

How Do I Evaluate A CALL



As a QM Manager you can evaluate calls for the agents in your team or department. This Quick Question topic covers the full evaluation process. For information on managing your evaluations (review, edit, and data visualisation), see the “Manage Evaluations” QQ topic.

At a Glance

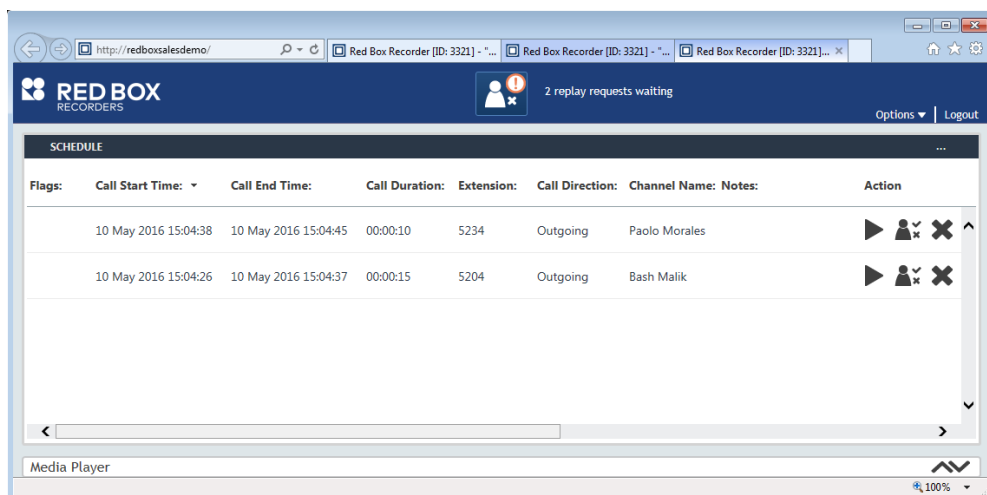
To evaluate a call:



1. Login to Quantify with a QM Manager account, and select **Quality Management** from the Quantify main menu.
2. You will be taken straight to your QM Schedule which lists all the calls automatically assigned to you for evaluation. In the **Action** column you can click ▶ **Play** to review the call, ✕ **Reject Call** to reject the call, or 👤 **Evaluate Call** to start the evaluation.
3. Click 👤 **Evaluate Call** and complete the evaluation form, scoring each question and adding notes. Use the Quick Control buttons or the Media Player to control call playback.
4. When you're done, click **Complete** to save and finish your evaluation, or click **Save & Close** to save a draft and come back to it later (see “Finish an Incomplete Evaluation” on page 3).

Note that you can also perform an unscheduled “ad-hoc” evaluation:

- From the QM Performance Center, highlight an agent and select **Evaluate** from the ⋮ **Menu**.
- From Search & Replay, highlight a call and click the 👤 **Evaluate Call** button. Note that you can only evaluate calls for agents in your QM team or department.



Using Your Schedule

Your QM Schedule lists all the calls that have been automatically assigned to you for evaluation. From here, you can **▶ Play**, **👤 Evaluate**, or **✖ Reject** your calls.

The Calls List provides a lot of information about each call, but you can organise the list the way you like it.

- To list calls in a particular order, click a column heading – for example, list by start time.
- To change the order of columns, just drag & drop.
- To show or hide columns in the list, click the triangle next to any column and simply select or deselect a column.

Your QM Schedule is automatically displayed whenever you open Quantify QM (as a QM Manager). To go to the main Quality Management home page, select **Load QM** from the schedule **⋮ Menu**.

Lastly, if you need to reject all the calls in your schedule and replace them with a fresh list (for example, when returning from holiday), select **Refresh** from the schedule **⋮ Menu**.

