How Do I Set Up Quantify QM

QM Administrator

This topic is designed for QM Administrators.

Before using Quantify QM you need to create your users and sort them into an organisational structure. This effectively defines roles and access permissions for using Quantify QM.

Design an Organisational Structure

Quantify QM uses three user types:

- **QM Agent**: An individual in your organisation who has their calls recorded, monitored, and evaluated. An agent's access to QM features is limited — they can view evaluations and coaching for their own calls only.
- **QM Manager**: A QM Manager can perform evaluations, run reports, and view available evaluation form types for their teams and departments. QM Managers are usually more senior individuals in your organisation who have responsibility for call quality assessment.
- **QM Administrator**: This is probably you. A QM Administrator has responsibility for system configuration and can create and assign users, evaluation forms, and evaluation schedules.

To organise users, Quantify QM uses three levels of organisational structure:

- **Unit**: This is the top level structure and is defined during installation. A unit can contain one or more departments.
- **Department**: A department can contain other departments (sub-departments) and/or teams. Here you can assign a department manager (QM Manager) who will then have access to all associated QM data for that department.
- **Team**: A team contains agents. Like a department, you can assign a team manager (QM Manager) who will then have access to all associated QM data for that team.

QM Administrator

QM configuration and administration.

QM Manager

Evaluates agent calls. Manages assigned departments and teams.

QM Agent

Calls are recorded and evaluated. QM access is limited.

Unit

Top level structure. Contains departments and teams.

Department

Contains sub-departments and teams. Can have an assigned manager.

Team

Contains agents. Can have an assigned manager.

Your Red Box system may look different to the one used in this document.

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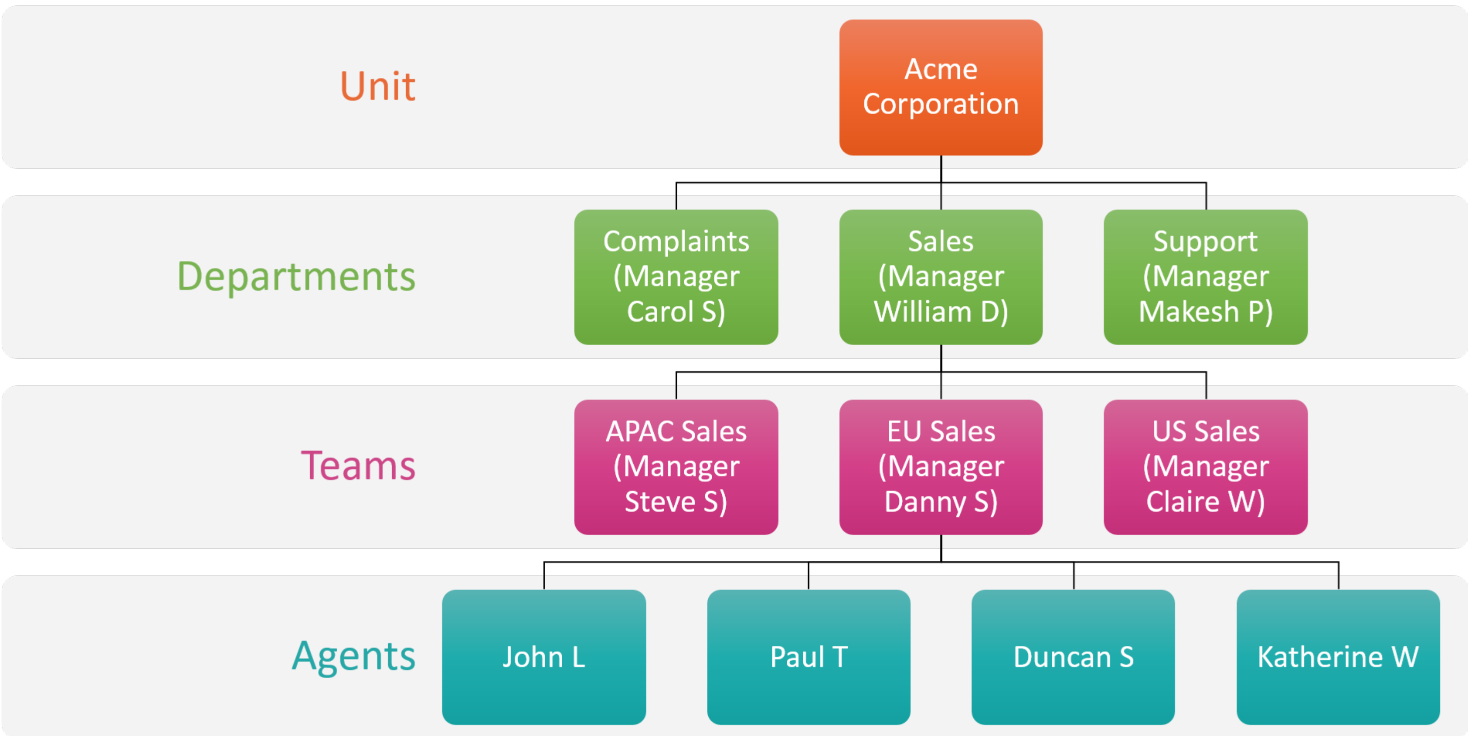
With these user types and structures you can design an organisational structure that reflects your business structure, role structure, or workflow, as appropriate. The choice of how you design your structure in QM is yours, but we recommend that you:

