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

[Create an evaluation](#)

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- Administrator

Use Quality Management evaluations to improve agent productivity as well as customer satisfaction. Quality Management evaluations enable you to promote a specific agenda that results in easy detection and training of agents who do not adhere to compliance or specified procedures.

### Related documentation:

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SpeechMiner Quality Management enables you to create five types of evaluations:

- Distributed Interaction Evaluation
- Distributed Agent Evaluation
- Shared Evaluation
- Calibration Evaluation
- Ad-Hoc Evaluation

Refer to Quality Management workflow for a better understanding about the evaluation process.

### Important

- You cannot create an evaluation without a form. Before you create an evaluation, verify that a form(s) was created.
- The Evaluation Session list will automatically refresh when a new set of evaluation sessions is available. To manually refresh the Evaluation Session list, click the **Refresh** button .

[Link to video](#)

## Distributed Interaction Evaluation

The SpeechMiner Quality Management - Distributed Interaction Evaluation creates evaluation sessions about interactions for selected evaluators. Each evaluator will be assigned an evaluation session for each agent associated with the evaluation. The evaluation is created about the agents

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who participated in the selected interactions. For example, if you add 2 evaluators and 3 interactions (each with a different agent) to the evaluation, 6 evaluation sessions will be created. That is, each evaluator will be asked to fill out the evaluation for each one of the 3 agents.

## Create a Distributed Interaction evaluation

1. Click **Quality > Evaluations Manager**. The Evaluations Manager grid appears.
2. Click the drop down arrow next to **New Evaluation** and select **Distributed > Interaction**.
3. In the **Untitled Evaluation** field, enter the name of your evaluation.
4. In the **Description** field, enter a description of the evaluation.
5. From the **Schedule** list select one of the following, and configure the schedule using the options available:
  - **Recurring:** Use to create an evaluation that repeatedly produces evaluation sessions for a configurable time interval.
  - **One Time:** Use to create an evaluation that only produces evaluation sessions once.

The available schedule configuration options are:

  - Start - The date on which the evaluation session(s) should be created.
  -  - The time at which the evaluation session(s) should begin.
  - Occur every - The frequency (Minutes, Hours, Days, Weeks or Months) with which the evaluation recurs.
  - Expires after - The time (Minutes, Hours, Days, Weeks or Months) at which the evaluation session should be performed after the evaluation is created.
6. Select the **Forms** tab and from the **Forms** list, select the forms to add to the evaluation. As soon as you select a form from the list, it appears in the Evaluation Summary under Forms. Select the form again to remove the form from the Evaluation Summary. The forms selected consist of the questions that must be answered to complete the evaluation session.
7. Select the **Evaluators** tab and from the **Evaluators** list, select the evaluator(s) that should perform the evaluation session(s). As soon as you select an evaluator from the list, the evaluator name appears in the Evaluation Summary under Evaluators. Select the evaluator again to remove the evaluator from the Evaluation Summary. Each evaluator will receive an evaluation session to evaluate the agent(s) associated with the selected interactions.
8. Select the **Interactions** tab.
  1. Select **Recurring** or **One Time**. If you selected a **Recurring** schedule in step #5, you cannot select the interactions yourself. The resulting interaction list associated with the evaluation corresponds to what you entered in the search filter. If you selected a **One Time** schedule, select one of the following:
    - **Interactions:** Enables you to select interactions from the list of interactions created after you click Search.
    - **Interaction Criteria:** Randomly selects interactions from the interaction list resulting from your specific search. The amount of interactions selected correspond to what you entered in the **Exactly** field.

## Important

If you select Interaction Criteria, continue directly to step 9.

- Configure the evaluation filter options on the left side of the screen, to generate a list of interactions.  
Your filter selections should be directly related to the business issue for which you want to evaluate an agent(s).

For additional information, see [Search filter](#).

- Click **Search**.

## Important

If you selected **Interactions** in step 8a, from the list provided select the interactions (one at a time) that you would like to add to the evaluation.

As soon as you select an interaction from the list, it appears in the Evaluation Summary under **Interactions**.

Clear an interaction's check box to remove that specific interaction from the Evaluation Summary.

You can play back an interaction to verify its relevancy to the purpose of the evaluation. Simply click the **Play** icon  associated with the interaction you want to hear. For more information about playing an interaction, see [Media Player](#).

- Click the **Inactive** option  **Inactive** to activate  **Active** the evaluation. Only an active evaluation will create evaluation sessions.
- Click **Save and Activate**. Once the evaluation is saved and activated, it will start to create evaluation sessions according to the schedule configured at the beginning of this procedure.

## Distributed Agent evaluation

The SpeechMiner Quality Management - Distributed Agent Evaluation creates evaluation sessions about one or more specific agent performances during customer interactions. The Distributed Agent Evaluation is assigned to one evaluator. The selected evaluator is assigned an evaluation session associated with the selected agent. For example, if you select 18 agents to be evaluated by a specific evaluator, 1 evaluation session will be created for each of the 18 agents according to the selected interaction filter criteria.

