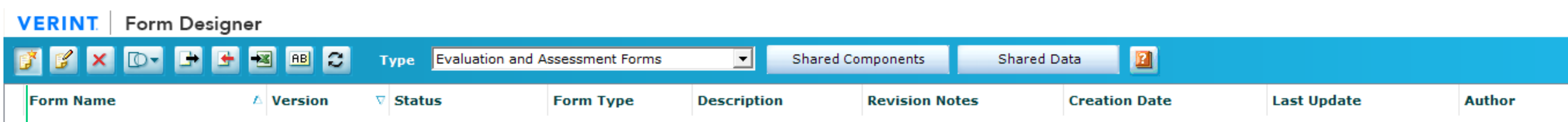
Create a partially or fully automated evaluation form

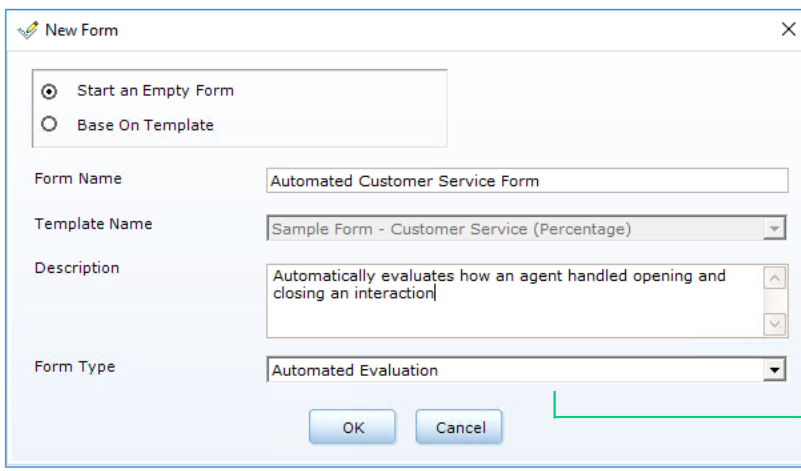
Automated Quality Management (AQM)

Automated Quality Management (AQM) enables you to partially or fully automated employee evaluations. In fully automated evaluations, the system retrieves relevant interactions and automatically evaluates them. In partially automated evaluations, specific questions are automatically answered by the system when you open an evaluation form.

Partially and fully automated evaluation forms are created in the Form Designer. When you create a partially or fully automated evaluation form, you define two sets of rules for the form:

- **Applicable interactions rules** that determine for which interactions the form is relevant.
- **Automated answer rules** that determine how the form's questions are answered by the system.





