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Interaction Quality Manager

Printed Help

Abstract

This document is a printable version of the Interaction Quality Manager help. Interaction Quality Manager view in IC Business Manager is used to retrieve recordings with associated Questionnaire Scorecards that need to be scored. The view also displays the scorecard status. Questionnaires can be automatically assigned to recordings by creating policies in Interaction Recorder Policy Editor.

For the latest version of this document, see the PureConnect Documentation Library at: http://help.genesys.com/cic.

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Introduction to Quality Manager view

Interaction Quality Manager view is used to retrieve recordings with associated Questionnaire Scorecards that need to be scored. The view also displays the scorecard status.

For more information, see About Interaction Quality Manager.

About Interaction Quality Manager

Interaction Quality Manager view is used to retrieve recordings with associated Questionnaire Scorecards that need to be scored. The view also displays the scorecard status. Questionnaires can be automatically assigned to recordings by creating policies in Interaction Recorder Policy Editor.

Recordings with scorecards are retrieved based on:
- Date and Time
- Scorecard Status
- Scoring User

The Interaction Quality Manager intuitive user interface guides you to:
- Retrieve recordings to score
- Preview scorecards associated with recordings
- Playback and score recordings

For more information on using Interaction Quality Manager, see Get Started with Interaction Quality Manager.

For information on using Interaction Quality Manager to create and organize your Questionnaires, see Interaction Quality Manager Navigation Pane.

Get Started with Interaction Quality Manager

To get started, from IC Business Manager, create a **New** view for an Interaction Quality Manager **Recordings to Score** view. To create this view, follow these steps.

1. From the IC Business Manager toolbar, click **New**. The **Create New View** dialog is displayed.
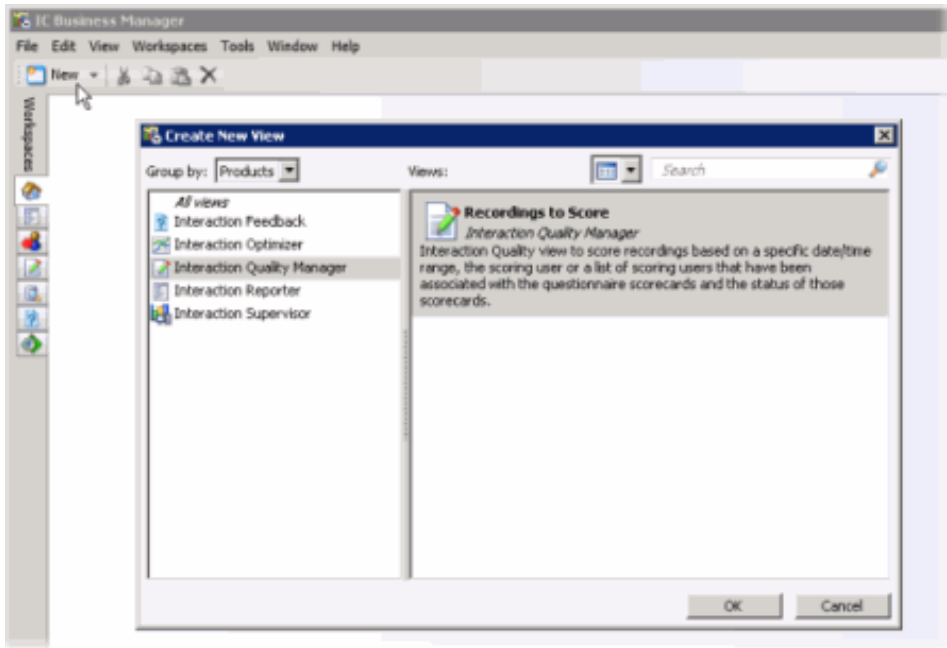
2. In the **Group by** box, select **Products** or select **Categories**. **Interaction Quality Manager** is displayed as an option in the left pane.

3. In the left pane, select **Interaction Quality Manager**. **Recordings to Score** view is displayed in the right pane of the Create New View dialog.

4. In the right pane, select **Recordings to Score** and click **OK**. The **Recordings to Score View Attributes** search dialog is displayed.

5. Complete the Recordings to Score View Attributes dialog and click **Create**. The **Recordings to Score** view tab is displayed in the workspace.

For more details, see [Search for Recordings to Score](#).
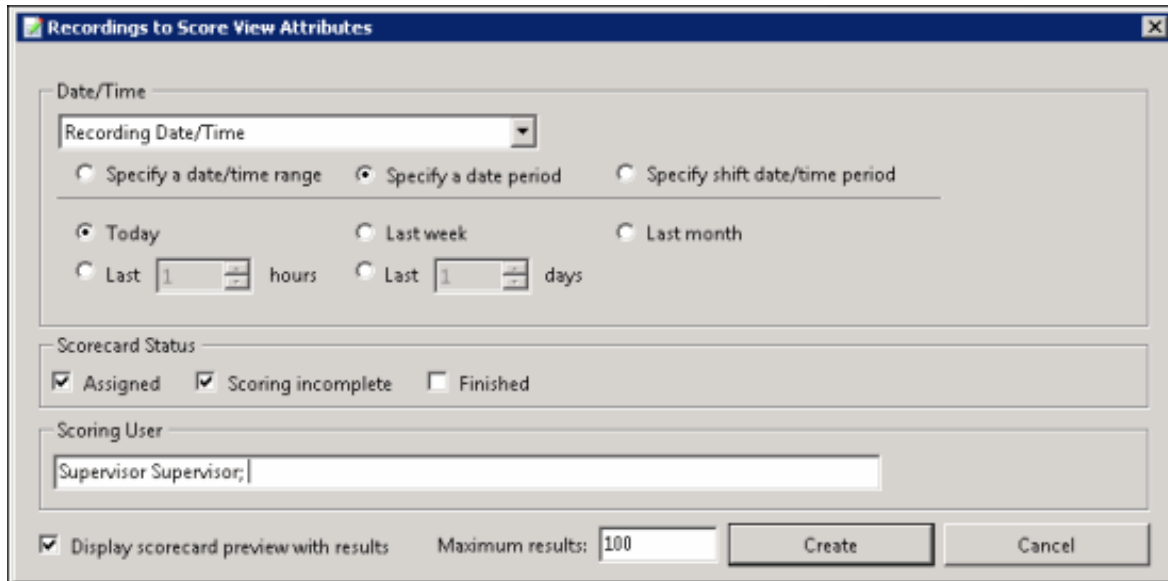
Recordings to Score

Use the Recordings to Score view to easily and quickly retrieve recordings, with assigned scorecards, that need to be scored.

For more information see Search for Recordings to Score.

Search for Recordings to Score

After you have created a new Interaction Quality Manager view, use the **Recordings to Score View Attributes** search dialog to create a search and retrieve recordings to be scored.

Retrieve Recordings to Score

To retrieve recordings with associated Questionnaire Scorecards that need to be scored, configure the attributes in the **Recordings to Score View Attributes** dialog.

The available attributes are:

Date and Time

Select **Recording Date/Time** to retrieve recordings based on the date and time of the recording, or select **Scoring Date/Time** to retrieve recordings based on the date and time the recording was last scored, and configure the attribute.

Scorecard Status

The Scorecard Status attribute searches for recordings based on their scorecard status. To narrow your search, select a scorecard status check box. The available scorecard statuses are: **Assigned**, **Scoring incomplete**, and **Finished**.

You can select more than one status in a search. If no Scorecard Status check boxes are selected, recordings for *all* scoring statuses are included in the search results.

Scoring User

The Scoring User attribute searches for users who have scored recordings. In the Scoring User field, begin typing a user name to display available User Names to choose from. Multiple user names can be specified to create a list of scoring users.

For additional information on configuring the attributes for your recordings to score search, see Recordings to Score View Attributes.

Displaying Search Results

Use these settings for displaying your search results.