- Keep it simple. Where possible, keep the structure simple. This will help you to manage your QM implementation and provide flexibility.
- Apply it consistently. Whatever method you choose, apply it consistently across your organisation, now and in the future.
- Avoid conflicts. Your departments, teams, managers and agents will have associated security, data protection, and access privileges. Your structure needs to take account of that and avoid conflicts.
- Map & visualise. Map out your structure using paper, whiteboard, Smart Art in Microsoft Office, or whatever method you wish to use. This will help you visualise your structure method and the roles and responsibilities across your organisation.

Sample Structure

In this sample structure for Acme Corporation, the Sales, Support, and Complaints departments each have regional teams. Each department manager can "see" all of the teams within their department, and each team manager can "see" all of the agents within their team. There are of course lots of alternative ways of organising these further — for example, you could instead have an EU Sales department with EU Sales Admin and EU Customer Sales teams if that breakdown was needed.



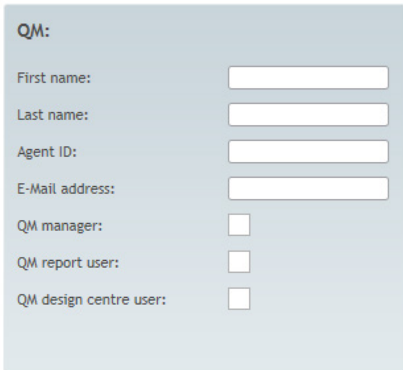
Create Agents, Managers, Administrators

All "QM users" are created/managed in the main Quantify User Management area.

To create a QM user:

1. Login to Quantify with an administrator account (User Management permissions).
2. Go to **Configuration** > **Management** > **Users** and **Create** or **Edit** a user.
3. Enter details to define your user role:
   - **Agent**: In the **QM** panel (see below), enter a **First Name**, **Last Name**, **Agent ID**, and **Email Address**.
   - **Manager**: In the **QM** panel (see below), enter a **First Name**, **Last Name** and **Email Address**, and tick the **QM Manager** option.
   - **Administrator**: A QM Administrator is effectively a system administrator — that is, they have **User Management** and **System Configuration** permissions assigned (in the **Permissions** panel).

QM Panel	
First name	User's first name.
Last name	User's last name.
Agent ID	Unique ID used to identify an agent. The **Agent ID** must match the defined database field used to identify an associated channel (device) within QM — this would usually be an **Extension Number** or **Channel Name** and is defined during installation. Note that an agent needs to be assigned to a team in order to be evaluated — see "Create Teams, Departments, Units" on page 4.
Email address	User's email address used by QM to send Coaching emails.
QM manager	Assign QM Manager permissions to the user. Note that a QM Manager: • Needs to be assigned as a team manager or department manager in order to perform and manage evaluations — see "Create Teams, Departments, Units" on page 4. • Must have appropriate replay permissions assigned in order to search, replay, and evaluate calls.
QM report user	Allow the user to run QM reports. This permission is automatically assigned if **QM manager** is ticked.
QM design centre user	Allow the user to view available evaluation form types using the QM Form Designer. This permission is automatically assigned if **QM manager** is ticked. Note that to create/edit evaluation forms, the user must be a QM Administrator.



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Create Departments & Teams

The organisational structure used within QM is created using the QM Admin Console. Before creating your teams and departments you should design your structure (see "Design an Organisational Structure" on page 1) and create your QM users (see "Create Agents, Managers, Administrators" on page 3).

Note that your Unit will have been created during installation and can only be changed by a Red Box Engineer.

