GENESYS™

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

Create and manage forms

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- Administrator

Use the New Form option to create and manage forms that enable evaluators to provide feedback about a specific agent. When a form is included in an evaluation, it becomes part of a process that helps you identify how an agent is functioning, and subsequently what the agent needs to do in order to maximize your business goals and customer satisfaction.

Related documentation:
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Quality Management forms are included in evaluation sessions. These forms enable evaluators to obtain feedback about how an agent is functioning, and subsequently determine what the agent needs to do to maximize your business goals and customer satisfaction.

Create a new form

1. Click **Quality > Forms Manager**. The Forms Manager grid appears.

2. Click **New Form**. A blank form appears.

3. In the **Untitled Form** field enter a name for the form.

4. In the **Description** field enter a description about the form you are creating. (optional)

5. Click **Insert** and select to create a group of questions, add a group with an existing question type or add an existing question group from the Question Library.

> ### Important
> By default one empty group already exists when you create a new form. For example, a form about agent/customer communication could have a group of questions called Interaction, containing questions about the interaction and another group called Agent, containing questions about how the agent handled the interaction.

   For details about how to create, edit and use question groups, see: Question library.

6. In the fields provided, add a group name and group description.

7. Click **Insert Question** to add a question to the group and select one of the following question types: For details about each question type refer to: Form Questions.

   - **Yes/No** or **N/A** - A question whose expected answer is either yes, no or not applicable.

   - **Choose from List** - A closed ended question that enables the user to select multiple answers from

a list of choices.

- **Multiple Choice** - A closed ended question that enables the user to select one answer from a list of answers.

- **Free Form** - A text box for users to input short answers to the question.

- **Sliding Scale** - A scale with a minimum and maximum value, where the maximum value represents a stronger association to the question.

8. If a question is mandatory, select the **Required** check box. When Required is selected, the user must answer the question before completing the form.

> ## Tip
>
> You can move the location of a question using the arrows provided ↑ ↓ .

9. Repeat steps 5-8 until the form contains all of the groups and questions you want.

> ## Tip
>
> Click **Clone Group** 🖻 to create a copy of an existing group of questions.

10. Click **Auto-fail** for a Yes/No, Multiple Choice, the minimum Sliding Scale value or Choose from List answer, to create a form that will automatically fail when the user selects an answer to one of these questions.

11. Click **Done** when you complete a group of questions. All of the group options will disappear and the group will appear as it will in the final form.

> ## Tip
>
> To edit the same group simply click within the group. The group options will reappear.

12. Click **Weighting...** to assign your questions a weight. Weights can only be assigned to **Multiple Choice**, **Yes/No**, **Choose from List** and **Sliding Scale** questions. The weights indicate the relative importance of each question and are used by the system to calculate the form's score. The sum of the weights for each form and each group must be 100%. #:

> ## Important
>
> Each form must contain at least one question that can be given a weight. For more information see: Configure question weights.

13. Click the **Preview Form** icon to review the form before you save it.

14. Click the **Active/Inactive** option to activate/deactivate the form. (optional). Only an active form can be attached to an evaluation. An inactive form is not available and cannot be associated with an evaluation. In addition, an active form cannot be edited.

15. Click **Save** to save the form. The screen reloads with the **Forms Manager** and the new form appears in the list.

Link to video

Manage forms

Once a Quality Management form is created and appears in the Forms Manager grid, you can:

- Save a form
- Edit a form
- Delete a form
- Delete a question
- Copy a form
- Preview a form
- Collapse/Expand a question group

> ### Important
> Forms associated with one or more evaluations, or an active evaluation, cannot be edited, deleted and/or deactivated.

Save a form

1. Create a new form or open an existing form.
2. Configure the form.
3. Click **Save > Save**. The form is saved.

Edit a form

1. Select **Quality > Forms Manager**. The list of existing forms appears.
2. Click the name of the form you want to edit. The specific form is opened.
3. Change the form.

4. Click **Save** to save your changes.

Delete a form

You can delete a form(s) in one of two ways.

To delete one or more forms:

1. Select **Quality > Forms Manager**. The list of existing forms appears.
2. Select the check box associated with the form(s) you want to delete.
3. Above the Forms Manager list click **Delete** 🗑 . The form(s) is deleted.

To delete a specific form:

1. Select **Quality > Forms Manager**. The list of existing forms appears.
2. Click the form you want to delete. The specific form is opened.
3. Click **Delete** 🗑 in the top right corner of the form. The form(s) is deleted.

Link to video

Delete a form question

1. Select **Quality > Forms Manager**. The list of existing forms appears.
2. Click the form whose question you want to delete. The specific form is opened.
3. Click **Delete** 🗑 next to the question you want to delete. The question is deleted.
4. Click **Save > Save** to save your changes.

Copy a form

Select Save As to create a copy of the form you are currently creating/editing.

1. Open the form you want to copy.
2. Click **Save > Save as**.
3. Enter a form name. A copy of the form is created and is listed in the Forms Manager grid.

Preview a form

As you add questions and question groups to a form, you may want to see how the form appears to users.

1. In a new or existing form, click the **Preview Form** icon 👁 . The form appears in a new window as it will appear when accessed by a user.

2. Click **X** in the top right corner of the Preview Form window to close the preview.

Collapse / expand all form groups

As you add questions and question groups to a form, the form can become long. You may want to either collapse all the groups or see specific groups while hiding others.

To collapse/expand all the groups:

- In a new or existing form, click the Collapse/Expand questions icon to expand or collapse all the question groups.

To collapse/expand a specific group:

- In a new or existing form, click the Collapse/Expand questions icon in the group you want to expand or collapse. The number in this option specifies the amount of question in the group.