Display scorecard preview with results

Select the **Display scorecard preview with results** check box to show or hide the scorecard preview control when a recording is selected in the **Recordings to Score** view.

Maximum results

Specify the number of results to be returned with the search in the **Maximum results** box. Valid values are between 1 and 10000.

After the **Recordings to Score View Attributes** search dialog is complete, click **Create** to run the search. The search results are displayed in the **Recordings to Score** view in the workspace.

Next, see Recordings to Score View.

Recordings to Score View

The Recordings to score view displays the results of the search in a grid and includes the details of a selected recording. The number of returned recordings to be scored from the search is indicated in the header of the view.
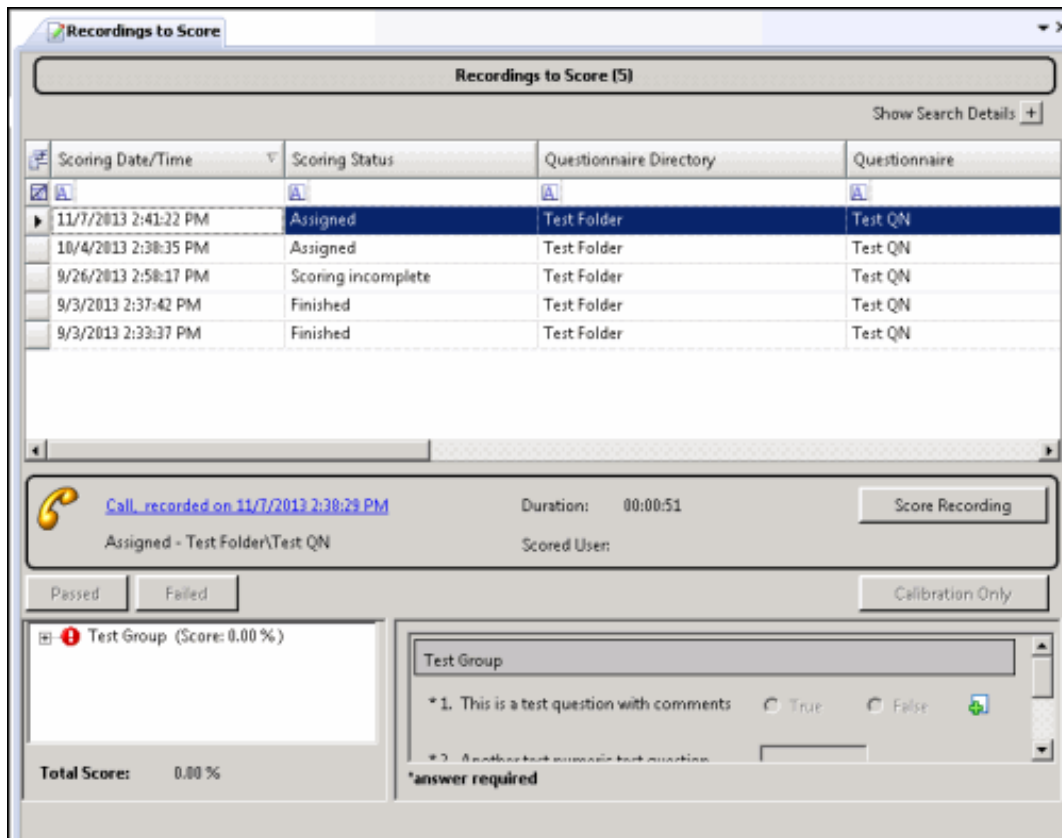
Show Search Details

Search attributes are collapsed when the view is displayed. To display the search attributes and run the search again, click the **Show Search Details** expand button.

To paste recording information into another application, use Ctrl+C in the grid to Copy an entire row, or multiple rows, to the clipboard.

Select Fields for the grid

The columns, or Fields, are displayed in the grid in the following order:
- Scoring Date/Time
- Scoring Status
- Questionnaire Directory
- Questionnaire
- Recording Date/Time
- Recording ID
- Scoring User
- Scored User
- Total Score
- Scorecard Rank
- Marked for Calibration
- Assign Questionnaire Policy

To change the Fields that are displayed in the grid, click the Field Chooser on the upper left of the grid. In the Show/Hide Columns dialog select the fields to display in the grid.
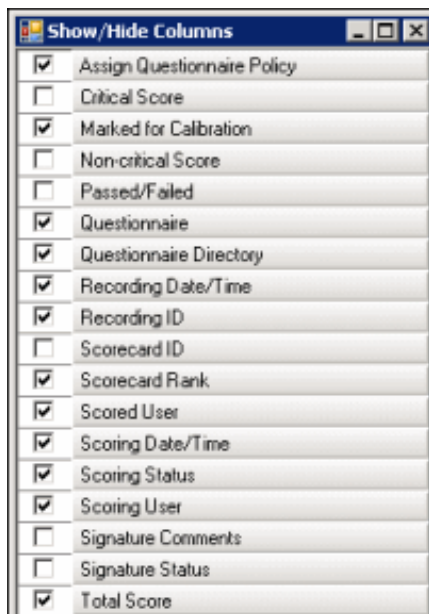
Sorting Columns in the grid

To sort a grid column in ascending or descending order, click the Field name.

Refining search results

To further refine the search results, use the Filter Criteria selection fields ▣ below each Field name. To create a field filter for the search results displayed in the grid, select the field below the Field name. To select an operand for the search, click ▣, and then click the arrow to select the search criteria from the list. Depending on the field and your selections, an additional dialog might be displayed. The search results are displayed according to your search filter. To clear the search filter criteria, click clear filter criteria ▨ for the field. To clear all filters, click clear all filter criteria ▨ on the left of the filter fields grid row.

Recording Details

When you select a recording in the Search results list, detailed information about a recording and a scorecard preview is displayed below the grid.

If you have CanScoreRecording security rights, the **Score Recording** button is displayed.

Score Recording

If the user has the **CanScoreRecording** security right, assigned in Policy Editor, associated with the selected recording, the Score Recording button is displayed. To score a recording, click **Score Recording**. The Scorecard assigned to the recording is displayed. For more information, see Score a Recording.

Open a Recording

To open a recording associated with the Scorecard, click the Recording title link.
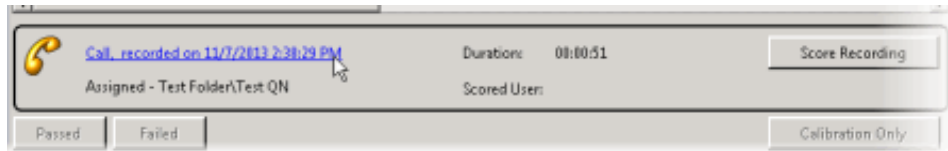
The recording opens for playback.
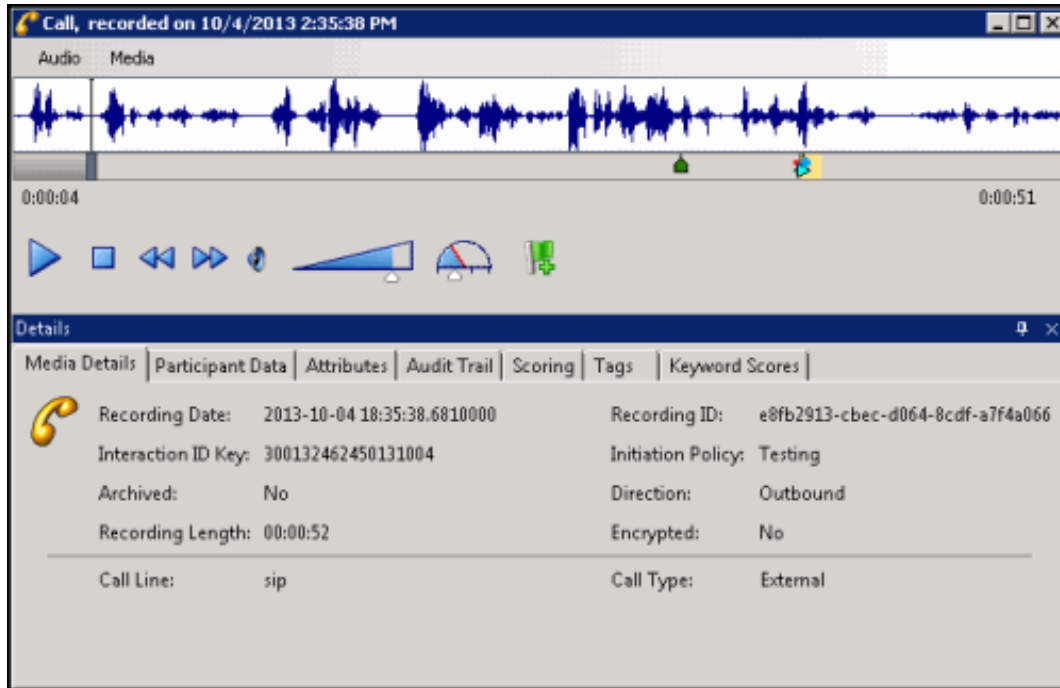
Recording Shortcut menu

