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Genesys Recording, Quality Management, and Speech Analytics User's Guide

Action Items

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- Administrator

Use Action Items to manage SpeechMiner tasks. Action Items allow you to create and monitor a task for yourself and/or others. For example, a supervisor can create an Action Item that asks a staff member to create a series of sessions. The staff member can add notes as he/she progresses with the task and his/her supervisor can monitor the progress.

Related documentation:

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About Action Items

Action Items enable you to manage SpeechMiner tasks.

To view your Action Items, click the Action Items link in the upper right corner of the SpeechMiner screen.

The Action Items link contains round brackets. The number within those brackets indicates the amount of Action Items assigned to you.

- A black Action Item link indicates that no items are assigned to you.
- A green Action Item link indicates that the list contains items assigned to you.
- A bold green Action Item link indicates that new items have not been read or the status of an existing Action Item has been changed.

With Action Items you can:

- Create an Action Item - Used to indicate and specify to a user what should be done.
- Edit an Action Item - Used to modify the content and purpose of an action item.
- Change the Action Item Status - Used to indicate if the action item has been completed, and whether or not it was either rejected or accepted.

For example, a supervisor can create an Action Item that asks one of his staff members to create a series of sessions. The staff member will see that a new task has been assigned to him when he logs in to SpeechMiner. With Action Item's the staff member can add notes as he progresses with the task and his supervisor can monitor his progress.

Important

The summary in an **Evaluator Message** action item is also a link to the Evaluation Session associated with the action item. If you received this action item type, read the **Summary** instructions and follow the URL to the associated evaluation session, to better understand the action item before you perform and complete it.

Create an Action Item

1. In the top right corner of your SpeechMiner screen, click **Action Items**.
2. Click **New Item**.
3. Configure the following Action Item parameters:
 - **Assignee** - The user to whom the Action Item will be assigned.
 - **Type** - The Action Item subject
 - **Due Date** - The date on which the Action Item must be completed.
 - **Summary** - A detailed description of what the user must do.
4. Click **OK**. The Action Item is created and appears in the **My Items** list.

Edit an Action Item

An Action Item can be modified by both the creator and the user it is assigned to.

When you edit an Action Item you can add a note(s). Notes are used to clarify, describe and point out thoughts and decisions about the Action Item.

Tip

You can view an Action Item's details from the Action Item list. To do so, simply click the **Details** link.

To edit an action item:

1. In the top right corner of your SpeechMiner screen, click **Action Items**.
2. Click **Edit**.
3. Modify the parameter settings as required.

Tip

When you edit an Action Item, the Edit Action Item window contains an area for notes.

4. Under **Notes** add your thoughts (for example, decisions made, limitations, ideas, and so on).

Change the Action Item status

When an action item is completed, change its status to Completed. Once the status is changed to Completed, the user who created the action item must either Confirm or Reject the change. When it is confirmed that the action item has been completed, the action item will no longer appear in the Action Item list. When the Completed status is rejected, the action item remains in the Action Item list and the option to Complete becomes available again.

When you finish the tasks associated with an Action Item, you can:

- Select to complete the Action Item
- Confirm that the Action Item has been completed
- Reject that the Action Item has been completed

Complete an Action Item

1. In the top right corner of your SpeechMiner screen, click **Action Items**.
2. Under **Actions**, click the **Complete** link associated with the Action Item that has been completed.
3. In the **Complete Action Item** window, add a note that describes why the Action Item is complete.
4. Click **OK**.

Tip

If you add a note in the **Note** field, the action item will be sent back to the evaluator for review.

Confirm that an Action Item has been completed

1. In the top right corner of your SpeechMiner screen, click **Action Items**.
2. Under **Actions**, click the **Confirm** link to approve the Complete status.
3. In the **Confirm Action Item** window, add a note that describes why you agreed to the complete status.
4. Click **OK**.

Reject the decision to complete an Action Item

1. In the top right corner of your SpeechMiner screen, click **Action Items**.
2. Under **Actions**, click the **Reject** link to dismiss the Complete status.
3. In the **Reject Action Item** window, add a note that describes why you disagree with the complete status.
4. Click **OK**.