



CallCopy®

Innovations in Call Recording  
and Contact Center Solutions

cc: Discover QA Coaching Manual, v5.2 R1

August 2013

Reference Guide

[callcopy.com](http://callcopy.com)

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0	Added Review Process content, updated Content Library and Acknowledgements sections.	MBuckingham	2013-05-31
1	Corrected mislabeled menu option when evaluating an agent from the call list. Removed "In Progress" as a possible QA Status for completed evaluations.	MBuckingham	2013-08-13

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# Introduction

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

The guide assumes that the user is familiar with:

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

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

# Create a QA Evaluation Form

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

Before creating a form, CallCopy recommends:

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

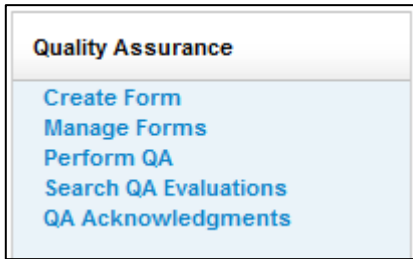
Remember these points when creating a form:

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

To create a QA evaluation, complete these steps:

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

## Step 1: Name and Assign Groups



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

In the Quality Assurance menu, click **Create Form**.

### Form Name

In the QA Form Editor, type a unique and descriptive name in the "Form Name" field (50 characters max). In the example below the name is "Customer Service Evaluation."

### Acknowledgement

Select the Agent Acknowledgement Required option if agents must acknowledge that they have reviewed their evaluations. If agents can login to cc: Discover, they will receive evaluation notices on the Home tab. If agents have email addresses recorded in cc: Discover, they will receive notices at that address. If this option is not selected, evaluators still have the option when performing reviews whether to notify agents.

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

## Create a QA Evaluation Form

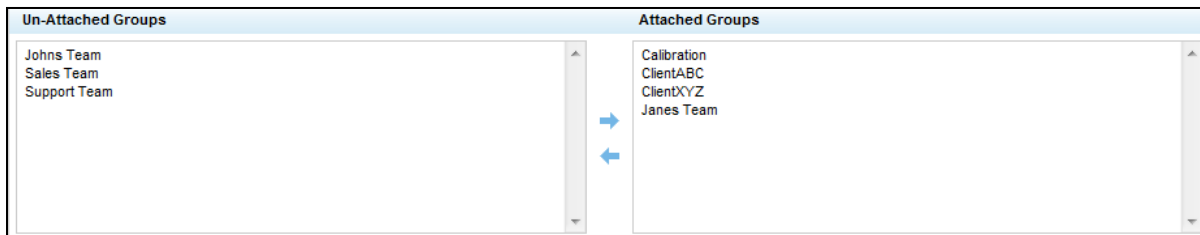
### Groups

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

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

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

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



### Step 2: Add a Section

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

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

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



The screenshot shows a form field with a light blue background. On the left side, there are three small icons: a blue up arrow, a blue down arrow, and a red X. To the right of these icons is the text "Section Title:" followed by a white rectangular input box.



## Step 3: Add a Question Type

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

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

To create a question, click .

A question text and type object will appear. Type the question text (1024 characters max). For example, the question can be "Did the agent use the standard greeting?"



The screenshot shows a form with a light green background. At the top left, there are three small icons: a blue up arrow, a blue down arrow, and a red X. To the right of these icons is the text 'Question Type:' followed by a dropdown menu currently showing 'Dropdown'. Further right is the text 'Critical:' followed by an unchecked checkbox. Below this is the text 'Question:' followed by a large, empty text input field.

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

Select the question type. There are five types:

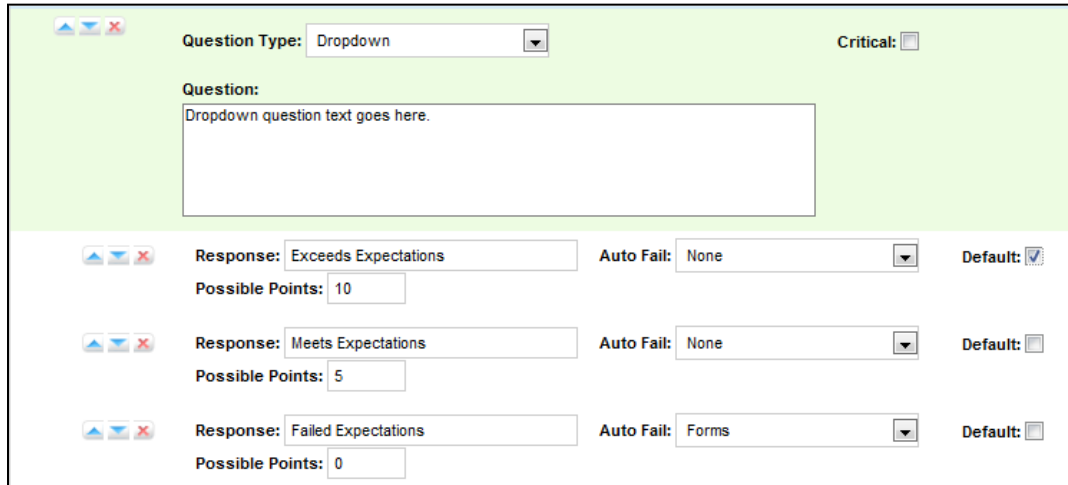
- Dropdown (Scoring)
- Horizontal Radio (Scoring)
- Vertical Radio (Scoring)
- Free Text (Non-Scoring)
- Comment (Non-Scoring)

## Create a QA Evaluation Form

### Dropdown

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

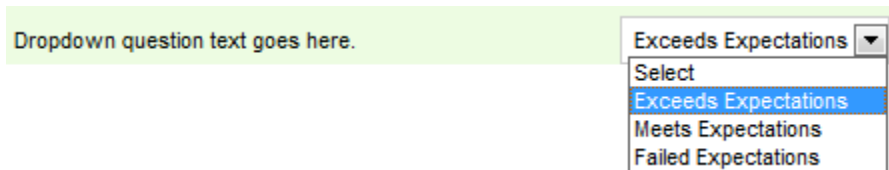
For example, a question with responses ranging from "Exceeds Expectations" to "Fails Expectations" with point values ranging from ten (10) for "Exceeds Expectations" to zero (0) for "Fails Expectations" would appear in the Form Creator like this:



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

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

This example will appear like this in the completed form:



The screenshot shows the completed form. The question text "Dropdown question text goes here." is displayed in a light green box. Below it is a dropdown menu with the following options: "Exceeds Expectations", "Select", "Exceeds Expectations" (highlighted in blue), "Meets Expectations", and "Failed Expectations".