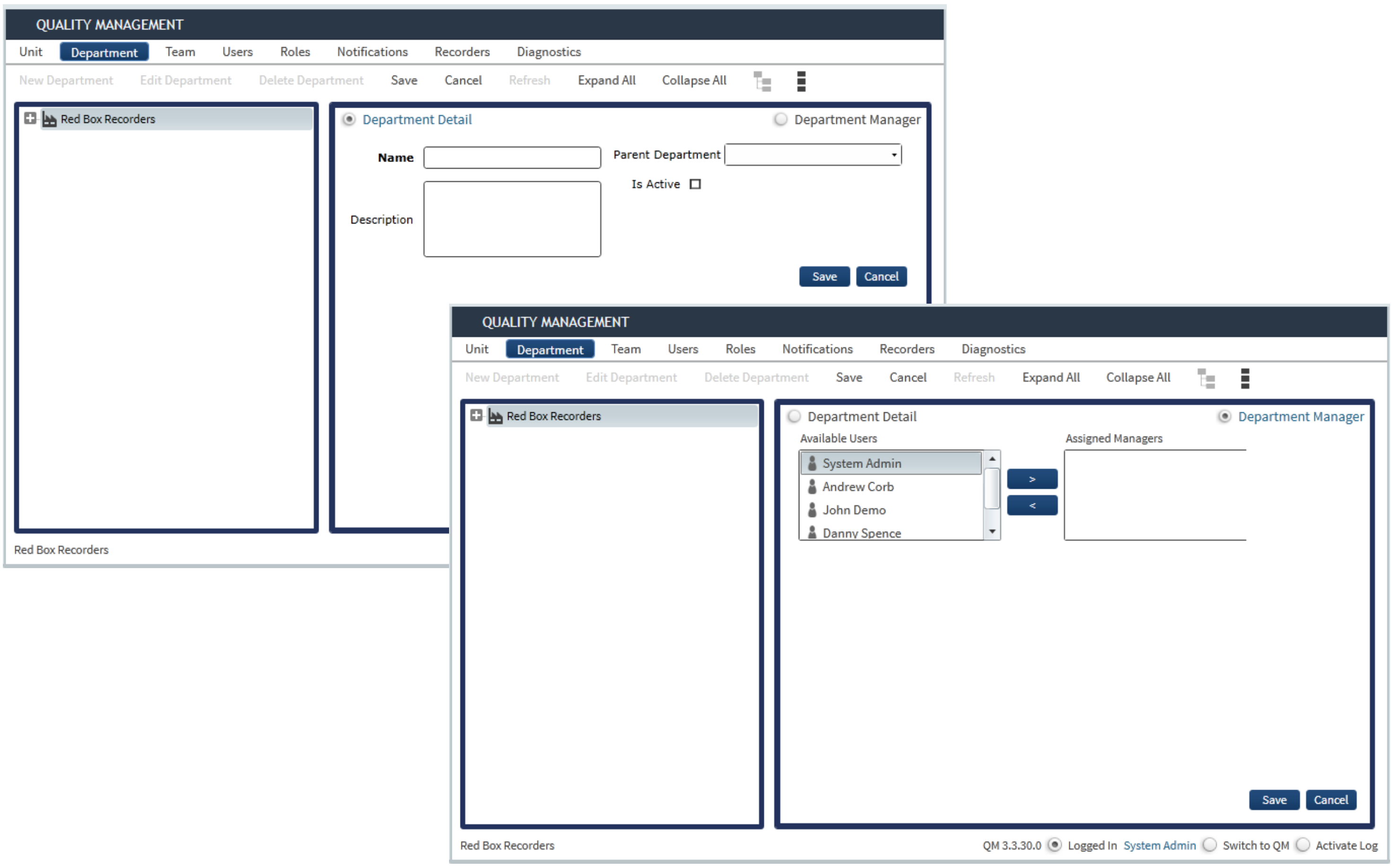
To create and manage Departments:

1. Login to Quantify with an administrator account (User Management and System Configuration permissions).
2. Go to **Quality Management** > **Switch to Admin Console** > **Switch**.
3. In the console menu bar, click **Department** > **New Department** and enter the department details.

   To define the department as a sub-department, select the **Parent Department** from the drop-down menu.

   To make the department visible and usable to others, tick the **Is Active** option. While you're setting up your structure your may wish to have this option unticked.
4. To assign a Department Manager, click the **Department Manager** radio button. Highlight an **Available** QM Manager and use the **>** button to move them to the **Assigned** list.

   The assigned Department Manager(s) will have access to all QM information for all sub-departments, teams, agents, and managers within the department.
5. When you're done, click the **Save** button to save your changes.
6. To edit and delete departments, use **Department** > **Edit Department** and **Department** > **Delete Department** in the console menu bar.



