



# MaxCS 8.6.1 Quality Management Guide

December 5, 2019

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Assessment tools are typically used by Call Center operations to generate and manage consistent independent evaluations of agent call-handling skills.

In Altigen's *Quality Management* application, assessments are accomplished by listening to a recorded call while scoring the agent's performance on that call. Performance is scored by responding to a series of evaluation questions within an assessment form.

Organizations can generate reports to identify areas of growth and coach agents accordingly.

Systematic use of the *Quality Management* application will help evaluate—and improve—the overall call-handling quality of the organization.

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## About This Guide

This guide covers the following information:

- Configuring the *Quality Management* application – see [Installation](#)
- Configuring user privileges – see [Administrators - User Privilege Management](#)
- Performing assessments – see [Performing Call Assessments](#)
- Creating and managing assessment forms - [Managing Forms](#)
- Generating reports – see [Assessment Reports](#)

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## Requirements

Your environment must meet the following requirements:

- You must have the appropriate *Quality Management* licenses; contact your Altigen representative for pricing and details. Like VRManager Pro, these licenses must be applied to those agents who are recording calls.
- The server must be running Windows Server 2012 R2
- The MaxCS 8.6.1 server must already be installed
- The CDR database must be deployed on an external SQL Server
- VRManager Pro must be installed.

**Note:** The *Quality Management* tool will work with only **encrypted 8.5 Update 1 and later recordings**; it will not work with non-encrypted recordings from previous releases of MaxCS.

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## Installation

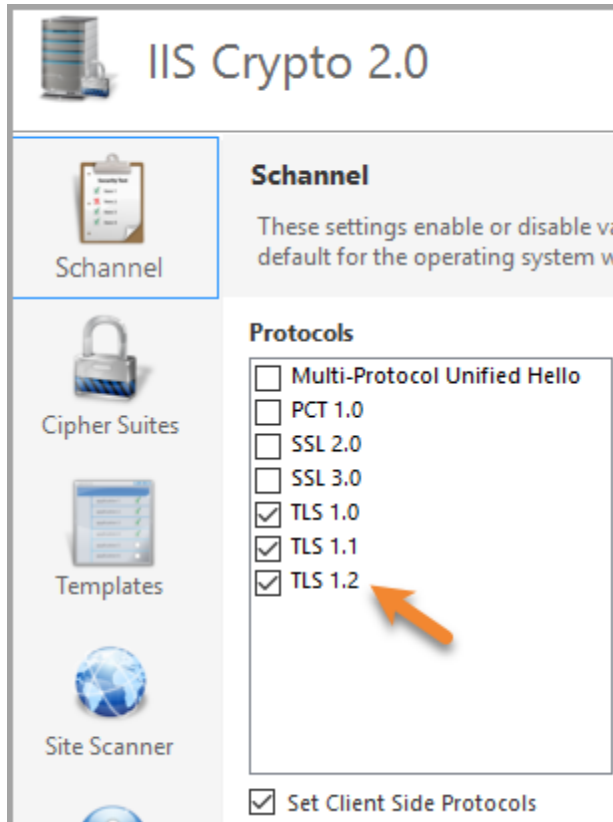
Have your CDR database connection details on hand before you start to install the *Quality Management* application, because you will need to enter details during the installation process.

### When Installing *Quality Management* on the MaxCS Server

If you plan to install the *Quality Management* application on the same Windows server as MaxCS, then you must take a few extra steps.

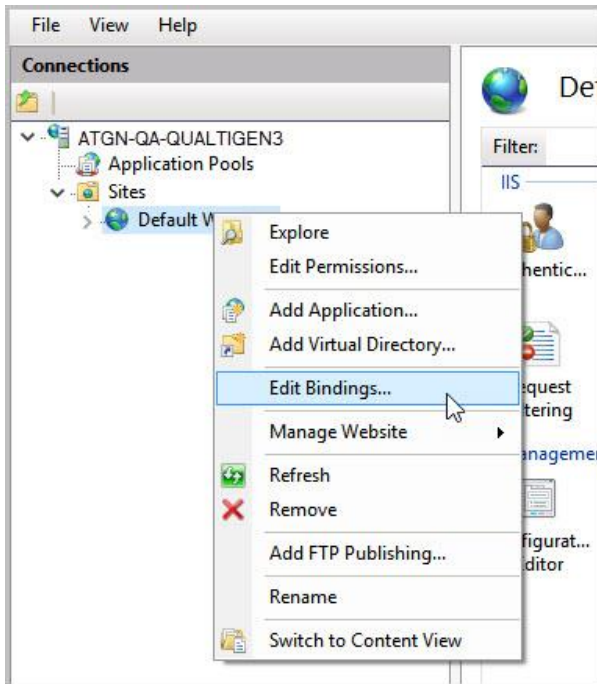
First, you must enable TLS 1.2 on that server. You can use the IIS Crypto tool to do this.

Make sure that you check the TLS 1.2 option (leave the other options as they are). Then apply and reboot.



If you are using Polycom phones, make an additional adjustment after you install the Quality Management application. This change is required to avoid a port conflict between the Polycom phone service and the Quality Management application.

1. Make sure that you have a public FQDN assigned to your MaxCS server.
2. Open IIS on the MaxCS server.
3. Under **Sites > Default Web Site** (or the web site where you installed the Quality Management application), right click and select **Edit Bindings**. In http or https, set the *hostname* field to the FQDN assigned to your MaxCS server.



## Installation Procedures

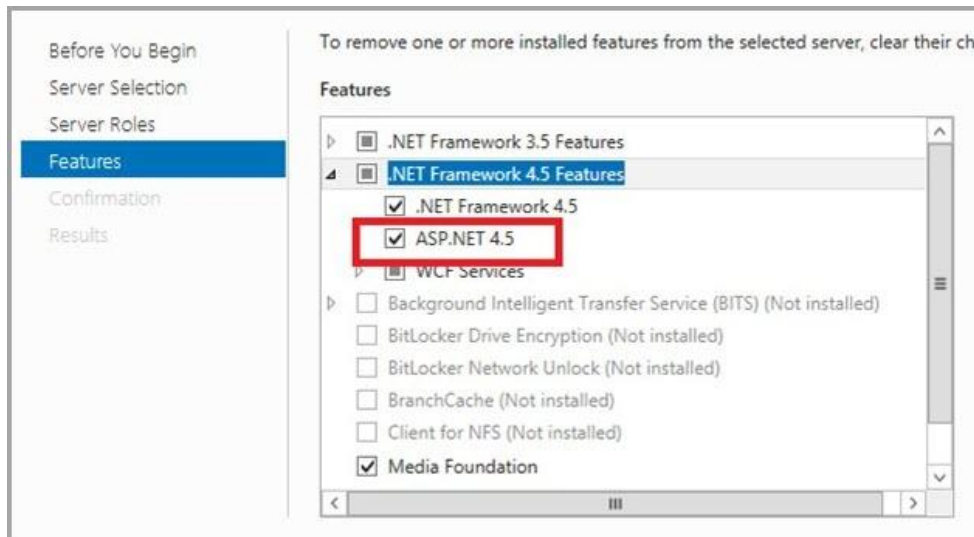
1. Click the *Setup* file in the Quality Management folder on your installation media.
2. When prompted where to store your QM application data, your selection will depend upon where your VRM Pro data is stored.
  - If your CDR and VRManager Pro databases are shared, then you must store your Quality Management data in the **CDR database**.
  - If your CDR and VRManager Pro databases are separate from each other, then you must store your Quality Management data in the **application database**.
3. After installation, request a new certificate (in MaxAdmin, select **System > Request Certificate**, then enter either the IP address or the FQDN of your MaxCS server) and restart the server.

For Cloud accounts, go to the Altigen Order portal to find the URL for the Quality Management application (on the *General* tab, in the *Call Center* section).

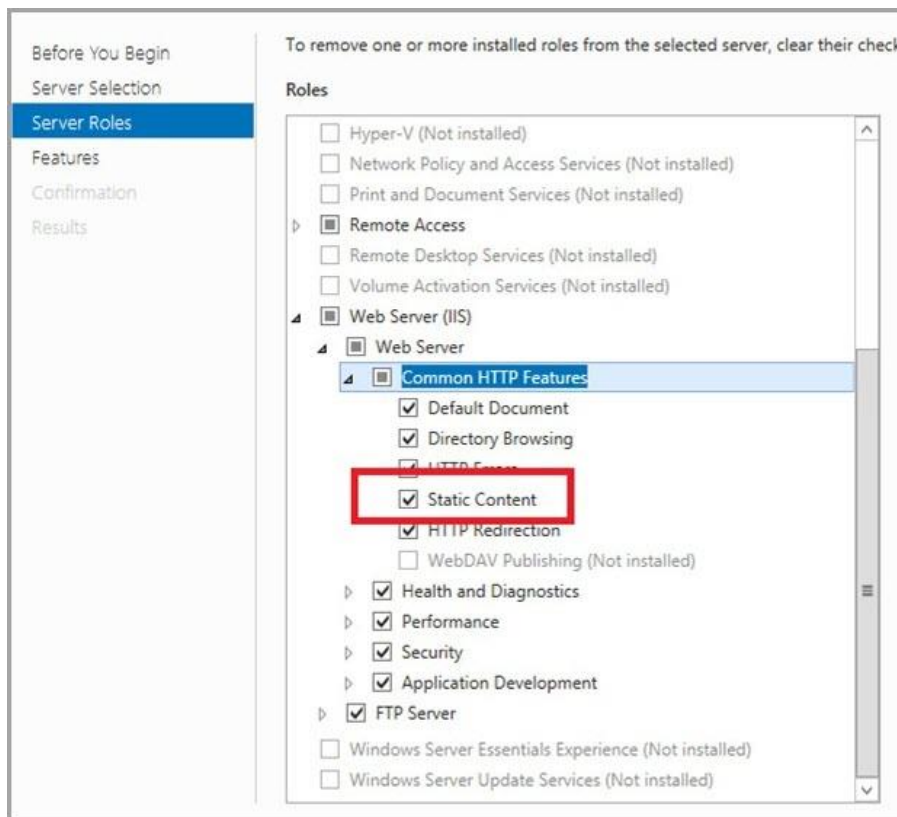
## Installation Troubleshooting

If you encounter issues during the installation, check the following settings in Windows Server Manager:

- Open **Features**. In the section *.NET Framework 4.5*, confirm that the option *ASP.NET 4.5* is checked.