## Horizontal Radio

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

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

The screenshot shows the configuration for a Horizontal Radio question. At the top, the question type is set to "Horizontal Radio Buttons" and there is a "Critical" checkbox. The question text is "Horizontal Radio question text is entered here." Below this, there are three response options:

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

This example will appear like this in the completed form:

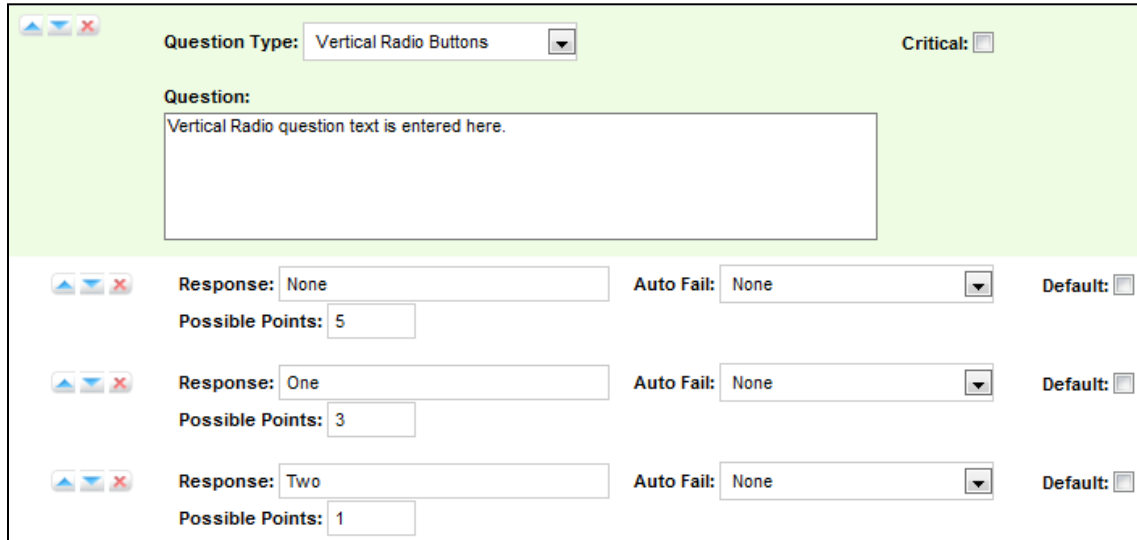
The completed form displays the question text "Horizontal Radio question text is entered here." followed by three radio button options:  Yes  No  Not Applicable.

## Create a QA Evaluation Form

### Vertical Radio

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

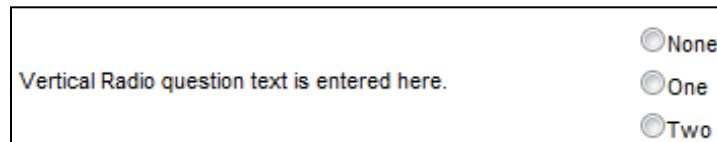
For example, a question with responses of "None," "One," and "Two" would appear in the Form Creator like this:



The screenshot shows the Form Creator interface for a "Vertical Radio Buttons" question. The question text is "Vertical Radio question text is entered here." Below the question, there are three response options:

- Response: None, Possible Points: 5, Auto Fail: None, Default:
- Response: One, Possible Points: 3, Auto Fail: None, Default:
- Response: Two, Possible Points: 1, Auto Fail: None, Default:

This example will appear like this in the completed form:



The screenshot shows the completed form with the question text "Vertical Radio question text is entered here." and three radio button options:

- None
- One
- Two

## Free Text

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

The screenshot shows a configuration window for a 'Free Text' question. At the top left, there are three small icons: a blue triangle pointing up, a blue triangle pointing down, and a red 'X'. To the right of these icons is the text 'Question Type:' followed by a dropdown menu currently set to 'Free Text'. Further right is the text 'Response required:' followed by a small square checkbox. Below this, the label 'Question:' is positioned above a large white text input area. Inside this input area, the text 'Free Text text is entered here.' is visible.

This example will appear like this in the completed form:

The screenshot shows a completed form element. On the left, there is a light green rectangular area containing the text 'Free text text is entered here.' To the right of this green area is a large white rectangular area, which is the response field for the question.

## Comment

This is a note that can be left on the form to describe the question or provide extra instructions or details. This is not a question, but rather informative text that appears on the QA form for the evaluator's benefit. Max 220 characters, including spaces.

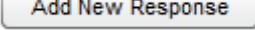
The screenshot shows a configuration window for a 'Comment' question. At the top left, there are three small icons: a blue triangle pointing up, a blue triangle pointing down, and a red 'X'. To the right of these icons is the text 'Question Type:' followed by a dropdown menu currently set to 'Comment'. Below this, the label 'Comment:' is positioned above a large white text input area. Inside this input area, the text 'Comment text is entered here and will appear in italics.' is visible.

This example will appear like this in the completed form:

The screenshot shows a completed form element. It consists of a single white rectangular box with a thin black border. Inside the box, the text 'Comment text is entered here and will appear in italics.' is displayed in an italicized font.

## Step 4: Add Responses

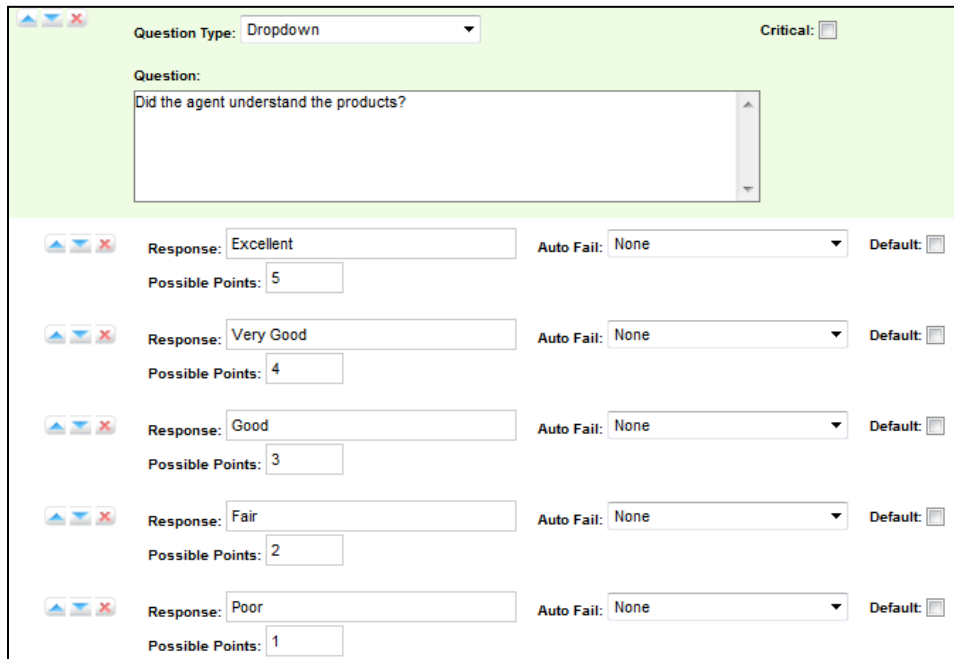
**Note** Questions can have an unlimited number of responses. You have to repeat this task for each response.

