUATION FROM THE EVALUATIONS LIST

1. In the Discover Web Portal, click **Coaching ➔ Quality Assurance ➔ Search QA Evaluations**.

2. Set your desired search criteria and click **Search**.

3. Double-click the desired evaluation to open it.

VIEWING AN EVALUATION FROM THE CALL LIST

1. In the Discover Web Portal, click **Interactions List ➔ Call List**.

2. Right-click the desired call record and select **View Completed Evaluations** to open a new window containing the Search QA Evaluations page, with evaluations for the selected call listed at the bottom of the window.
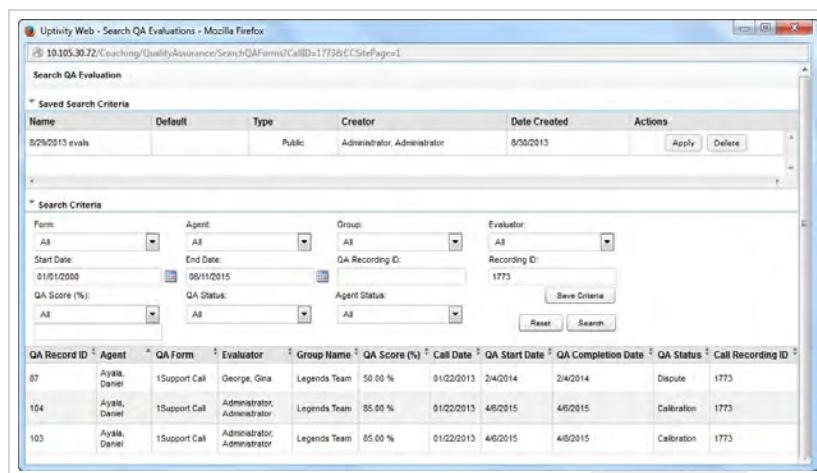
3. Double-click any evaluation to open it.

SEE ALSO

- **Completing an In-Progress Evaluation** — for details on changing or finishing an evaluation started previously
- **Editing a QA Evaluation** — for details on changing an evaluation that has previously been submitted
- **Deleting a QA Evaluation** — for details removing an evaluation that has previously been submitted
- **Search QA Evaluation Reference** — for information on the search criteria and evaluation information fields shown in the QA Evaluations Listing

Search QA Evaluation Reference

The Search QA Evaluation page enables you to search for completed and in-progress evaluations. If you use the same search criteria frequently, you can also save criteria sets from this page.

For more information, see QA Evaluations Overview.

Saved Search Criteria Information Fields

Name

» Displays the name assigned to the criteria set when it was created.

Default

» Displays an **X** if the criteria set is the default for the current user. Only one set of criteria at a time may be assigned as the default.

Type

» Displays the status of the criteria set as *Public* or *Private*. Private 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 forms or view relevant reports, but can only be edited or deleted by the user who created them.

Creator

» Displays the names of the user who created the criteria set.

Date Created

» Displays the date on which the criteria set was originally saved.

Actions

» Displays the Apply button, which can be used to apply the criteria set to a search, and the Delete button, which can be used to delete the saved criteria.

Search Criteria

Form

» Displays the name of the form assigned by its creator. You can choose a single form or use the default of all forms.

Agent

» Displays the names of all agents to whom you have access. You can choose a single agent or use the default of all agents.

Group

» Displays the Uptivity Groups to which you have access. You can choose a single group or use the default of all groups.

Evaluator

» Displays Uptivity WFO users who have permission to evaluate calls. You can choose a single evaluator or use the default of all evaluators.

Start Date

» Select a starting date as part of a date range. The default value is the current date. Applies to the date the evaluation was completed, not the date the interaction was recorded.

End Date

» Select an ending date as part of a date range. The default value is the current date. Applies to the date the evaluation was completed, not the date the interaction was recorded.

QA Record ID

» Unique identifier created by Uptivity WFO for each evaluation. You must type a valid ID in the text box; partial IDs are not accepted.

Recording ID

» Unique identifier created by Uptivity WFO for each recorded interaction. You must type a valid ID in the text box; partial IDs are not accepted.

QA Score

» Score awarded to completed evaluations. You can use the default value of all or filter your search by QA score based on these operators: Equal to, Less than, Greater than, Equal to or Less than, and 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 are 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

» Allows you to filter your search by the statuses which can be applied to QA evaluations: Calibration, Calibration In Progress, In Progress, Completed, Question, Dispute. You can select one status or use the default of all statuses.

Agent Status

» Allows you to filter your search by the statuses which can be applied to agents: Active or Inactive. You can select one status or use the default of all statuses.

Evaluation Information Fields

QA Record ID

» Unique identifier created by Uptivity WFO for this evaluation.

Agent

» Name of the agent who was evaluated.

QA Form

» Name of the form used for this evaluation.

Evaluator

» Name of the user who performed the evaluation.

Group Name

» Name of the Uptivity Group to which this agent belongs and with which this QA form is associated.

QA Score %

» Score awarded to this evaluation.

Call Date

» Date on which the recorded interaction associated with this evaluation occurred.

QA Start Date

» Date on which this evaluation was started.

QA Completion Date

» Date on which this evaluation was completed.

QA Status

» Current status of the evaluation.

Call Recording ID

» Unique identifier created by Uptivity WFO for this recorded interaction.

RELATED TASKS

- **View Completed or In-Progress Evaluations**
- **Complete an In-Progress Evaluation**
- **Edit a QA Evaluation**
- **Delete a QA Evaluation**
- **Save a Search Criteria Set**

Using Saved Search Criteria Sets

Uptivity WFO allows you to save sets of commonly-used criteria so that you can search for evaluations more quickly. This topic explains how to use a saved criteria set.

For more information, see QA Evaluations Overview.

1. In the Discover Web Portal, click **Coaching** ➔ **Quality Assurance** ➔ **Search QA Evaluations**.

2. Click **Apply** on the line for the desired criteria set.

SEE ALSO
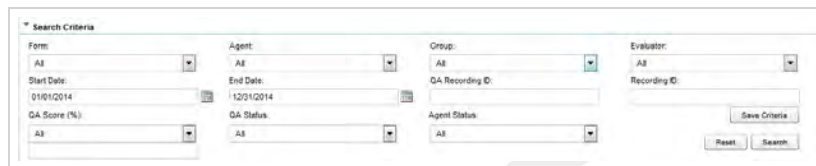
- **Search QA Evalulations Reference** — for definitions of the fields available as search criteria
- **Saving Search Criteria Sets** — for information on how to save a set of search criteria
- **Removing Saved Search Criteria Sets** — for information on how to delete a saved criteria set

Saving a Search Criteria Set

When you search for evaluations, you can save criteria selections for future use. You can also make one of these saved criteria sets the default, so that evaluations matching that criteria set automatically display when you launch the Search QA Evaluations page. This topic explains how to save a search criteria set.

For more information, see QA Evaluations Overview.

1. In the Discover Web Portal, click **Coaching → Quality Assurance → Search QA Evaluations**.

2. Set the desired search criteria and then click **Save Criteria**.

3. Type a name in the **Search Criteria** field.
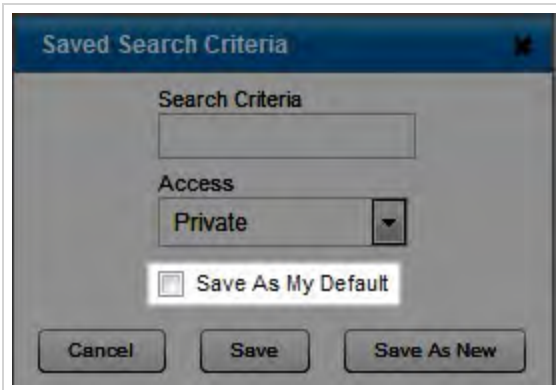
4. Select **Private** or **Public**.
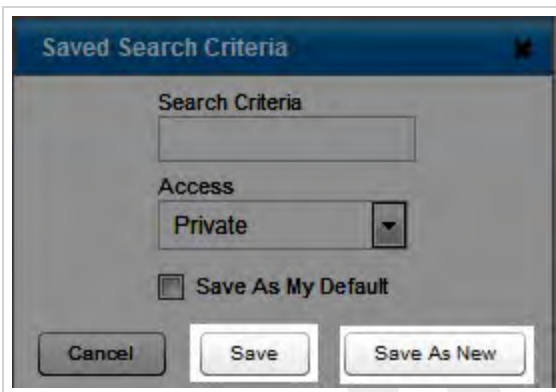
5. Select the checkbox if you want to save this set of criteria as your default set.

6. To save this set of criteria over the currently-applied filter, click **Save**, or, to save it as a new criteria set, click **Save as New**.

SEE ALSO

- **Search QA Evalulations Reference** — for definitions of the fields available as search criteria
- **Using Saved Search Criteria Sets** — for information on how to apply a saved criteria set to a search
- **Removing Saved Search Criteria Sets**— for information on how to delete a saved criteria set

Removing a Saved Search Criteria Set

Uptivity WFO allows you to save sets of search criteria for future use. This topic explains how to delete a saved criteria set when it is no longer needed.

For more information, see QA Evaluations Overview.

1. In the Discover Web Portal, click **Coaching** ➔ **Quality Assurance** ➔ **Search QA Evaluations**.
2. Click **Delete** on the line for the desired criteria set.

Completing an In-Progress Evaluation

This topic explains how you can return to evaluations that you left "in-progress" and change, complete, or delete them. For more information, see QA Evaluations Overview.

1. In the Discover Web Portal, click **Coaching** ➔ **Quality Assurance** ➔ **Search QA Evaluations**.

2. Set your desired search criteria and click **Search**.

3. Double-click the desired evaluation to open it.

4. Click **Edit this QA**.

5. Make any desired changes or updates.

6. 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**.

SEE ALSO

- **Search QA Evaluation Reference** — for information on the search criteria and evaluation information fields shown in the QA Evaluations Listing
- **Perform QA Reference** — for details on fields used in evaluating agent performance

Deleting a QA Evaluation

This topic explains how to delete an evaluation that has previously been submitted. Deleting completed QA evaluations affects reporting and requires individual permission typically granted to very few users. If you believe you should have permission to delete completed evaluations and are unable to do so, contact your Uptivity WFO administrator.
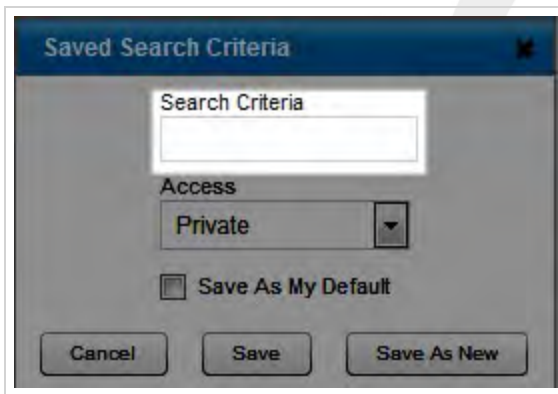
For more information, see QA Evaluations Overview

1. In the Discover Web Portal, click **Coaching ➜ Quality Assurance ➜ Search QA Evaluations**.
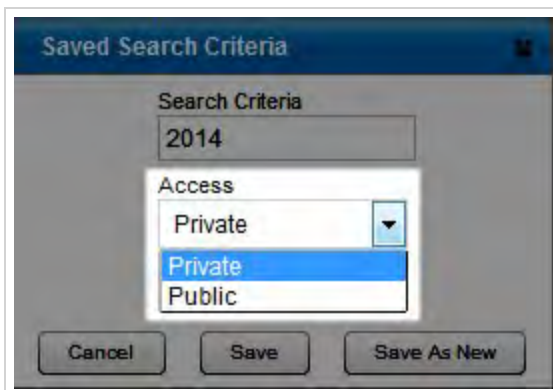
2. Set your desired search criteria and click **Search**.

3. Double-click the desired evaluation to open it.

4. Click **Delete this QA**.

Please give a reason why you are deleting this Completed QA Form

[Confirm Delete] [Cancel]

5. Type a reason for the deletion.

6. Click **Confirm Delete**.

SEE ALSO

- **Search QA Evaluation Reference** — for information on the search criteria and evaluation information fields shown in the QA Evaluations Listing
- **Perform QA Reference** — for details on fields used in evaluating agent performance

Editing a QA Evaluation

This topic explains how to edit an evaluation that has previously been submitted. Editing completed QA evaluations affects reporting and requires individual permission typically granted to very few users. If you believe you should have permission to edit completed evaluations and are unable to do so, contact your Uptivity WFO administrator.