- Open **Server Roles**. In the section *Web Server (IIS) > Web Server > Common HTTP Features*, make sure that *Static Content* option is checked.



## Opening the Quality Management Application

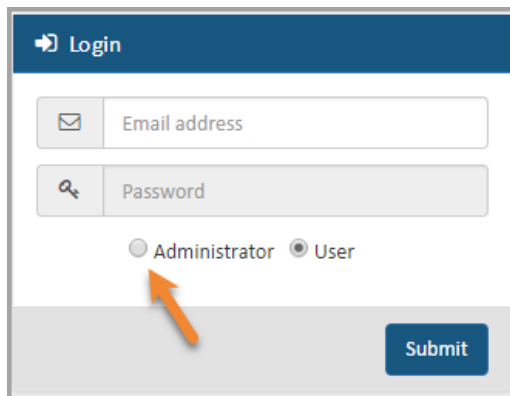
Open the application and verify that the connection to the database works correctly.

1. In a browser, navigate to the URL to the application, which you set up during installation. This URL will be similar to the following:

`http://<QM Server FQDN/IP Address>/QualityManagement/Account/Login`

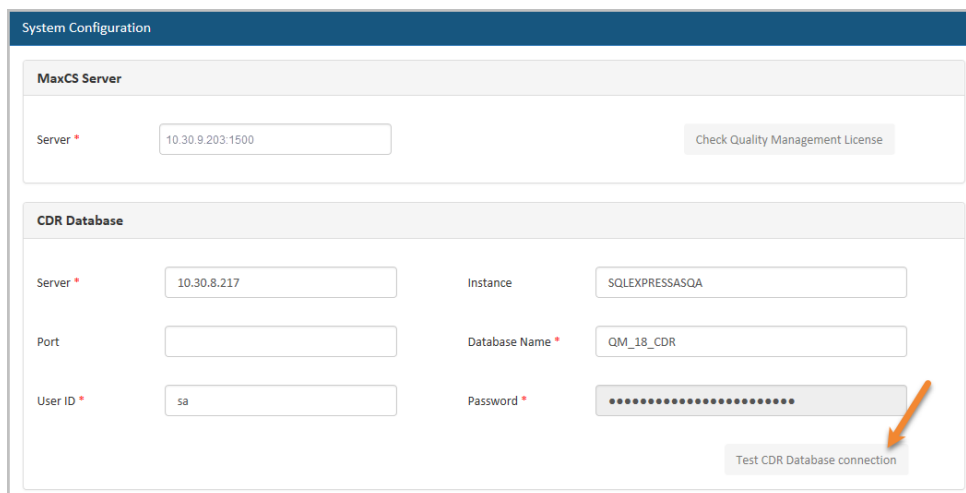
2. At the Login prompt, check the option **Administrator** and log in.

The default username is *Admin*; the password for that username is 22222. For security reasons, we recommend that you change this to a more complex password.



The application opens. You will see a Menu bar at the top. When you log in for the first time, the *System Configuration* panel will automatically open for you.

4. Note that for the *Server* field, the default port is 1433. If you are using a different port for CDRs, then you need to append the port number after the server IP address, preceded with a colon character. For example: `10.30.9.203:1500`.
5. In the *System Configuration* panel, click **Test CDR Database connection**.



6. You should see a confirmation that the connection was successful; click **Save**.

If the connection was not successful, confirm your CDR database settings and try again. Also see the section [Installation Troubleshooting](#).



## About Assessments

Assessments are basically scored evaluations of call recordings. Various assessment forms can be used to evaluate different criteria. Assessment forms are made up of a series of questions.

### Types of Questions

Assessments can contain several different types of questions. While listening to a recording, evaluators respond to the questions in the form.

When assessment forms are created, the form author can assign a specific number of available points for most questions. The points for each question are totaled to calculate a score for the recording.

Some forms may contain questions that are optional.

Following is an explanation of the types of questions that can be included in assessment forms.

- **Binary:** This is typically a Yes/No type of question, where evaluators have two choices. Each choice is assigned a different number of points, in order to rate the responses.

Example:

*Did the agent announce his/her name to the caller? Yes / No*

With this type of question, the form could be designed to assign 10 points to a Yes response and 1 point to a No response.

- **Free Form:** This is a basic text field where an evaluator can add comments or describe something about the recording. Free-form questions have no points; therefore, they do not contribute to the score of a recording.
- **Integer:** This question type is typically a range of numbers. Most often, these types of questions are used to rate something, say, on a scale from 1-10, with one end of the range as a low score, and the other end of the range as a high score.

Example:

*Rate the friendliness of the agent on a scale from 1 to 5, with 1 being unfriendly and 5 being very friendly.*

The form could be designed to assign 1 point to a response of 1, 2 points to a response of 2, 3 points to a response of 3, and so on.

- **Multiple Choice:** This type of question asks the evaluator to choose one response from among several options. Each choice is assigned a certain number of points, similar to the Integer questions.

Example:

*Overall, how closely did the agent follow the standard script?*

The form may be designed to assign 0 points for a response of "Did not follow the script," 5 points to a response of "Usually followed the script," and 10 points "Followed the script."

Additional notes about questions:

- Some questions can have an 'auto-fail' setting; refer to the section [About Pass/Fail](#) for details.
- Some questions can be optional. If the optional questions have responses, those response points will be included in report calculations.

## Administrators - User Privilege Management

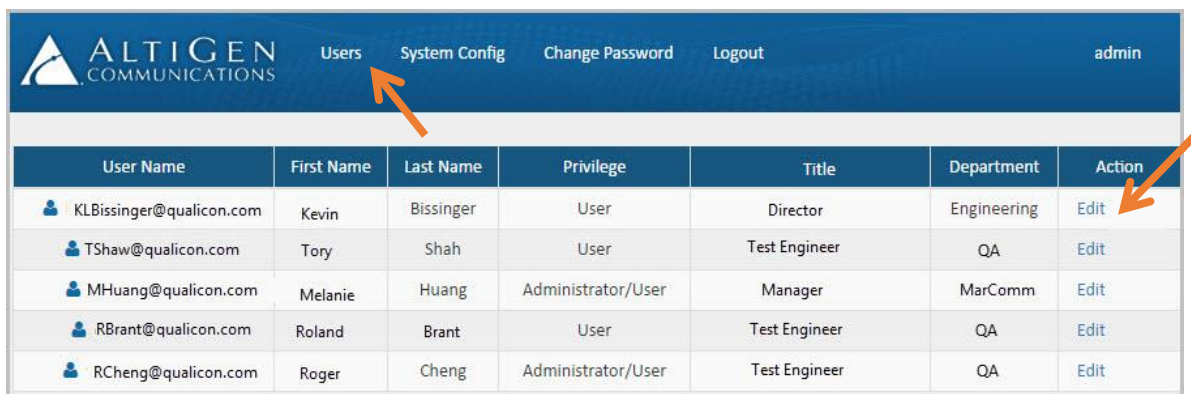
This section is for Administrators. It describes how to set QM privileges for QM users.






Users are configured for the Quality Management application through VRManager Pro. This includes the user name, password, and role.

Note that passwords can only be changed from within VRManager Pro (except for the default administrator account, with a user ID of *admin*, which can change that account's password from within the Quality Management application.)

You can configure specific QM privileges for each user from within the QM application.

1. On the Menu bar, click **Users**. The page opens, showing a list of existing users.



User Name	First Name	Last Name	Privilege	Title	Department	Action
 KLBissinger@qualicon.com	Kevin	Bissinger	User	Director	Engineering	<a href="#">Edit</a>
 TShaw@qualicon.com	Tory	Shah	User	Test Engineer	QA	<a href="#">Edit</a>
 MHuang@qualicon.com	Melanie	Huang	Administrator/User	Manager	MarComm	<a href="#">Edit</a>
 RBrant@qualicon.com	Roland	Brant	User	Test Engineer	QA	<a href="#">Edit</a>
 RCheng@qualicon.com	Roger	Cheng	Administrator/User	Test Engineer	QA	<a href="#">Edit</a>

2. Click the **Edit** button beside the user whom you want to configure.

### User Properties

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<p>User Name(Email): * <input type="text" value="rbuchanan@qualicon.com"/></p> <p>First Name: <input type="text" value="Ralph"/></p> <p>Title: <input type="text" value="Manager"/></p>	<p>Password: * <input type="password" value="*****"/></p> <p>Last Name: <input type="text" value="Buchanan"/></p> <p>Department: <input type="text" value="Marketing"/></p>
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Scope

Role:  Administrator  User

Privilege:

**Assessment and Reports**

- Perform an Assessment
- Review an Assessment
- Run Agent Reports
- Run Assessment Reports

**Form Management**

- Create/Copy Forms
- View Forms
- Edit Forms
- Publish Forms
- Activate/Deactivate Forms
- Delete Forms

3. On the *User Properties* page, adjust the user's privileges (in the lower portion of the page) as needed, and then click **Save**.