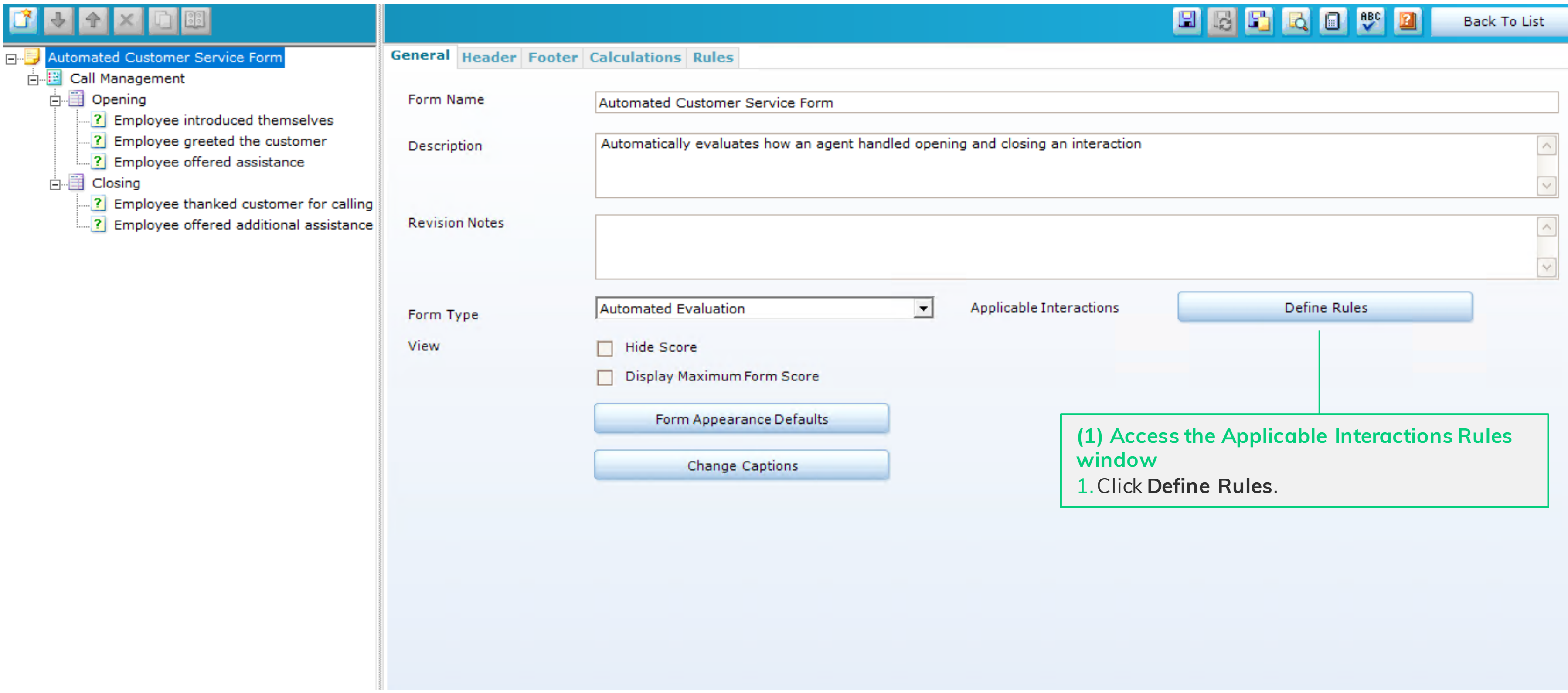
(1) Create a partially or fully automated evaluation form

1. In the Form Designer, click **New Form**.
2. Enter a name and description for the form.
3. Set the **Form Type**:
   - **Automated Evaluation:** Selected this form type to create a *fully automated evaluation form*.
   - **Evaluation:** Select this form type to create a *partially automated evaluation form*.
4. Add sections, categories, and questions to the form as needed.

Create applicable interactions rules (slide 1 of 2)

Applicable interactions rules

Create applicable interactions rules for the form to determine for which interactions the form is relevant. You can create many applicable interactions rules per form, each with its own set of conditions.



(1) Access the Applicable Interactions Rules window

1. Click **Define Rules**.

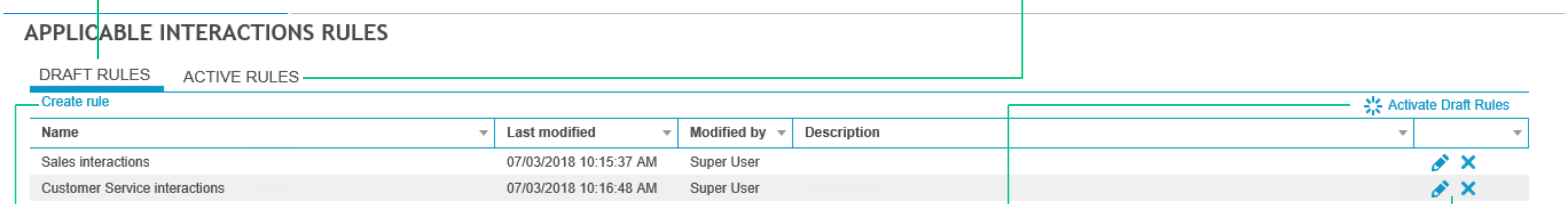
Create applicable interactions rules (slide 2 of 2)

Draft Rules tab

Displays the applicable interactions rules that you created for the form. The rules are saved as draft rules and are used to create the interactions set in the Automated Answer Rule window. The interactions set contains a sampling of interactions that match the draft rules and is used to test the form's automated answer rules.

Active Rules tab

Displays the form's active applicable interactions rules. When a fully automated evaluation form is published, the system uses the active rules to retrieve matching interactions for automated evaluation.



(2) Create an applicable interactions rule

1. Click **Create Rule**.
2. In the **New Rule** window, define conditions for the rule by setting filters, such as extension #, contact ID, DNIS, and Custom Data.
3. Click **Save**.
   The rule is saved as a draft rule.