For more information, see QA Evaluations Overview

> ⚠ When you edit a previously-submitted evaluation, the original is overwritten and is not retained by Uptivity WFO.

1. In the Discover Web Portal, click **Coaching** ➜ **Quality Assurance** ➜ **Search QA Evaluations**.

2. Set your desired search criteria and click **Search**.

3. Double-click the desired evaluation to open it.

4. Click **Edit this QA**.

5. Make any desired changes or updates.

6. Click **Submit Q.A. Review**.

SEE ALSO

- **Search QA Evaluation Reference** — for information on the search criteria and evaluation information fields shown in the QA Evaluations Listing

- **Perform QA Reference** — for details on fields used in evaluating agent performance

Managing Calibration

This section is designed for Uptivity WFOusers who set up calibration sessions and perform calibration evaluations.

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.

Uptivity WFO 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 Uptivity WFO:

- Managers/administrators must manually notify evaluators when a calibration evaluation is to be performed. This can be done either outside the Uptivity WFO 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 Adding 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 **Calibration Evaluation** when they start their evaluation. For more information, see Creating a QA Evaluation Form and Performing Calibration Evaluations.

- 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 **Calibration Evaluation** 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 **Calibration Evaluation** 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 WFO Reporting Manual*.

RELATED TASKS

- **Performing Calibration Evaluations**
- **Creating a QA Evaluation Form**
- **Viewing Completed or In-Progress Evaluations**
- **Adding an Item to the Content Library**

RELATED REFERENCES

- **Perform QA Reference**
- **Search QA Evaluation Reference**
- **QA Form Editor Reference**

Performing Calibration Evaluations

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. This topic explains how to perform a calibration evaluation.

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

For more information, see Calibration Overview.

1. In the Discover Web Portal, click **Interactions List** → **Call List**.

2. Locate the designated call using **Call List** filtering tools.

3. Right-click the call and select **Evaluate This Agent** (either in the current window or a new window).
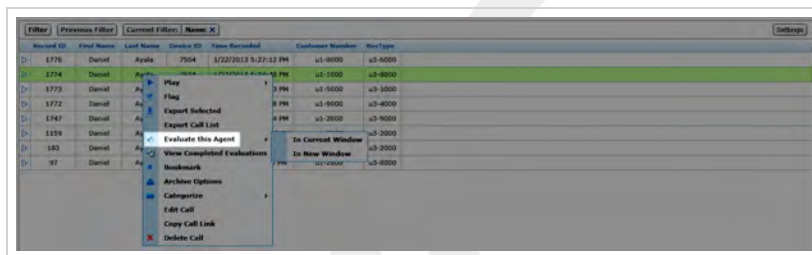
4. Select **Calibration Evaluation**.
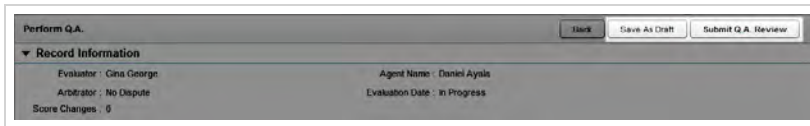
5. Double-click the form you want to use to score the recording and then click **Next**.

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 WFO 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 or submitted successfully, or whether additional information is required. 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.

SEE ALSO

- **Completing an In-Progress Evaluation** — for information on finishing an evaluation
- **Editing a QA Evaluation** — for information on editing a submitted evaluation
- **Perform QA Reference** - for details on fields used in evaluating agent performance

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

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

ACKNOWLEDGMENT WORKFLOW

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 Discover 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 a workflow branch.

Acknowledged Evaluations

If the agent acknowledges the evaluation, it moves to Reviewed Assignments in the agent's Assignment Inbox and has a status of Acknowledged in the list of QA Acknowledgments. Agents cannot interact with any buttons on an acknowledged evaluation or add additional questions or comments.

Questioned Evaluations

If the agent questions the evaluation, it moves to Pending Assignments and has a status of Question in the list of QA Acknowledgments. Agents cannot interact with any buttons on a questioned evaluation or add additional questions or comments.

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.

ARBITRATION WORKFLOW

When the 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 available for use with the 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. If a selected arbitrator changes roles, permissions, or both, disputed evaluations can become stranded. Therefore, inContact recommends selecting more than one arbitrator. The evaluator should also designate the completed evaluation as "Agent Acknowledgment Required.".
- 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 Discover 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 workflow branches. Acknowledged and questioned evaluations were discussed earlier in this topic.

Disputed Evaluations

If the agent disputes the evaluation, it moves to Pending Assignments and has a status of Dispute in the list of QA Acknowledgments. Agents cannot interact with any buttons on a disputed evaluation or add additional questions or comments.

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 the evaluation is designated as the arbitrator for that evaluation, even if they don't edit or rescore it. Any later attempts by other arbitrators to make changes will result in a message indicating another arbitrator has already rescored the evaluation and that no new changes have been or can be saved.

Once the arbitrator has replied, the evaluation's status changes to Completed, 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.

EVALUATION COMMENTS

Evaluations include Comments fields for 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.

NOTIFICATIONS

Agents are notified about the status of their evaluations, and can access the evaluations from their Assignment Inbox. Evaluators and arbitrators receive email notifications when an agent questions or disputes an evaluation.

RELATED TASKS
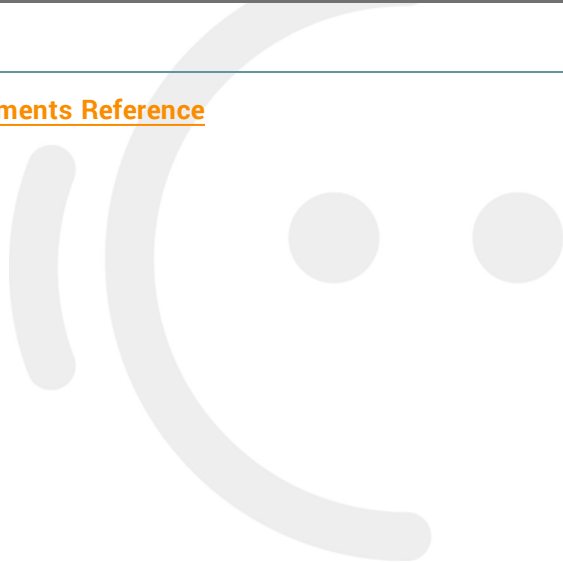
- **Acknowledging QA Evaluations**
- **Disputing QA Evaluations**
- **Questioning QA Evaluations**
- **Responding to Questioned QA Evaluations**
- **Responding to Disputed QA Evaluations**
- **Viewing QA Acknowledgments**

Related References

RELATED REFERENCES

- **Search QA Acknowledgments Reference**

Acknowledging a QA Evaluation

If your organization uses the Uptivity WFO QA review process, agents can review, question, and acknowledge evaluations after they have been submitted. This topic explains how to acknowledge an evaluation.

For more information, see QA Review Process Overview.

1. In the Discover Web Portal, click **Home** ➔ **Assignment Inbox** ➔ **New Assignments**.
2. Click the desired evaluation to open it.

3. Review the evaluation and **Add a Comment** if desired.

4. Click **Acknowledge**.

SEE ALSO

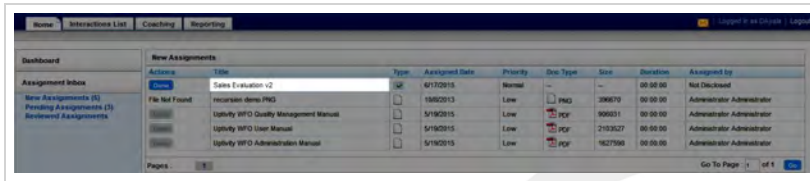- **Assignment Inbox Reference[href]** — for explanations of the information provided for each evaluation
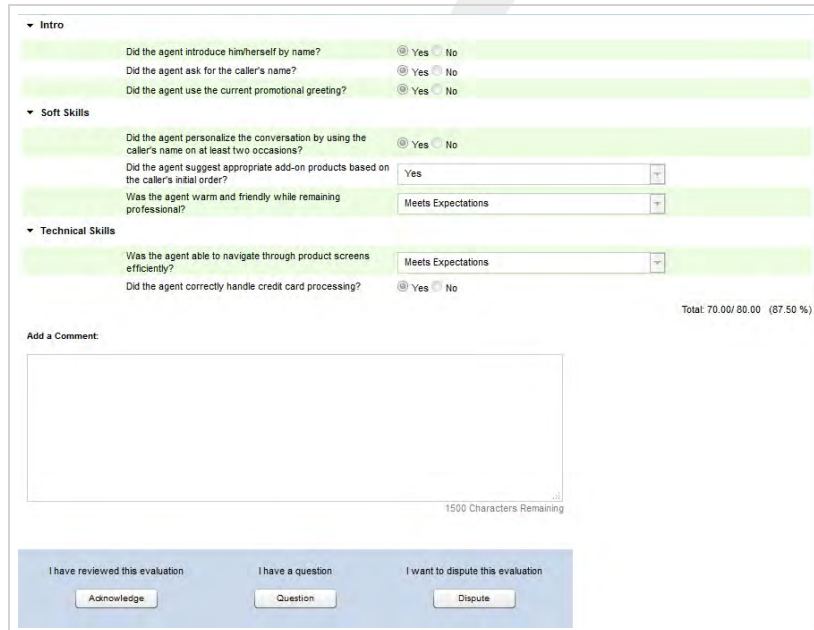
Questioning a QA Evaluation

If your organization uses the Uptivity WFO QA review process, agents can review, question, and acknowledge evaluations after they have been submitted. This topic explains how to question an evaluation.

For more information, see QA Review Process Overview.

> ⓘ The **Add a Comment** field is required for questioned evaluations.

1. In the Discover Web Portal, click **Home → Assignment Inbox → New Assignments**.
2. Click the desired evaluation to open it.

3. Review the evaluation and **Add a Comment**.

4. Click **Question** .

SEE ALSO

- **Dispute a QA Evaluation** — for information on disputing the evaluation
- **Acknowledge a QA Evaluation** — for information on acknowledging the evaluation
- **Assignment Inbox Reference[href]** — for explanations of the information provided for each evaluation

Disputing a QA Evaluation

If your organization uses the Uptivity WFO QA review process, agents can review, question, and acknowledge evaluations after they have been submitted.

When the Arbitration workflow has been enabled for an evaluation form, agents can also choose to dispute the evaluation.

For more information, see QA Review Process Overview.

> ℹ The **Add a Comment** field is required for disputed evaluations.

1. In the Discover Web Portal, click **Home → Assignment Inbox → New Assignments**.

2. Click the desired evaluation to open it.

3. Review the evaluation and **Add a Comment**.

4. Click **Dispute** .

SEE ALSO

- **Question a QA Evaluation** — for information on submitting a question about the evaluation
- **Acknowledge a QA Evaluation** — for information on acknowledging the evaluation
- **Assignment Inbox Reference[href]** — for explanations of the information provided for each evaluation

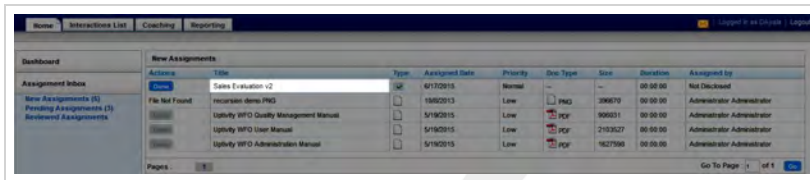# Responding to a Questioned QA Evaluation

If your organization uses the Uptivity WFO QA review process, agents can review, question, and acknowledge evaluations after they have been submitted. This topic explains how to respond to a questioned evaluation.

For more information, see QA Review Process Overview.