The screenshot displays the Red Box Recorder web interface. At the top, there's a navigation bar with the Red Box logo and user information. Below it is a 'SCHEDULE' section containing a table of call records. The table has columns for 'Flags', 'Call Start Time', 'Call End Time', 'Call Duration', 'Extension', 'Call Direction', 'Channel Name', 'Caller Num...', 'Caller Name', 'Extension No...', 'CallSafe Tag', 'SMS Text', and 'Audio Action'. The 'Audio Action' column contains icons for play, evaluate, and reject. Below the table is a 'Media Player' section showing a waveform and playback controls. The interface is clean and professional, with a dark blue header and white content area.

Flags	Call Start Time	Call End Time	Call Duration	Extension	Call Direction	Channel Name	Caller Num...	Caller Name	Extension No...	CallSafe Tag	SMS Text	Audio Action
	01 May 2016 21:13:34	01 May 2016 21:14:08	00:00:34	5224	Outgoing	Barbara McFell	Phone1	Phone1				▶ 👤 ✖
	01 May 2016 21:13:09	01 May 2016 21:14:00	00:00:51	5204	Outgoing	Bash Malik	Phone1	Phone1				▶ 👤 ✖
	01 May 2016 21:12:38	01 May 2016 21:13:09	00:00:31	5269	Outgoing	Jim Morisson	Phone1	Phone1				▶ 👤 ✖
	01 May 2016 21:12:27	01 May 2016 21:13:24	00:00:57	5234	Outgoing	Paolo Morales	Phone1	Phone1				▶ 👤 ✖
	01 May 2016 21:11:47	01 May 2016 21:12:20	00:00:34	5289	Outgoing	Thomas Kriste...	Phone1	Phone1				▶ 👤 ✖
	01 May 2016 21:11:12	01 May 2016 21:11:43	00:00:31	5224	Outgoing	Barbara McFell	Phone1	Phone1				▶ 👤 ✖
	01 May 2016 21:10:32	01 May 2016 21:11:24	00:00:52	5204	Outgoing	Bash Malik	Phone1	Phone1				▶ 👤 ✖
	01 May 2016 21:10:06	01 May 2016 21:10:52	00:00:47	5269	Outgoing	Jim Morisson	Phone1	Phone1				▶ 👤 ✖
	01 May 2016 21:09:43	01 May 2016 21:10:36	00:00:53	5234	Outgoing	Paolo Morales	Phone1	Phone1				▶ 👤 ✖
	01 May 2016 21:09:20	01 May 2016 21:10:00	00:00:41	5289	Outgoing	Thomas Kriste...	Phone1	Phone1				▶ 👤 ✖

Evaluation Options

During an evaluation:

- To cancel an evaluation without saving it, click the **Cancel** button.
- To save an evaluation and come back to it later, click the **Save & Close** button.
- The completion status is shown at the bottom of the screen. Once all questions have been scored (100% complete), click the **Complete** button to save and complete the evaluation.
- You can also use the evaluation **⋮ Menu** to **Print** the evaluation.

Finish an Incomplete Evaluation

If you've used the **Save & Close** button during an evaluation, this will have saved a draft of the evaluation. You can then use the QM Performance Center to return to, and finish, the incomplete evaluation.

To finish an incomplete evaluation:



1. Go to the QM Performance Center.
 - From your QM Schedule, select **Load QM** from the schedule **⋮ Menu**.
 - From the Quality Management home page, just click the **Performance Center** tab.
2. Highlight a team or agent to list the available evaluations.
3. Incomplete evaluations are highlighted by the **Incomplete Evaluations** flag (they also have no **Score**). To update the evaluation, click the **Review** icon in the **Action** column.
4. Complete the evaluation form, scoring each question and adding notes. Use the Quick Control buttons or the Media Player to control call playback.
5. The completion status is shown at the bottom of the screen. Once all questions have been scored (100% complete), click the **Complete** button to save and complete the evaluation.

Note that if you still haven't completed the evaluation, you can click **Save & Close** to save your changes and come back to it later, or click **Cancel** to exit without saving.

www.redboxvoice.com

info@redboxrecorders.com

+44 (0)115 937 7100



RBRQQ1023 V1.2