- **Role**
  - **Administrator:** The user can log in as an administrator and perform administrator tasks such as edit user privileges.
  - **User:** The user can log in as a user and perform specific activities, as specified below
- **Assessment and Report Privileges:**
  - **Perform an Assessment:** The user can assess call recordings
  - **Review an Assessment:** The user can review assessments
  - **Run Agent Reports:** The user can run agent-specific reports
  - **Run Assessment Reports:** The user can run assessment reports
- **Form Management Privileges:**
  - **Create / Copy Forms:** The user can create new forms, and can copy forms to make new forms or new versions of the same form
  - **View Forms:** The user can view forms
  - **Edit Forms:** The user can update forms
  - **Publish Forms:** The user can publish forms, so that they can be used during call assessments

- **Activate/Deactivate Forms:** The user can activate and deactivate forms
- **Delete Forms:** The user can delete forms

## Performing Call Assessments

Users can perform assessments of call recordings, review assessments, and run reports.

Your administrator must have set up a user account in the *Quality Management* application in order for you to review or perform assessments.

The specific tasks that you can perform in *Quality Management* will depend upon the privileges that your administrator has granted to your user account.

## Opening the Quality Management Application

There are two ways that users can open the Quality Management application.

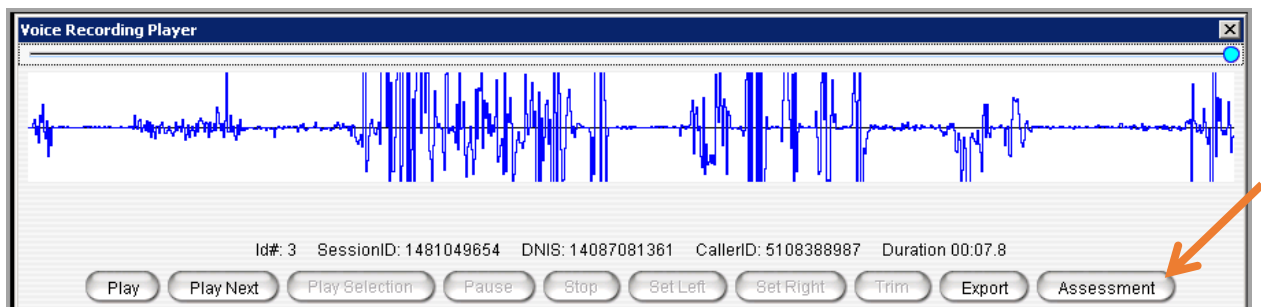
- By clicking the **Assessment** button within the VRManager Pro Client. This is found on the Voice Recording Player, which opens when you double-click a recording (or click the **Play** button).
- By navigating to the application in a web browser. Contact your administrator for the URL, your username, and your password.

Assessments are evaluations of call recordings. Assessments are based upon specific criteria, which has been set up in various forms.

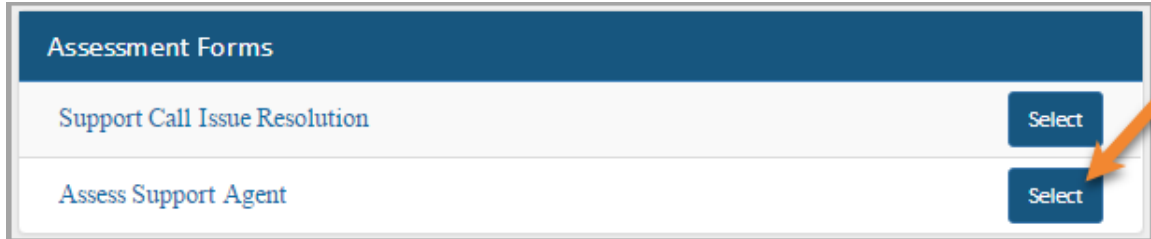
## Assessing Call Recordings

If your user account has been set up with the appropriate permissions, you can perform an assessment, or evaluation, of recordings. To assess a recording, you can launch the Quality Management application directly from VRManager Pro Client:

1. In VRManager Pro, search for, and select, the recording which you want to evaluate.
2. Double click the entry or select it and click the **Play** button.
3. When the Voice Recording Player opens, click the **Assessment** button.



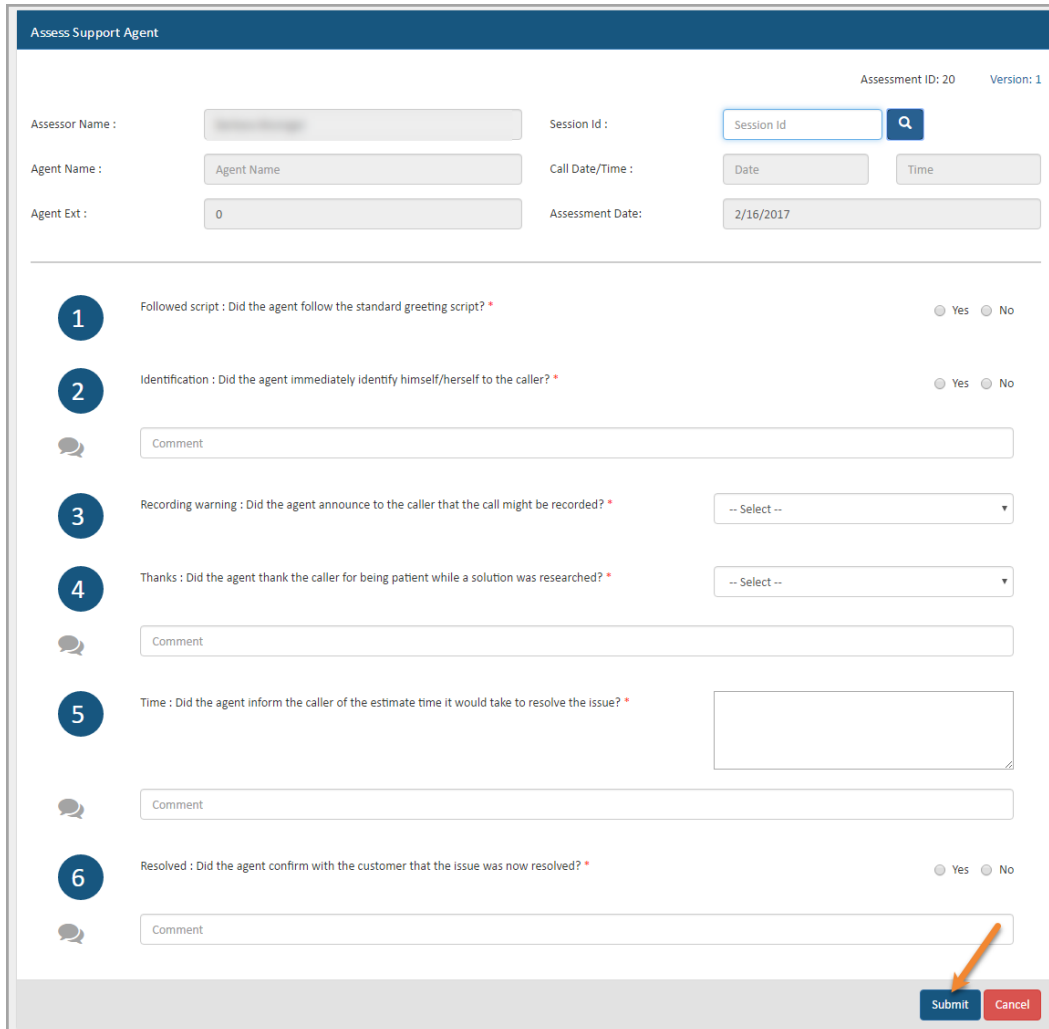
4. A browser window opens, showing a list of forms. You are now in the *Quality Management* application. Determine which form you should use and click the **Select** button on that row.



5. The form opens; you will see a series of questions. When you are ready to listen the recording, return to the Voice Recording Player in VRManager Pro and click **Play**.
6. Listen to the recording, and respond to the questions in the form to evaluate the interactions in the recording.

7. After you enter all pertinent information into the form, click **Submit**.

You can click **Play Next** to listen to the next recording.



Assess Support Agent

Assessment ID: 20 Version: 1

Assessor Name :

Session Id :

Agent Name :

Call Date/Time :  Date  Time

Agent Ext :  0

Assessment Date:  2/16/2017

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1 Followed script : Did the agent follow the standard greeting script? \*  Yes  No

2 Identification : Did the agent immediately identify himself/herself to the caller? \*  Yes  No

Comment

3 Recording warning : Did the agent announce to the caller that the call might be recorded? \*  -- Select --

4 Thanks : Did the agent thank the caller for being patient while a solution was researched? \*  -- Select --

Comment

5 Time : Did the agent inform the caller of the estimate time it would take to resolve the issue? \*

Comment

6 Resolved : Did the agent confirm with the customer that the issue was now resolved? \*  Yes  No

Comment

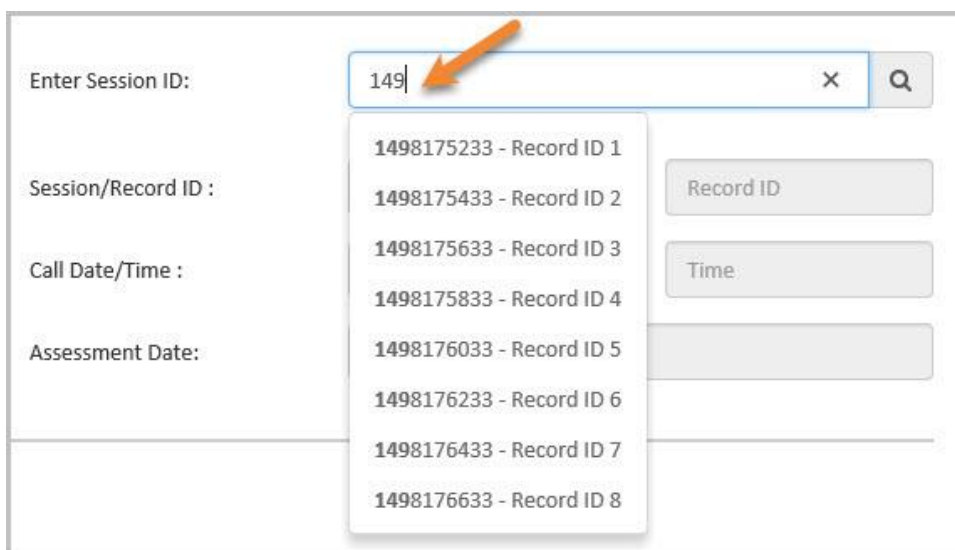
## Assessing Recordings by Searching for the Recording

You do not have to open the *Quality Management* application from within the VRManager Pro client. You can run VRManager Pro and the *Quality Management* application side by side. If you know the Session ID, you can search for the recording within the *Quality Management* application.