RESPONDING TO A QUESTIONED EVALUATION FROM AN EMAIL

1. Click the link in the email you received from Uptivity WFO.
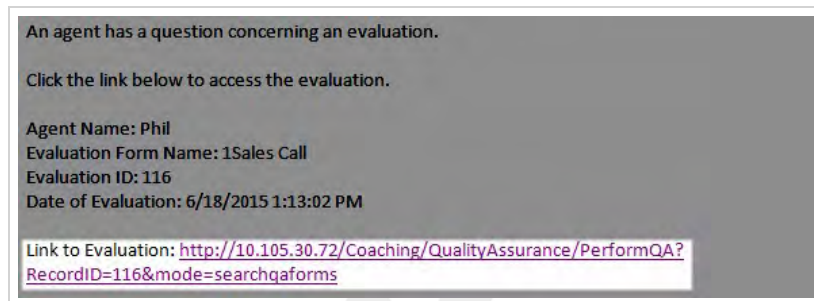
2. (Optional) Log in to Uptivity WFO if necessary.

3. Click **Edit this QA**.

4. **Add a Comment** to respond to the agent's question(s).
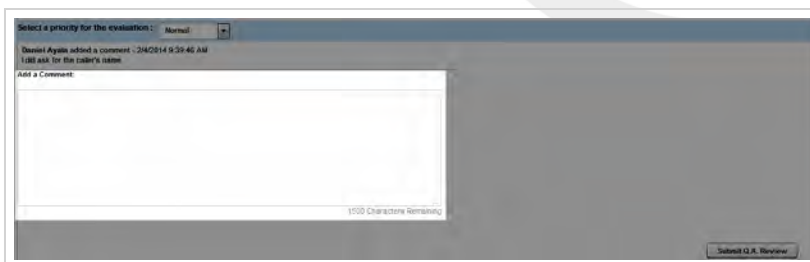
5. Click **Submit QA Review**.

RESPONDING TO A QUESTIONED EVALUATION FROM THE DISCOVER WEB PORTAL

1. In the Discover Web Portal, click **Coaching** → **Quality Assurance** → **Search QA Evaluations**.

2. Select the necessary criteria to find your questioned evaluations, then click **Search**.
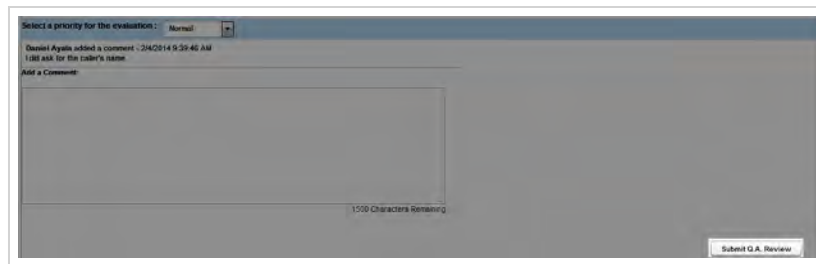
3. Click a questioned evaluation to open it.

4. Click **Edit this QA**.

5. **Add a Comment** to respond to the agent's question(s).

6. Click **Submit QA Review**.

SEE ALSO

- **Search QA Evaluations Reference** — for information on the search criteria and evaluation information fields shown in the QA Evaluations Listing.

Responding to a Disputed QA Evaluation

If your organization uses the Arbitration workflow, evaluators may be designated as evaluation arbitrators, based on the 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. This topic explains how to respond to a disputed evaluation.

For more information, see QA Review Process Overview.

RESPONDING TO A DISPUTED EVALUATION FROM AN EMAIL

1. Click the link in the email you received from Uptivity WFO.
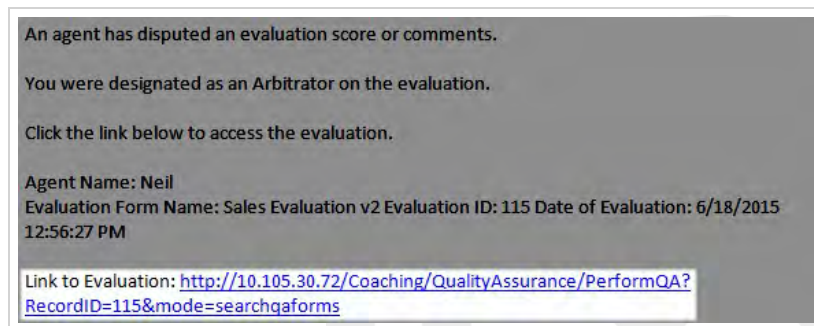
2. (Optional) Log in to Uptivity WFO if necessary.

3. Click **Edit this QA**.

4. Review the evaluation, changing scores if applicable.

5. (Optional) **Add a Comment** to explain score changes or add other pertinent information about your review.

81
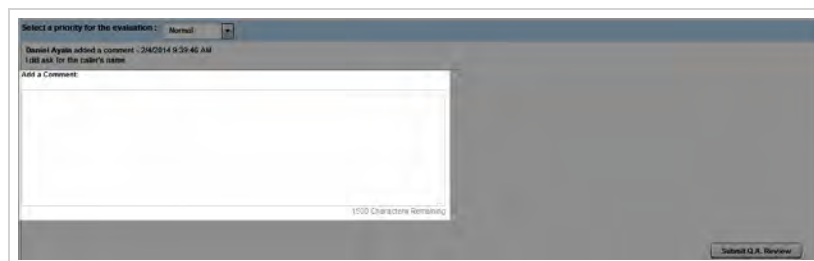
6. Click **Submit QA Review**.

RESPONDING TO A DISPUTED EVALUATION FROM THE DISCOVER WEB PORTAL

1. In the Discover Web Portal, click **Coaching** ➔ **Quality Assurance** ➔ **Search QA Acknowledgments**.

2. Select criteria to find disputed evaluations within your desired search period and click **Search**.

3. Click any disputed evaluation for which no arbitrator is listed.

4. Click **Edit this QA**.

5. Review the evaluation, changing scores if applicable.

6. (Optional) **Add a Comment** to explain score changes or add other pertinent information about your review.

7. Click **Submit QA Review**.
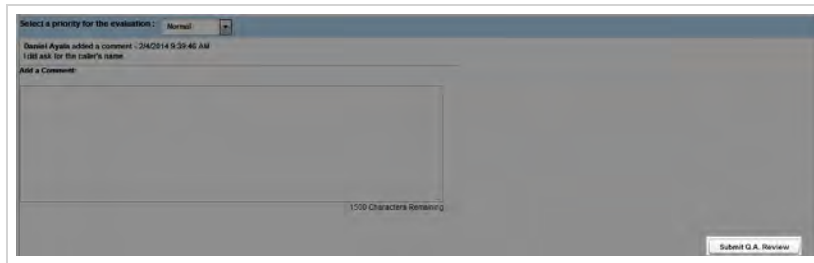
SEE ALSO

- **Search QA Acknowledgments Reference** — for information on the search criteria and evaluation information fields shown in the QA Acknowledgments Listing
- **Perform QA Reference** — for details on fields used in evaluating agent performance
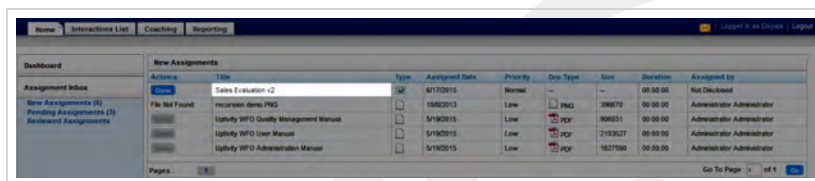
Viewing QA Acknowledgments

If your organization uses the Uptivity WFO QA review process, agents can review, question, and acknowledge evaluations after they have been submitted. This topic explains how to view the acknowledgment status for a list of evaluations.

For more information, see QA Review Process Overview.

1. In the Discover Web Portal, click **Coaching** ➔ **Quality Assurance** ➔ **Search QA Acknowledgments**.
2. Select any desired criteria.

3. Click **Search**.

SEE ALSO

- **Search QA Acknowledgments Reference** — for information on the search criteria and evaluation information fields shown in the QA Acknowledgments Listing

Search QA Acknowledgments Reference

The Search QA Acknowledgments page enables you 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.

You can also use the Search QA Evaluations page to see evaluations in a Question or Dispute status. However, this search will not show you whether or not an evaluation has been acknowledged.

For more information, see QA Review Process Overview.

Search Criteria

Form

» Displays the name of the form assigned by its creator. You can choose a single form or use the default of all forms. Available choices are limited by the forms to which you have access.

Agent

» Displays the names of all agents to whom you have access. You can choose a single agent or use the default of all agents.

Agent Status

» Allows you to filter your search by the statuses which can be applied to agents: Active or Inactive. You can select one status or use the default of all statuses.

Evaluator

» Displays Uptivity WFO users to whom you have access who have permission to evaluate calls. You can choose a single evaluator or use the default of all evaluators.

Arbitrator

» Displays Uptivity WFO users to whom you have access who have been marked as an arbitrator on a previous evaluation. You can choose a single arbitrator or use the default of all arbitrators.

Group

» Displays the Uptivity Groups to which you have access. You can choose a single group or use the default of all groups.

Acknowledgment Required

» Allows you to filter your search by the values of 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.

Acknowledgment Status

» Allows you to filter your search by these acknowledgment statuses: Acknowledged, Unacknowledged, Question, or Dispute. The default value is All.

Start Date

» Allows you to select a starting date as part of a date range. The default value is one week prior to the current date. Applies to the date the evaluation was submitted.

End Date

» Allows you to select an ending date as part of a date range. The default value is the current date. Applies to the date the evaluation was submitted.

Acknowledgment Information Fields

Agent Name

» Displays the name of the agent who was evaluated.

QA Form

» Displays the name of the form used for this evaluation.

Evaluator

» Displays the name of the user who performed the evaluation.

Arbitrator

» Displays the name of the user designated as arbitrator for the evaluation.

Group

» Displays the name of the Uptivity Group to which this agent belongs and with which this QA form is associated.

Evaluation Date

» Displays the date on which the evaluation was submitted.

Acknowledgment Date

» Displays the date on which this evaluation was acknowledged by the agent.

Status

» Displays the current acknowledgment status of the evaluation.

Acknowledgment Required

» Displays a value of either Yes or No. "Yes" indicates the QA form required agent acknowledgment and the evaluator sent the evaluation to an agent for acknowledgment. "No" indicates the QA form did not require an acknowledgment but the evaluator chose to send the evaluation to an agent for acknowledgment.

RELATED TASKS

- **Viewing QA Acknowledgments**
- **Responding to a Disputed QAEvaluation**

Managing the Content Library

This section is designed for Uptivity WFO users who manage the **Content Library**.

Content Library Overview

The **Content Library** enables you 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 procedure and policy guides,
- Saved Web pages, which can serve as links to an organization's website, blog, or knowledgebase,
- Powerpoint files, such as training or product presentations, or
- Call recordings exported from Uptivity WFO 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 agents will only see those items assigned to the Uptivity Groups to which they 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 Uptivity WFO administrator.

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

When you add an item to the **Content Library** and assign it to an Uptivity 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 Discover Web Portal. Depending on your system configuration, agents may also be notified via email about the new content.

RELATED TASKS

- **Adding Items to the Content Library**
- **Editing Items in the Content Library**
- **Deleting Items from the Content Library**
- **Accessing Items in the Content Library**
- **Creating Categories in the Content Library**
- **Editing Categories in the Content Library**
- **Deleting Categories in the Content Library**
- **Viewing the Agent and Group List**
- **Viewing Content Acknowledgments**

RELATED REFERENCES

- **Content Library Reference**
- **Add Content Reference**

Adding an Item to the Content Library

The **Content Library** enables you to upload files that can be shared with agents who have access to the Discover Web Portal. This topic explains how to add an item to the **Content Library**.

For more information, see [Content Library Overview](#).