Use the recording shortcut menu to open a recording and scorecard. To display the shortcut menu, right-click on a recording. You can also delete a scorecard from a recording from the shortcut menu.

Run Search

In addition to re-running a search from the Search Details, you can re-run a search with the Run Search toolbar button.

Next, see Score a Recording.

Score a Recording

After you have selected a recording in the Search results list, if you have the **CanScoreRecording** security right assigned in Policy Editor associated with the recording, the Score Recording button is displayed.
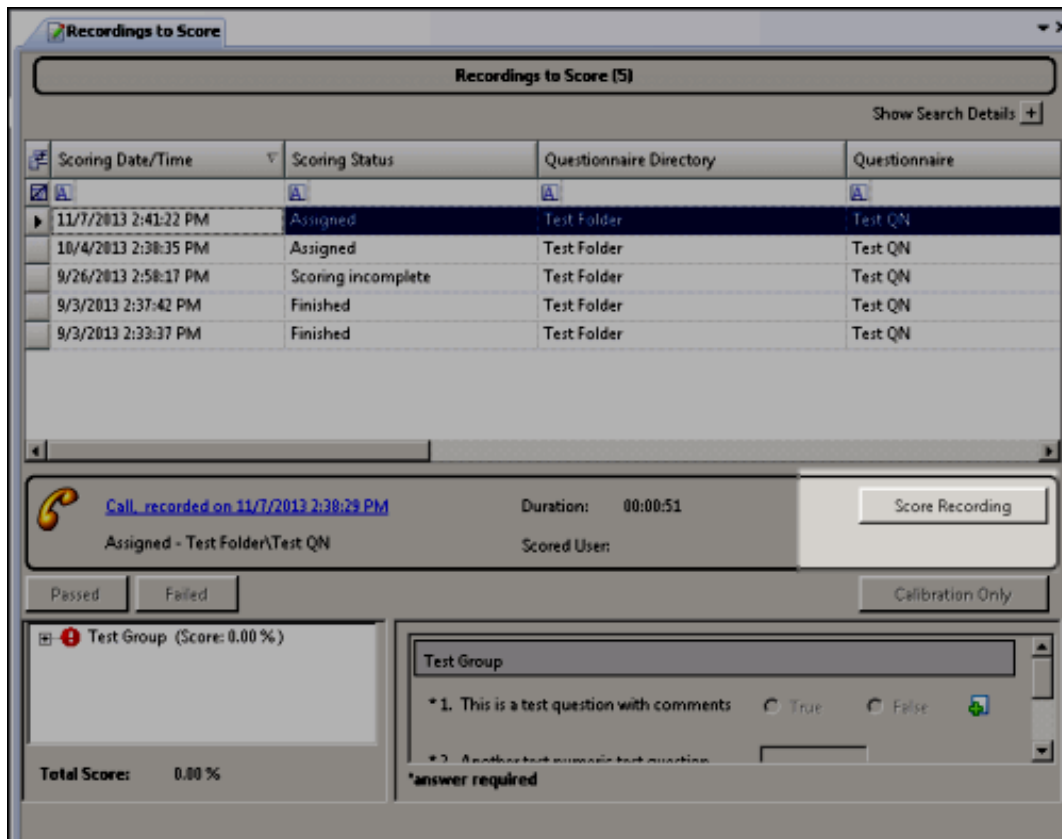
To score a recording, click **Score Recording**. The Scorecard assigned to the recording is displayed. The title of the Questionnaire is
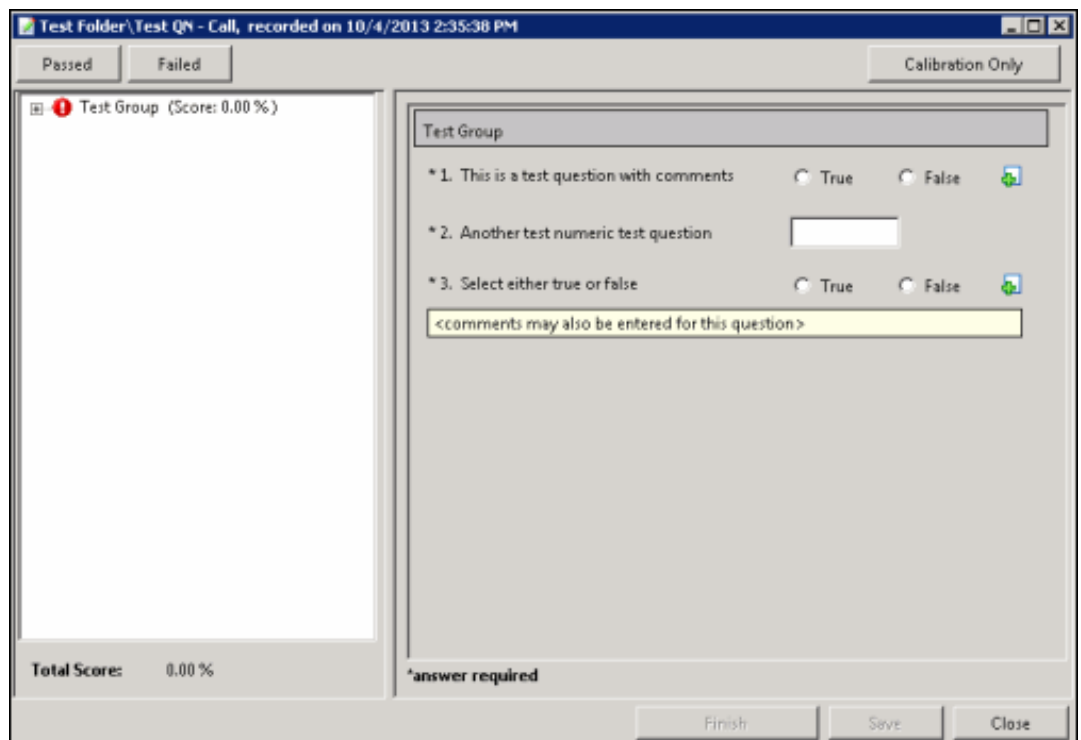
displayed in the dialog title bar.

Scoring a Recording

To score a recording:

1. Use the left pane to display Scorecard questions. Expand a Question Group. The questions are displayed in the right pane.
2. In the right pane, answer the questions. If Help Text is available for a question, it is displayed below the question. If a comment can be added to a question while scoring, it is indicated by the Add Comments ![icon] button. Required questions are indicated by an asterisk (*).
3. Click **Passed** or **Failed**, and then click **Finish**.

Passed

Click this toggle button to indicate this Scorecard has passed.