To specify the responses an evaluator can provide, click .

Enter an option in the Response text field.

These settings can be used or left blank:

- **Auto-fail:** If the evaluator selects a response designated as Auto Fail, then the agent fails the Section or the entire Form. This setting is typically used to enforce service-affecting protocol, such as security verifications or adherence to scripts with legal disclaimers.
- **Default:** Selecting the Default option causes the response text to appear in the question's response field on the form.
- **Possible points:** This value provides a score for the response. During evaluation and scoring, cc: Discover adds the points scored on each question and divides that value by the total of the highest possible points for all applicable questions. This calculation generates a percentage score for a form. Responses that are specified as Auto Fail **MUST** have a Possible Points value of 0.



The screenshot shows the configuration interface for a 'Dropdown' question. At the top, 'Question Type' is set to 'Dropdown' and 'Critical' is unchecked. The question text is 'Did the agent understand the products?'. Below the question, there are five response options, each with a 'Response' text field, 'Possible Points' input, 'Auto Fail' dropdown, and 'Default' checkbox:

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

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

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

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




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

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

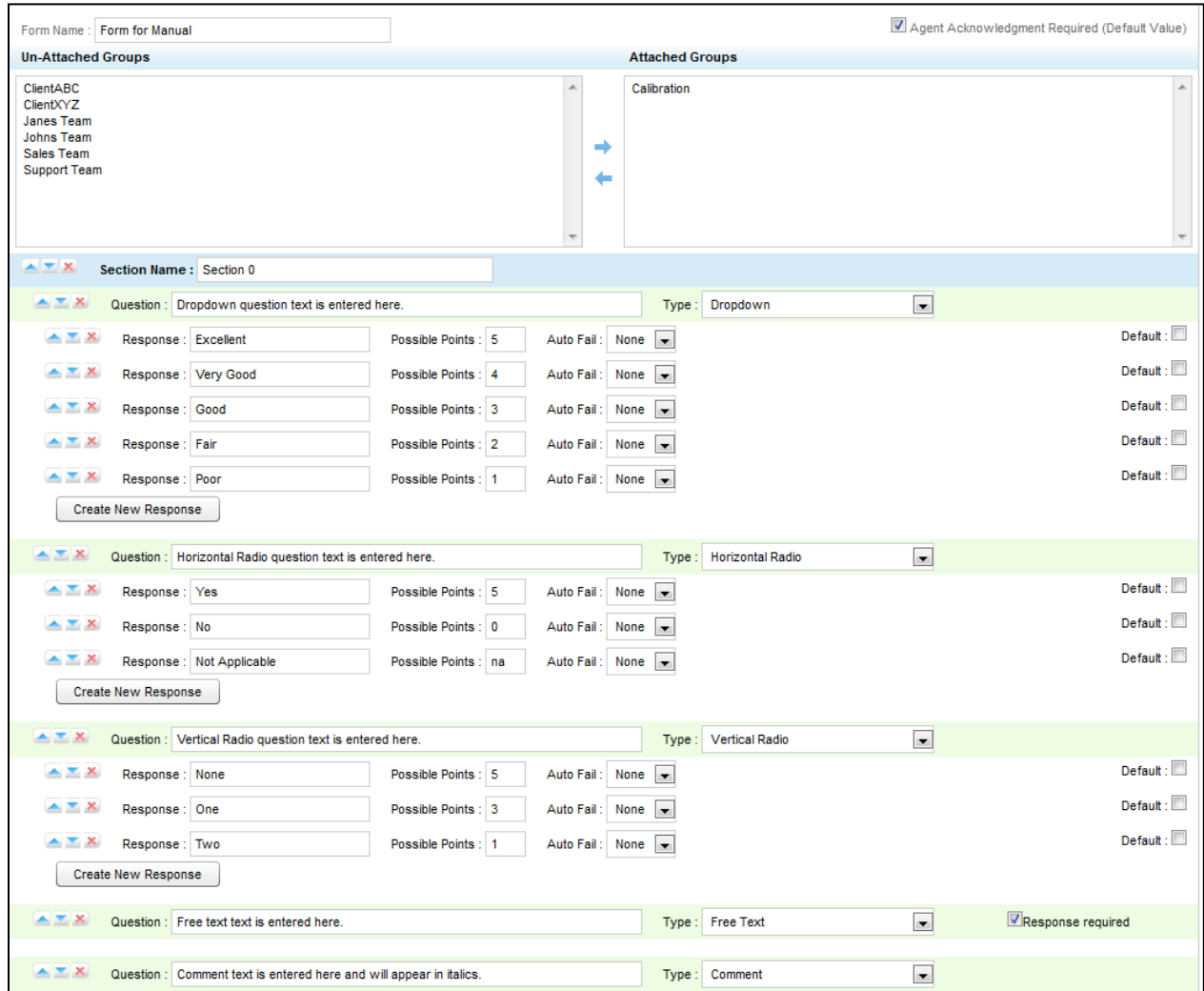
## Create a QA Evaluation Form

### Step 5: Move Form Items

Use the sequence buttons  to set the order of QA Form items:

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

#### Example Form:



Form Name : Form for Manual  Agent Acknowledgment Required (Default Value)

**Un-Attached Groups**

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

**Attached Groups**

- Calibration

Section Name : Section 0

Question : Dropdown question text is entered here. Type : Dropdown

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

Create New Response

Question : Horizontal Radio question text is entered here. Type : Horizontal Radio

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

Create New Response

Question : Vertical Radio question text is entered here. Type : Vertical Radio

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

Create New Response

Question : Free text text is entered here. Type : Free Text  Response required

Question : Comment text is entered here and will appear in italics. Type : Comment



## Step 6: Save a Form

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

If the form needs changes, click **Manage Forms** under the Quality Assurance menu. The QA Forms Listing page opens. The form must be retrieved using the Filter. (See the "[Manage QA Forms](#)" section of this document.)

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

**QA Form Editor**

---

Form for Manual

---

Section 0

Dropdown question text goes here. Exceeds Expectations ▾

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

Vertical Radio question text is entered here.  None  
 One  
 Two

Free Text text is entered here.

