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

Performing and managing Evaluation Sessions

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- Administrator

Use Evaluation Sessions to provide to identify the skill sets of your agents, as well as any skill gaps that need to be filled by additional training. This page describes how to perform an evaluation session and how you can subsequently modify and/or archive it.

### Related documentation:

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## Perform an evaluation session

### Important

When performing an evaluation session, you can always click the **Clear Form** option at the bottom of the form to clear all of your input.

1. Click **Quality > Evaluation Sessions**. The **Evaluation Sessions grid** appears.
2. Click the name of the evaluation you want to perform.




### Important

If you select an Unassigned evaluation session, you will be asked to confirm that the specific session should be assigned to you.

3. From the **Form** list at the top of the screen, select the first form you want to fill out. Once you complete the selected form, continue filling out the remaining forms.
4. Answer the questions provided. If necessary, click **+More** to view the entire question.

### Important

You cannot complete an evaluation session without answering all the required form questions. Required form questions are marked with a red star.

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5. Click the **Play** icon  to playback the interaction to hear the discussion between the agent and the customer. (optional). For more information about playing an interaction, refer to Media Player.
  6. Click the inactive **Show score** option **Show score**  to enable the evaluator to see the evaluation session scores during the evaluation and a final score when the evaluation is completed. For more details about scores see Configure question weights.
  7. If the interaction is not suitable in any way (for example, poor audio/video quality, irrelevant interaction, and so on), you can click the **Replace Interaction** icon  to select a different interaction for the evaluation session (optional).

### Important

The Replace Interaction option is only available in evaluation sessions associated with interactions derived from search criteria. Evaluation sessions associated with manually selected interactions, Calibration evaluations and Ad-Hoc evaluations will not include the Replace Interaction option. Replacing the interaction associated with the evaluation session will reset all the answers in the form(s) associated with the same evaluation session.

8. Select one of the following options.

### Important

When an evaluation session is completed, the interaction associated with the evaluation session is automatically tagged Evaluated. The Evaluated tag (visible both in the Search Filters and the Search Results grid) enables you to recognize interactions that have already been part of an evaluation session and subsequently prevents evaluated interactions from being reused.

- Scroll down to the bottom of the form and click **Complete** to finalize the evaluation session. A summary of the completed evaluation session appears.
  1. Click **Show More Options** for the following options.
    - **Export Session to CSV** - Downloads the evaluation session to an Excel (password protected) document and is saved in a location of your choice.
    - **Export Session to PDF** - Downloads the evaluation session to a PDF document and is saved in a location of your choice.
    - **Notify agent of results** - Creates an action item for the agent associated with the specific evaluation session. See the **Notify agent** bullet below for further instructions.
  2. Click **Complete** at the bottom of the window to finalize this process. The process will continue according to your **Show More Options** selection. The evaluation session's status in the Evaluation Session grid will change to **Completed**.
- In the top right corner of the screen, open the **Save** menu and select one of the following options.
  - **Save** - Save your work so you can continue at a later time. If you select to save the evaluation session, its status in the Evaluation Session grid will be **In Progress**.
  - **Complete** - Finalize the evaluation session. A summary of the completed evaluation session

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appears.

1. Click **Show More Options** - for the following options.
  - **Export Session to CSV** - Downloads the evaluation session to an Excel (password protected) document that is saved in a location of your choice.
  - **Export Session to PDF** - Downloads the evaluation session to a PDF document that is saved in a location of your choice.
  - **Notify agent of results** - Creates an action item for the agent associated with the specific evaluation session. See the **Notify agent** bullet below for further instructions.
2. Click **Complete** at the bottom of the window to finalize this process. The process will continue according to your **Show More Options** - selection. The evaluation session's status in the Evaluation Session grid will change to **Completed**.

### Important

You can edit a session with an expired due date, but you cannot select Complete if the session due date has passed.

