

How Do I Use AUTOFAIL



AutoFail is an advanced feature within Quantify QM and provides an automated failure mechanism within evaluation forms. This Quick Question topic is targeted at QM Administrators and describes how to implement AutoFail.

AutoFail Options

There may be circumstances where a particular score for a question or combination of questions means that the evaluation should be regarded as a "Fail". For example, questions related to PCI compliance, data protection rules, or regulatory compliance. Quantify QM provides an AutoFail feature to automatically fail an evaluation and apply a zero score to the whole evaluation.

The QM AutoFail feature provides flexibility so that you can be as strict or as lenient as you need to on what constitutes a failed evaluation. To use AutoFail, consider the following:

- **Scores:** Decide what scores should be regarded as a "Fail" within each of your scoring modes. This is usually a zero score in a scoring mode, but the choice is yours.
- **Questions and Sections:** Decide what questions and/or sections to enable AutoFail on for an evaluation form. You can automatically fail an evaluation based on an AutoFail score for one question, one section (based on one or more questions in the section), or multiple sections.
- **Actions:** Decide what action to take when an evaluation form is automatically failed. You can either stop the evaluation and prevent any further scoring, or you can continue the evaluation. In both circumstances the failed evaluation is submitted with a zero score.
- **Reports:** As stated, auto-failed evaluations are submitted with a zero score. This obviously impacts QM Reports that use evaluation scores and you may decide this unrealistically skews the data.



AutoFail Triggers and Actions

As stated, you can automatically fail an evaluation based on an AutoFail score for one question, one section (based on one or more questions in the section), or multiple sections. The table below provides more details on the exact triggers and actions:

Level	Trigger (During an Evaluation)	Action
Questions <ul style="list-style-type: none"> AutoFail enabled on one or more Questions anywhere within the evaluation form. 	<ul style="list-style-type: none"> At least one Question has an AutoFail score selected. 	<ul style="list-style-type: none"> Stop or Continue the evaluation, as defined within the Question(s). Evaluation will be submitted with a zero score.
Sections <ul style="list-style-type: none"> AutoFail enabled on one or more Questions within a single Section. AutoFail enabled on one or more Sections. Here you can define the number of Questions (1 or more) that would trigger an AutoFail for each Section. 	<ol style="list-style-type: none"> One or more Questions have an AutoFail score selected, but the defined number of Questions for an individual Section has not been reached. The defined number of Questions for at least one Section have an AutoFail score selected. 	<ol style="list-style-type: none"> The evaluation is unaffected. Stop or Continue the evaluation, as defined within the Questions. Evaluation will be submitted with a zero score.
Multiple Sections <ul style="list-style-type: none"> AutoFail enabled on one or more Questions within multiple Sections. AutoFail enabled on multiple Sections. Here you can define the number of Questions (1 or more) that would trigger an AutoFail within a Section. AutoFail enabled on the Evaluation Form (Template). Here you can define the number of Sections (usually 2 or more) that would trigger an AutoFail for the evaluation. 	<ol style="list-style-type: none"> One or more Sections have an AutoFail triggered, but the defined number of Sections for the Evaluation Form has not been reached. The defined number of Sections have an AutoFail triggered. 	<ol style="list-style-type: none"> The evaluation is unaffected. Stop or Continue the evaluation, as defined within the Questions. Evaluation will be submitted with a zero score.

Enable AutoFail

Now the practical information. To enable AutoFail:

1. Select the AutoFail option within your scoring modes.
2. Create an evaluation form.
3. Enable the AutoFail option within the evaluation form.

Select AutoFail within your scoring modes:



1. Login to Quantify with an administrator account (User Management and System Configuration permissions) and go to **Quality Management > Switch to Admin Console**.
2. In the console menu bar, click **Design Center > Scoring Mode**.
3. Select your AutoFail settings for your scoring modes:
 - Default scoring modes (except **Comments**) all use AutoFail (for **No, 0** score, and **Red** traffic light). If you don't want to have AutoFail in all of these scoring modes, then create a set of customised scoring modes and untick the option as needed.
 - For customised scoring modes, click **Edit** in the console menu bar to edit your scores and tick or untick the **AutoFail** option as needed.

Remember, just because AutoFail is selected for an individual score, the AutoFail option must also be enabled within your evaluation form – see below. Of course this does mean that you can have forms that make use of AutoFail, and others that don't, but still use the same scoring modes.