*Comment text is entered here and will appear in italics.*

# Manage QA Forms

## Search for Existing QA Forms

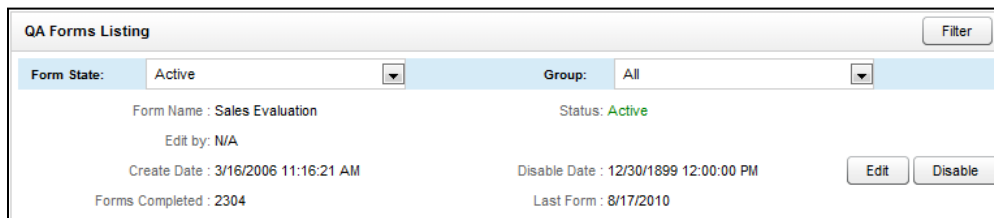
The Manage Forms menu allows you to view Quality Assurance forms already added to the system.

1. On the Coaching tab's Quality Assurance menu, click **Manage Forms**.
2. On the QA Forms Listing page, select the search criteria.
  - **Form State:** The options for Form State are All, Active, and Disabled. Active forms are available to users who have permissions to perform QA evaluations. Disabled forms are not currently used to perform evaluations.
  - **Groups:** (Optional) Groups are the CallCopy groups that administrators can create and to which agents can be assigned. They usually represent business organizational units or projects.



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

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



The screenshot shows the 'QA Forms Listing' results for a specific form. The 'Form State:' dropdown is set to 'Active' and the 'Group:' dropdown is set to 'All'. The form details are as follows:

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

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

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


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

## Edit Existing Forms

An existing form:

- CANNOT be changed if it has ever been used to evaluate an agent. Changing a form would alter any reporting based off of it.
- Can be saved as a new version if it has been used to evaluate agents.
- Can be attached to CallCopy groups regardless of whether it has been used. Once it has been used, it cannot be un-attached from its existing groups. If it has not been used yet, un-attaching a group prevents users from evaluating that group with the form.

## Change Group Attachments

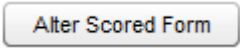
To edit an existing form in the QA Form Editor, locate the form and click .

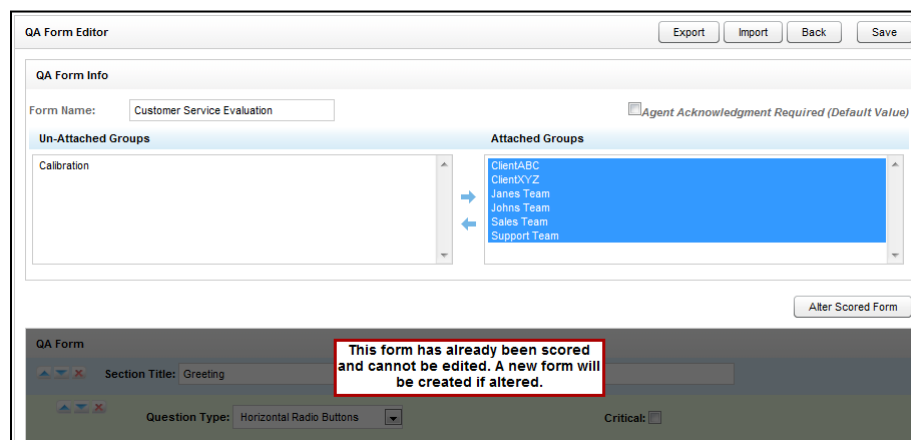
If the form has never been used for scoring or only Group attachments need change, make the necessary changes and click **Save**.

## Create a New Form from an Existing Form

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

Follow these steps:

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



4. Make the necessary changes to the form. Click **Save**.

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

## Disable/Enable Forms

Active forms are available to users who have permissions to perform QA evaluations. Disabled forms are not currently used to perform evaluations. A form can be disabled and enabled an unlimited number of times. Forms cannot be deleted. Disabling a form assures that it is not accidentally used and makes the forms list shorter.

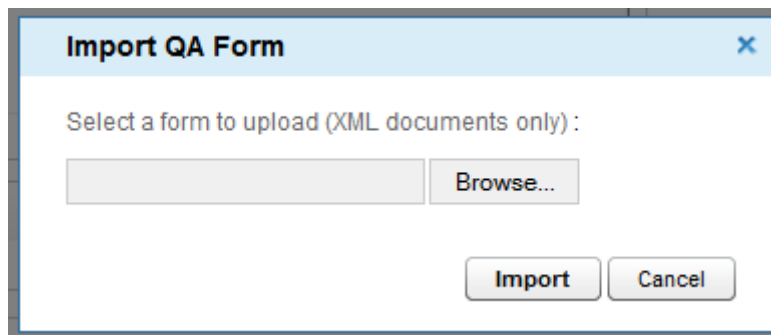
To disable a form, find the form on the QA Forms listing and click **Disable**. The form's Status field changes from Active (green) to Disabled (red). To enable a form, reverse these steps.

## Import/Export Forms

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

Follow these steps to import an XML document:

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



5. Select it and click **Open**. Click **Import**.
6. The form will be created. Edit it as needed and click **Save**.

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

# Perform Evaluations

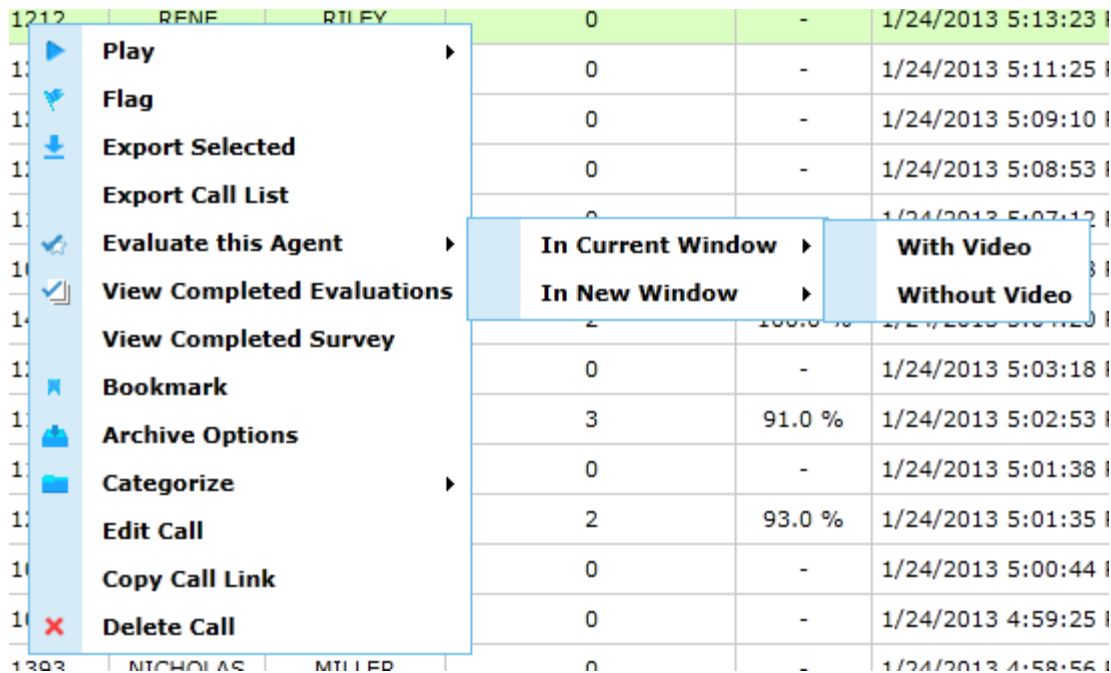
To perform QA evaluations, a user must have Coaching Permissions, access to the CallCopy group attached to the QA form used for the evaluation, and permissions for the cc: Discover Web Player.