- **Export to CSV** - Create a .csv file that contains evaluation session details in an Excel worksheet. Since the evaluation session has not been completed, an uncompleted prefix will be added to the exported file.
- **Export to PDF** - Create a Adobe PDF file that contains evaluation session details.
- **Close** - Close the evaluation session without saving your work.
- **Notify agent** - Send the agent associated with the evaluation an action item about the specific evaluation. The **Add Action Item** window appears.
  1. In the window that appears, enter a **due date** by which the specific agent must perform this action item, enter what you would like the agent to do in the **Summary** field and select the **Show the agent his/her evaluation score** checkbox if you want the agent to be aware of the score he/she received. To learn more about scores refer to Configure question weights.
  2. Click **Complete**. An **Evaluator Message** is added to the specific agent's Action Items list. See Action Items for additional details.

### Important

You do not have to wait to complete the evaluation session to select **Save > Notify agent**. You can send the action item at any time during the evaluation session.

When the agent opens the new Notify Agent action item (Type - **Evaluator Message**), he/she can review the specific evaluation session and send a response back to the evaluator. In the Evaluator Message action item, the Summary instructions are a link to the associated evaluation session.

[Link to video](#)

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## Modify a completed evaluation session

A completed evaluation session provides an overview of the agent's productivity in relation to a specific business goal.

After an evaluation session is completed users assigned to the evaluation session can change the questions answers. Once this change is saved the evaluation session score is automatically updated.

### Open and edit a completed evaluation session

1. Click **Quality > Evaluation Sessions**. The Evaluation Sessions grid appears.
2. Click the name of the completed evaluation session you want to review. The completed evaluation opens with the following options:
  - **Form List:** View the different evaluation session forms and the given answers.
  - **Show Score:** View the evaluation session score. The score appears next to the Form list and within the exported Excel worksheet. The score is automatically updated if a change is made to one or more answers.
  - **Save:** Select one of the following options:
    - **Save:** Save your work so you can continue at a later time.
    - **Export to CSV:** Create a .csv file that contains evaluation session details in an Excel worksheet. Since the evaluation session has not been completed, an uncompleted prefix will be added to the exported file.
    - **Export to PDF:** Create a Adobe PDF file that contains evaluation session details.

#### Important

You can select the Export option even if the evaluation session has not been completed. In this case, a uncompleted prefix will be added to the exported file

- **Close:** Close the evaluation session without saving your work.
- **Notify agent:** Send the agent associated with the evaluation an action item about the specific evaluation. For details about each of these options, refer to Perform an evaluation session.
- **External ID:** A unique number assigned to the interaction in the SpeechMiner database.
- **Media Player:** Play back the interaction associated with the evaluation session. For more information about playing an interaction, refer to Media Player.
- **Session Characteristics:** To see when the session was last changed and who changed it, click the arrow in the top right corner of the screen next to the date and time and notice the information associated with Last edited by.
- **Default scores to 100%:** Turn on all the default answers in all the forms in the specific Evaluation Session. When this option is turned on the form score is 100%. Also, when this option is turned on or off, all the information entered up to this point will be deleted. Once the evaluator chooses to turn on the Default scores to 100% option, and subsequently answer all the questions in the form, the evaluator can change the default answers and reduce the score.

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The Default scores to 100% option does not exempt you from answer questions marked as Autofail.

### Important

The Default scores to 100% option is only available in a Azure environment.

3. Edit the session if required.
4. Click **Save** to save your changes.

### Important

If you do not save your changes when you change an evaluation session's answers, your changes will not affect the session score.

## Archive an evaluation session

Archiving evaluation sessions enables you to remove sessions no longer needed online, but which must still be accessible at a later date if required. That is, archived sessions will be removed from the session grid, and will only be visible when the user filters to view archived sessions. By limiting the number of sessions that appear, archiving also enables you to maximize performance by minimizing search and filter response times.


There is one type of archiving option:

- Manual Archive - Enables you to select specific sessions to archive.

### Important

You can only archive completed and expired evaluation sessions.

## Manually archive an evaluation session

1. Select **Quality > Evaluation Sessions**. A list of evaluation sessions appears.
2. Select the evaluation sessions you want to archive.
3. Click the **Archive** button . The selected sessions are removed from the grid and archived.

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### Important

If the Archive button is not visible, you do not have the permission required for archiving sessions.