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

Evaluation Sessions

Contents

- [1 Evaluation Sessions grid](#)



- Administrator

Use Evaluation Sessions to help ensure that an agent's participation in an interaction coincides with a specific business agenda. A completed evaluation session provides a view into how an agent communicates with consumers. Such evaluation sessions provide consistent and regular feedback that helps surface insightful reports, comments and suggestions that can lead to formal skills training and action plans to improve an agent's performance.

Related documentation:

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To help ensure that an agent's participation in an interaction coincides with a specific business agenda, SpeechMiner Quality Management evaluators receive a list of evaluation sessions that they must fill out according to a configurable schedule.

A completed evaluation session provides a view into how an agent communicates with consumers. Such evaluation sessions provide consistent and regular feedback that helps surface insightful reports, comments, and suggestions that can lead to formal skills training and action plans to improve an agent's performance.

Before you perform an evaluation consider the following:

- An evaluation session can be saved and continued at a later time. Only when you select Complete will the evaluation session end.
- You can export an uncompleted evaluation session. When you export an uncompleted evaluation session, an uncompleted prefix is added to the exported file.
- A Shared Evaluation session creates evaluation sessions that are not assigned to a specific evaluator. Instead, each evaluator associated with the session can select and assign himself/herself a specific session from the available session pool.
- Archived evaluation sessions are removed from the Evaluation Session grid, and will only be visible when you filter to view archived sessions.
- A Calibration Evaluation session is filled out in the same way as a Distributed or Shared evaluation session. But, unlike a Distributed or Shared evaluation a Calibration Evaluation can be used as part of a report that compares the performance of two or more evaluators.
- When performing an evaluation, you have the option of enabling the evaluator to see their evaluation score when the evaluation session is completed.
- To complete an evaluation session, you must answer all the required questions in all the forms associated with the specific evaluation session.
- An evaluation session score is visible throughout the evaluation session.

Evaluation Sessions grid

The Quality Manager - Evaluations Sessions grid contains a list of all evaluation sessions an evaluator must fill out.

From the grid you can:

- View which evaluation sessions were started, in progress and or completed
- View whether or not a session was assigned to an evaluator and which evaluator it was assigned to.
- Filter the evaluation session list to quickly find and work with a subset of the list.

The Evaluations Sessions grid contains the following information and options:

-  - Enables you to delete the selected evaluation session.
-  - Enables you to refresh the Evaluation Session grid with the latest evaluation sessions.
-  - Use to archive selected evaluation sessions and remove them from the grid.
- **Filter by name** - Enables you to search for a specific evaluation session according to the session's name.
- **0 Selected** - The number of evaluation session selected in the grid.
- **Filter** - Select one or more of the following filter options to limit the evaluation session list, so you can quickly find the information you are looking for:
 - **Sessions** - Filter the list to show all unarchived evaluation sessions.
 - **Archived** - Filter the list to only show archived evaluation sessions.
 - **Expired** - Filter the list to only show expired evaluation sessions.
 - **Status** - Filter the list to only show sessions that have not been started, are in progress and/or have been completed.
 - **Types** - Filter the list to only show distributed, shared, calibration and/or ad-hoc sessions.
 - **Creation Date** - Filter the list to only show sessions that were created on a specific date.
 - **Due Date** - Filter the list to only show sessions that should be completed on a specific date.
 - **Completion Date** - Filter the list to only show sessions that were completed on a specific date.
 - **Agent** - Filter the list to only show sessions associated with a specific agent.
 - **Evaluator** - Filter the list to only show sessions associated with a specific evaluator.
 - **Unassigned** - Filter the list to only show sessions that have not been assigned to an evaluator.
- **Name** - The name of the evaluation session.
- **Evaluator** - The name of the evaluator to whom the evaluation session was assigned.

Important

Unassigned sessions are only associated with Shared Evaluations. Unassigned signifies that you can select the session and assign it to yourself if you are part of the selected evaluators. Once you assign an Unassigned session to yourself, your name will appear in the Evaluator column.

- **Interaction ID** - The interaction in which the agent participated.
- **Agent** - The agent for which the evaluation session was created.
- **Description** - Contains an explanation about the specific evaluation session.
- **Type** - Indicates whether the evaluation session is a Distributed, Shared or Calibration session. For details, see Create an evaluation.
- **Form(s)** - The number of forms associated with the evaluation session.
- **Created** - The date on which the evaluation session was created.
- **Due** - The date on which the evaluation session must be completed.
- **Completed** - The date on which the evaluation session was completed.
- **Status** - Indicates the status of the evaluation:
 - **In Progress** - The evaluation has started, but has not been completed.
 - **Ready** - The evaluation has not started.
 - **Completed** - The evaluation session has been completed.
- **Creator** - The name of the person who created the evaluation session.
- **Score** - The score the agent received as a result of the evaluation.
-  - Enables you to select the columns that appear in the Evaluations Manager grid.

Important

To return the grid columns to their default state, click **Reset to defaults** from the Select Columns list .