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

## Evaluate a Call Record

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

1. Select the calls to be evaluated using the filtering tools.
2. Click a record. Then right-click it and select the **Evaluate this Agent** option from the Context Menu.
3. Select whether you want the web player to open up in a standalone window or at the bottom of the pane. Also select whether you want the web player to display video (i.e., screen capture information) if it is available.



## Perform Evaluations

4. A listing of the QA forms attached to the CallCopy Group(s) associated with the record will appear. Click the form you want to use to score the recording.
5. The system will prompt to select up to three arbitrators from the drop-down list. Arbitrators who appear in the list have permission to evaluate the agent. Click **Next**.

**Note** If the selected arbitrator changes roles/permissions, disputed evaluations can become stranded. To avoid this problem, users can select more than one arbitrator.

6. The evaluation form will appear in the window. At the top will be displayed the names of the Evaluator, Arbitrator (first and last name if disputed, or "No Dispute" if this is the initial evaluation), number of score changes, and the agent's name.

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

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

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


The bottom window, titled "Web Player", shows a Mozilla Firefox browser displaying the "BBCS Tech CRM" website. The address bar shows "http://sugar.bbcstech.cc". Below the browser, there is a "Zoom Panel" and a "Tags" panel. The "Tags" panel contains the following data:

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

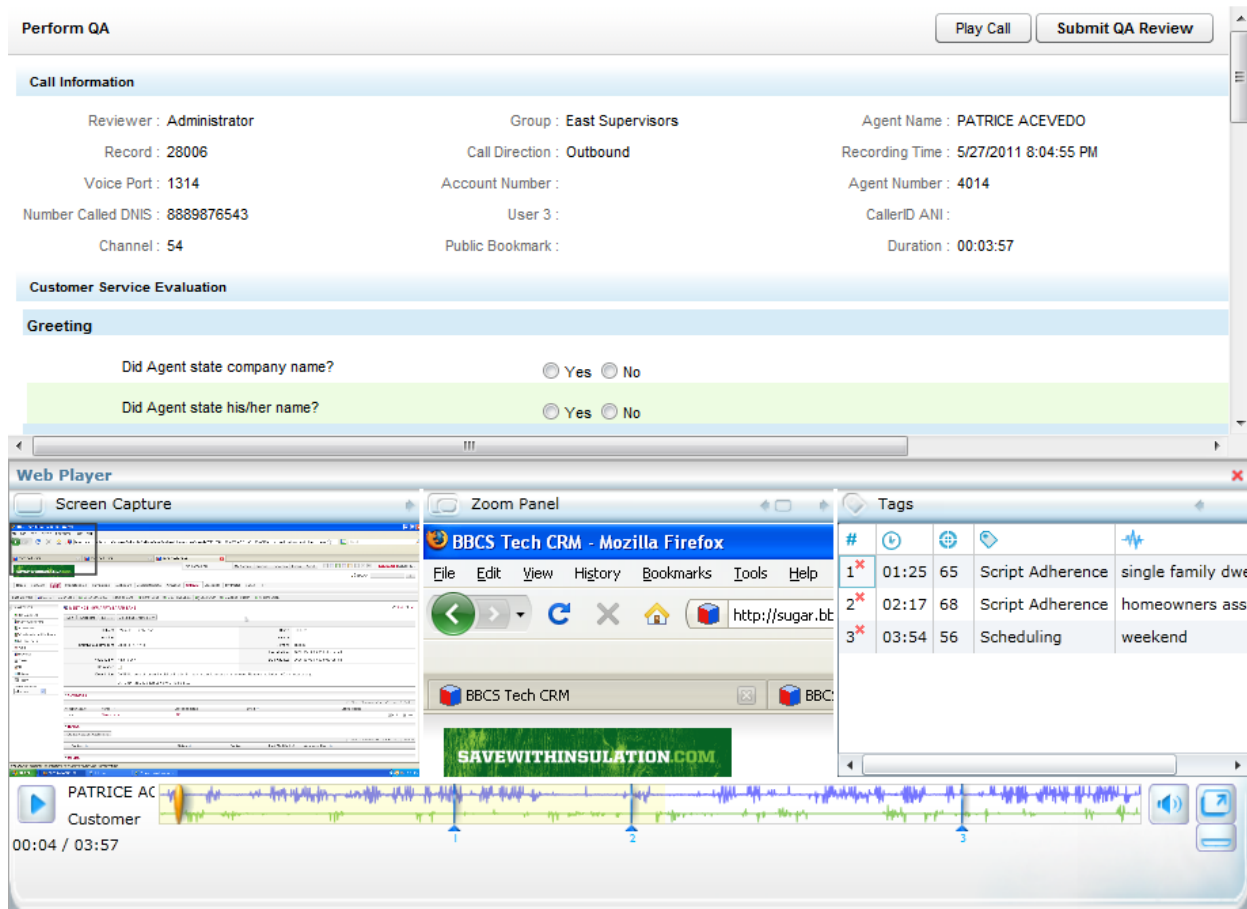
At the bottom of the Web Player window, there is an audio waveform and playback controls. The waveform shows a recording by "LEON HOLT" for a "Customer". The playback controls include a play button, a progress bar showing "00:05 / 03:57", and volume controls.

7. Review the form to see what items are being evaluated.
8. Use the playback controls to review the audio and/or video content. You can use the playback controls as needed to pause, fast forward, or rewind the recording to help in your evaluation.