## Create a Distributed Agent evaluation

- Click **Quality > Evaluations Manager**. The Evaluations Manager grid appears.

2. Click the drop down arrow next to **New Evaluation** and select **Distributed > Agent**.
3. In the **Untitled Evaluation** field, enter the name of your evaluation.
4. In the **Description** field, enter a description of the evaluation.
5. From the **Schedule** list select one of the following, and configure the schedule using the options available:
  - **Recurring:** Use to create an evaluation that repeatedly produces evaluation sessions for a configurable time interval.
  - **One Time:** Use to create an evaluation that only produces evaluation sessions once.

The available schedule configuration options are:

  - Start - The date on which the evaluation session(s) should be created.
  -  - The time at which the evaluation session(s) should begin.
  - Occur every - The frequency (Minutes, Hours, Days, Weeks or Months) with which the evaluation recurs.
  - Expires after - The time (Minutes, Hours, Days, Weeks or Months) at which the evaluation session should be performed after the evaluation is created.
6. Select the **Forms** tab and from the **Forms** list, select the forms to add to the evaluation. As soon as you select a form from the list, it appears in the Evaluation Summary under Forms. Select the form again to remove the form from the Evaluation Summary. The forms selected consist of the questions that must be answered to complete the evaluation session.
7. Select the **Evaluators** tab and from the **Evaluators** list, select the evaluator that should perform the evaluation session(s). As soon as you select an evaluator from the list, the evaluator name appears in the Evaluation Summary under Evaluators. Select the evaluator again to remove the evaluator from the Evaluation Summary. Each evaluator will receive an evaluation session to evaluate the agent(s) associated with the selected interactions.
8. Select the **Agents** tab and from the **Agents** list, select the agent(s) whose interactions you want to evaluate. As soon as you select an agent from the list, the agent's name appears in the Evaluation Summary under Agents. Select the agent again to remove the agent from the Evaluation Summary. If you select a manager, the sessions will only be created for the agents associated with the selected manager and not for the manager.
9. Select the **Interactions** tab.

### Important

You cannot manually select a list of Interactions. The resulting interaction list corresponds to what you entered in the search filter.

1. Configure the evaluation filter options on the left side of the screen, to generate a list of interactions. Your filter selections should be directly related to the business issue for which you want to evaluate an agent(s). For additional information, see Search filter.
2. Click **Search**.

## Important

You can play back an interaction to verify its relevance to the purpose of the evaluation. Simply click the **Play** icon  associated with the interaction you want to hear. For more information about playing an interaction, see Media Player.

10. Click the **Inactive** option  **Inactive** to activate  **Active** the evaluation. Only an active evaluation will create evaluation sessions.
11. Click **Save and Activate**. Once the evaluation is saved and activated, it will start to create evaluation sessions according to the schedule configured at the beginning of this procedure.

## Shared evaluation

The SpeechMiner Quality Management - Distributed Shared Evaluation creates evaluation sessions about an agent's performance during customer interactions without assigning the sessions to a specific evaluator. Instead, each evaluator associated with the session can select and assign himself/herself the Shared session from the available pool of Shared sessions. Once an evaluator selects a Shared session, the specific session is no longer available to other evaluators.

### Create a Shared evaluation

1. Click **Quality > Evaluations Manager**. The Evaluations Manager grid appears.
2. Click the drop down arrow next to **New Evaluation** and select **Shared**.
3. In the **Untitled Evaluation** field, enter the name of your evaluation.
4. In the **Description** field, enter a description of the evaluation.
5. From the **Schedule** list select one of the following, and configure the schedule using the options available:
  - **Recurring:** Use to create an evaluation that repeatedly produces evaluation sessions for a configurable time interval.
  - **One Time:** Use to create an evaluation that only produces evaluation sessions once.

The available schedule configuration options are:

  - Start - The date on which the evaluation session(s) should be created.
  -  - The time at which the evaluation session(s) should begin.
  - Occur every - The frequency (Minutes, Hours, Days, Weeks or Months) with which the evaluation recurs.
  - Expires after - The time (Minutes, Hours, Days, Weeks or Months) at which the evaluation session should be performed after the evaluation is created.
6. Select the **Forms** tab and from the **Forms** list, select the forms to add to the evaluation. As soon as you select a form from the list, it appears in the Evaluation Summary under Forms. Select the form again to remove the form from the Evaluation Summary. The forms selected consist of the questions that must