1. In the Discover Web Portal, click **Coaching** → **Manage Content** → **Add Content**.

2. Click **Browse**, navigate to the file you want to add to the library, and click **Open**.
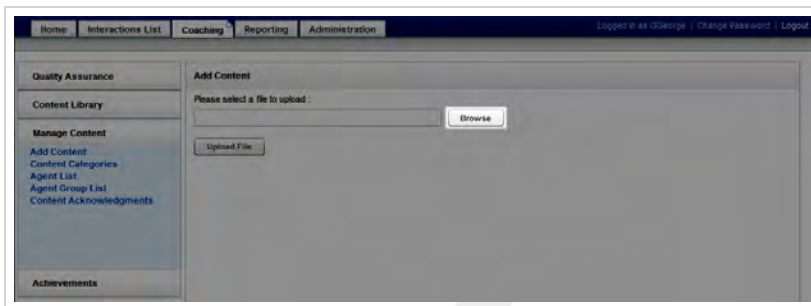
3. Click **Upload File**.
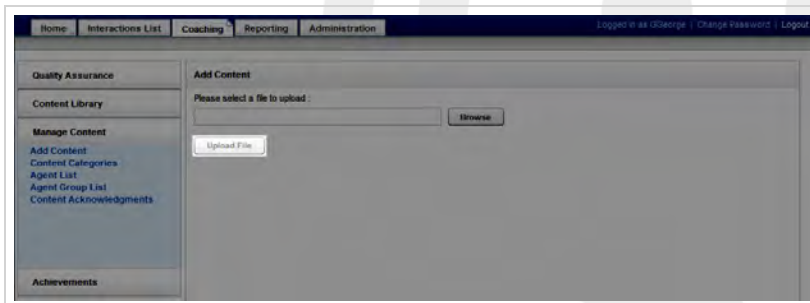
4. Type a **Title**.
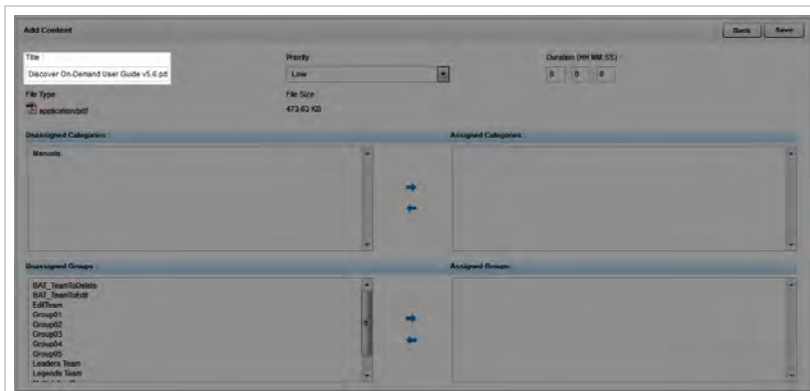
5. Select a **Priority** if desired.
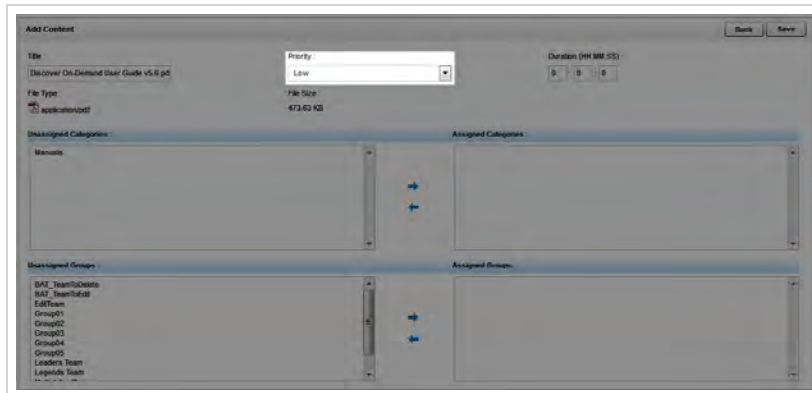
6. Type a **Duration** if desired.

7. Select the category(ies) in which this item will appear.
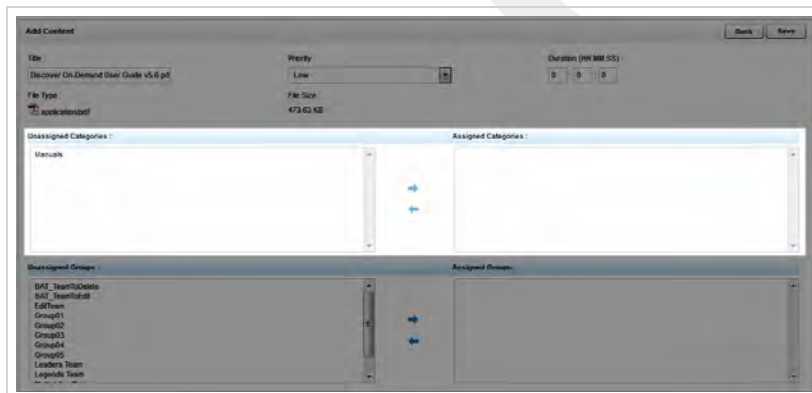
8. Select the Uptivity Groups which should have access to this item.

9. Click **Save**.

SEE ALSO

- **Add Content Reference** — for details on fields used in adding an item to the **Content Library**

Add Content Reference

The Add Content page is used to upload files that can be shared with agents via the **Content Library**. This topic explains the fields that appear on the Add Content page.

For more information, see Content Library Overview.

Add Content Fields

Title *

» Allows you to create a meaningful name for the item as it will appear to users of the **Content Library**. The default value is the filename.

Priority

» Allows you to assign a priority to indicate how quickly users should review the item. Available choices are *Low*, *Normal*, and *High*. The default value is *Low*.

Duration

» Allows you to provide an estimate for the length of time it should take a user to review the item. Format is HH:MM:SS.

File Type

» Displays the underlying file type of the item, such as PDF, Excel (.xls), Word (.doc), and so forth.

File Size

» Displays the size of the underlying file.

Unassigned Categories

» Displays a list of all **Content Library** categories to which the item can be assigned. You can use the right and left arrow icons to move the item between **Unassigned Categories** and **Assigned Categories**.

Assigned Categories

» Displays a list of the **Content Library** categories to which this item is assigned. You can use the right and left arrow icons to move the item between **Unassigned Categories** and **Assigned Categories**.

Unassigned Groups

» Displays a list of all Uptivity Groups to which the item can be assigned. You can use the right and left arrow icons to move the item between **Unassigned Groups** and **Assigned Groups**.

Assigned Groups

» Displays a list of the Uptivity Groups to which this item is assigned. You can use the right and left arrow icons to move the item between **Unassigned Groups** and **Assigned Groups**.

## RELATED TASKS

- **Adding Items to the Content Library**

Accessing Items in the Content Library
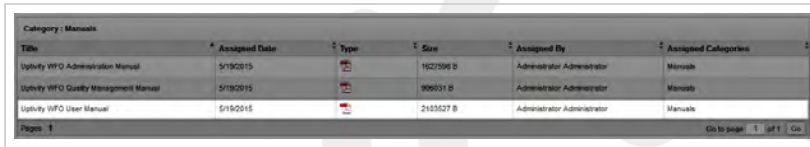
The **Content Library** enables supervisors to upload files to be shared with agents who have access to the Web Portal. This topic explains how to access items within the **Content Library**.

For more information, see Content Library Overview.

1. In the Discover Web Portal, click **Coaching �జ Content Library**.

2. Click the desired category.
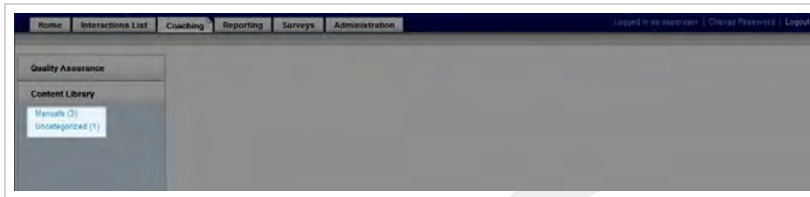
3. Click the desired item in the category content list, and open or save the file as directed by your web browser.

SEE ALSO

- **Content Library Reference** — for details on the information fields shown in the **Content Library** category content list

Editing Items in the Content Library

The **Content Library** enables you to upload files to be shared with agents who have access to the Web Portal. This topic explains how to edit the fields that describe items within the **Content Library**. It does not cover how to edit the underlying file for an item.

For more information, see Content Library Overview.

1. In the Discover Web Portal, click **Coaching** ➔ **Content Library**.

2. Click the desired category.
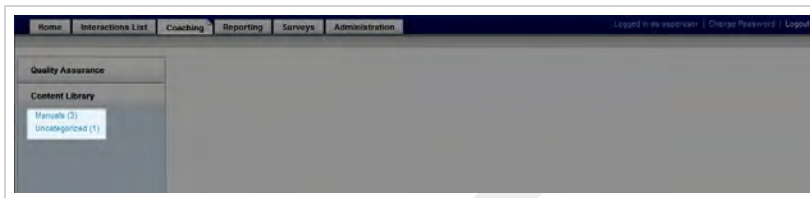
3. Click **Edit** for the desired item in the category content list.

4. Edit the desired fields for the item.

5. Click **Save**.

SEE ALSO

- **Content Library Reference** — for details on the information fields shown in the **Content Library** category content list
- **Add Content Reference** — for details on fields used to describe an item in the **Content Library**

Deleting Items from the Content Library

The **Content Library** enables you to upload files to be shared with agents who have access to the Web Portal. This topic explains how to delete an item from the **Content Library**.

For more information, see [Content Library Overview](#).

> ⚠ Deleting an item from the **Content Library** only removes it from the Discover Web Portal. It does not remove the underlying file from your system server. You should always notify your Uptivity WFO application administrator when you delete items from the **Content Library**.

1. In the Discover Web Portal, click **Coaching** ➜ **Content Library**.

2. Click the desired category.
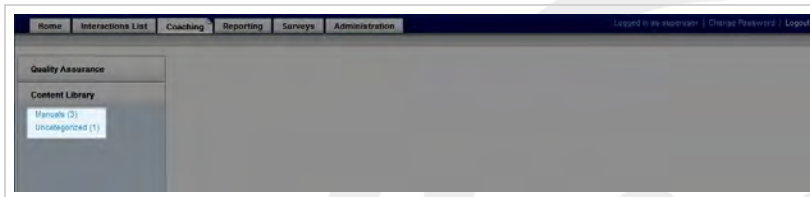
3. Click **Delete** for the desired item in the category content list.

4. Click **Okay**.

SEE ALSO

- **Content Library Reference** — for details on the information fields shown in the **Content Library** category content list

Content Library Reference

The **Content Library** enables you to upload files that can be shared with agents who have access to the Discover Web Portal.

For more information, see Content Library Overview.

Library Item Information Fields

> ℹ️ You can sort the list of library items by clicking on any column header.

Title

» Displays the name of the item assigned at the time it was uploaded to the **Content Library**.

Assigned Date

» Displays the date the content was uploaded to the **Content Library**.

Type

» Displays the underlying file type of the item, such as PDF, Excel (.xls), Word (.doc), and so forth.

Size

» Displays the size of the underlying file. Individual files cannot exceed 10 MB, and this limit can be lowered upon request by the Uptivity WFO Support team.

Assigned By

» Displays the name of the user who originally uploaded the item to the **Content Library**.

Assigned Categories

» Displays all of the **Content Library** categories to which this item is assigned.

Actions

» Displays buttons for the actions that can be taken on library items: **Edit** and **Delete**.

RELATED TASKS

- **Adding Items to the Content Library**
- **Accessing Items in the Content Library**
- **Creating Categories in the Content Library**

- [Editing Categories in the Content Library](#)
- [Deleting Categories in the Content Library](#)
- [Viewing the Agent and Group List](#)
- [Viewing the Agent List](#)
- [Viewing Content Acknowledgments](#)

Creating Content Library Categories

Content Library categories allow you to assign 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 Uptivity WFO. This topic explains how to create a category.

For more information, see Content Library Overview.