(3) Activate draft rules

Before publishing a fully automated evaluation form, activate the draft rules.

1. Click **Activate Draft Rules**.
   All the draft rules are copied to the Active Rules tab. The activated rules take effect when the form is published.

(4) Edit or delete draft rules (optional)

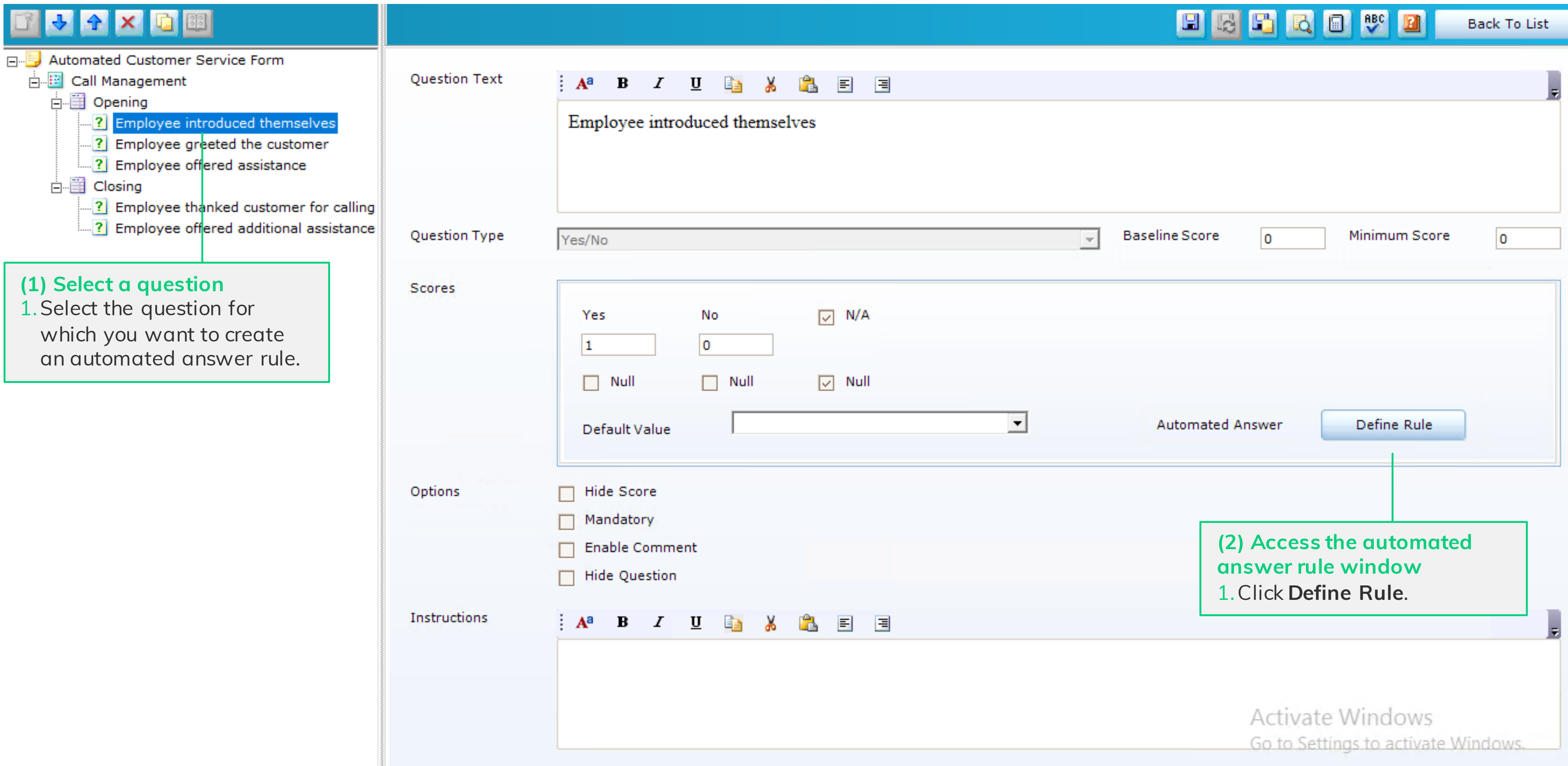
Click here to edit or delete a draft rule.