1. In a web browser, log into the *Quality Management* application. You will need to obtain the URL and your login username and password from your administrator in order to log in.
2. Click **Assessments** on the Menu bar and then click **Perform an Assessment**.



3. Click **Select** beside the appropriate assessment form.
4. You now will search for the recording that you want to evaluate. Begin typing the session ID number and click the **Search** icon to search for the correct recording. As you begin typing, a menu shows the records that match that ID number.



5. From the list, click the recording you want to evaluate. A panel opens with the assessment form fields, ready for you to start your assessment.
6. Click **Submit** after you have completed your assessment.

You can play the recording in VRManager Pro while you enter your feedback into the form in the *Quality Management* application in another window.

## Reviewing Assessments

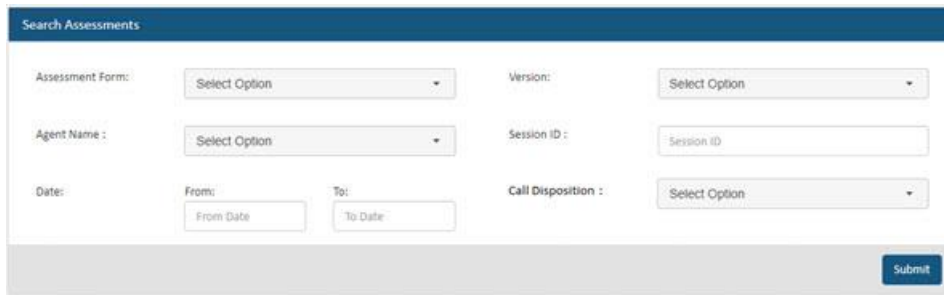
If you have the proper permissions, you can review assessments of call recordings.

To review an assessment,

1. Within the Quality Management application, click **Assessments** on the Menu bar. Then click **Review an Assessment**.
2. In the top portion of the page, enter search criteria to search for the assessment that you want to review. Remember, you are searching for the *assessment*, not the recording.
  - **Assessment Name:** The name of the form
  - **Version:** The version number of the form

- **Agent Name:** The name of the agent whose recording was evaluated
- **Session ID:** The CDR Session ID of the recording
- **Date:** The assessment date
- **Call Disposition:** (Optional) specify a call disposition code if desired

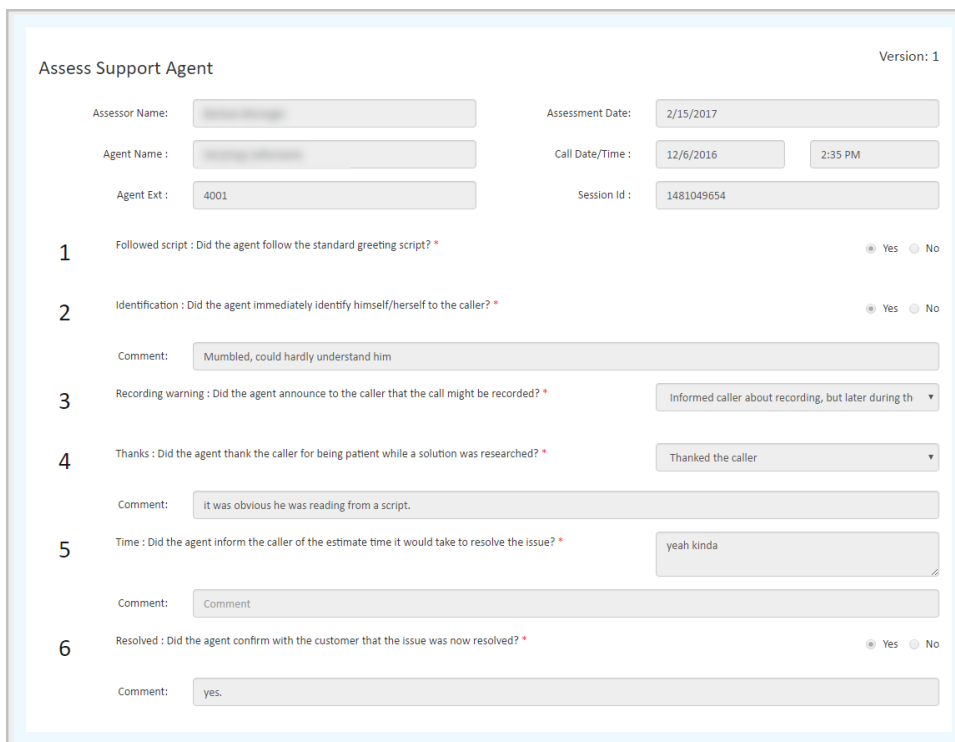
3. Click **Submit**.



The search results show you assessments that meet the criteria that you entered.

4. Locate the assessment that you want to review, and then click **Review** on that row.

A new panel opens showing that assessment. You will see the questions in the form and the responses that the assessor chose, along with any comments.



## Managing Forms

You can create and update assessment forms as needed, depending upon the privileges of your user account.



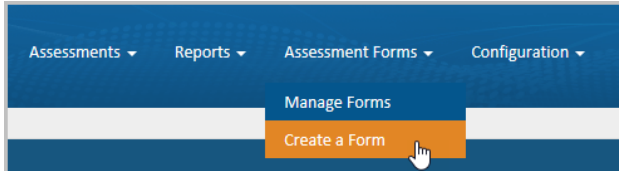
## Creating a New Form

Your user account must have the correct privileges in order to create forms.

We recommend that you sketch out the form's questions and responses before you begin to create the form itself.

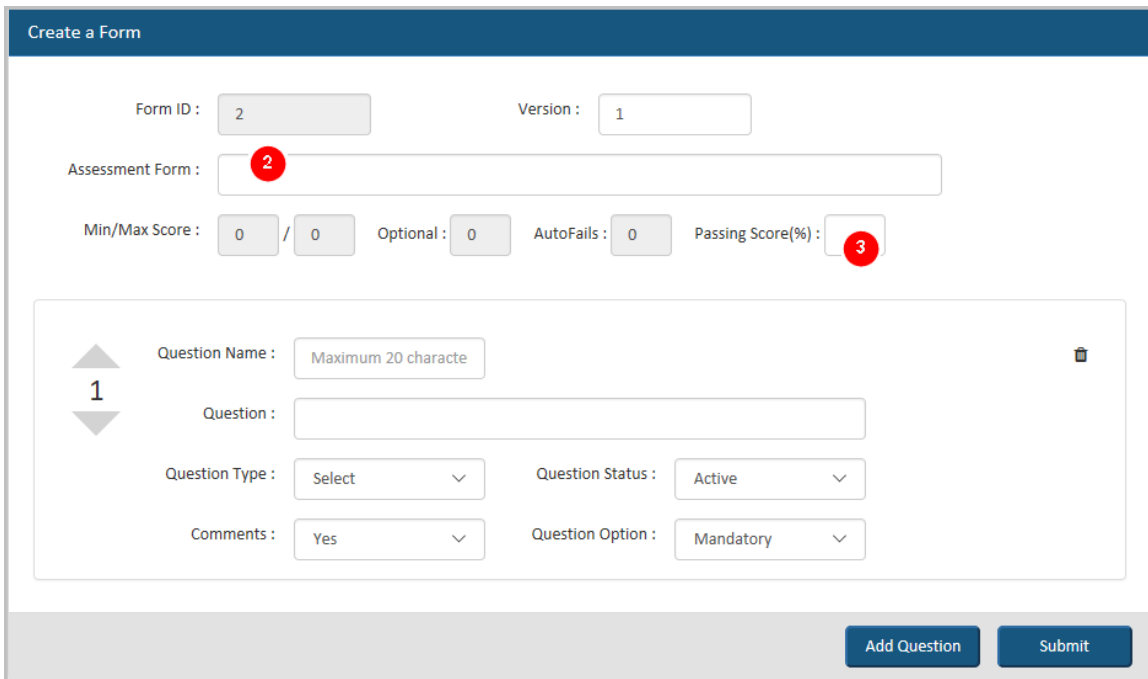
To create a new form,

1. On the Menu bar, click **Assessment Forms**. Then click **Create a Form**.



2. On the next page, enter a name for the form in the **Assessment Form** field.
3. On the line just below the name, you must specify a required *Passing Score* percentage; for example, you can specify that an assessment that scores below 85% fails the assessment.

Other fields in the top section will be calculated automatically from the questions that you enter.



The image shows the 'Create a Form' interface. At the top, there are fields for 'Form ID' (value: 2) and 'Version' (value: 1). Below these is the 'Assessment Form' field, which is empty and has a red circle with the number '2' next to it. Underneath are several input fields: 'Min/Max Score' (0 / 0), 'Optional' (0), 'AutoFails' (0), and 'Passing Score(%)' (empty, with a red circle and '3' next to it). The main section is a list of questions, with the first one highlighted and numbered '1'. The first question has a 'Question Name' of 'Maximum 20 characte', an empty 'Question' field, 'Question Type' set to 'Select', 'Question Status' set to 'Active', 'Comments' set to 'Yes', and 'Question Option' set to 'Mandatory'. At the bottom right, there are 'Add Question' and 'Submit' buttons.

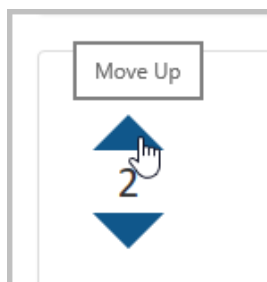
4. You are ready to enter your first question. Complete the fields as appropriate.