Failed

Click this toggle button to indicate this Scorecard has failed. When the Failed button is selected a warning is displayed at the top of the dialog indicating the **Scorecard has been failed**, and the Finish button is labeled **Finish (Failed)**.

Calibration Only

Click this button to mark the Scorecard for calibration use only.

Notes
• Calibration provides confidence that monitored interactions will be scored consistently among Quality Assurance team members. Calibrating scoring ensures fairness to agents whose recorded interactions are being evaluated.
• When a scorecard is marked for Calibration, this indicates that the score is excluded from other scored interactions and does not count toward the agent's individual performance results. Scorecards marked for Calibration are also excluded from the overall group performance results. **Important**: In Interaction Reporter, the **Calibration Only** parameter is required to be set within Calibration reports to ensure only scorecards that have been marked for Calibration are included in the report results. Excluding the Calibration Only parameter from the Calibration reports will result in all scorecards being included within individual and overall group performance results. See the Interaction Reporter help for more details on how to configure and run Calibration reports.
• When searching for scorecards in Interaction Quality Manager, scorecards marked for Calibration are included in search results. To exclude scorecards marked for Calibration in search results, select **No** when configuring the **Marked for Calibration** search attribute.
• In Interaction Reporter, only *completed* scorecards are included in Calibration reports. Scorecards that are still *in progress* are not included in Calibration reports.

Scoring Results

The **Score** percentage and **Rank** are displayed by **Group** in the left pane next to the Question Group.

Total Score and Rank

The averaged percentage and rank for scored Question groups is displayed next to the **Total Score**.

Non-critical Score

If applicable for the Questionnaire, the averaged percentage for the Non-critical questions is displayed in **Non-critical Score**.

Critical Accuracy

If applicable for the Questionnaire, the averaged percentage for the critical questions is displayed in **Critical Accuracy**. The correct number of responses for the total number of critical questions is also indicated.

Save

To save a scored interaction to be emailed or to finish scoring later, click **Save**.

Finish

When you have completed scoring the interaction, click **Finish**. If the Scorecard has been failed, the Finish button is labeled **Finish (Failed)**. The scored results are now available for reporting.

> **Note** When you click Finish, the Search Results View is dynamically updated for the Scorecard status.

Recordings to Score View Attributes

The following table defines the search attributes on the **Recordings to Score View Attributes** dialog, to retrieve recordings to be scored.

Recordings to Score Search Attribute Descriptions

Attribute	Description
Date/Time	Date/Time is a rich attribute that contains multiple sub-fields. First, in the Date/Time box: select **Recording Date/Time** to retrieve recordings based on the date and time of the recording; or select **Scoring Date/Time** to retrieve recordings based on the date and time the recording was last scored. You can select: **Specify a date/time range**, **Specify a date period**, or **Specify shift date/time period**. Operands are displayed depending on your selection. For **Specify a date/time range**, select an operator from the drop-down list. The available operators are: Equal, Before, After, or Between. Next, specify a date argument using the drop-down box and selecting a date from the calendar. Type or select a time to specify a time argument. For **Specify a date period**, specify a date in which the interactions occurred to be included in the search. Available options are: Today, Last week, Last month, Last N hours, or Last N days. For **Specify shift date/time period**, specify a shift date range and time of day range. For example, a shift date/time might be Monday through Friday, 8:00 a.m. to 5:00 p.m. The date/time attribute uses the Windows time zone set for the Windows User on the Interaction Recorder Client machine.
Scorecard Status	This attribute searches for recordings based on their scorecard status. The search options are **Assigned**, **Scoring incomplete**, or **Finished**. To narrow your search, select a scorecard status check box. You can select more than one status in a search. If no Scorecard Status check boxes are selected, recordings for *all* scoring statuses are included in the search results.
Scoring User	This attribute searches for users who have scored recordings. In the Scoring User field, begin typing a user name to display available User Names to choose from. Multiple user names can be specified to create a list of scoring users.

Display scorecard preview with results check box

Select this check box to show or hide the scorecard preview control when a recording is selected in the **Recordings to Score** view.

Maximum results field

Use this field to specify the number of results to be returned with the search. Valid values are between 1 and 10000.

Questionnaires

Questionnaires are used to score recorded interactions. Use Questionnaires to measure script adherence, compliance, and customer satisfaction. Questionnaires are integrated with scoring and simplify the quality assessment process, by easily adding a Questionnaire to the recording's Scoring page.

Use the Interaction Quality Manager navigation pane to create and publish Questionnaires.

Interaction Quality Manager Navigation Pane

Use the Interaction Quality Manager pane to create and organize your Questionnaires. Questionnaires are created in folders, and Questions are organized within Groups.
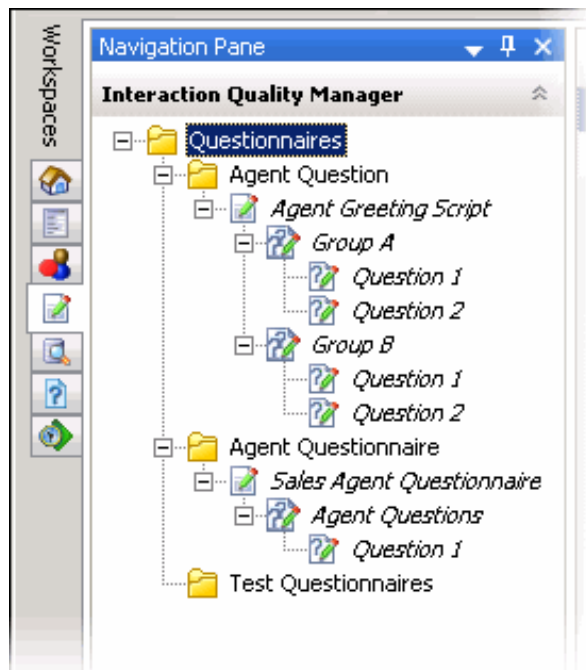
- **Questionnaires Folder** Use the **Questionnaires** folder to create Questionnaire sub-folders. To create a Questionnaire folder, select the **Questionnaires** folder, right-click, point to **New**, and click **Folder**. On the New Questionnaire Folder dialog, type a name for the folder.

  When you select the **Questionnaires** folder, the Questionnaires List View--a list of all Questionnaires--is displayed in the Workspace.
- **Questionnaire Folder**   Use the Questionnaire folder to create new Questionnaires. To create a questionnaire in the folder, right-click, point to **New**, and click **Questionnaire**. A *New Questionnaire* is created under the Questionnaire folder, and it includes a *Group* and a *Question* .
- **Questionnaire** When a Questionnaire is created, it is displayed in the Questionnaire View in the Workspace. Use the Questionnaire View to configure the settings for your questionnaire.

  Descriptive Groups, which are created to organize Questions, can be added from the Questionnaire View. To create a Group from the Questionnaires pane, right-click a Questionnaire, and click **New Group**.

  Also, Questionnaires can be published from the Questionnaire View.
- **Group** When a Group is created, it is displayed in the Group View in the Workspace. You configure Group settings in this view. Use a descriptive name for the Group, which will contain a set of logically related questions.

To create a question in a Group, right-click a Group, and click **New Question**.

- **Question** When a Question is created, it is displayed in the Question View in the Workspace. Configure the Question settings in the Question View. You can also add a new question from the Question View.

Note

For Security Access:

- To create new Questionnaire folders, or delete existing Questionnaire Folders, a User must have the Application Security Right for Recorder Policy Create/Delete Questionnaire Directories and Modify Rankings assigned in Interaction Administrator on the Security page.
- For a User to View or Modify Questionnaires, a User must have Access rights for the Recorder Questionnaires folders, assigned in Interaction Administrator on the Security page.