1. In the Discover Web Portal, click **Coaching ➜ Manage Content ➜ Content Categories**.

2. Type a **Title** for the new category.
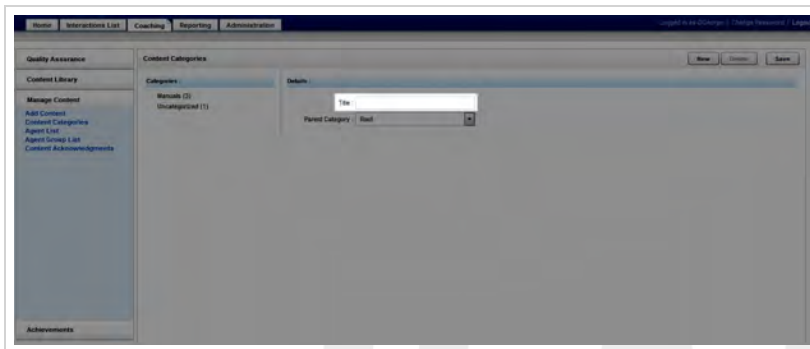
3. For **Parent Category**, select *Root* or select an existing category if the new category is a sub-category.
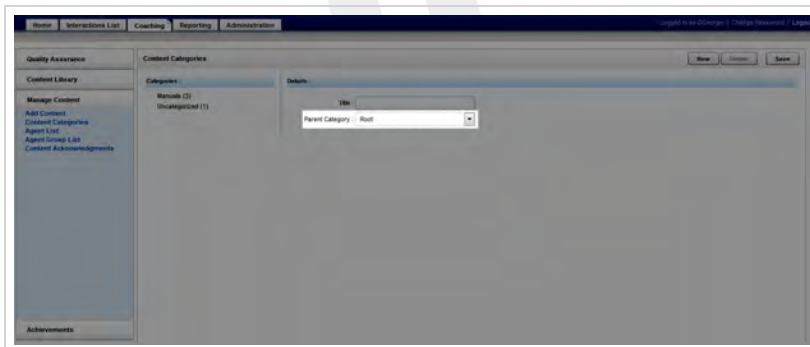
4. Click **Save**.
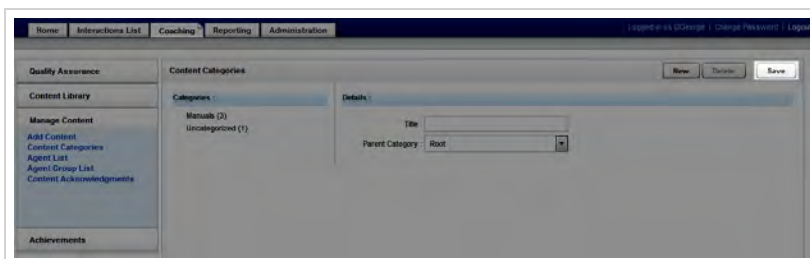
SEE ALSO

- **Content Categories Reference** — for details on the fields shown on the **Content Categories** page

Editing Content Library Categories

Content Library categories allow you to assign content to the appropriate users and make the content easy for them to find. This topic explains how to edit a category.

For more information, see [Content Library Overview](#).

1. In the Discover Web Portal, click **Coaching** ➜ **Manage Content** ➜ **Content Categories**.
2. Click the category you want to edit.
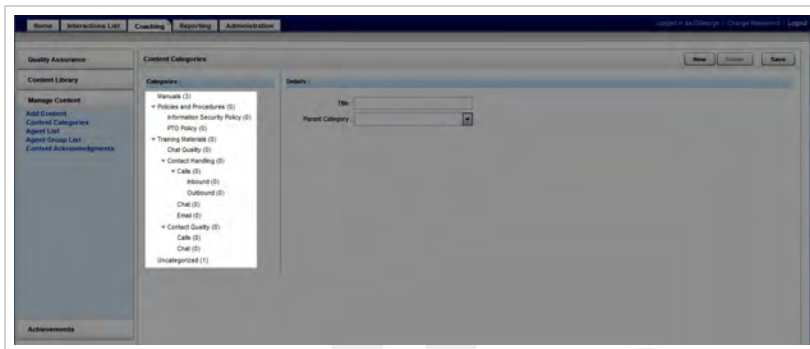
3. Edit the **Title** or **Parent Category** as desired.
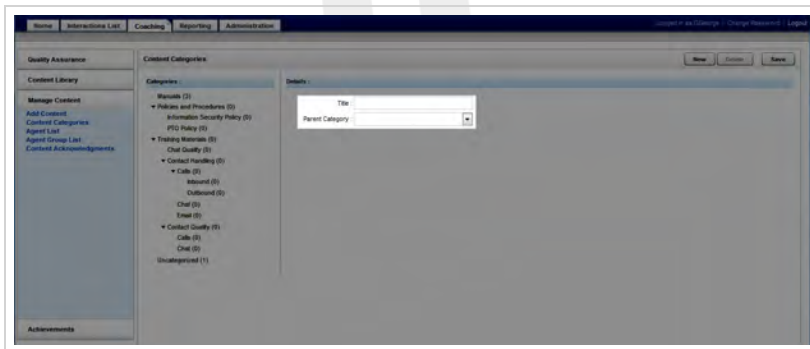
4. Click **Save**.
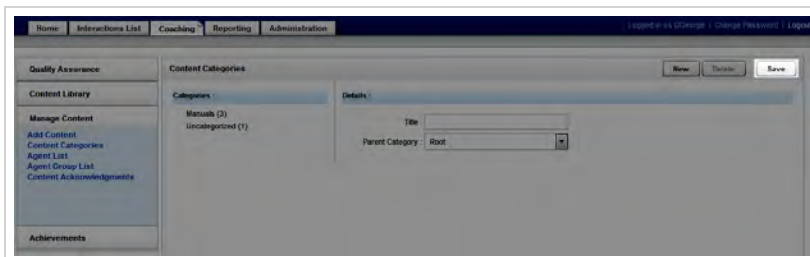
SEE ALSO

- **Content Categories Reference** — for details on the fields shown on the **Content Categories** page

Deleting Content Library Categories

Content Library categories allow you to assign content to the appropriate users and make the content easy for them to find. This topic explains how to delete a category.

For more information, see Content Library Overview.

1. In the Discover Web Portal, click **Coaching** ➔ **Manage Content** ➔ **Content Categories**.

2. Click the category you want to delete.
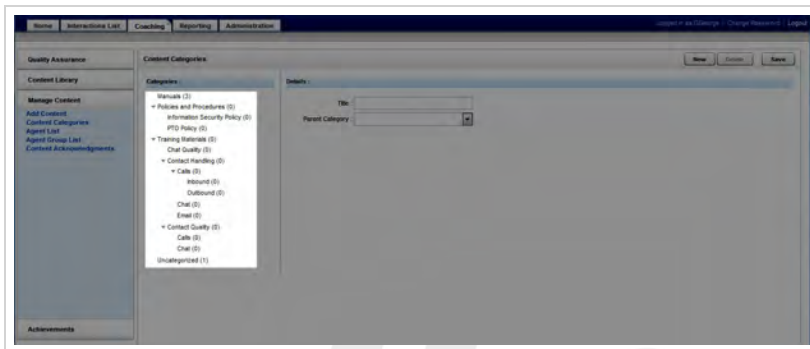
3. Click **Delete**.
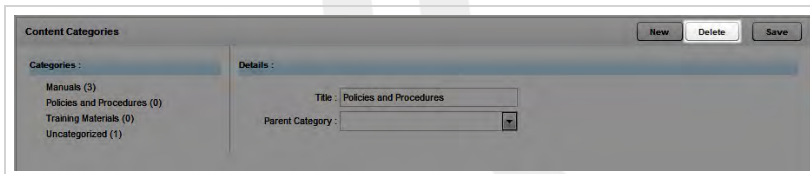
4. Click **OK**.
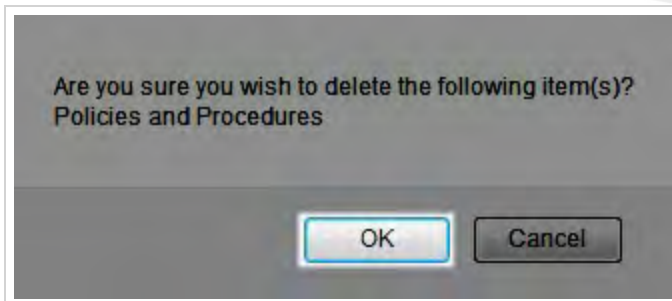
SEE ALSO

- **Content Categories Reference** — for details on the fields shown on the **Content Categories** page

Content Categories Reference

The Content Categories page is used manage categories in the **Content Library**. Categories allow you to assign content to the appropriate users and make the content easy for them to find. This topic explains the fields that appear on the Content Categories page.

For more information, see Content Library Overview.
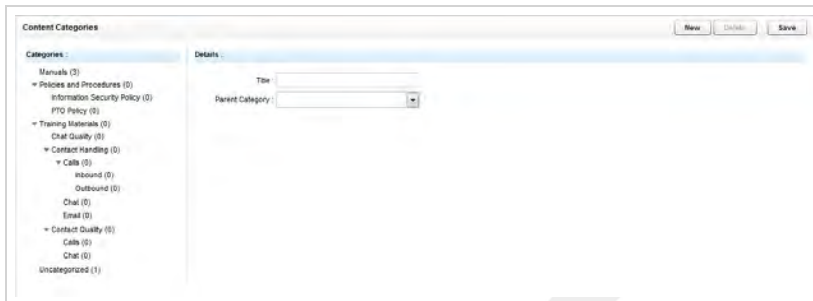
Categories

This pane displays a hierarchical list of all current content categories. You can use parent/child relationships to organize items within the Content Library. inContact recommends against nesting more than two levels deep.

Details

Title *

» Allows you to create a meaningful name for this category as it will appear to users of the **Content Library**.

Parent Category

» Allows you to create hierarchical relationships between categories if desired. Available values are *Root* and all other existing categories.

RELATED TASKS

- **Creating Content Library Categories**
- **Editing Content Library Categories**
- **Deleting Content Library Categories**

Viewing the Agent Group List

This topic explains how to the display the **Agent Group List**, one of two report-style lists associated with the Uptivity WFO **Content Library**.

For more information, see Content Library Overview.

The **Agent Group List** shows each Uptivity Group to which agents can be assigned and the number of agents in that group.

1. In the Discover Web Portal, click **Coaching ➜ Manage Content ➜ Agent Group List**.

Viewing the Agent List

This topic explains how to the display the **Agent List**, one of two report-style lists associated with the Uptivity WFO **Content Library**.

For more information, see [Content Library Overview](#).

The **Agent Group List** shows each Uptivity Group to which agents can be assigned and the number of agents in that group. or if you need to load multiple documents for a group.

The **Agent List** shows each agent, the number of Uptivity Groups to which he belongs, and the number of documents assigned to the agent. This information may be useful if you need to track the total number of items assigned to an agent who is in multiple groups

1. In the Discover Web Portal, click **Coaching ➜ Manage Content ➜ Agent List**.
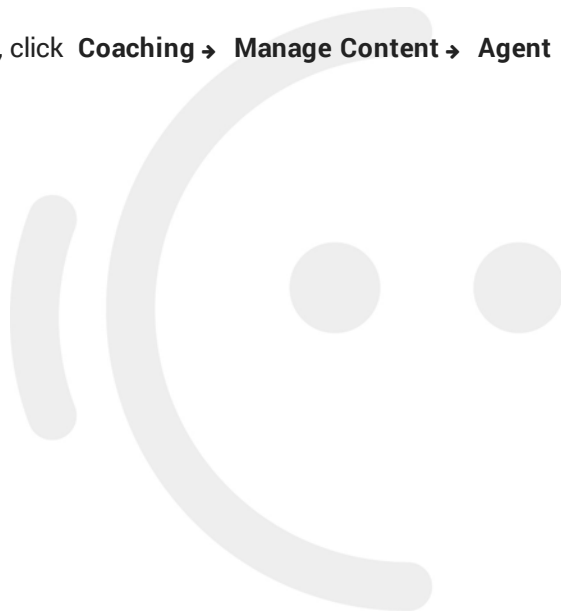
Viewing Content Acknowledgments

Content acknowledgments enable you to see which agents have or have not reviewed or acknowledged their assigned items in the **Content Library**. This topic explains how to view content acknowledgments.

For more information, see Content Library Overview.

1. In the Discover Web Portal, click **Coaching** ➔ **Manage Content** ➔ **Content Acknowledgments**.

2. Specify any desired search criteria and then click **Search**.

SEE ALSO

- **Search Content Acknowledgments Reference** — for details on fields used in searching for and viewing content acknowledgments

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Search Content Acknowledgments Reference

The **Search Content Acknowledgments** page enables you to search for and view agents in relation to the **Content Library** and see who has not reviewed or acknowledged their assigned content.

For more information, see Content Library Overview.

Search Criteria

Form

» Displays a list of all items ever added to the **Content Library**. You can choose a single item or use the default value of *All*.

Category

» Displays a list of current **Content Library** categories. You can choose a category or use the default value of *All*.

Group

» Displays a list of the Uptivity Groups to which you have access. You can choose a single group or use the default value of *All*.

Agent

» Displays a list of all agents to whom you have access. You can choose a single agent or use the default value of *All*.