The following fields are common to all question types.

Field	Description
Question Name	Enter a short, descriptive name for this question (maximum 20 characters). These will be shown in various reports, so using one or two words for the name will keep the reports easy to read. In our examples, we've used names such as

Field	Description
	“Clarity” and “Tone.”
Question	Enter the actual question as you want it to appear to reviewers.
Question Type	Select the type of question this is: Binary; Integer; Free-form; or Multiple choice. Refer to <a href="#">Types of Questions</a> on page 9 for examples.
Question Status	Select whether the question is included in the form: <ul style="list-style-type: none"> <li>• Active: The question is included in future assessments that use this form.</li> <li>• Inactive: The question is not included in future assessments that use this form.</li> </ul>
Comments	Select whether to offer a comment field for this question, where reviewers can expand upon their responses or provide other pertinent details.
Question Option	Select whether a response to this question is required. <ul style="list-style-type: none"> <li>• <b>Mandatory:</b> A response to this question is required.</li> <li>• <b>Optional:</b> A response to this question is optional.</li> </ul>

- After entering the first question, click **Add Question** to add another question.
- If you need to delete a question as you go along, click the trash can icon on the right.
- If you want to change the order of the questions in a form, click the up or down arrow around the question number to move it above or below the adjacent question.



- Click **Submit** when you have completed all questions.

## Fields for Binary Questions

Binary questions typically are positive/negative queries. You can specify both positive and negative responses (for example, Yes and No), and assign values to both.

Binary Question Field	Description
Positive Response	Enter the word or phrase for a positive response. This will often be “Yes,” but can be whatever is appropriate for your question.
Positive Response Value	Enter a relative value for a positive response. The value that you en-

Binary Question Field	Description
	ter will be used in various scoring algorithms. Therefore, this value should be higher than the “Negative Response Value.”
Positive Response Auto-Fail	When the evaluator chooses this response, whether to mark the question as “Failed.” In some cases, one failed questions can automatically fail an assessment. Refer to the discussion in <a href="#">About Pass/Fail</a> .
Negative Response	Enter the word or phrase for a negative response. This will often be “No,” but can be whatever is appropriate for your question.
Negative Response Value	Enter a relative value for a negative response. The value that you enter will be used in various scoring algorithms. Therefore, this value should be lower than the “Positive Response Value.”
Negative Response Auto-Fail	When the evaluator chooses this response, whether to mark the question as “Failed.” In some cases, one failed questions can automatically fail an assessment. Refer to the discussion in <a href="#">About Pass/Fail</a> .

Following is an example of a Binary question. Note that the fields in the top of the form are starting to update.

Add Assessment

Form Id : 
Version :

Assessment Name :

Min/Max Score :  / 
Optional : 
AutoFails : 
Passing Score(%) :

▲  
1  
▼

Question Name :

Question :

Question Type :

Question Status :

Comments :

Question Option :

Positive Response :


Value :

AutoFail :

Negative Response :

Value :

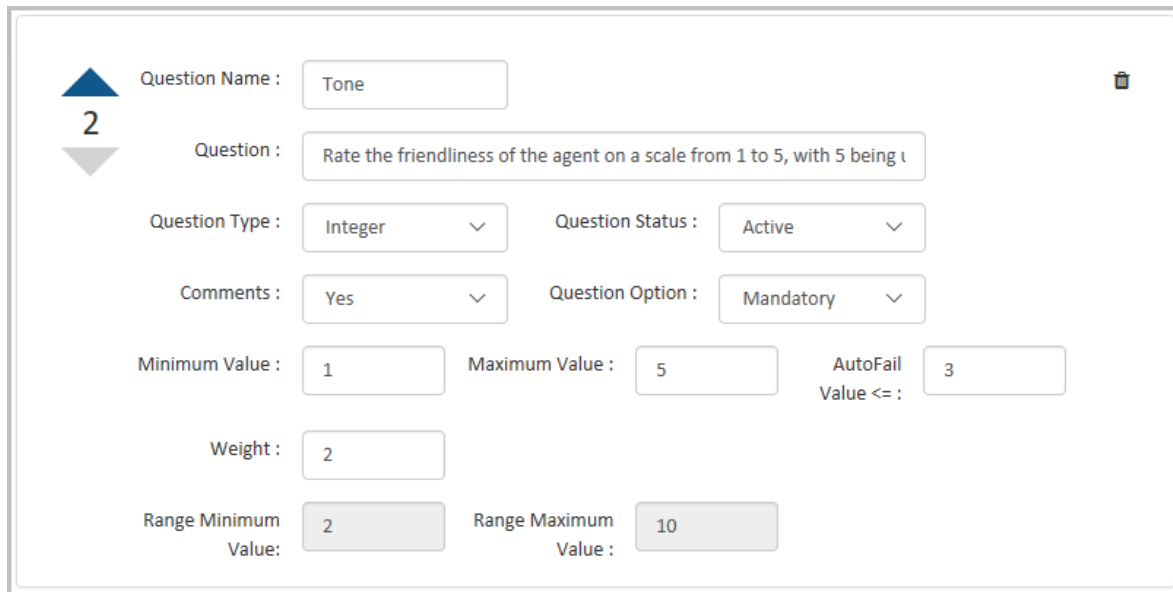
AutoFail :


  
Click this icon to delete a question

Add Question
Submit

## Fields for Integer Questions

Integer questions prompt reviewers to enter a value in a range, say, from 1 to 5. Usually, the higher the number, the better the score.



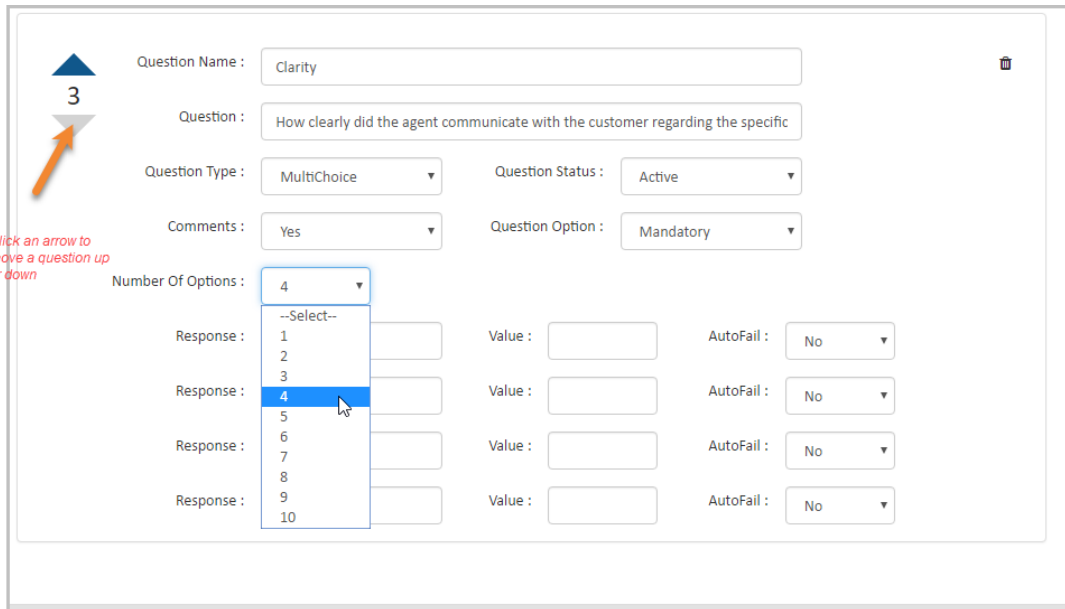
The screenshot shows a configuration form for an integer question. On the left, there is a blue triangle pointing up with the number '2' inside, and a grey triangle pointing down below it. The form fields are as follows:

- Question Name :
- Question :
- Question Type :
- Question Status :
- Comments :
- Question Option :
- Minimum Value :
- Maximum Value :
- AutoFail Value <= :
- Weight :
- Range Minimum Value:
- Range Maximum Value :

Integer Question Field	Description
Minimum Value	Enter the minimum number for the range; this will be the lowest number that reviewers can choose as a response.
Maximum Value	Enter the maximum number for the range; this will be the highest number that reviewers can choose as a response.
AutoFail Value <=	Enter the response value at which this question will automatically fail. For example, suppose your range is from 1-10, and you enter 7 as the AutoFail value. If an evaluator rates this question a 7, then the question automatically fails.
Weight	This field allows you to enter a weight factor. Use this field as needed to increase the value of this question in terms of the overall score. For example, a weight of 1 limits the score of this question to the Maximum Value entry. Entering "2" for the weight, as shown in the preceding figure, essentially doubles the value of this question.

## Fields for Multiple Choice Questions

Multiple choice questions prompt assessors to pick one choice from several options.



