QuickQuestion

How Do I Schedule Calls for Evaluation

QM Administrator

This topic is designed for QM Administrators.

Quantify QM Schedules are used to automatically select and assign calls for evaluation. This Quick Question topic focusses on creating and managing schedules (usually performed by a QM Administrator) — for information on how to use schedules see the "Perform Evaluations" QQ topic.

Which Calls

Current best practice for call quality monitoring and improvement uses an automated, targeted approach — that is, to automatically select "high-value" calls and assign those calls to managers for evaluation. This is exactly what QM Schedules do.

Before you create a schedule, you should therefore consider what calls you want to evaluate, how many calls to evaluate, and how often evaluations should take place. This will all be completely dependent on your business requirements, and your Quality Framework.

Once you've made those decisions, your schedules then act like a filter system, to select and assign the "right" calls to the "right" people at the "right" time.

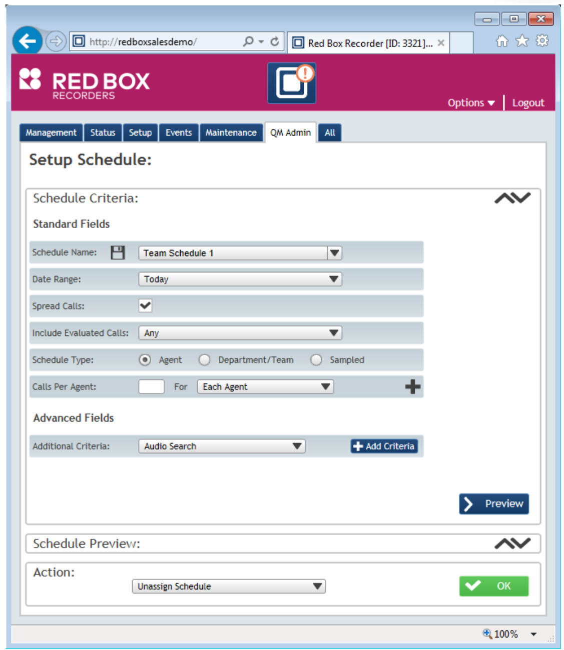
Create Schedules

Use the Quantify Configuration app to create and manage schedules.

To create a QM Schedule:

1. Login to Quantify with an administrator account (User Management and System Configuration permissions).
2. Go to **Configuration** > **QM Admin** > **Setup Schedule**
3. Select the **Schedule Criteria** as needed — see "Schedule Criteria" on page 2:
    - **Standard Fields**: General criteria (such as date range) to define the calls for this schedule.
    - **Advanced Fields**: Detailed search criteria to filter your calls even further.
4. Once you've set your criteria, click the **Preview** button to review your schedule. You can then make any changes you need to. This can help to eliminate errors and avoid conflicts in your criteria.
5. When you're done, enter a **Name** for your schedule (if you haven't done that already), and click the **Save** icon to save the schedule.

   To "use" the schedule, you assign it to one or more QM Managers, see "Assign Schedules" on page 3.



Tip: If your system has the optional transcription capability, you can use the **Transcription Search** criteria to identify specific spoken words in a call – this is a great way to select the right calls for evaluation.

Red Box

Schedule Criteria

Standard Fields	
Schedule Name	Enter a short, descriptive name for your schedule.
Date Range	Set a general date range to select calls from. This field also effectively defines how often the schedule is applied to a QM Manager — daily, weekly, every two weeks, monthly.
Spread Calls *	Tick this option to select calls from across the entire date range (that match the schedule criteria). Untick this option to select the first calls found (that match the schedule criteria).
Include Evaluated Calls	Select which calls to include in the schedule: • **Not Evaluated**: Only include calls that have never been evaluated • **Evaluated Once**: Only include calls that have been evaluated once. • **Evaluated More Than Once**: Only include calls that have been evaluated more than once. • **Any**: Include any calls, whether they have been evaluated or not.
Schedule Type **Calls Per Agent**	The **Schedule Type** and **Calls Per Agent** fields are used in combination with each other to define the number of calls to select for evaluation: **Schedule Type** > **Agent**: In **Calls per Agent**, enter the number of calls to select for the specified agents (either **All Agents** or a "specific agent"). Click the ✚ button to add the criteria — you can add multiple individual agents. Note that when you assign the schedule to a QM Manager, only those agents in the manager's team/department will be used. **Schedule Type** > **Department/Team**: In **Calls per Agent**, enter the number of calls to select per member of the specified department/team. Click the ✚ button to add the criteria — you can add multiple teams/departments. Note that when you assign the schedule to a QM Manager, only the manager's teams/departments will be used. **Schedule Type** > **Sampled**: In **Calls per Agent**, enter the number of calls to sample from the specified department/team (random selection). Click the ✚ button to add the criteria — you can add multiple teams/departments. Note that when you assign the schedule to a QM Manager, only the manager's teams/departments will be used.

* Note that selecting this option can increase the time taken to run a schedule when a QM Manager opens QM.

Advanced Fields	
Additional Criteria *	Select a database field to search and click **+ Add Criteria** to add the search criteria to the schedule. You will also need to select or type the data to search for. Note that you can also use the "**%**" wildcard character to broaden your criteria, if needed. You can add as many criteria as you need to, but remember to avoid conflicts which could result in incorrect or empty schedules. **Tip:** If your system has the optional transcription capability, you can use the **Transcription Search** criteria to identify specific spoken words in a call – this is a great way to select the right calls for evaluation.

* Note that selecting multiple criteria and/or using wildcards can increase the time taken to run a schedule when a QM Manager opens QM.