Related Topics

Creating a Questionnaire

Interaction Quality Manager Navigation Pane

Introduction to Quality Manager view

Publishing a Questionnaire

Creating a Questionnaire

Use the **Interaction Quality Manager** navigation pane to create Questionnaires for scoring recorded interactions. Questionnaires can be created to measure script adherence, compliance, and customer satisfaction. Questionnaires are integrated with scoring and simplify the quality assessment process, by easily adding a Questionnaire to a recording's Scoring page.

> **Note**
>
> For Security Access:
>
> **-** To create new Questionnaire folders, or delete existing Questionnaire Folders, a User must have the **Application** Security Rights for Recorder Policy **Create/Delete Questionnaire Directories and Modify Rankings** assigned in Interaction Administrator on the Security page.
>
> **-** For a User to **View** or **Modify** Questionnaires, a User must have Access rights for the **Recorder Questionnaires** folders, assigned in Interaction Administrator on the Security page.

Create a Questionnaire folder

When you create a questionnaire, first create a folder to hold your questionnaires.

Here's how to create a folder to hold a Questionnaire:

1. In the **Interaction Quality Manager** pane, select the **Questionnaires** folder.
2. Right-click the Questionnaires folder, point to **New**, and click **Folder**. The New Questionnaire Folder dialog is displayed.
3. Type a descriptive name for the folder that will contain the questionnaire. In the **Description** box, you can type a description. This description is displayed in the tooltip for the folder.

   Note The **Description** can be edited in the **Questionnaire Directory** view, after the folder has been created.

   When you have completed the dialog, click **OK**.

The new Questionnaire folder is created under **Questionnaires**.

Create a Questionnaire

To create a questionnaire, right-click the questionnaire folder, point to **New**, and click **Questionnaire**. The new questionnaire is displayed in the Questionnaire View in the Workspace. A New Questionnaire and a Group and a Question are automatically created in the Questionnaire folder.

Configure Questionnaire settings

Configure the settings for the *New Questionnaire*.

1. Select the *New Questionnaire* in the Questionnaire folder. The current settings are displayed in the Questionnaire View in the Workspace.
2. In the **Name** box type a descriptive name for your questionnaire. When you move to the next field, the Questionnaire name is updated in the Questionnaires pane.
3. You can make comments about the questionnaire in the **Notes** box.
4. In the **Ranking** drop-down list, select a Ranking system. You can also create a new ranking system at this time by clicking Create new ranking.
5. To hide scores for incomplete questionnaires while they are being scored, select the **Hide scores when questionnaire scorecard is incomplete**. Choose this option so scorers cannot see the current ranking and scores for incomplete questionnaires while they are being scored. After the questionnaire scorecard is complete, the scores panel is displayed for the questionnaire.
6. If you want to hide the Pass/Fail buttons on the questionnaire scorecard, select the **Hide Pass/Fail options on the questionnaire scorecard** check box.

Minimum score and **Maximum score** for the Questionnaire are displayed.

> **Note** You can Add a new question group to the questionnaire from this view by clicking **Add new group**.

Configure Questionnaire Group settings

When you have completed configuring the settings for the questionnaire, set the values for the *Group*.

1. Select the **Group** in the Interaction Recorder Questionnaires pane under the questionnaire. The current settings are displayed in the Group View in the Workspace.
2. In the **Name** box, type a descriptive name for the questionnaire Group. When you move to the next field, the group name is updated in the Questionnaire pane.
3. If you want to mark this group optional, allowing questions to be marked Not Applicable, select the **Allow group to be Optional** check box.

Minimum score and **Maximum score**, and **Total Score Contribution** for all Questions in the Group are displayed.

> **Note** You can Add a new question to the questionnaire from this view by clicking **Add new question**.

Configure Question settings

Next, to configure the settings for a question:

1. Select the *Question* in the Group. The current settings are displayed in the Question View in the Workspace.
2. In the **Question** box, type the name for the question. When you move to the next field, the question name is updated in the Questionnaire pane.
3. In the **Help Text** box, add any additional text that will help the scorer grade the question.
4. In the **Data type** drop-down list, select a question type. Depending on the question type you selected, other fields are presented

for configuration. The available question types are: **Free text (non-scoring)**, **Integer**, **Multiple Choice**, **Numeric**, **True/False**, and **Yes/No**.

5. Assign a value to the question in the **Weight** box.

6. To allow comments to be added when scoring a Questionnaire, select the **Allow comments** check box.

7. To classify a Question, use the **Importance** drop-down box. Questions can be classified as:
   - **Required**, if the Question must be answered
   - **Optional**, if an answer is not required
   - **Critical** when the question represents agent behavior that is a key requirement to successfully handling the interaction. Critical questions require a **Yes/No** or **True/False** answer type. Score value for Critical questions can be weighted and/or have a low value for a No or False response in order to result in a failing score. Additionally the scorer can choose to use the manual **Fail** button when the response to a Critical question is No or False.

8. To allow the Scorer to mark a Question not applicable, select the **Allow Not Applicable (N/A) Answer** check box. Selecting this box adds N/A to the list of choices for a response when Scoring a Questionnaire.

Minimum score and **Maximum score**, and **Total Score Contribution** for the Question are displayed.

Preview Questionnaire

You can preview a Questionnaire while you are creating it and after it has been published, using the **Preview Questionnaire** toolbar button [Preview Questionnaire]. When the Questionnaire View or the Question View is displayed in the Workspace, click Preview Questionnaire to display the Questionnaire Scorecard.
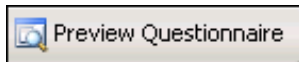
Save Questionnaire
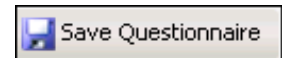
While you are creating a Questionnaire, you can save it using the **Save Questionnaire** toolbar button [Save Questionnaire]. Saving the Questionnaire allows you to edit and make changes to the questions before publishing. When your Questionnaire is saved, the name is no longer in italics.

Organize Groups and Questions

You can change the order of question groups in a questionnaire and you can also change the order of the questions within a group. Use the **Move Down/ Move Up** toggle button on the toolbar to order groups and questions in your questionnaire.

Related Topics

Publishing a Questionnaire

Score a Recording

Interaction Quality Manager Navigation Pane

Publishing a Questionnaire

Published questionnaires are activated and available for scoring. When a Questionnaire is published, it cannot be modified or unpublished. A published questionnaire can be deactivated if you do not want it available for scoring purposes. For more

information, see [deactivating a questionnaire](#).

There are two ways to publish a questionnaire from the Questionnaire View:
- Clicking **Publish Questionnaire** in the Workspace

- Using the Publish Questionnaire toolbar button

Publish a Questionnaire

In the Questionnaires Navigation pane, unpublished Questionnaires are indicated by the unpublished questionnaire icon .

To publish a questionnaire:

1. From the Questionnaires Navigation pane, select the questionnaire to be published. The Questionnaire View is displayed in the Workspace.
2. On the upper-right corner of the Workspace, click **Publish Questionnaire**. Or, click the Publish Questionnaire button on the toolbar.

   A message box is displayed to remind you that when a Questionnaire is published, it cannot be modified or unpublished.

3. Click **OK**. The questionnaire is now displayed in the Questionnaire pane with a published questionnaire icon . Also, the group and question icons are updated to published icons.

> **Note** Published Questionnaires can be duplicated and renamed, allowing you to create a new questionnaire with the same properties as the published questionnaire. The new, duplicated, questionnaire is unpublished and can be modified.

> **Note** To delete a Published Questionnaire, the user needs to have write access to the questionnaire directory.

Deactivate or Activate a Questionnaire

Published Questionnaires are activated and available for scoring. if you do not want a questionnaire available for scoring purposes, a published questionnaire can be deactivated. Questionnaire and scorecard data are still available for historical reporting for deactivated questionnaires.

Following these steps to Deactivate a questionnaire.

1. In the Interaction Quality Manager navigation pane, right-click on the questionnaire to be deactivated. A shortcut menu is displayed.
2. On the shortcut menu, click **Deactivate**.