Question Name : Clarity

Question : How clearly did the agent communicate with the customer regarding the specific

Question Type : MultiChoice Question Status : Active

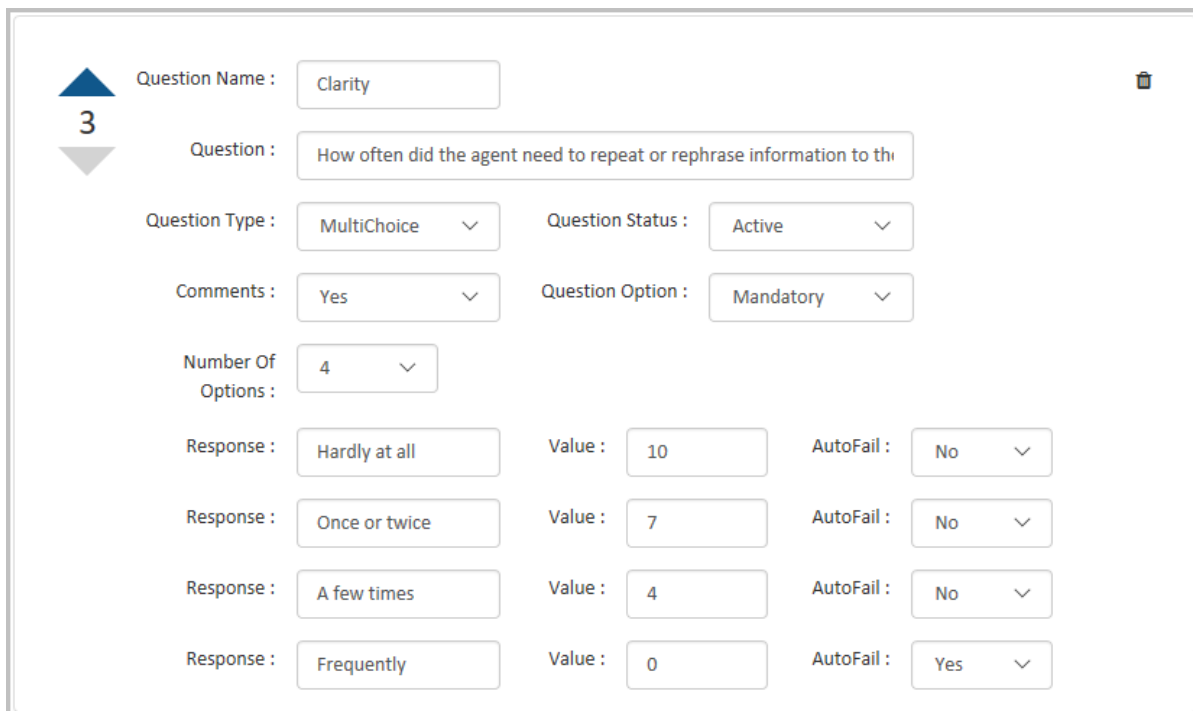
Comments : Yes Question Option : Mandatory

Number Of Options : 4

Response	Value	AutoFail
1		No
2		No
3		No
4		No
5		No
6		No
7		No
8		No
9		No
10		No

*Click an arrow to move a question up or down*

You will need to specify the number of choices that you want to present to assessors, in the **Number of Options** menu. Then complete the entries for each option, indicating the response, its value, and whether that response should automatically fail the question.



Question Name : Clarity

Question : How often did the agent need to repeat or rephrase information to th

Question Type : MultiChoice Question Status : Active

Comments : Yes Question Option : Mandatory

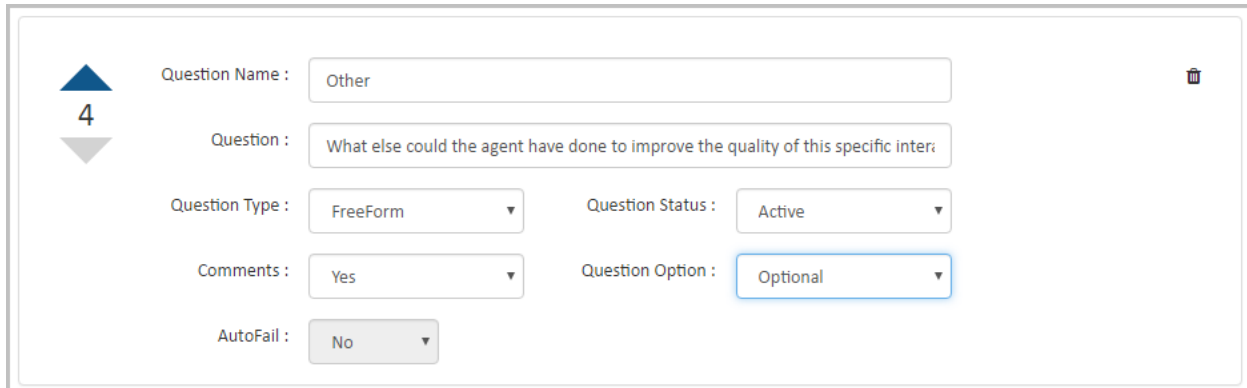
Number Of Options : 4

Response	Value	AutoFail
Hardly at all	10	No
Once or twice	7	No
A few times	4	No
Frequently	0	Yes

In our example, the question offers four responses, valued from 10 points to 0. The 4<sup>th</sup> choice, “Frequently,” is marked as Auto-Fail.

## Fields for Free Form Questions

Free-form questions allow assessors to write anything that is pertinent to the review. Free-form questions have no values associated with them, so they do not affect the overall score of an assessment. They are often used as a catchall question for any aspects of the call that did not fall into the other questions.



The screenshot shows a configuration form for a question. On the left, there is a blue triangle pointing up with the number '4' below it, and a grey triangle pointing down below that. The form fields are as follows:

- Question Name :
- Question :
- Question Type :
- Question Status :
- Comments :
- Question Option :
- AutoFail :

## Form States

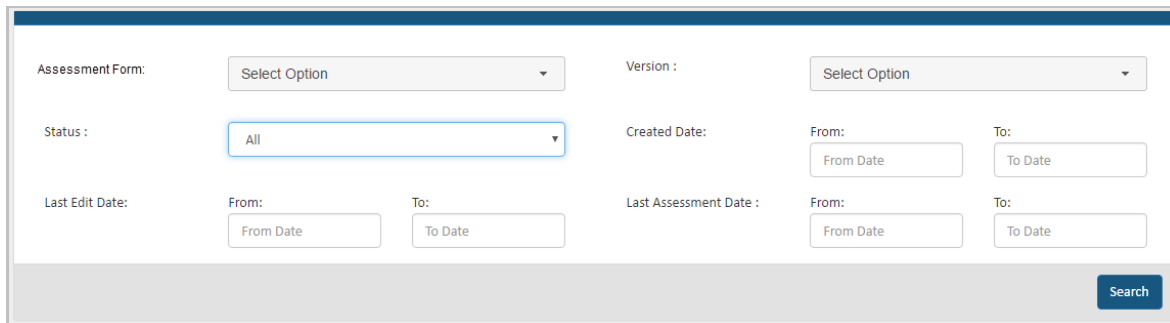
Assessment forms can be in any of the following states:

Form State	Description
Published	The form has been published and is available to use during assessments.
Unpublished	The form has not been published, and is not available to use during assessments.
Deactivated	The form has been published, but is has since been deactivated. This means that it is not currently available for use in assessments. To make the form available again, you can activate it.

## Updating Forms

After you submit a form, you can update it as needed, view it, publish it, deactivate it, copy it, or delete it. These options are offered in the search results, in the **Actions** column.

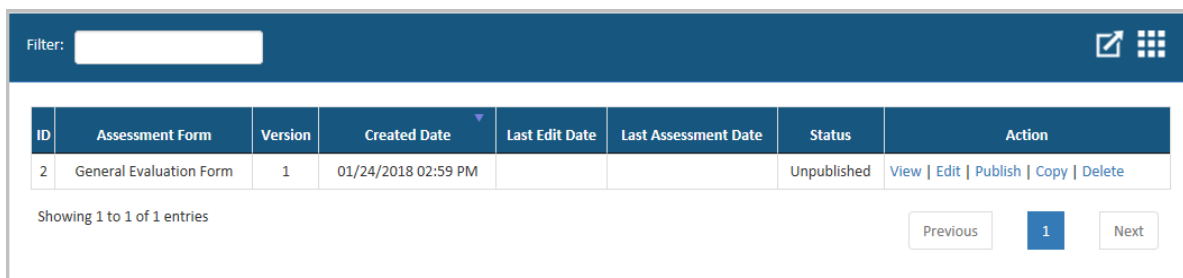
To view the forms in your system, choose **Assessment Forms > Manage Forms**. From there, you can search for the specific form you want.



Search for the desired form by entering search criteria.

Search Field	Description
Assessment Form	The name of the assessment form.
Version	The version number of the form.
Status	Select the status of the form: <ul style="list-style-type: none"> <li>• <b>Unpublished</b> – Forms that have been created but not yet published</li> <li>• <b>Published</b> – Forms that have been published for use.</li> <li>• <b>Deactivated</b> – Forms that have been deactivated.</li> </ul>
Created	You can enter a range of dates when the form was created, in order to narrow the search results.
Last Edit Date	You can enter a range of dates when the form was last updated, in order to narrow the search results.
Last Assessment Date	You can enter a range of dates when the form was last used in an assessment, in order to narrow the search results.


After you click **Search**, you will see a list of forms that meet your criteria. Each form appears on a separate row. Each row has action buttons, which you click to perform an action on that form.




ID	Assessment Form	Version	Created Date	Last Edit Date	Last Assessment Date	Status	Action
2	General Evaluation Form	1	01/24/2018 02:59 PM			Unpublished	<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Publish</a>   <a href="#">Copy</a>   <a href="#">Delete</a>

Showing 1 to 1 of 1 entries

Previous 1 Next

In this view, you can hide or show the various columns. Click the **Columns** icon  in the upper right corner of that panel and check columns to show, uncheck columns to hide.

You can also export the list to a file by clicking the **Export** icon  and choosing a file format.

## Viewing Forms

To view a form,

1. Choose **Assessment Forms > Manage Forms** and search for the form you want to view.
2. Click **View** on that form's row in the search results.

Filter: <input type="text"/>						
Id	Form Name	Version	Created Date	Last Edit Date	Status	Action
24	Tier 2 Support Call	1	03/29/2017 01:45 PM		Unpublished	View   Edit   Publish   Copy   Delete

A new browser tab opens, showing you the form.

Note that you cannot edit the form in this view.

To close the view, close that browser tab.


## Editing Forms

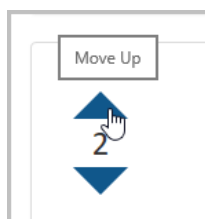
You can only edit forms that have not been published.

To update a form,

1. Choose **Assessment Forms > Manage Forms** and search for the form you want to change.
2. Click **Edit** on that form's row in the search results. This opens the form for editing.