Agent Status

» Displays a list of the statuses which can be applied to agents: *Active* or *Inactive*. You can select one status or use the default of *All*.

Acknowledgment Status

» Displays a list of the statuses which can be applied to acknowledgments: *Pending* or *Reviewed*. You can select one status or use the default of all statuses.

Date Type

» Allows you to specify the date to which a date range is applied during your search. Available choices are *Assigned Date*, *Due Date*, and *Reviewed Date*. The default is *Assigned Date*.

Start Date

» Allows you to select a starting date as part of a date range. The default value is the current date. Applies to the date selected in **Date Type**.

End Date

» Allows you to select an ending date as part of a date range. The default value is the current date. Applies to the date selected in **Date Type**.

Acknowledgment Information Fields

ⓘ To sort the results list by the contents of any column, click on that column's header.

Agent Name

» Displays the name of the agent to whom a content item was assigned.

Content Title

» Displays the name of the content item.

Assigned Date

» Displays the date the content was uploaded to the **Content Library**.

Due Date

» Displays the date by which the agent should review the assigned content.

Reviewed Date

» Displays the date on which the agent actually reviewed the content, or, if the agent has not completed the assignment, *Not Reviewed*.

Priority

» Displays the priority level assigned to the content item when it was uploaded to the **Content Library**.

Type

» Displays the underlying file type of the item, such as PDF, Excel (.xls), Word (.doc), and so forth.

Size

» Displays the size of the underlying file.

Assigned by

» Displays the name of the user who originally uploaded the item to the **Content Library**.

Categories

» Displays all of the **Content Library** categories to which this item is assigned.

Reviewed

» Displays *Yes* or *No* depending on whether the agent has reviewed the content item.

RELATED TASKS

- [Viewing Content Acknowledgments](#)

Managing Achievements

This section is designed for Uptivity WFO users who manage and award achievements.

Achievements Overview

Uptivity WFO 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 Uptivity WFO Achievements, you can:

- Create custom achievements that can be awarded to individual agents or particular Uptivity 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 Uptivity WFO 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 Uptivity 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.

An achievement type can have an open-ended award period, or specific start and end dates that indicate when the achievement can be awarded. You cannot add achievement types with overlapping start and end dates for the same agents, Uptivity Group, or QA form (if applicable).

Each achievement type must specify the number of points to be awarded and the individual agents or Uptivity Groups eligible to receive the award. 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.

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 the current date or later, and the end date, if any, to be after the new start date. Edits to an achievement type do not affect achievements that have already been awarded.

> ⓘ 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.

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 Uptivity WFO 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 WFO 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 Uptivity WFO 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 Uptivity Groups, until the achievement end date is reached.
- If an achievement is awarded to multiple Uptivity 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 Uptivity WFO 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 Uptivity 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 Uptivity WFO administrator.

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

RELATED TASKS

- **Adding Achievement Types**
- **Viewing Achievement Types**
- **Editing Achievement Types**
- **Awarding Ad Hoc Achievements**
- **Uploading Custom Achievement Icons**

- **Viewing Awarded Achievements**
- **Viewing Agent Achievements Detail**
- **Deleting Agent Achievements**

RELATED REFERENCES

- **Achievement Types Reference**
- **Add Achievement Type Reference**
- **Awarded Achievements Reference**
- **Agent Achievements Detail Reference**

Adding Achievement Types

Uptivity WFO allows you to create a variety of achievement types which can be awarded on either an automated or ad hoc basis. This section explains how to create an achievement type.

For more information, see Achievements Overview.

1. In the Discover Web Portal, click **Coaching** ➔ **Achievements** ➔ **Achievement Types**.

2. Click **Add New Achievement Type**.
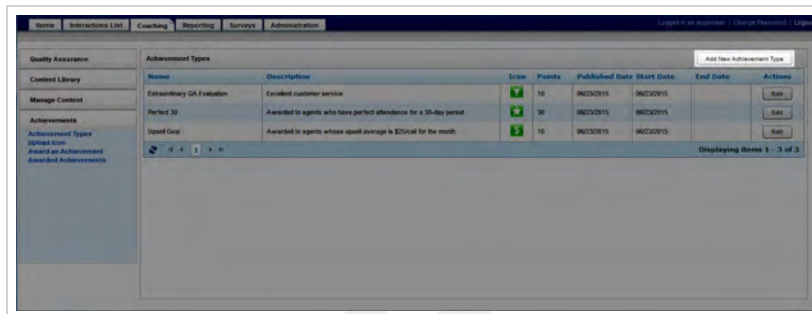
3. Type a **Name** for the achievement.
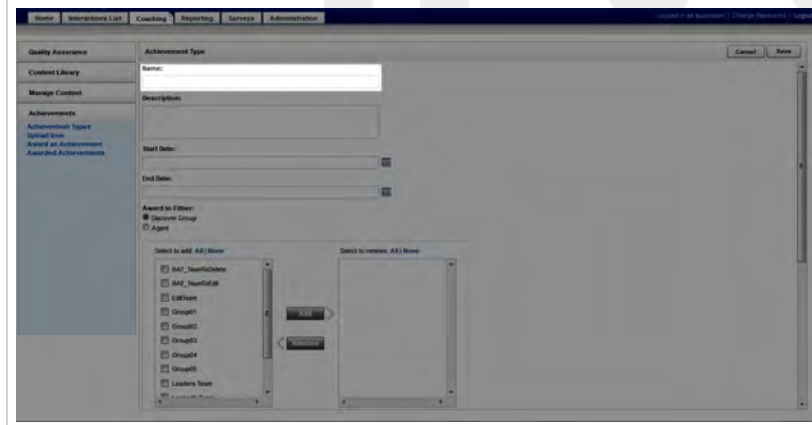
4. If desired, type a **Description**.
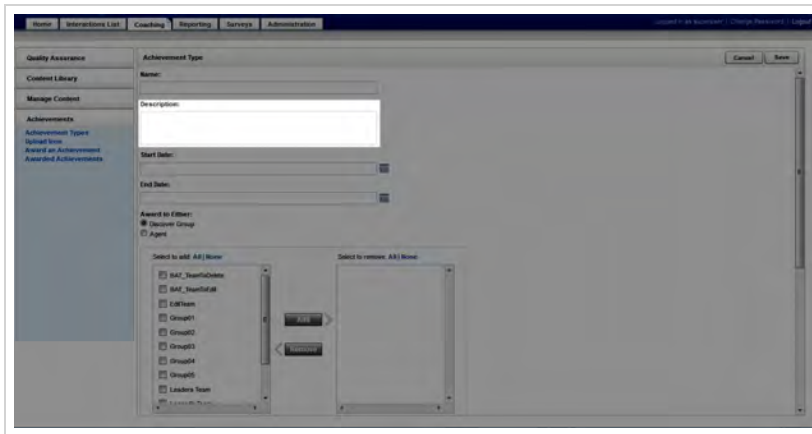
5. Enter a **Start Date** and, if desired, an **End Date** for the award period.
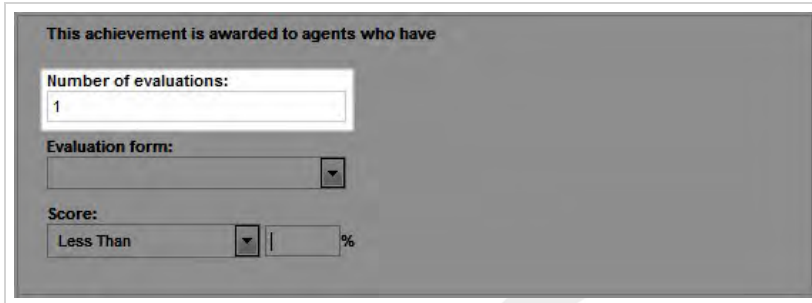
6. Specify whether eligibility for this achievement is by Uptivity Group Group or individual agent, and move the eligible groups/agents from the left column to the right.
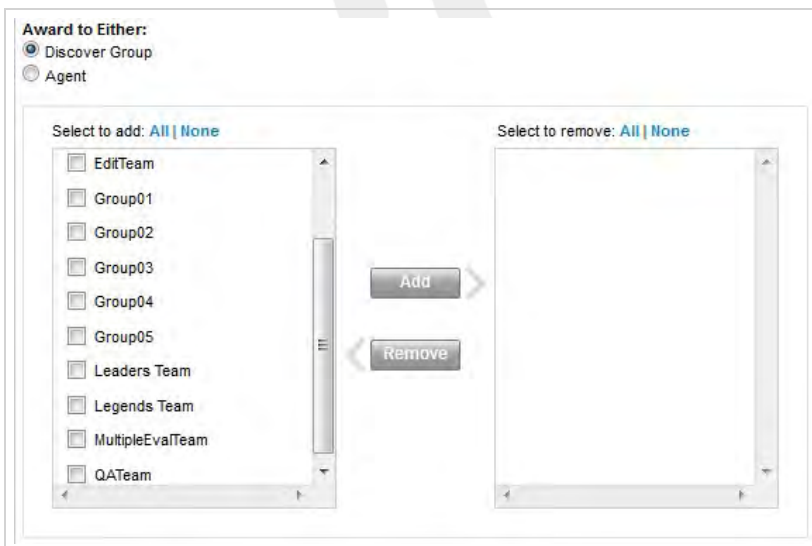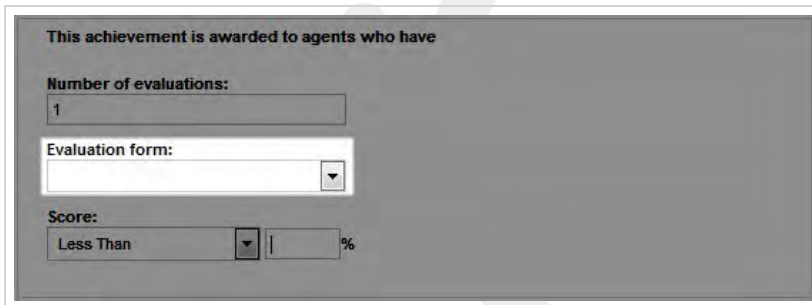
7. Select your desired **Criteria**. If you select *Ad Hoc*, skip to step 11.
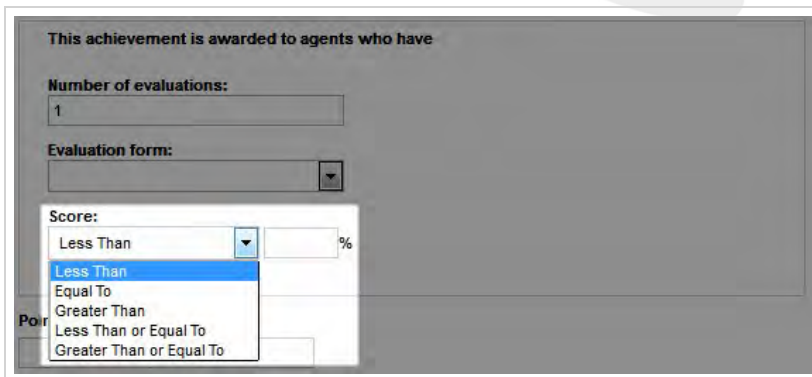
8. Type the desired **Number of evaluations**.

9. Select an **Evaluation form**.

10. Type a value in **Score** and specify the desired parameter (such as Less Than).

11. Type the number of **Points** to be awarded for the achievement.

12. If applicable, enter an end **Date** or **Number of days** for **Points Expiration**.

13. If desired, click the currently-displayed icon and select a new one from the available icon options, then click **OK**.
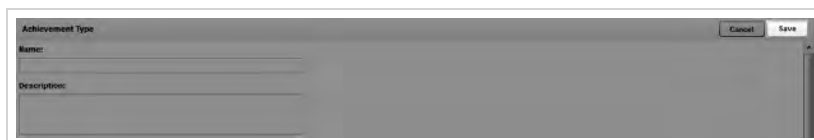
14. For **Post To**, select at least one notification method.