Create an evaluation form:



Creating evaluation forms is fully described in the "Create Evaluation Forms" Quick Question topic, but summarised below for your convenience.

1. Login to Quantify with a QM Administrator account and go to **Quality Management > Form Designer**.
2. To create an evaluation form, click the **Add Template** button.
3. In the **Details** panel, enter a **Name** and **Description** for your form. While you're creating your form, leave the **Status** field set to **Draft**.
4. In the **Content** panel, type a section name into the **Section Title** banner. Use the **Add Section** buttons to add another section before or after the current section.
5. To add a question to a section, click the **Add Question** button. Enter the **Question** details, select a **Scoring Mode**, and select the total number of **Points** assigned to the question.
6. For sections and questions, click the **^ Move Up**, **v Move Down**, and **🗑 Delete** icons to rearrange or delete your sections and questions.
7. To save your draft evaluation form at any time, click the **Save** button at the bottom of the form.
8. Once you've set your AutoFail options (see below), you can return to the **Form Designer** and set the **Status** of the evaluation form to **Published** (in the **Details** panel) and click **Save**. This makes the form available to QM Managers. Once **Published** (and used once), an evaluation form can't be changed or deleted (only **Discontinued**).

Set the AutoFail option on an evaluation form:



1. Login to Quantify with an administrator account (User Management and System Configuration permissions) and go to **Quality Management > Switch to Admin Console**.
2. In the console menu bar, click **Design Center > Template** and highlight the draft evaluation form in the template list.
3. For each question you want to enable AutoFail for:
 - Highlight the question in the template detail panel (referred to as “**Definition**” in the admin console) and click **Edit** in the console menu bar.
 - In the **Edit** panel, tick the **AutoFail** option, select an **Action**, and click the **Save** button to save your changes.
4. For each section you want to enable AutoFail for:
 - Highlight the section in the template detail panel (referred to as “**Attribute**” in the admin console) and click **Edit** in the console menu bar.
 - In the **Edit** panel, tick the **AutoFail** option, set the **AutoFail Count** (number of questions required to fail the section), and click the **Save** button to save your changes.
5. If you want to enable AutoFail on multiple Sections (fail 2 or more Sections):
 - Highlight the evaluation form title in the template detail panel and click **Edit** in the console menu bar.
 - In the **Edit** panel, tick the **AutoFail** option, set the **AutoFail Count** (number of sections required to fail the evaluation), and click the **Save** button to save your changes.
6. When you're done, return to the QM Form Designer to publish your evaluation form.

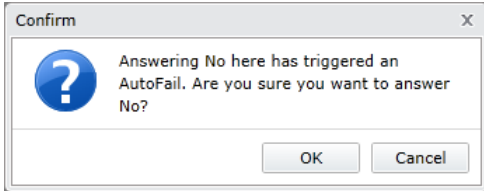
The image displays three overlapping screenshots of the Admin Console interface, illustrating the configuration of the AutoFail option at different levels:

- Top Screenshot (Question Definition):** Shows the 'Definition Text' panel for 'Question One'. The 'Points' are set to 1. The 'Auto Fail' checkbox is checked. The 'Action' dropdown menu is open, showing options: Continue, Stop, and Continue. The 'Scoring Mode' is set to 'No / Yes'. A 'Scoring Mode Information' box shows: 'No = 0% (Is NA = False, Is AutoFail = True)' and 'Yes = 100% (Is NA = False, Is AutoFail = False)'. 'Save' and 'Cancel' buttons are at the bottom.
- Middle Screenshot (Section Attribute):** Shows the 'Attribute Text' panel for 'Section One'. The 'Points' are set to 2. The 'Auto Fail' checkbox is checked. The 'AutoFail Count' is set to 1. 'Save' and 'Cancel' buttons are at the bottom.
- Bottom Screenshot (Evaluation Form):** Shows the main form configuration. The 'Name' is 'TestForm', 'Description' is 'AutoFail test form', and 'Status' is 'Draft'. The 'AutoFail Count' is set to 2. The 'Auto Fail' checkbox is checked, and the 'Is Default' checkbox is unchecked. 'Save' and 'Cancel' buttons are at the bottom.

Using AutoFail

During an evaluation, if you select an AutoFail score within an AutoFail question, you will be prompted to confirm the score. The evaluation will then stop or continue as appropriate.

In the QM Performance Center, AutoFail evaluations are highlighted in the AutoFail column.



www.redboxvoice.com
info@redboxrecorders.com
+44 (0)115 937 7100



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