Status	Action
Unpublished	View   Edit   Publish   Copy   Delete

3. Make your changes, adding questions, altering settings as needed.
4. If you need to delete a question, click the trash can icon to the right of that question. 
5. If you want to change the order of the questions in a form, click the up or down arrow around the question number to move it above or below the adjacent question.



6. When you have made all of your changes, click **Submit**. A message opens, confirming that the forms was successfully updated. Close the popup, and then you can close this browser tab.



In order to produce a new version of a form, copy it, make your changes, and then assign it the same name but with a new (higher) version number.

## Publishing Forms

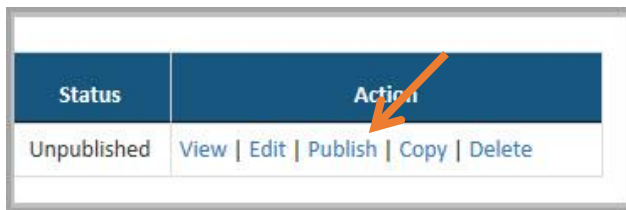
You can publish unpublished forms, so that they can be used to perform call assessments.

Note that you can only publish one version of a form at a time. For example, if you try to publish version 2 of a form while version 1 is published, the system will ask whether you want to deactivate version 1 in order to publish version 2.

Published forms can be activated or deactivated as needed.

To publish an unpublished form,

1. Choose **Assessment Forms** > **Manage Forms** and search for the form you want to publish.
2. Click **Publish** on that form's row in the search results.



3. The form opens in a new browser tab. At the bottom, click **Publish Assessment**. A pop-up message confirms that the form was successfully published. Close the popup, and then you can close this browser tab.

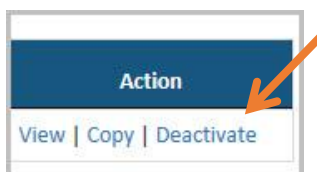
## Deactivating Published Forms

You can deactivate a form when you do not want to use it for assessments.

When you want to update a form, you should first make a copy and update that copy. Then deactivate the earlier version and publish the newer version.

To deactivate a published form,

1. Choose **Assessment Forms** > **Manage Forms** and search for the form you want to deactivate.
2. Click **Deactivate** on that form's row in the search results.



3. A new browser tab opens showing you the form; in the bottom, click **Deactivate Assessment**.
4. A pop-up message opens, confirming that the form was successfully deactivated. Close the popup, and then you can close this browser tab.


Once you deactivate a form, it will not be used in assessments. (You can activate the form to use it again.)

## Copying Forms

You can make a copy of a form, to build a new form or to update this form.

To copy a form,

1. Choose **Assessment Forms > Manage Forms** and search for the form you want to copy.
2. Click **Copy** on that form's row in the search results.



Status	Action
Unpublished	View   Edit   Publish   Copy   Delete

The form opens in a new tab.

3. Make your changes.
4. If you want this updated version to be a completely new form, give the form a new name and use **1** for the version number.

If you want this to be a later version of the original form, keep the same name but assign a higher version number.

5. Click **Submit**. A pop-up message confirms that the form was successfully copied. Close the popup, and then you can close this browser tab.

## Reactivating Forms

To reactivate a deactivated form, search for the form and click **Activate** on its row.



Status	Action
Deactivate	View   Copy   Activate
Unpublished	View   Edit   Publish   Copy   Delete

## Deleting Forms

Deleting a form means removing it from the system.

You can only delete unpublished forms; once a form has been published, it may have assessments associated with it.

To delete a form,

1. Choose **Assessment Forms > Manage Forms** and search for the form you want to delete.
2. Click **Delete** on that form's row in the search results. You will be prompted to confirm that you want to delete the form; click **OK**.

## Assessment Reports

Reports provide supervisors with historical performance data, by assessment form or by agent.

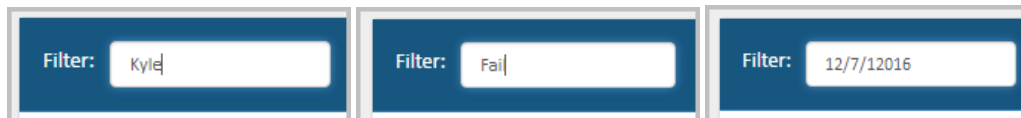
There are four reports available in this release:

- **Agent Detail Report:** Shows details for a specified agent's assessments, including ratings for each question on the form. This report shows the responses to the questions.
- **Agent Summary Report:** Shows a summary for one or more agent's assessments, including average points and average score for each question.
- **Assessment Performance Detail Report:** Shows a detailed report for a single form or all forms. This report includes the average points for each question.
- **Assessment Performance Summary Report:** Shows a summary report for a single form (leave the Assessment Name field empty to include all forms in the report). This report does not include question details.


## Generating Reports

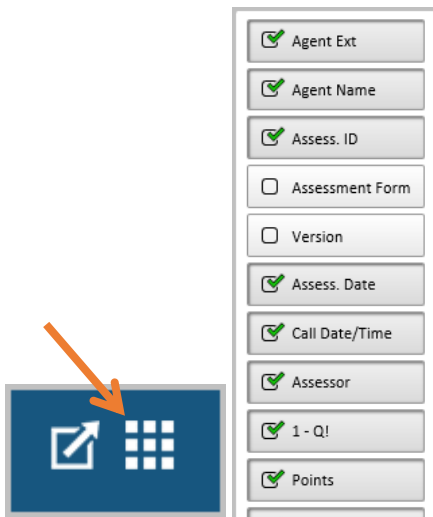
To generate a report,

1. On the Menu bar, click **Reports**.
2. Select the type report you want to create.
3. Specify details for the report and click **Search**. Required fields are noted with an asterisk symbol (\*).
4. To filter the report, type your criteria in the **Filter** field.



The filter works across columns; here are some examples:

- To filter the results by a reviewer, type all or part of the reviewer's name into the filter field.
  - To filter the results by assessments (and questions) that failed, type `Fail` into the filter field. Note that the results, in this case, may include assessments that passed but that contained questions that may have failed.
  - To filter the results by a specific date, type the date into the filter field.
5. In the report window, you can select which columns to include. You can also select which questions to include or omit. Click the **Columns** icon . Check a column to show it; uncheck a column to hide it. Click outside of the column selector to close it.

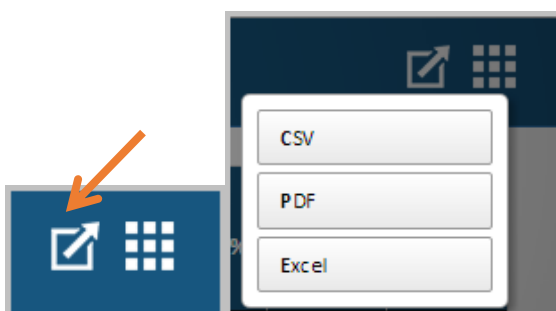


**Tip** If your report has a large quantity of questions, you can remove some questions from the display to make the report easier to read and interpret.

- To sort the results by a column, click the column heading. A small triangle shows how the data was sorted; click the column heading a second time to reverse the sort order.

Score %
14.8
14.8
37.0
37.0
40.7

- To export a report, click the **Export** icon  and choose a file format.



## About Pass/Fail

Many reports contain Pass/Fail statistics. It is important to understand how a recording can pass or fail an assessment.

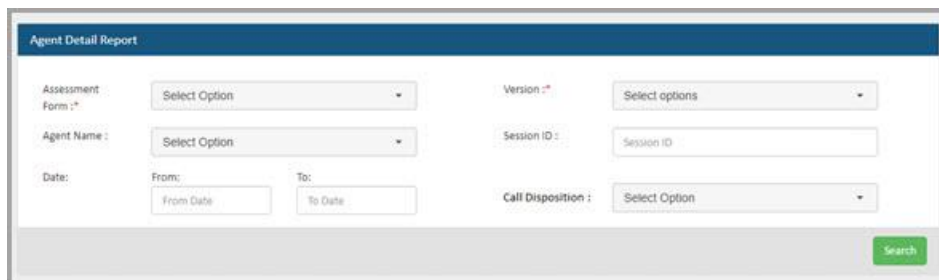
A recording can fail an assessment in two different ways:

- **Insufficient total points.** A recording can fail because it did not achieve sufficient total points. For example, if a form requires of a score of 70% in order for the recording to pass, but an assessment's Score % is calculated at 63%, then the recording has failed the assessment.
- **Auto-Fail question.** A recording can automatically fail if it fails a question that the form has designated as 'Auto Fail.'

## Agent Detail Report

The Agent Detail report shows details for a specified agent's assessments, including ratings for each question on the form.

### Report Criteria



The screenshot shows a search criteria form titled "Agent Detail Report". It contains several input fields: "Assessment Form" (dropdown menu), "Version" (dropdown menu), "Agent Name" (dropdown menu), "Session ID" (text input), "Date" (with "From" and "To" sub-inputs), and "Call Disposition" (dropdown menu). A green "Search" button is located at the bottom right of the form.

- **Form:** Select a form.
- **Version:** Select the version of the form.
- **Agent Name:** Either select an agent or leave the field empty to include all agents.
- **Session ID:** Either enter a Session ID or leave the field empty to include all records.
- **Date:** Enter a *From* and *To* date, or leave the fields empty to include all records.
- **Call Disposition:** (Optional) Enter a call disposition code.

## Agent Detail Report Content

Agent Ext	Agent Name	Assess. ID	Assessment Form	Version	Assess. Date	Call Date/Time	Assessor	1 - Greeting	2 - Tone	3 - Clarity	4 - Other	Points	Max Available	Score %	Pass/Fail	Auto Fail
4701	Frank Lee	12	General Evaluation Form 12-2017	v2	01/24/2018 04:05 PM	01/09/2018 10:43 AM	TEST USER	10	6	7	Less time on hold	23	30	76.7	Fail	Yes
4701	Frank Lee	13	General Evaluation Form 12-2017	v2	01/24/2018 04:08 PM	01/12/2018 10:25 AM	TEST USER	10	8	10		28	30	93.3	Pass	No
4701	Frank Lee	14	General Evaluation Form 12-2017	v2	01/24/2018 04:09 PM	01/23/2018 11:11 AM	TEST USER	10	10	4		24	30	80.0	Pass	No

The next table describes the report contents.