After you edit or delete a draft rule, if you already activated the draft rules, activate the draft rules again to overwrite the existing active rules with the updated draft rules.

Create automated answer rules (slide 1 of 5)

Automated answer rules

Create automated answer rules that are used by the system to automatically answer Yes/No/N/A questions. In a fully automated form, each question in the form must have an automated answer rule defined for it. In a partially automated form, define an automated answer rule only for those questions you want to automate.



(1) Select a question

1. Select the question for which you want to create an automated answer rule.

(2) Access the automated answer rule window

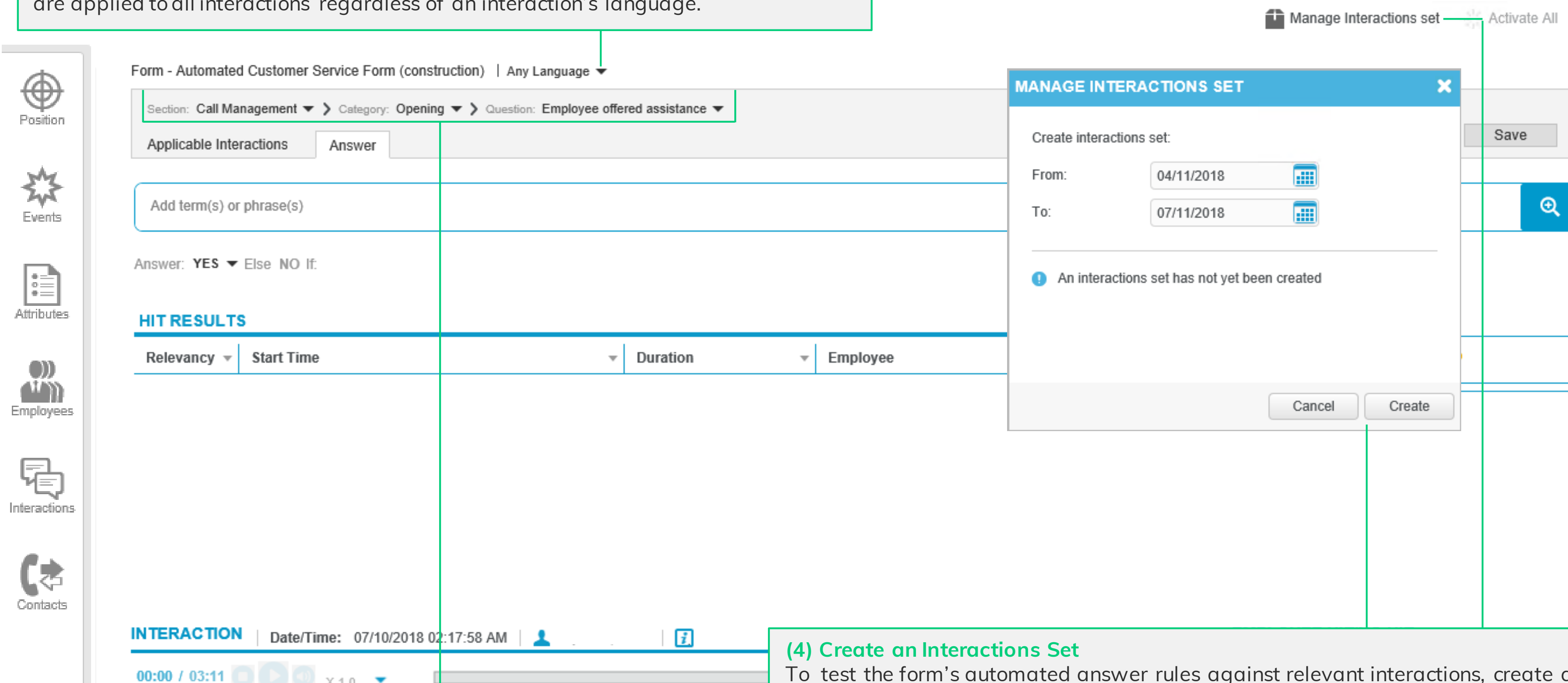
1. Click **Define Rule**.