- be answered to complete the evaluation session.
7. Select the **Evaluators** tab and from the **Evaluators** list, select the evaluator(s) that should perform the evaluation session(s). As soon as you select an evaluator from the list, the evaluator name appears in the Evaluation Summary under Evaluators. Select the evaluator again to remove the evaluator from the Evaluation Summary. Each evaluator will receive an evaluation session to evaluate the agent(s) associated with the selected interactions.
8. Select the **Interactions** tab.
1. Select **Recurring** or **One Time**. If you selected a **Recurring** schedule in step #5, you cannot select the interactions yourself. The resulting interaction list associated with the evaluation, corresponds to what you entered in the search filter. If you selected a **One Time** schedule, select one of the following:
    - **Interactions:** Enables you to select interactions from the list of interactions created after you click **Search**.
    - **Interaction Criteria:** Randomly selects interactions from the interaction list resulting from your specific search. The amount of interactions selected correspond to what you entered in the **Exactly** field.
- ### Important
- If you select Interaction Criteria, continue directly to step 9.
2. Configure the evaluation filter options on the left side of the screen, to generate a list of interactions.  
Your filter selections should be directly related to the business issue for which you want to evaluate an agent(s).  
For additional information, see [Search filter](#).
3. Click **Search**.
- ### Important
- If you selected **Interactions** in step 8a, from the list provided select the interactions (one at a time) that you would like to add to the evaluation.
- As soon as you select an interaction from the list, it appears in the Evaluation Summary under Interactions.  
Clear an interaction's checkbox to remove that specific interaction from the Evaluation Summary.  
You can play back an interaction to verify its relevancy to the purpose of the evaluation. Simply click the **Play** icon  associated with the interaction you want to hear. For more information about playing an interaction, see [Media Player](#).
9. Click the **Inactive** option  **Inactive** to activate  **Active** the evaluation. Only an active evaluation will create evaluation sessions.

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10. Click **Save and Activate**. Once the evaluation is saved and activated, it will start to create evaluation sessions according to the schedule configured at the beginning of this procedure.

## Calibration Evaluation

The SpeechMiner Quality Management - Calibration Evaluation creates evaluation sessions that can be used to compare evaluator performance, to ensure consistency across teams. A Calibration Evaluation is performed on one evaluation in the same way as a Distributed Interaction Evaluation session, the difference is that the result of these evaluation sessions can be used in a Calibration Score report (that is, a report that compares how the evaluators filled out the same evaluation session).

### Create a Calibration evaluation

1. Click **Quality > Evaluations Manager**. The Evaluations Manager grid appears.
2. Click the drop down arrow next to **New Evaluation** and select **Calibration**.
3. In the **Untitled Evaluation** field, enter the name of your evaluation.
4. In the **Session Expires after** field, enter the time (Days, Weeks or Months) by which the evaluation session should be performed after the evaluation is created.
5. Select the **Forms** tab and from the **Forms** list, select the forms to add to the evaluation. As soon as you select a form from the list, it appears in the Evaluation Summary under Forms. Select the form again to remove the form from the Evaluation Summary. The forms selected consist of the questions that must be answered to complete the evaluation session.
6. Select the **Evaluators** tab and from the **Evaluators** list, select the evaluator(s) that should perform the evaluation session(s). As soon as you select at least two evaluators, the evaluator name appears in the Evaluation Summary under Evaluators. Select the evaluator again to remove the evaluator from the Evaluation Summary. Each evaluator will receive an evaluation session to evaluate the agent(s) associated with the selected interactions. When you select more than one evaluator, the resulting Evaluation Sessions are evenly distributed across evaluators in Round Robin fashion.
7. Select the **Interactions** tab, and configure the evaluation filter options on the left side of the screen to generate a list of interactions and click **Search**.

#### Important

A Calibration evaluation has a **One Time** schedule. It creates an evaluation that only produces one evaluation session.

A Calibration evaluation cannot be a **Recurring** evaluation.

Your filter selections should be directly related to the business issue for which you want to evaluate an agent(s). For additional information, see Search filter.

1. Select one interaction. As soon as you select an interaction from the list, it appears in the Evaluation Summary under Interactions. Clear an interaction checkbox to remove the specific interaction from the Evaluation Summary.

## Important

If you select more than one interaction, the Calibration Evaluation session will not be activated.

8. Click the **Inactive** option  **Inactive** to activate  **Active** the evaluation. Only an active evaluation will create evaluation sessions.
9. Click **Save and Activate**. Once the evaluation is saved and activated, it will start to create evaluation sessions according to the schedule configured at the beginning of this procedure.

## Ad-Hoc Evaluation

The Ad-Hoc Evaluation enables you to create an evaluation session for a specific interaction or segment currently being played in the Media Player.

Before you create and/or perform an Ad-Hoc evaluation, consider the following:

- By default, the Ad-Hoc evaluation will expire 24 hours after it is created.
- An Ad-Hoc evaluation is only visible to the user who created it and to users with the permission to edit all evaluation sessions.
- An Ad-Hoc evaluation can only be created from the **Media Player > More options** menu for the interaction currently being played.

## Create an Ad-Hoc evaluation session

1. Select an interaction and click **Play**  For more information about playing an interaction, see Media Player.
2. Click **More**  in the Media Player and select Evaluate. The Evaluate Interaction window appears.
3. Enter a name in the **Evaluation Name** field.
4. From the **Form(s)** list, select the forms that should be included in the Ad-Hoc evaluation session. For additional details about Forms, see Forms Manager.
5. Click **Create**. The new Ad-Hoc evaluation session is opened.
6. Perform the evaluation. For details on how to perform an evaluation session, see Perform an evaluation session.