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

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

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



The screenshot displays the 'Perform QA' interface. At the top, there are buttons for 'Play Call' and 'Submit QA Review'. Below this is the 'Call Information' section with the following details:

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

The 'Customer Service Evaluation' section contains two questions:

- Did Agent state company name?  Yes  No
- Did Agent state his/her name?  Yes  No

Below the evaluation questions is a 'Web Player' window. It features a 'Screen Capture' button, a 'Zoom Panel', and a 'Tags' table. The 'Tags' table contains the following data:

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

The web player also shows a browser window for 'BBCS Tech CRM - Mozilla Firefox' with a URL of 'http://sugar.bt'. Below the browser window is an audio waveform for 'PATRICE AC Customer' with a duration of '00:04 / 03:57'. A 'SAVEWITHINSULATION.COM' banner is visible at the bottom of the web player.

10. The evaluation can be sent to the agent to review and acknowledge, review and question, or review and dispute. If the Agent does not have access to the cc: Discover Web Portal, this option is not available.

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

11. Assign a priority for the evaluation from the drop-down list. The options are Low, Normal, and High, with Normal being the default.

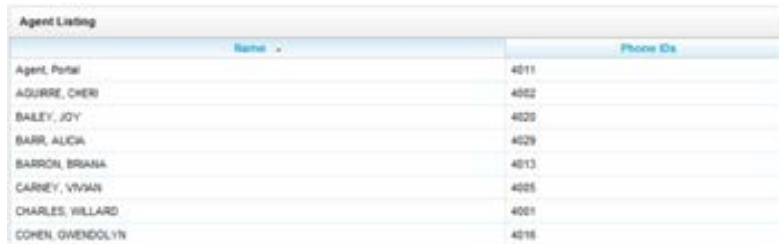
12. When you have completed the QA form, click **Submit QA Review**.

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

## Evaluate an Agent

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

1. In the Quality Assurance menu, click **Evaluate an Agent**.
2. The Agent Listing shows all the agents you can evaluate. Click the agent to be evaluated.



Agent Name	Phone ID
Agent Portal	4011
AQUIRRE, CHERI	4002
BAILEY, JOY	4020
BARR, ALICIA	4029
BARRON, BRIANA	4013
CARNEY, VIVIAN	4005
CHARLES, WILLARD	4001
COHEN, GWENDOLYN	4016

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

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




Form Name	Group Name	Create Date
Customer Service Evaluation	ClientXYZ	8/10/2010 12:15:03 PM
Customer Service Evaluation	Support Team	8/10/2010 12:15:03 PM
Display Test Form	Calibration	8/17/2010 1:54:41 PM
Display Test Form	ClientXYZ	8/17/2010 1:54:41 PM
Display Test Form	Support Team	8/17/2010 1:54:41 PM
Form for Manual	Calibration	8/29/2010 8:50:23 AM
Sales Evaluation	ClientXYZ	3/16/2008 11:16:21 AM
Sales Evaluation	Support Team	3/16/2008 11:16:21 AM

4. The system will prompt to select up to three arbitrators from the drop-down list. Arbitrators who appear in the list have permission to evaluate the agent. Click **Next**.

**Note** If the selected arbitrator changes roles/permissions, disputed evaluations can become stranded. The customer is responsible for addressing this scenario.



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

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

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

**Perform QA**

---

**Record Information**

Reviewer : Administrator Agent Name : Smith, Max

---

**Product Knowledge Review**

**Camping Products**

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

How many kayak brands can the agent name?

Is the agent able to demonstrate tent assembly technics?

---

**Sports Products**

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

Total : 0.00/ 25.00 (0.00 %)

Send Evaluation to Agent for Acknowledgement?  Yes  No

- The **Sent Evaluation to Agent for Acknowledgement** option allows the agent to review and acknowledge, review and question, or review and dispute. If you select **Yes**, an Evaluator's Notes box for comments and directions opens. If the Agent does not have access to the cc: Discover Web Portal, this option is not available. Selecting **No** here submits the evaluation without the agent's review. It does not appear in the agent's Assignment Inbox or the QA Acknowledgements report, but is available under Search QA Evaluations.
- Assign a priority for the evaluation from the drop-down list. The options are Low, Normal, and High, with Normal being the default.
- When you have completed the QA form, click **Submit QA Review**.

Messages will appear indicating if the evaluation was saved successfully or requires additional information. Follow the instructions in the message as necessary. When the evaluation is saved, review options will appear at the top of the page. These options are explained in the "[Review QA Evaluations](#)" section of this guide. If the evaluation was sent to the agent for acknowledgement, the options there are covered in the "[QA Dispute Process](#)" section.

# Review QA Evaluations

This section is for users who are members of a group and have permissions to view, edit, and delete completed evaluations. Be aware that if a call is auto archived and/or deleted from the server, the QA Evaluations performed on that call will remain on the database for historical searching and review. However, if a call is manually deleted from the server, the QA Evaluations performed on the call are deleted. Please refer to the *cc: Discover Administration Manual* for more information on call archiving.

## Locate Completed Evaluations

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

**Search QA Evaluation**

Save Search Criteria

Search Criteria

Form :  Agent :  Group :  Evaluator :

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

QA Score :  QA Status :

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

2. Enter a combination of search criteria:
  - **Form:** Select a particular form or all forms.
  - **Agent:** Select a particular agent or all agents.
  - **Group:** Select a particular group or all groups.
  - **Evaluator:** Select a particular evaluator or all evaluators.
  - **Start Date:** Pick a starting date as part of a date range. Applies to evaluation date(s), not the call recording dates.
  - **End Date:** Pick an ending date as part of a date range. Applies to evaluation date(s), not the call recording dates.
  - **QA Record ID:** Number identifying the completed QA evaluation.
  - **Recording ID:** Find a completed evaluation for a call based on the call's record ID number in the system.
  - **QA Score:** Locate evaluations based on these operators: Equal to, Less than, Greater than, Equal to or Less than, Equal to or Greater than. Scores entered in this field must be whole numbers.
  - **QA Status:** Choose whether to search for evaluations that are Complete, or All (default).

- Once you have made your appropriate selections, click **Search**. A list of evaluations matching the criteria appears in the window. To clear all selected criteria, click **Reset**. To save this filter, click **Save Criteria**, and refer to the "[Saveable Search Filters](#)" section in this document.