15. Click **Save**.

SEE ALSO
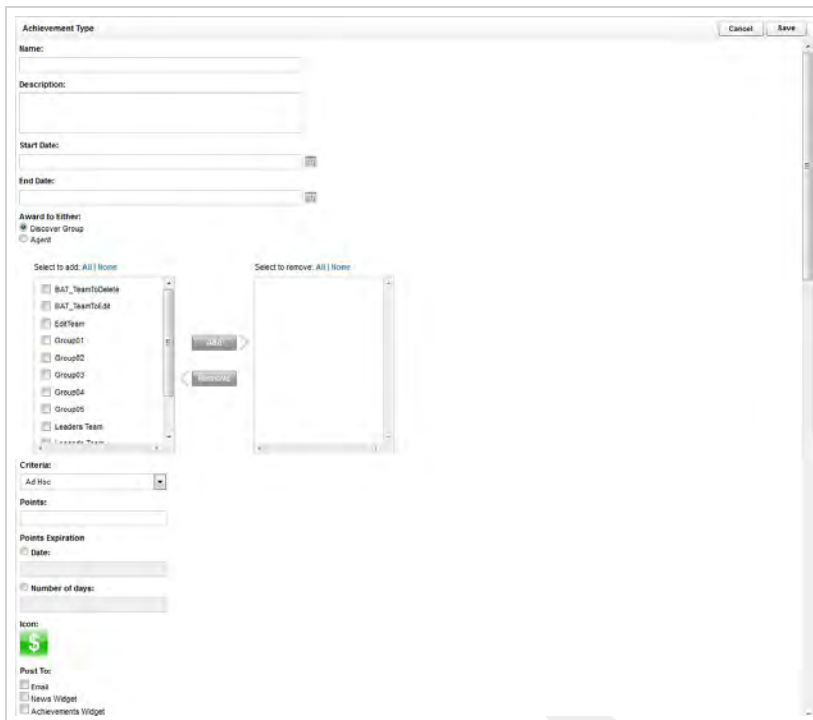
- **Achievement Types Reference** — for information about the Achievement Types page
- **Add Achievement Types Reference** — for details on fields used in adding an achievement type

Add Achievement Type Reference

The Achievement Type page is used to create new achievement types that can be awarded to agents. This section explains the fields that appear on the Achievement Type page.

For more information, see Achievements Overview.

Add Achievement Type Fields

Name *

» Allows you to create a meaningful name for the achievement as it will appear to agents in email and widget notifications.

Description

» Allows you to create a description of up to 150 characters. This description is not displayed to agents but is shown in the Achievement Types list.

Start Date *

» Allows you to provide the first date on which this achievement can be awarded. This date cannot be earlier than the date on which the achievement type is created.

End Date

» Allows you to provide the last date on which this achievement can be awarded. If no date is specified, the achievement is open-ended.

Award to Either *

» Allows you to specify whether eligibility for this achievement is by Uptivity Group or individual agent. Your selection here will determine whether you see a list of groups (as shown in the image) or agents in the selection columns. This selection is also shown when you select an achievement to award; the achievement is noted as either "Group Type" or "Agent Type."

Criteria

» Allows you to specify whether the achievement is *Ad Hoc* or *QA*. The default value is Ad Hoc. QA achievements are awarded automatically based on criteria you specify in these three additional fields that appear once you have selected the QA criteria.

Number of Evaluations

» For QA achievements, allows you to specify 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.

Evaluation Form *

» For QA achievements, displays a list of 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 is not assigned to a QA form.

Score *

» For QA achievements, allows you to specify the score the agent must receive on the specified number of evaluations to be awarded the achievement. Type the score as a percentage (whole numbers only), and then 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.

Points *

» Allows you to specify the number of points (0-999) to be awarded for the achievement.

Points Expiration

» Allows you to specify 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 the **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.

Icon

» Allows you to specify an icon to represent this achievement from all available icons, including any custom icons previously uploaded.

Post To *

» Allows you to specify how agents will be notified when they earn an achievement. At least one notification method must be selected.

RELATED TASKS

- **Adding Achievement Types**
- **Editing Achievement Types**
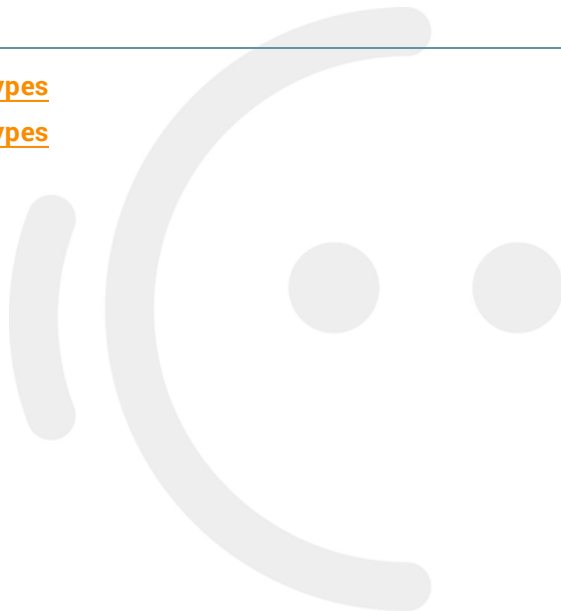
Viewing Achievement Types

Uptivity WFO allows you to establish a system for awarding points to agents who have achieved certain pre-defined goals. This section explains how to see the achievements that have been created in your system.

For more information, see Achievements Overview.

1. In the Discover Web Portal, click **Coaching** ➜ **Achievements** ➜ **Achievement Types**.

SEE ALSO

- **Achievement Types Reference** — for explanations of the detail fields for each achievement type

Editing Achievement Types

Uptivity WFO allows you to establish a system for awarding points to agents who have achieved certain pre-defined goals. This section explains how to edit achievements that have been created in your system.

For more information, see Achievements Overview.

> ⓘ 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.

1. In the Discover Web Portal, click **Coaching** ➜ **Achievements** ➜ **Achievement Types**.

2. Click **Edit** and make any changes desired.

3. Click **Save**.

SEE ALSO

- **Achievement Types Reference** — for explanations of the detail fields for each achievement type
- **Add Achievement Types Reference** — for information on fields available for editing in an achievement type

Achievement Types Reference

The Achievement Types page enables you to see the achievements that have been created in your Uptivity WFO system, to access those achievements for editing, and to add a new achievement type.

For more information, see Achievements Overview.

Achievement Types Information Fields

Name

» Displays the name given the achievement when it was added.

Description

» Displays the description, if any, given the achievement when it was added.

Icon

» Displays the icon shown when the agent is notified of the awarded achievement by widget.

Points

» Displays the number of points the agent receives when the achievement is awarded.

Published Date

» Displays the date the achievement type was created. If the achievement type is edited, this date is updated to reflect the date the edited achievement was saved.

Start Date

» Displays the first date that this achievement type can be or could have been awarded, either automatically or ad hoc.

End Date

» Displays the last date that this achievement type can be or could have been awarded, either automatically or ad hoc.

RELATED TASKS

- **Viewing Achievement Types**
- **Editing Achievement Types**

Uploading a Custom Icon

Achievement awards can be represented with an icon that is displayed when the achievement appears in the Achievement widget. This section explains how to upload a custom icon from a network location to which you have access.

For more information, see Achievements Overview.

1. In the Discover Web Portal, click **Coaching** ➜ **Achievements** ➜ **Upload Icon**.

2. In **Name**, type a name for the icon.
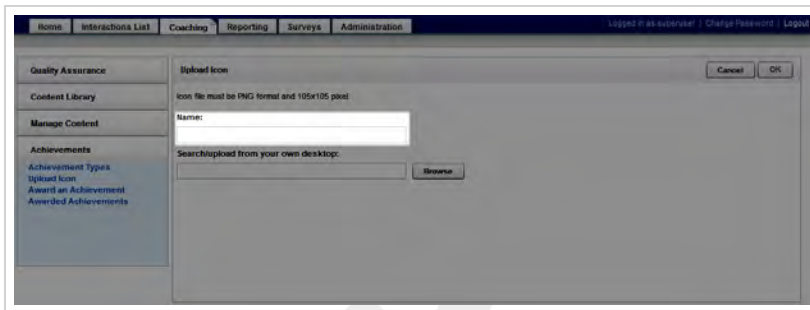
3. Click **Browse** and navigate to the file to be uploaded, then click **OK**.
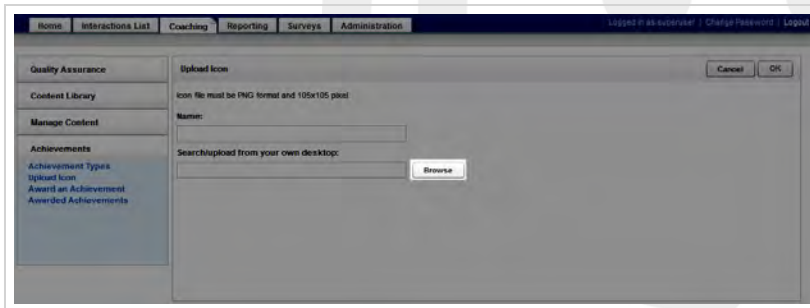
SEE ALSO

- **Add Achievement Types** — for information on using the icon with an achievement type

Awarding an Ad Hoc Achievement

Uptivity WFO allows you to establish a system for awarding points to agents who have achieved certain pre-defined goals, Ad hoc achievements are awarded manually when an agent or Uptivity Group accomplishes a goal. This section explains how to award an ad hoc achievement.

For more information, see Achievements Overview.

1. In the Discover Web Portal, click **Coaching → Achievements → Award an Achievement**.

2. Select the desired achievement type and then click **OK**.
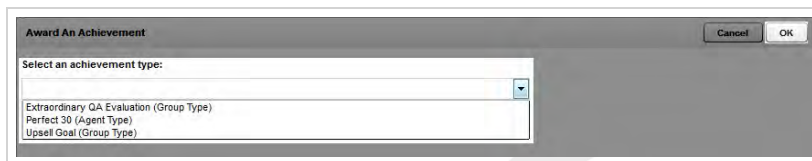
3. Select the agents or groups (based on the achievement type), or click **All** to select all possible agents or groups, and then click **Add**.

4. Click **OK** and then click **Yes** to confirm.
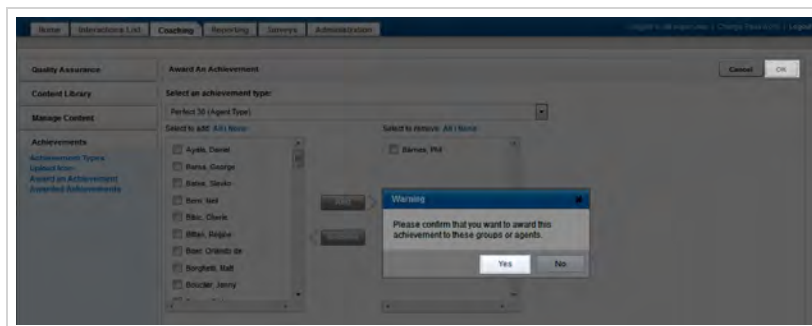
Viewing Awarded Achievements

Uptivity WFO allows you to establish a system for awarding points to agents who have achieved certain pre-defined goals. This section explains how to search for and view awarded achievements.

For more information, see Achievements Overview.

1. In the Discover Web Portal, click **Coaching** ➜ **Achievements** ➜ **Awarded Achievements**.

2. Type any desired search criteria and click **Search**.
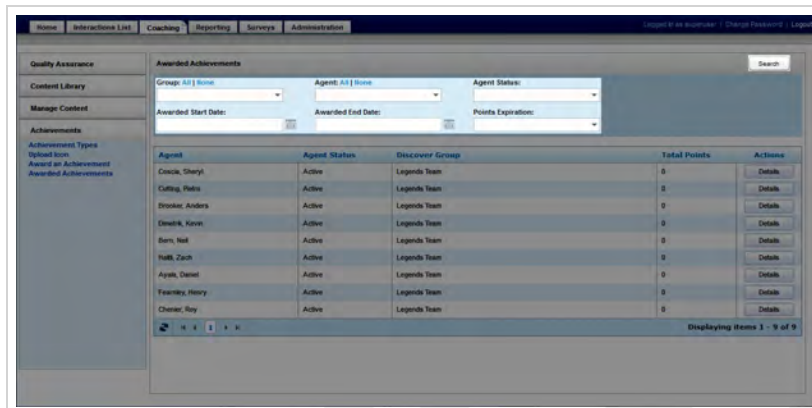
SEE ALSO

- **Awarded Achievements Reference** — for details on fields used to search for and view awarded achievements

Awarded Achievements Reference

The Awarded Achievements page enables you to search for achievements that have been awarded to individual agents, Uptivity Groups, or both.