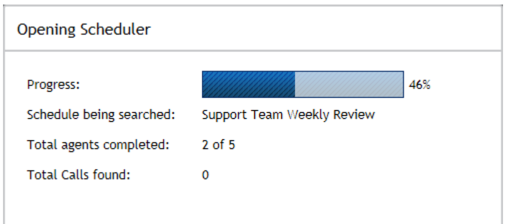
Assign Schedules

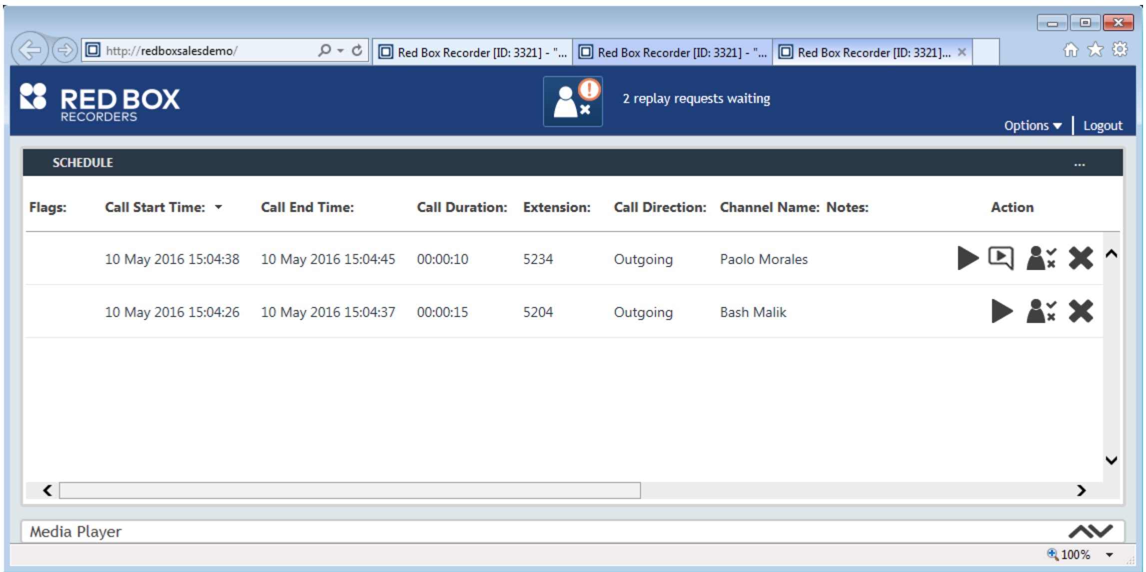
To automatically select and assign calls for evaluation in Quantify QM, you need to assign your schedules to your QM Managers. Each schedule can only be assigned to one QM Manager, but you can assign multiple schedules to an individual manager if needed.

To assign a schedule to a QM Manager:

1. Login to Quantify with an administrator account (User Management and System Configuration permissions).
2. Go to **Configuration** > **QM Admin** > **Setup Schedule**
3. Select the QM Schedule you want to assign from the **Schedule Name** drop-down list.
4. In the **Action** panel, select the QM Manager from the menu and then click **OK** to assign the schedule.

Once a schedule has been assigned to a QM Manager, whenever they login to Quantify QM the schedule will be "run" and calls selected and assigned to them for evaluation. This is covered in detail in the "Perform Evaluations" Quick Question topic.



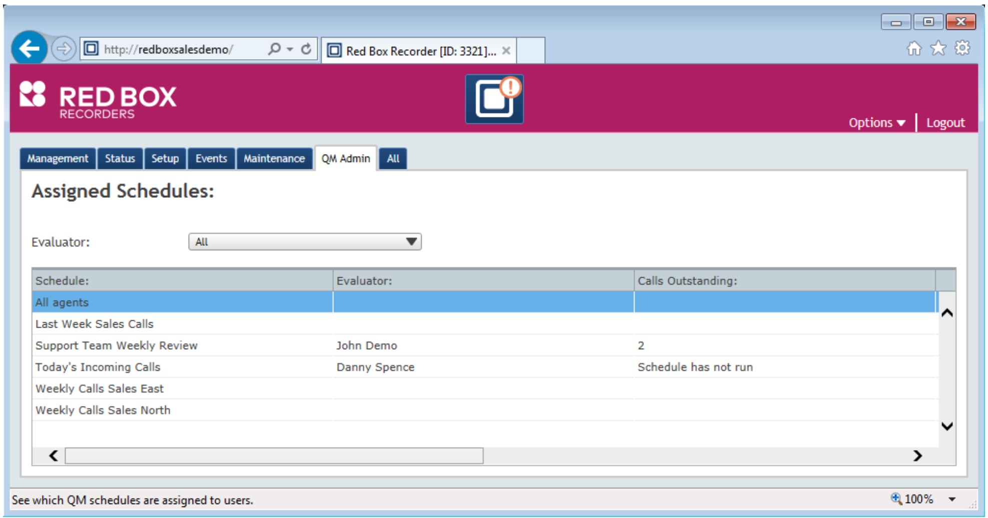


Red Box

Manage Schedules

To review and manage your schedules:

1. Login to Quantify with an administrator account (User Management and System Configuration permissions).
2. Go to **Configuration** > **QM Admin**
3. To review your schedules, go to **Assigned Schedules**:
    - Use the schedule list to review who schedules are assigned to, and the calls outstanding (if applicable).
    - If needed, use the **Evaluator** drop-down menu to filter the schedule list.
    - To make changes to a schedule, you can double-click the schedule to go to the **Setup Schedule** screen (see below).
4. To manage your schedules, go to **Setup Schedule**:
    - To update a schedule, select the schedule from the **Schedule Name** drop-down list, make your changes, and click the **Save** icon to save the schedule.
    - To assign, unassign, reassign, or delete a schedule, select the appropriate option in the **Action** panel and click **OK** to make the change.



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

RBRQQ1022 V1.3

Red Box