Search QA Evaluation

▼ Save Search Criteria

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

▼ Search Criteria

Form :

Agent :

Group :

Evaluator :

Start Date :

End Date :

QA Recording ID :

Recording ID :

QA Score :

QA Status :

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

## Review QA Evaluations

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

The screenshot shows a web-based evaluation form titled "Perform QA". At the top, there are buttons for "Play Call", "Printable Version", "Delete the Completed QA", "Edit the Completed QA", and "Back". The form is divided into several sections:

- Call Information:** A grid of call details including Reviewer (John Doe), ACD Group (East Supervisors), Agent Name (JOY BAILEY), ACD Queue, Record (8254), Call Direction (Inbound), Recording Time (8/1/2010 5:22:23 PM), Screen Capture (Yes), Phone Number (1207), User 1, Agent Number (4020), Project, Number Called (DNIS) (8662758925), User 3, CallerID (ANI) (2123793946), User 4, Channel (69), User 5, and Duration (Sec) (00:08:11).
- Sales Evaluation:**
  - Greeting:** Three questions with radio button options for Yes/No: "Did Agent use branded greeting?", "Did the Agent state his/her name?", and "Did the agent verify the promo code?". A note below says "Agent should validate code against screen pop".
  - Sales Skills:** "Was sale closed?" (Yes/No), "What objections were given?" (Price dropdown), "How many rebuttals were used?" (None, 1, 2 radio buttons), and a "Notes / Tips" text area containing "Not bad, but we will need to work on your documentation."
  - Documentation:** "Was proper closing code used?" (Yes/No) and "Were notes concise and professional?" (Good dropdown).

At the bottom right, it shows "Total : 70 / 75 (93.3 %)" and a checkbox for "Sent Agent Acknowledgement".

## Saveable Search Filters

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

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

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

click **Reset**. The default filter is overridden when viewing completed QA evaluations directly from the Web Player Call List.

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

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

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

## Additional Functions

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



- **Play Call:** Plays the call for which this particular evaluation was completed.
- **Link for Completed QA:** Displays the URL of an evaluation in a popup window. This option is useful if referencing a completed QA in an email.
- **Printable Version:** Opens the completed evaluation in PDF format that you can then save or print. The printable PDF includes the fields Agent, Evaluator, Arbitrator, Evaluation Form, Date of Evaluation, Date of Recording, and Call ID.
- **Delete the Completed QA:** Deletes the completed evaluation from the system. Very few users should be given this permission. Deleting or editing completed QA forms affects reporting.
- **Edit the Completed QA:** Allows you access to update the form with any necessary changes. After your edits are complete, click the **Submit QA** button to update the evaluation. The original version of the evaluation is not retained in the system. Deleting or editing completed QA forms affects reporting.

# QA Acknowledgements

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

You can report on who has or has not acknowledged the evaluation on the Coaching tab. In the Quality Assurance menu, click **Search QA Acknowledgements**.

The screenshot shows the 'Search QA Acknowledgments' interface. The search form includes the following fields:

- QA Form: All
- Agent: All
- Group: All
- Evaluator: All
- Arbitrator: All
- Start Date: 5/7/2013
- End Date: 5/14/2013
- Acknowledgement Required: All
- Status: All

The search results table is as follows:

Agent Name	QA Form	Evaluator	Arbitrator	Group	Evaluation Date	Acknowledge Date	Status
user, test	Form 1	Nota User	N/A	Test	5/10/2013	5/10/2013	Acknowledged
user, test	Form 1	CallCopy Administrator	Nota User	Test	5/10/2013	N/A	Question
user, test	Form 1	CallCopy Administrator	Nota User	Test	5/10/2013	N/A	Unacknowledged
user, test	Form 1	Nota User	N/A	Test	5/10/2013	N/A	Unacknowledged

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

- **Form:** Allows you to select a particular form or all forms.
- **Agent:** Allows you to select a particular agent or all agents.
- **Group:** Allows you to select a particular group or all groups.
- **Evaluator:** Allows you to select a particular evaluator or all evaluators.
- **Start Date:** Allows you to pick a starting Evaluation Date range. The start date will automatically default to a week prior to today's date.
- **End Date:** Allows you to pick an ending Evaluation Date range. The end date will automatically default to today's date.
- **Acknowledgement Required:** Allows you to search for evaluations based on whether the QA form creator required agent acknowledgement. If set to 'No', then evaluations whose form did not require an acknowledgement but whose evaluator selected to require an acknowledgement are found.
- **Status:** Allows you to search for Unacknowledged or Acknowledge Evaluations.

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

## QA Review Process

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

**Note** The Agent/Evaluator/Arbitrator Comments fields:

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

If either of these limitations is violated, when the form is submitted, an error message will appear.

These comments also appear when an evaluation is converted to a PDF for printing. When an evaluation is in acknowledged, question, or dispute status, agents cannot interact with any buttons on the evaluation or add additional questions or comments.

### Acknowledge an Evaluation

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

1. In *cc: Discover*, an agent clicks Home tab > Assignment Inbox > New Assignments to view the list of evaluations and documents awaiting attention.
2. The agent clicks an evaluation to open it.
3. After reviewing the evaluation, the agent can acknowledge the evaluation two different but equivalent ways:
  - Enter comments in the Agent Comments field and click **Acknowledge** to agree with the evaluation score and evaluator's comments.
  - Click **Back** and then click **Done** next to the item in the New Assignments list.
4. The evaluation is moved to the agent's Reviewed Assignments section, and appears on the QA Evaluation Acknowledgements report with the Status "Acknowledged" and the date the acknowledgement was made.
5. The evaluator sees the acknowledgement in the report and can perform several actions on the evaluation: delete, edit, print, etc.



## Question an Evaluation

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

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

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

## Dispute an Evaluation

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

1. In cc: Discover, an agent clicks Home tab > Assignment Inbox > New Assignments to view the list of evaluations and documents awaiting attention.
2. The agent clicks an evaluation to open it.
3. After reviewing the evaluation, the agent enters a comment in the Agent Comments text field (required), then clicks **Dispute**.
4. The evaluation moves to the agent's Pending Assignments section, and appears on the QA Evaluation Acknowledgements report with the Status "Dispute."
5. The system sends an email to each of the arbitrators (persons selected to review disputed evaluations) notifying them that an evaluation is being disputed.
6. An arbitrator sees the evaluation in the QA Acknowledgement page and opens it. The original evaluator can see that the evaluation is being disputed, but cannot change anything on the evaluation unless they are specified as an arbitrator for that evaluation.
7. The arbitrator clicks **Edit this QA**, re-scores the evaluation, and responds to the agent's comments by adding comments in the Arbitrator Comments text field and clicks **Submit QA Review**.
8. The updated evaluation moves to the agent's New Assignments section and the system sends an email notification to the agent about the response and adds the arbitrator's name to the evaluation form and its entry in the QA Acknowledgements report. The envelope icon appears at the top of the web portal. The evaluation would now appear on the QA Evaluation Acknowledgements report with the Status "Unacknowledged."
9. The agent reviews the arbitrator's comments and performs one of the following actions:
  - **Acknowledge:** The agent enters comments if necessary and clicks **Acknowledge**. The evaluation appears on the QA Evaluation Acknowledgements report with the status "Acknowledged."
  - **Question:** If the agent has additional questions, those questions are entered in the Agent Comments field and the agent clicks **Question**. The evaluation appears on the QA Evaluation Acknowledgements report with the status "Question."
  - **Dispute:** If the agent disagrees with the evaluation, comments are entered in the Agent Comments field and the agent clicks **Dispute**. The evaluation appears on the QA Evaluation Acknowledgements report with the status "Dispute."