For more information, see Achievements Overview.

Search Criteria

Group

» Allows you to select one or more Uptivity Groups, which restricts the Agent drop-down list to include only agents in those groups. Groups are listed with the name of the group in Uptivity WFO at the time the achievement was awarded. If you do not further filter by agent, all the agents in the selected group(s) 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

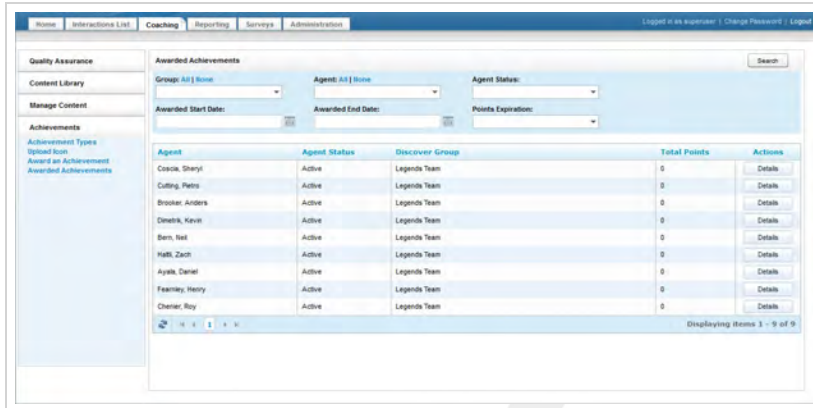» Allows you to select one or more agents, depending on the groups previously selected. If no groups were selected, you can select from a list of all agents who have ever been awarded an achievement. If groups were selected, you can select only agents included in those groups. To select all agents in 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

» Allows you to 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

» Allows you to 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

» Allows you to specify 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.

Awarded Achievement Information Fields

Agent

» Displays the name of the agent.

Agent Status

» Displays the agent's status.

Group

» Displays all Uptivity Groups to which the agent belongs that were awarded achievements. Groups are displayed with the name of the group in Uptivity WFO at the time the achievement was awarded. If this name is changed after the achievement is awarded, the achievement is still displayed with the old group name. If you excluded a group in your search criteria, that group is not shown even if the agent belongs to it.

Total Points

» Displays 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. If your search was filtered by Uptivity Group, only points awarded at the group level are included in this total.

Actions

» Allows you to access additional information about the agent's achievements by clicking **Details**.

RELATED TASKS

- **Viewing Awarded Achievements**
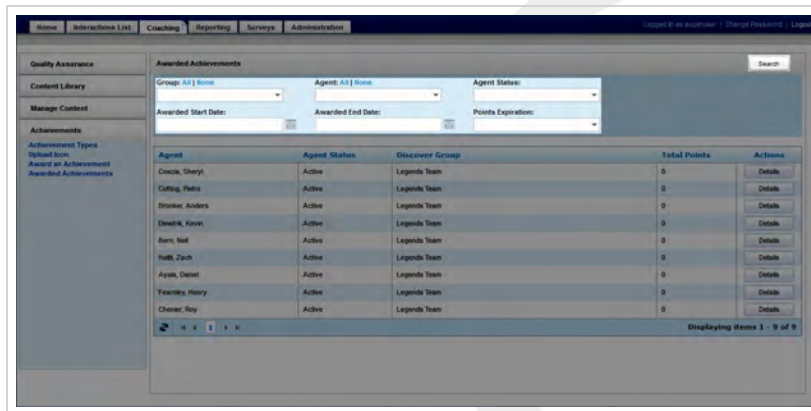- **Viewing an Agent's Achievement Details**

Viewing an Agent's Achievement Details

Uptivity WFO allows you to establish a system for awarding points to agents who have achieved certain pre-defined goals. This section explains how to view a list with details of each achievement awarded to a particular agent.
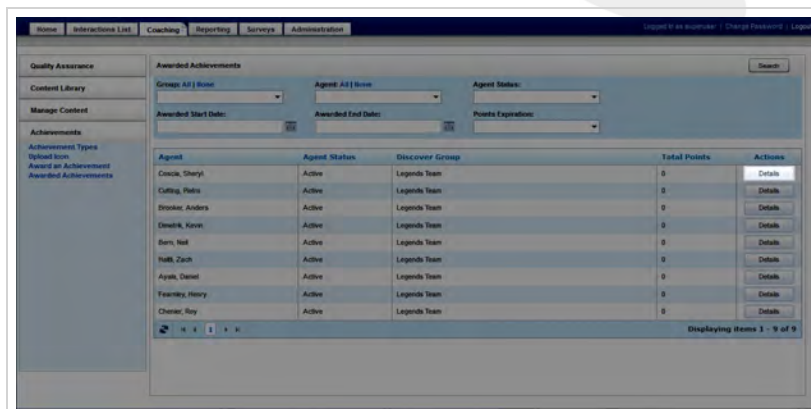
For more information, see Achievements Overview.

The achievements shown on the Agent Achievements Detail page are controlled by any group and agent selections you make on the Awarded Achievements page in step 2. For example, if you filter by a specific Uptivity Group, only achievements awarded at the group level are shown for that agent. To see all of an agent's achievements, filter your search by **Agent**, not **Group**.

1. In the Discover Web Portal, click **Coaching** ➜ **Achievements** ➜ **Awarded Achievements**.

2. Type any desired search criteria and click **Search**.

3. Click **Details** for the desired agent.

SEE ALSO

- **Awarded Achievements Reference** — for details on fields used to search for and view awarded achievements
- **Agent Achievements Reference** — for explanations of the achievement details fields

Deleting an Agent's Awarded Achievements

Uptivity WFO allows you to establish a system for awarding points to agents who have achieved certain pre-defined goals. This section explains how to delete an achievement awarded to an agent.
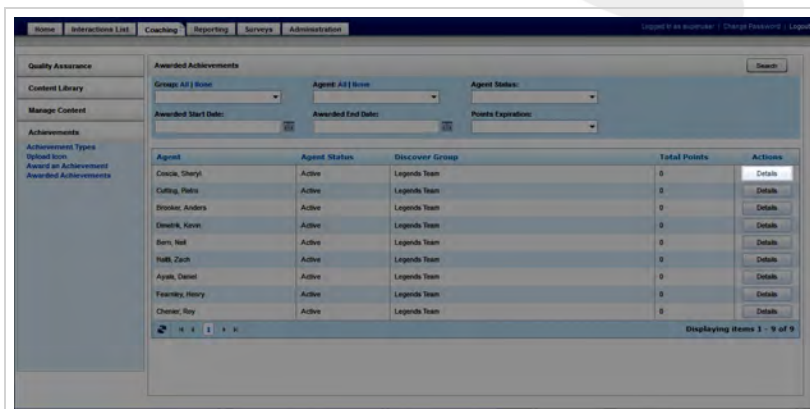
For more information, see Achievements Overview.

The achievements shown on the Agent Achievements Detail page are controlled by any group and agent selections you make on the Awarded Achievements page in step 2. For example, if you filter by a specific Uptivity Group, only achievements awarded at the group level are shown for that agent. If you do not see the achievement you need to delete, try filtering your search by **Agent**, not **Group**, to see all of the agent's achievements.
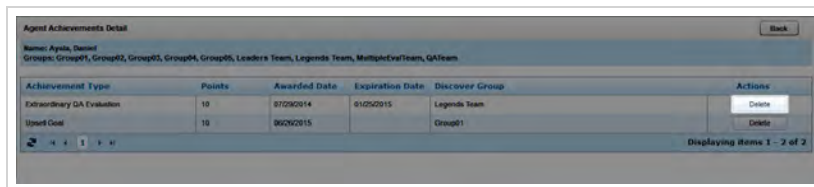
1. In the Discover Web Portal, click **Coaching** ➜ **Achievements** ➜ **Awarded Achievements**.

2. Type any desired search criteria and click **Search**.
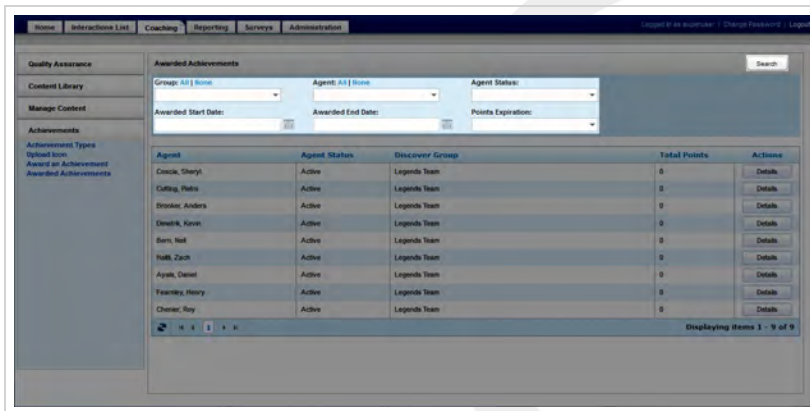
3. Click **Details** for the desired agent.

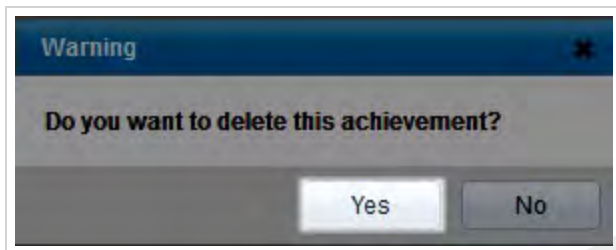4. Click **Delete** under Actions for the desired achievement.


5. Click **Yes** to confirm.

SEE ALSO

- **Awarded Achievements Reference** — for details on fields used to search for and view awarded achievements
- **Agent Achievements Reference** — for explanations of the achievement details fields
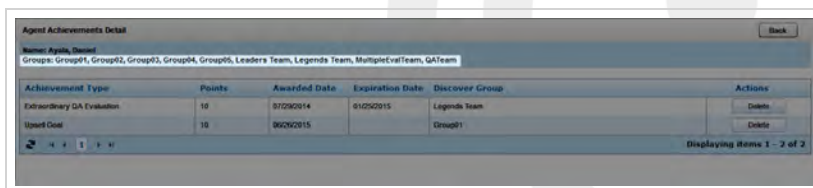
Agent Achievements Detail Reference

The Agent Achievements page enables you to view additional details about an agent's achievements, and to delete achievements if necessary.

For more information, see Achievements Overview.
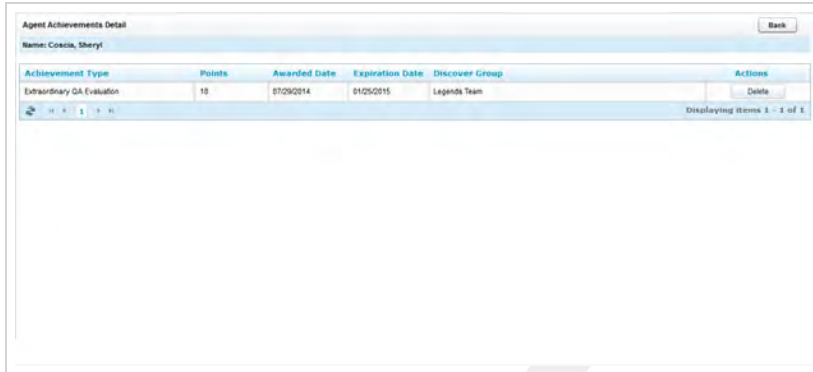
Information shown on this page is influenced by agent and group selections made on the Awarded Achievements page. If your search on that page was filtered by Uptivity Group, a list of all Uptivity Groups included in your filter appears after the agent name, regardless of whether the agent belongs to all of those groups.

If your search was not filtered by Uptivity Group, the list of groups does not appear, even though the details may include achievements awarded at the group level for that agent.

Agent Achievements Detail Fields

Achievement Type

» Displays the name of the achievement.

Agent

» Displays the number of points awarded to the agent for this achievement.

Awarded Date

» Displays the date on which the achievement was awarded to the agent.

Expiration Date

» Displays the date on which the points for this achievement expired or will expire. If this field is blank, the points for this achievement never expire.

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.

Actions

» Allows you to remove the achievement and associated points from the agent by clicking **Delete**.

RELATED TASKS

- **Viewing Awarded Achievements**