Deactivating a published questionnaire allows existing scorecard data, associated with the questionnaire, to be available for historical reporting purposes. Deactivated questionnaires are no longer available in IC Business Manager Interaction Recorder or for Interaction Recorder policies, for creating and assigning scorecards. If you want to add additional scorecards to a deactivated questionnaire, you can Activate the questionnaire again.

Follow these steps to Activate a questionnaire.

1. In the Interaction Quality Manager navigation pane, right-click on the questionnaire to be activated. A shortcut menu is displayed.
2. On the shortcut menu, click **Activate**.

To Deactivate and Activate Questionnaires, you must have Modify Access Control rights for Recorder Questionnaires, assigned in Interaction Administrator.

Interaction Quality Manager Reports

Interaction Quality Manager reporting is available in Interaction Reporter in IC Business Manager. For more information see Interaction Quality Manager Reporting.

Interaction Quality Manager Reporting

Interaction Quality Manager reporting is available in Interaction Reporter in IC Business Manager.

The Interaction Quality Manager Reports include:
- Calibration Details
- Calibration Question Group Details
- Calibration Recording Summary
- Deleted Recording Audit by Date
- Deleted Recording Audit by User
- Recorder Questionnaire Detail
- Recorder Scoring Summary
- Recorder User Scoring Summary
- Quality Scoring Details

For detailed information on running these reports, see the Interaction Reporter Help.

Miscellaneous topics

Integer Question View

The Integer Question view displays current settings for the selected question. Use this view to create, change, and update Integer question settings. This question type allows the scorer to assign an integer when scoring a recorded interaction.

Question

Use this field to type the content of the question to be used when scoring a recorded interaction.

Help Text

Use this field to include information in the question that is displayed when an interaction is being scored. The information included in this field should be helpful to the person scoring the interaction.

Data Type

Select **Integer** from the drop-down list for this type of question.

Weight

Select the number for which you want to weight the importance of this question. The Weight is used as a multiplier to calculate the final score for a question. For example, if the question is scored as a 9 with a weight of 2, the final score for that question is 18.

The current value is displayed. To change the value, enter the new value in the **Weight** box.

Allow comments

To allow comments to be added when scoring a Questionnaire, select the **Allow comments** check box.

Importance

To classify this Question, use the **Importance** drop-down box. Questions can be classified as: **Required**, if this Question must be answered, or **Optional**, if an answer is not required.

Allow Not Applicable (N/A) Answer

To allow the Scorer to mark this Question not applicable, select the **Allow Not Applicable (N/A) Answer** check box. Selecting this box adds N/A to the list of choices for a response to this Question when Scoring a Questionnaire.

Minimum and Maximum

The range of integers to score the question is displayed in the Minimum and Maximum boxes. To change the minimum or maximum value for the range, enter a new value in the **Minimum** or **Maximum** box.

Minimum score and Maximum score

The calculated **Minimum score** and **Maximum score** for this question are displayed at the bottom of the Question View. The **Total Score Contribution** percentage, for this question, is also displayed at the bottom of the view.

Manage Questionnaire Rankings

Access **Manage Questionnaire Rankings** from the **Tools** menu.

Questionnaire Rankings are scaled scores used to rate or grade Questionnaires. When a Questionnaire is completed, the final score is compared to the value defined in the Questionnaire's ranking.

Defining a Rank Group

Define ranking scales on the Questionnaires Rank Groups dialog.

To access the Questionnaires Rank Groups dialog, from the **Tools** menu click **Manage Questionnaire Rankings**. The Questionnaires Rank Groups dialog is displayed.
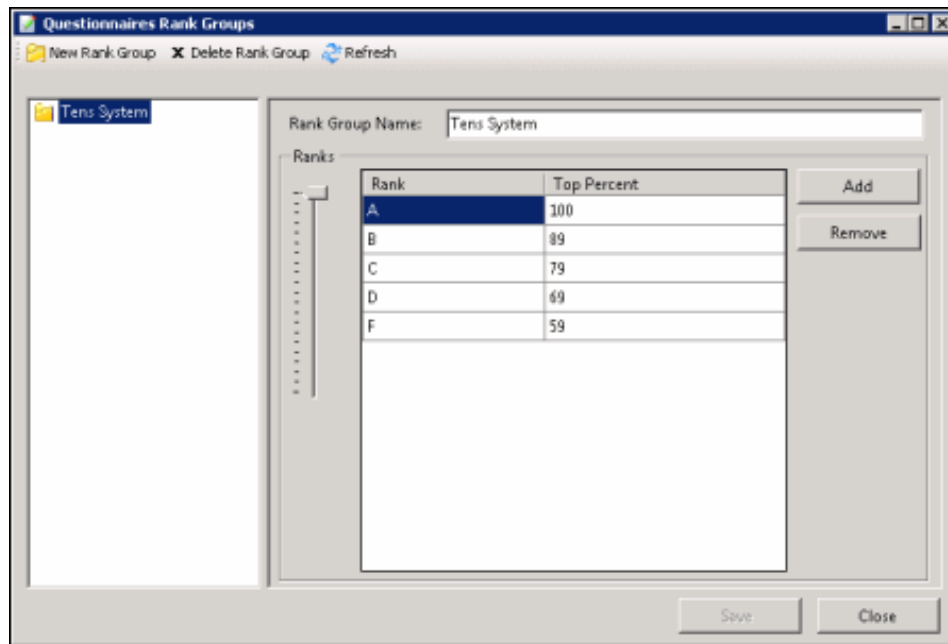
To define a new ranking scale for a Questionnaire, first create a new Rank Group.
1. On the toolbar click **New Group**. The **New Rank Group** is displayed under **Rank Groups** at the end of the list.
2. In the Rank Groups list, right-click **New Rank Group** and click **Rename** to name the new Rank Group.
3. Type the new name for this rank group, and press **Enter**. The new name is displayed in the **Group Name** box in the Rank Groups view. The Rank Group Name is limited to 40 characters.

Defining the ranking scale

To define the ranking scale for a Rank Group, select the Rank Group in the left pane, and edit its properties in the right pane.
1. To add a **Rank**, click **Add**.
2. **New Rank** is added to the Rank list and is selected. Type a name for the ranking.
3. Use the **Ranks** percentage slider to select a percentage for the **Top Percent** column

> Define as many ranks as you choose to use in your ranking scale. Assign a top percent for each Rank in the **Top Percent** column, setting the highest percentage for the Rank in this column. For example, if A = 90—100 percent, the highest percentage, 100, is set in the Top Percent column. Therefore, if B = 80—89 percent, 89 is set in the Top Percent column for B. Next, C = 70—79 percent, and 79 is set in the Top Percent column for C. Rank D = 60—69 percent, and 69 is set in the Top Percent column for D. And the F Rank includes 0—59 percent when 59 is set as the Top Percent column for the Rank. The lowest Rank includes all scores below 59, including zero.