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

# Content Library

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

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

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

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

Home   Web Player   <b>Coaching</b>   Reporting   Administration								Logged in as superuser   Change Password   Logout																													
Quality Assurance	Category: Customer Service																																				
Content Library	<table border="1"> <thead> <tr> <th>Title</th> <th>Assigned Date</th> <th>Type</th> <th>Size</th> <th>Assigned by</th> <th>Assigned Categories</th> <th>Actions</th> </tr> </thead> <tbody> <tr> <td>CallCopy-Fax Cover.dotx</td> <td>8/18/2010</td> <td></td> <td>30000</td> <td>Administrator</td> <td>Customer Service</td> <td>Edit Delete</td> </tr> <tr> <td>ccDiscover Web Player Guide, v4.3.docx</td> <td>9/10/2010</td> <td></td> <td>1852000</td> <td>Administrator</td> <td>Customer Service</td> <td>Edit Delete</td> </tr> <tr> <td>Group QA Summary</td> <td>5/17/2010</td> <td></td> <td>26624</td> <td>Administrator</td> <td>Customer Service, Sales</td> <td>Edit Delete</td> </tr> </tbody> </table>									Title	Assigned Date	Type	Size	Assigned by	Assigned Categories	Actions	CallCopy-Fax Cover.dotx	8/18/2010		30000	Administrator	Customer Service	Edit Delete	ccDiscover Web Player Guide, v4.3.docx	9/10/2010		1852000	Administrator	Customer Service	Edit Delete	Group QA Summary	5/17/2010		26624	Administrator	Customer Service, Sales	Edit Delete
Title	Assigned Date	Type	Size	Assigned by	Assigned Categories	Actions																															
CallCopy-Fax Cover.dotx	8/18/2010		30000	Administrator	Customer Service	Edit Delete																															
ccDiscover Web Player Guide, v4.3.docx	9/10/2010		1852000	Administrator	Customer Service	Edit Delete																															
Group QA Summary	5/17/2010		26624	Administrator	Customer Service, Sales	Edit Delete																															
Customer Service (3)																																					
HR (2)																																					
Sales (6)																																					
Uncategorized (2)																																					
Pages: 1						Go To Page: 1 of 1 <input type="button" value="GO"/>																															

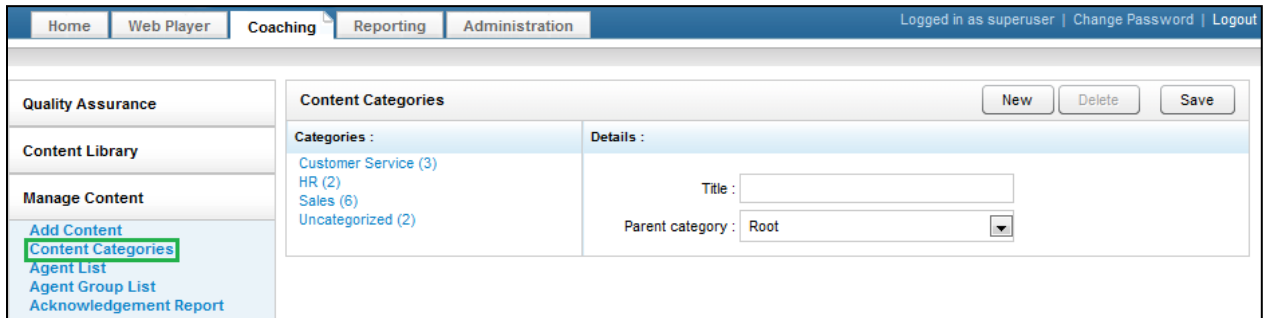
You will see:

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

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

## Manage Categories

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



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

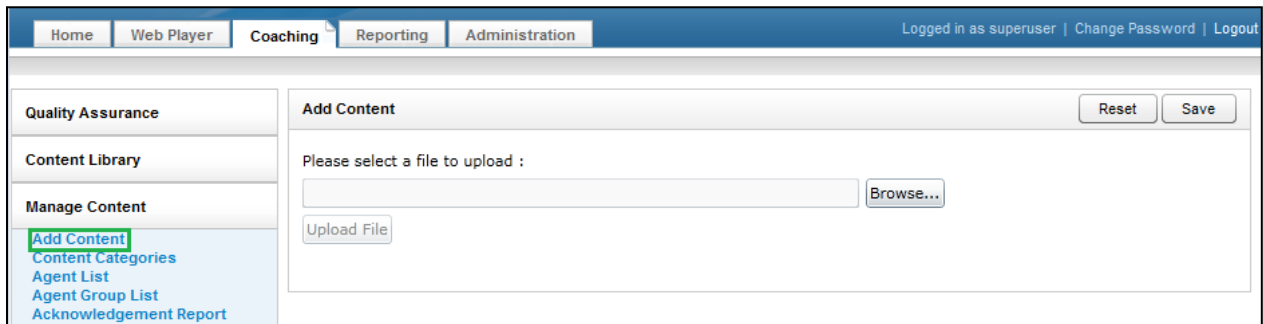
To delete a category, select it from the Categories list, and click **Delete**.

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

## Add and Assign Content

Follow these steps to add or assign content in the library:

1. Click the **Add Content** link under the Coaching tab on the Manage Content menu.



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

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

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

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

## Agent List/Agent Group List

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

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

## Acknowledgement Report

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

Agent Name	Content Title	Assigned Date	Due Date	Review Date	Priority	Type	Size	Assigned by	Categories	Reviewed
Anderson, Brad	cc Discover Web Player 5 Tips.docx	1/4/2012	1/4/2012	Not Reviewed	Normal	DOCX	10372	Administrator	Hints & Tips	No
Barsa, George	cc Discover Web Player 5 Tips.docx	1/4/2012	1/4/2012	Not Reviewed	Normal	DOCX	10372	Administrator	Hints & Tips	No
Eddy, Cheryl	cc Discover Web Player 5 Tips.docx	1/4/2012	1/4/2012	Not Reviewed	Normal	DOCX	10372	Administrator	Hints & Tips	No
, Administrator	cc Discover Web Player 5 Tips.docx	1/4/2012	1/4/2012	1/4/2012	Normal	DOCX	10372	Administrator	Hints & Tips	Yes

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

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

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

## About CallCopy

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

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

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