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To create and manage Teams:

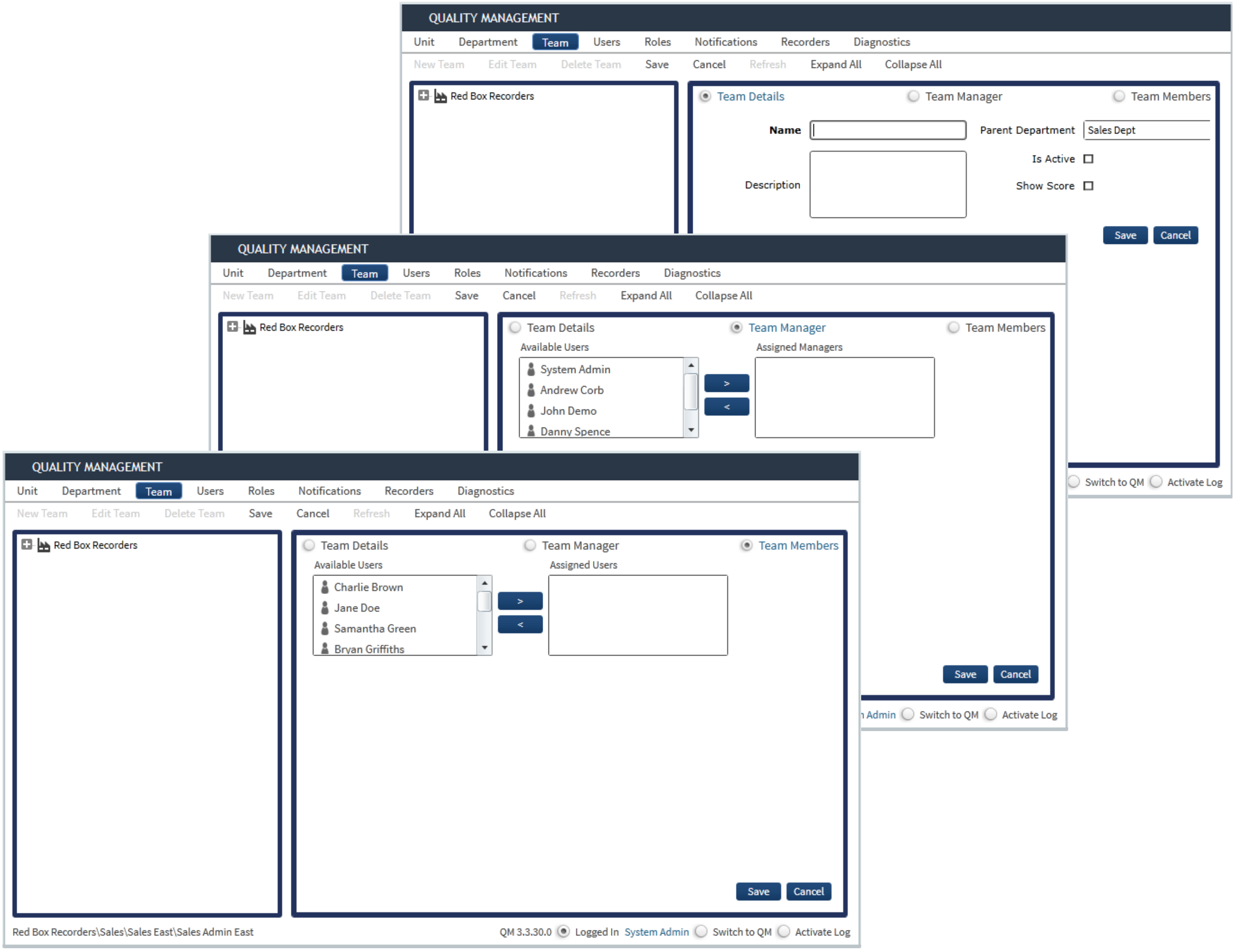
1. Login to Quantify with an administrator account (User Management and System Configuration permissions).
2. Go to **Quality Management** > **Switch to Admin Console** > **Switch**.
3. In the console menu bar, click **Team** > **New Team** and enter the team details.

   Select the **Parent Department** from the drop-down menu.

   To make the department visible and usable to others, tick the **Is Active** option.

   Tick the **Show Score** option to show a running score while a call is being evaluated (within that team).
4. To assign a Team Manager, click the **Team Manager** radio button. Highlight an **Available** QM Manager and use the **>** button to move to the **Assigned** list.

   The assigned Team Manager(s) will have access to all QM information for all agents within the team.
5. To assign Team Members (agents), click the **Team Members** radio button. Highlight an **Available** QM Agent and use the **>** button to move to the **Assigned** list.
6. When you're done, click the **Save** button to save your changes.
7. To edit and delete teams, use **Team** > **Edit Team** and **Team** > **Delete Team** in the console menu bar.



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QM Admin Console

As described above, the QM Admin Console is used to create and manage your organisational structure (create and manage departments, create and manage teams, assign managers, and assign agents), and to define custom scoring modes for evaluation forms (covered in a separate Quick Question topic).

Red Box recommends that you don't use any of the other features provided by the console. These have been retained in order to support legacy customers and should not be used for general QM admin.

Once you've finished using the console, simply close the browser tab.

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