4. Click **Save**, and then click **Close** to exit the Questionnaires Rank Group dialog.

Assigning a Ranking to a Questionnaire

To assign a ranking to a Questionnaire, under **Questionnaires** select a Questionnaire to view it in the Workspace.
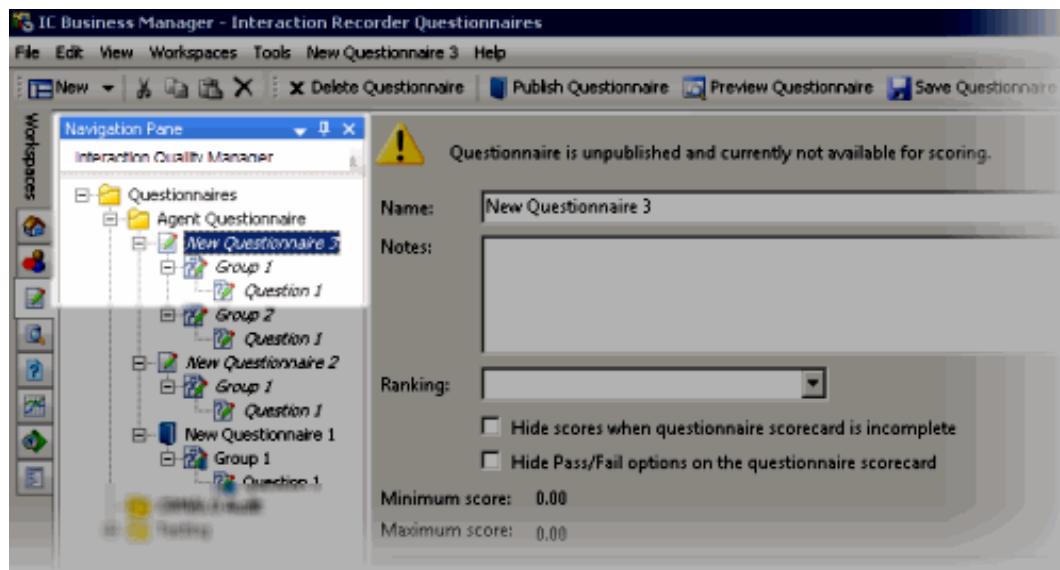
> **Note** To assign or modify a ranking, a User must have the **Application** Security Rights for Recorder Policy **Create/Delete Questionnaire Directories and Modify Rankings** assigned in Interaction Administrator on the Security page.

Next, in the **Ranking** drop-down list, select a Rank Group to assign to the Questionnaire.
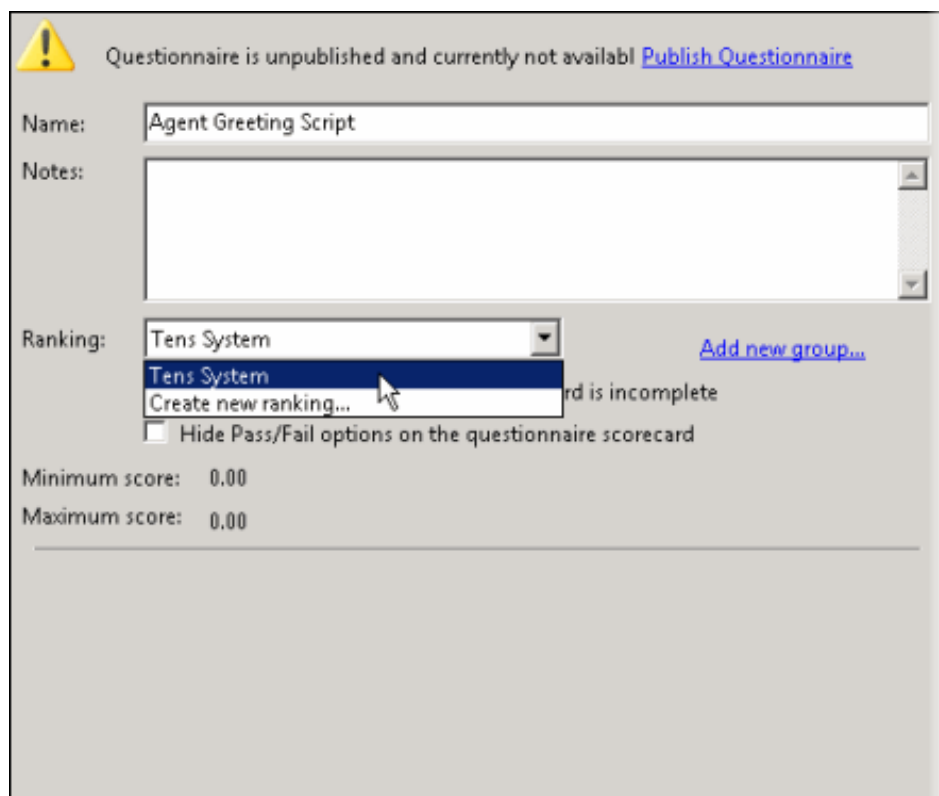
Multiple Choice Question View

The Multiple Choice Question View displays current settings for the selected question. Use this view to create, change, and update Multiple Choice question settings. This question type allows the scorer to choose an answer from a list of possible answers when scoring an interaction.

Question

Use this field to type the content of the question to be used when scoring a recorded interaction.

Help Text

Use this field to include information in the question that is displayed when an interaction is being scored. The information included in this field should be helpful to the person scoring the interaction.

Data Type

Select **Multiple Choice** from the drop-down list for this type of question.

Weight

Select the number for which you want to weight the importance of this question. The Weight is used as a multiplier to calculate the final score for a question. For example, if the question is scored as a 9 with a weight of 2, the final score for that question is 18.

The current value is displayed. To change the value, enter the new value in the **Weight** box.

Allow comments

To allow comments to be added when scoring a Questionnaire, select the **Allow comments** check box.

Importance

To classify this Question, use the **Importance** drop-down box. Questions can be classified as: **Required**, if this Question must be answered, or **Optional**, if an answer is not required.

Allow Not Applicable (N/A) Answer

To allow the Scorer to mark this Question not applicable, select the **Allow Not Applicable (N/A) Answer** check box. Selecting this box adds N/A to the list of choices for a response to this Question when Scoring a Questionnaire.

Answer and Value

Click the Add Answer button to insert Answer and Value fields into the Answer list box. In the Answer field, type an answer choice for the scorer to choose from. In the Value field, type a numeric value for this answer.

Delete an Answer

To delete an Answer, select the Answer and Value row by clicking the button on the left side of the row. When the entire row is

selected, the Delete Answer button is enabled . Click this button to delete the Answer.

Change Order of Answers

To change the order for the Answers displayed in the list box, select the row for the Answer, and use the Up and Down buttons to change its order in the list.

Answer	Value	
More than three times	5.00	➕
Two times	3.00	✖
One time	1.00	
Did not use caller's name	0.00	
		⬆
		⬇

Minimum score and Maximum score

The calculated **Minimum score** and **Maximum score** for this question are displayed at the bottom of the Question View. The **Total Score Contribution** percentage, for this question, is also displayed at the bottom of the view.

Numeric Question View

The Numeric Question view displays current settings for the selected question. Use this view to create, change, and update Numeric question settings. This question type allows the scorer to assign a numeric value when scoring a recorded interaction.

Question

Use this field to type the content of the question to be used when scoring a recorded interaction.

Help Text

Use this field to include information in the question that is displayed when an interaction is being scored. The information included in this field should be helpful to the person scoring the interaction.

Data Type

Select **Numeric** from the drop-down list for this type of question.

Weight

Select the number for which you want to weight the importance of this question. The Weight is used as a multiplier to calculate the final score for a question. For example, if the question is scored as a 9 with a weight of 2, the final score for that question is 18.

The current value is displayed. To change the value, enter the new value in the **Weight** box.

Allow comments

To allow comments to be added when scoring a Questionnaire, select the **Allow comments** check box.

Importance

To classify this Question, use the **Importance** drop-down box. Questions can be classified as: **Required**, if this Question must be answered, or **Optional**, if an answer is not required.

Allow Not Applicable (N/A) Answer

To allow the Scorer to mark this Question not applicable, select the **Allow Not Applicable (N/A) Answer** check box. Selecting this box adds N/A to the list of choices for a response to this Question when Scoring a Questionnaire.

Minimum and Maximum

The range of numbers to score the question is displayed in the Minimum and Maximum boxes. To change the minimum or maximum value for the range, enter a new value in the **Minimum** or **Maximum** box.

Minimum score and Maximum score

The calculated **Minimum score** and **Maximum score** for this question are displayed at the bottom of the Question View. The **Total Score Contribution** percentage, for this question, is also displayed at the bottom of the view.

Free Text Question View

The Free Text Question view displays current settings for the selected question. Use this view to create, change, and update Free Text question settings. The Free Text format is non-scoring. This question type allows the scorer to type a comment in a text field while scoring a recorded interaction.