Agent Detail Report Column	Description
Agent Ext	The agent's extension number.
Agent Name	The agent's name.
Assessment ID	Each assessment has a unique ID.
Assessment Form	The name of the form used during the evaluation.
Version	The version of the form used during the evaluation.
Assessment Date	The date of the assessment.
Call Date/Time	The date and start time of this call recording.
Assessor	The name of the assessor.
Questions 1 – x	Each question in the form has a column. The columns show the points scored for that question during the assessment. Free-form questions have no points associated with them; you will see the assessor's comments.
Points	The total points scored during this assessment. This value is calculated by adding the points for each question. Free-form questions have no points associated with them.
Max Available	The maximum number of points that could have been achieved during this assessment. This number is derived from the form itself, not from the assessment. For example, if the form had three questions, and each question could be scored 0-10, then the maximum number of points that could have been achieved during this assessment would be 30 (3 x 10).
Score %	The score for this recording. This entry will be a percentage from 0% - 100%. The higher the percentage, the better the rating. This percentage is calculated as Points/Maximum Points Available.
Pass/Fail	Whether this recording passed or failed the assessment. See <a href="#">About Pass/Fail</a> for a discussion of how recordings pass or fail an assessment.

Agent Detail Report Column	Description
Auto Fail	Where this recording failed due to an auto-fail question.
Call Disposition	The call disposition code for this call.

## Agent Summary Report

The Agent Summary report shows a summary for an agent's assessments, including average points and average score.

### Report Criteria

The report criteria are the same as for the Agent Detail Report.

### Agent Summary Report Content

Agent Ext	Assessment Form	Form ID	Version	Total Assess.	1 - Q1	2 - Q2	3 - Q3	4 - Q4	Avg Points	Max Points	Avg Max Available	Avg Score %	Pass %	Fails	Fail %	Auto Fails	Auto Fail %
1103	Final Review Assessment	1	v1	12	2.0	N/A	9.0	8.8	19.8	27	27.0	73.3	58.3	5	41.7	5	41.7
4001	Final Review Assessment	1	v1	8	1.9	N/A	9.4	6.3	17.5	27	27.0	64.8	62.5	3	37.5	3	37.5
4002	Final Review Assessment	1	v1	7	1.9	N/A	3.0	7.1	12.0	27	27.0	44.4	0.0	7	100.0	7	100.0

The next table describes the report contents.

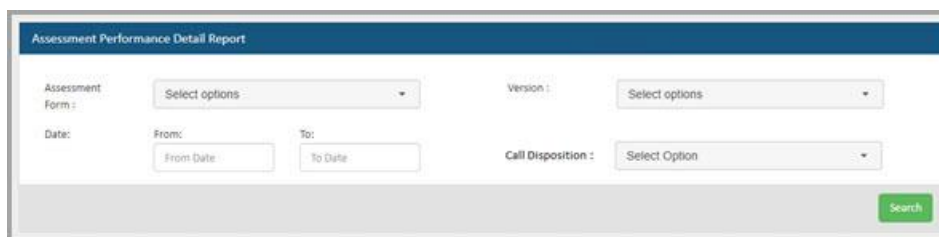
Agent Summary Report Column	Description
Agent Extension	The agent's extension number.
Agent Name	The agent's name.
Assessment Form	The name of the form that was used during the evaluation.
Form ID	The form ID; each form has a unique ID.
Version	The version of the form that was used during the evaluation.
Total Assessments	The total assessments performed using this form.
Questions 1 – x	Each question has a column. Each column shows the average points scored for that question (the average from all assessments).
Average Points	The total average points, calculated from the points for each question on all assessments.
Maximum Points	The maximum number of points that could have been achieved using this form. This

Agent Summary Report Column	Description
	number is derived from the form itself, not from the assessment.
Average Max Available	The average maximum available points for all assessments. This is calculated as Total Max Available points of all the assessments (excluding points from unanswered questions) / Total number of assessments. Because points from unanswered, optional questions are not included in this calculation, the Max Points result may vary from one assessment to another, for the same form.
Average Score %	The average score, calculated from all assessments.
Pass %	The percentage of assessments that passed.
Fails	The number of assessments that failed. Refer to <a href="#">About Pass/Fail</a> to understand how recordings can fail an assessment.
Fail %	The percentage of assessments that failed.
Auto Fails	The number of assessments that auto-failed.
Auto Fail %	The percent of assessments that auto-failed.
Call Disposition	The Call Disposition code will be included in the report heading.

## Assessment Performance Detail Report

Shows a detailed report for a form.

### Report Criteria



- **Assessment:** Select a form. Leave this field empty to include all forms.
- **Version:** Select the version of the form.
- **Date:** Enter a *From* and *To* date, or leave the fields empty to include all records.
- **Call Disposition:** (Optional) Specify the call disposition code.



## Assessment Performance Detail Report Content

Assessment Form	Form ID	Version	Total Assess.	Q1	Q2	Q3	Q4	Avg Points	Max Points	Avg Max Available	Avg Score %	Pass %	Fails	Auto Fails	Auto Fail %
General Evaluation Form 12-2017	3	v2	4	10.0	7.5	6.3	0.0	23.8	30.0	30.0	79.3	50.0	2	2	50.0
TEST MASTER FORM	1	v1	11	1.7	0.0	0.0	0.0	1.7	2.0	2.0	85.0	72.7	3	3	27.3

Showing 1 to 2 of 2 entries

Previous **1** Next

The next table describes the report contents.

Report Column	Description
Assessment Form	The name of the form.
Form ID	The ID of the form.
Version	The version of the form.
Total Assessments	The total number of assessments that have been performed using this form.
Questions 1 – x	Each question has a column. Each column shows the average points scored for that question (the average from all assessments).
Average Points	The average points, calculated from the points for each question on all assessments.
Maximum Points	The maximum number of points that could have been achieved using this form. This number is derived from the form itself, not from the assessment.
Average Max Available	The average maximum available points for all assessments. This is calculated as Total Max Available points of all the assessments (excluding points from unanswered questions) / Total number of assessments. Because points from unanswered, optional questions are not included in this calculation, the Max Points result may vary from one assessment to another, for the same form.
Average Score %	The average score, calculated from all assessments.
Pass %	The percentage of assessments that passed.
Fails	The number of assessments that failed. Refer to <a href="#">About Pass/Fail</a> to understand how recordings can fail an assessment.
Fail %	The percentage of assessments that failed.
Auto Fails	The total number of auto fails for this form.
Auto Fail %	The percentage of auto fails for this form.
Call Disposition	The Call Disposition code will be included in the report heading.

## Assessment Performance Summary Report

The Assessment Performance Summary report shows a summary report for a single form.

### Report Criteria

The report criteria are the same as for the Assessment Performance Detail report.

### Assessment Performance Summary Report Content

Assessment Form	Form ID	Version	Total Assess.	Avg Points	Max Points	Avg Max Available	Avg Score %	Pass %	Fails	Auto Fails	Auto Fail %
General Evaluation Form 12-2017	3	v2	4	23.8	30.0	30.0	79.3	50.0	2	2	50.0
TEST MASTER FORM	1	v1	11	1.7	2.0	2.0	85.0	72.7	3	3	27.3

Showing 1 to 2 of 2 entries

Previous 1 Next

The next table describes the report contents.

Report Column	Description
Assessment Form	The name of the form used during the evaluation.
Form ID	The ID of the form.
Version	The version of the form used during the evaluation.
Total Assessments	The total number of assessments that have been performed using this form.
Average Points	The average points, calculated from the points for each question on all assessments.
Maximum Points Available	The maximum number of points that could have been achieved using this form. This number is derived from the form itself, not from the assessment.
Average Max Available	The average maximum available points for all assessments. This is calculated as Total Max Available points of all the assessments (excluding points from unanswered questions) / Total number of assessments. Because points from unanswered, optional questions are not included in this calculation, the Max Points result may vary from one assessment to another, for the same form.
Average Score %	The average score, calculated from all assessments.
Pass %	The percentage of assessments that passed.
Fails	The number of assessments that failed. Refer to <a href="#">About Pass/Fail</a> to understand how recordings can fail an assessment.
Auto Fails	The total number of auto fails for this form.
Auto Fail %	The percentage of auto fails for this form.
Call Disposition	The Call Disposition code will be included in the report heading.

## Altigen Technical Support

Authorized Altigen Partners and distributors may contact Altigen technical support by the following methods:

- You may request technical support on Altigen's Partner web site, at <https://partner.altigen.com>. Open a case on this site; a Technical Support representative will respond within one business day.
- Call 888-ALTIGEN, choose option 5 from the IVR, or 408-597-9000, option 5 from IVR, and follow the prompts. Your call will be answered by one of Altigen's Technical Support Representatives or routed to the Technical Support Message Center if outside of normal business hours and no one is available to answer your call.

Technical support hours are 5:00 a.m. to 5:00 p.m., PST, Monday through Friday, except holidays.

If all representatives are busy, your call will be returned in the order it was received, within four hours under normal circumstances. Outside Altigen business hours, only urgent calls will be returned on the same day (within one hour). Non-urgent calls will be returned on the next business day.

Please be ready to supply the following required information when calling in for Support:

- Partner ID
- Altigen Certified Tech ID
- Product serial number
- MaxCS version number
- Server model
- Number and types of boards in the system
- Indicate whether this is a virtual or standalone server installation
  - If this is a virtual installation, be prepared to identify whether you're using VMware or Hyper-V, and which version of the virtual software is installed
- The telephone number where you can be reached

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