Question

Use this field to type the content of the question to be used when scoring a recorded interaction.

Help Text

Use this field to include information for the question that is displayed when an interaction is being scored. The information included in this field should be helpful to the person scoring the interaction.

Data Type

Select **Free Text (non-scoring)** from the drop-down list for this type of question.

Weight

The Weight is used as a multiplier to calculate the final score for a question. **Weight** is not applicable to Free Text questions; the field is not available.

Allow comments

To allow additional comments to be added when scoring a Free Text Question, select the **Allow comments** check box.

Questionnaire Folder View

Use the Questionnaire Folder View to add a Description for a Questionnaire Directory.

Name

The name box displays the name of the Questionnaire Directory.

Description

This box displays the description of the Questionnaire Directory. Use this box to edit the Questionnaire Directory description.

Questionnaire Group View

A Questionnaire Group contains Questions that are logically related. The Questionnaire Group View displays current settings for the selected Questionnaire Group.

Use this view to configure, change, and update Questionnaire Group settings.

Name

In the **Name** box, type a descriptive name for the questionnaire Group, which will contain a set of logically related questions.

Notes

You can make comments in the **Notes** box. These notes will be displayed as part of the Scorecard.

Allow Group to be Optional

If you want to mark this group optional, allowing questions to be marked Not Applicable, select the **Allow group to be Optional** check box. Marking a group of questions optional allows a questionnaire to be complete, if the scorer chooses not to answer a question from this group.

Minimum Score and Maximum Score

Minimum score and **Maximum score** for the Questionnaire Group are displayed.

Total Score Contribution

The Total Score Contribution percentage, for this group of questions is displayed in this view.

Questionnaire View

Use the Questionnaire View to configure the settings for a Questionnaire.

Name

In the Name box type a descriptive name for your questionnaire. When you move to the next field, the Questionnaire name is updated in the Questionnaires pane.

Notes

Use this box to make comments about the questionnaire.

Ranking

In the **Ranking** drop-down list, select a Ranking system. You can also create a new ranking system at this time by clicking **Create new ranking**.

Hide Scores When Questionnaire Scorecard is Incomplete

Select this check box to hide scores for incomplete questionnaires. When this option is selected, the scores panel is hidden from the scorecard while the scorer is answering questions. You might want to choose this option so scorers cannot see the current ranking and scores, for incomplete questionnaires while they are being scored, which might influence their answers.

After the questionnaire scorecard is complete, the scores panel is displayed for the questionnaire.

Hide Pass/Fail Options on the Questionnaire Scorecard

Select this check box to hide the Pass/Fail buttons on the questionnaire scorecard.

Minimum Score and Maximum Score

Minimum score and **Maximum score** for the Questionnaire are displayed.

Publish Questionnaire

Only published questionnaires are available for scoring. When a Questionnaire is published, it cannot be modified or unpublished.

On the upper-right corner of the Workspace, click **Publish Questionnaire**. A message box is displayed to remind you that when a Questionnaire is published, it cannot be modified or unpublished. When you click **OK**, The questionnaire is displayed in the

Questionnaire pane with a published questionnaire icon .

Add New Group

You can Add a new Questionnaire Group to this Questionnaire by clicking **Add new group**.

Toolbars

Interaction Recorder *toolbars* contain buttons that represent tasks you can do within the program. Click a button on the toolbar to perform the task.

To display toolbars, from the **View** menu, point to **Toolbars** and on the submenu, select the toolbar you want to view. Depending on the selected Workspace, available Toolbars for Interaction Recorder and Interaction Recorder Questionnaires are: Standard and Questionnaire.

Available toolbar buttons vary according to the task you are performing.

Tools Menu

Interaction Quality Manager has a Tools menu on the menu bar. The Interaction Quality Manager Tools menu has the Manage Questionnaire Rankings command.

True/False Question View

The True/False Question view displays current settings for the selected question. Use this view to create, change, and update True/False question settings. This question type allows the scorer to assign a True and False value when scoring a recorded interaction.

Question

Use this field to type the content of the question to be used when scoring a recorded interaction.

Help Text

Use this field to include information in the question that is displayed when an interaction is being scored. The information included in this field should be helpful to the person scoring the interaction.

Data Type

Select **True/False** from the drop-down list for this type of question.

Weight

Select the number for which you want to weight the importance of this question. The Weight is used as a multiplier to calculate the final score for a question. For example, if the question is scored as a 9 with a weight of 2, the final score for that question is 18.

The current value is displayed. To change the value, enter the new value in the **Weight** box.

Allow comments

To allow comments to be added when scoring a Questionnaire, select the **Allow comments** check box.

Importance

To classify a Question, use the **Importance** drop-down box. Questions can be classified as:
- **Required**, if the Question must be answered
- **Optional**, if an answer is not required

- **Critical** when the question represents agent behavior that is a key requirement to successfully handling the interaction. Critical questions require a **Yes/No** or **True/False** answer type. Score value for Critical questions can be weighted and/or have a low value for a No or False response in order to result in a failing score. Additionally the scorer can choose to use the manual **Fail** button when the response to a Critical question is No or False.

Allow Not Applicable (N/A) Answer

To allow the Scorer to mark this Question not applicable, select the **Allow Not Applicable (N/A) Answer** check box. Selecting this box adds N/A to the list of choices for a response to this Question when Scoring a Questionnaire.

True Value

The value for this question based on a True response. Enter the value in the **True value** box.

False Value

The value for this question based on a False response. Enter the value in the **False value** box.

Minimum score and Maximum score

The calculated **Minimum score** and **Maximum score** for this question are displayed at the bottom of the Question View. The **Total Score Contribution** percentage, for this question, is also displayed at the bottom of the view.

Workspace

Views selected in the Navigation Pane, such as Searches and Questionnaires, are displayed in the Workspace.

Yes/No Question View

The Yes/No Question view displays current settings for the selected question. Use this view to create, change, and update Yes/No question settings. This question type allows the scorer to assign a Yes and No value when scoring a recorded interaction.

Question

Use this field to type the content of the question to be used when scoring a recorded interaction.

Help Text

Use this field to include information in the question that is displayed when an interaction is being scored. The information included in this field should be helpful to the person scoring the interaction.

Data Type

Select **Yes/No** from the drop-down list for this type of question.

Weight

Select the number for which you want to weight the importance of this question. The Weight is used as a multiplier to calculate the final score for a question. For example, if the question is scored as a 9 with a weight of 2, the final score for that question is 18.

The current value is displayed. To change the value, enter the new value in the **Weight** box.

Allow comments

To allow comments to be added when scoring a Questionnaire, select the **Allow comments** check box.

Importance

To classify a Question, use the **Importance** drop-down box. Questions can be classified as:
- **Required**, if the Question must be answered
- **Optional**, if an answer is not required
- **Critical** when the question represents agent behavior that is a key requirement to successfully handling the interaction. Critical questions require a **Yes/No** or **True/False** answer type. Score value for Critical questions can be weighted and/or have a low value for a No or False response in order to result in a failing score. Additionally the scorer can choose to use the manual **Fail** button when the response to a Critical question is No or False.

Allow Not Applicable (N/A) Answer

To allow the Scorer to mark this Question not applicable, select the **Allow Not Applicable (N/A) Answer** check box. Selecting this box adds N/A to the list of choices for a response to this Question when Scoring a Questionnaire.

Yes Value

The value for this question based on a Yes response. Enter the value in the **Yes value** box.

No Value

The value for this question based on a No response. Enter the value in the **No value** box.

Minimum score and Maximum score

The calculated **Minimum score** and **Maximum score** for this question are displayed at the bottom of the Question View. The **Total Score Contribution** percentage, for this question, is also displayed at the bottom of the view.

Change log

Date	Changes
12-March-2019	Created this change log.