Create an automated answer rule (slide 2 of 5)

(3) Set the rule language

If your system transcribes interactions in multiple languages, to use the same form to evaluate interactions in multiple languages, create separate automated answer rules per language.

To create rules for a specific language, from the Language list box, select the relevant language. The rules you create while this language is selected are applied only to interactions in the selected language. If you select Any Language, the rules are applied to all interactions regardless of an interaction's language.



Navigate between questions

Use the **Section**, **Category**, and **Question** list boxes to navigate to other questions in the form to create or view their automated answer rule.

(4) Create an Interactions Set

To test the form's automated answer rules against relevant interactions, create an interactions set for the selected language. The interactions set contains a sampling of interactions retrieved from the system that match the applicable interactions rules you defined in the Applicable Interactions window.

1. Click **Manage Interactions Set**.
2. Enter a date range for which to retrieve recorded interactions and click **Create**. A message is displayed at the bottom of the screen indicating the number of interactions retrieved in the set.

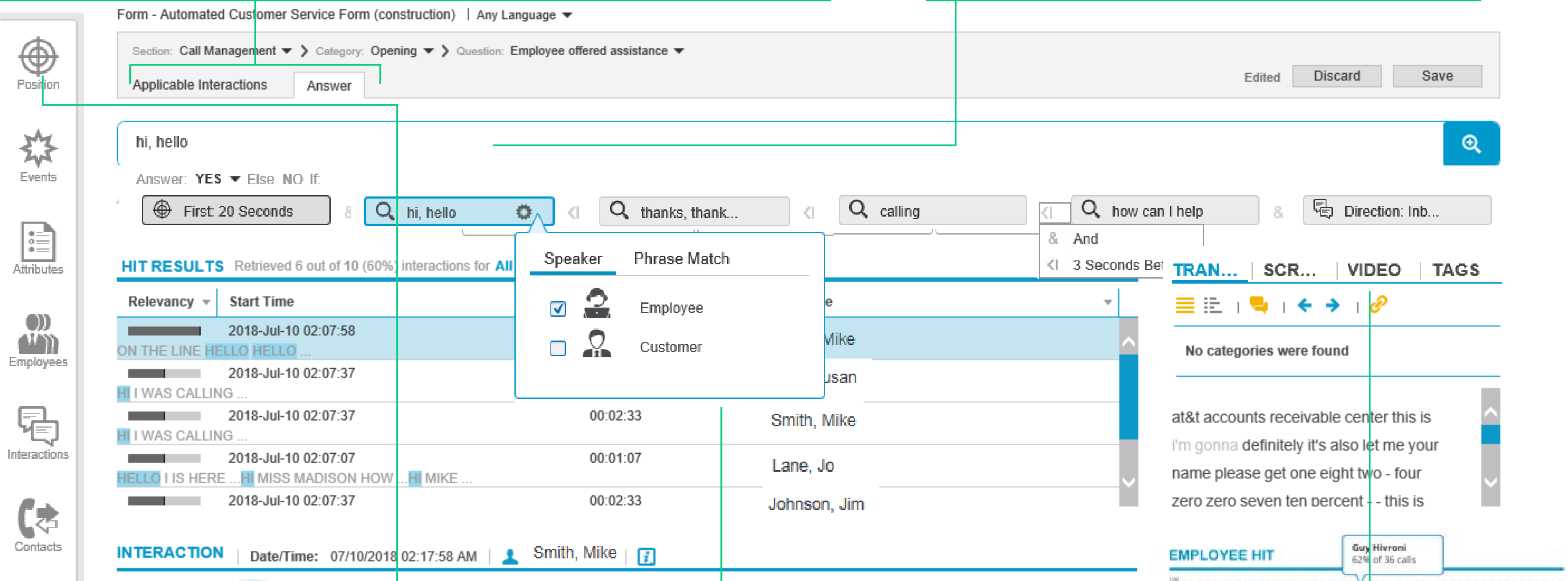
Create an automated answer rule (slide 3 of 5)

(5) Select Applicable Interactions /Answer tab

- If the question has an N/A answer option, to add conditions that determine whether the question is relevant to an interaction, click the **Applicable Interactions** tab. If an interaction does not match the conditions, the question is marked as N/A and the system does not process the conditions in the Answer tab.
- To add conditions for the Yes/No answer, click the **Answer** tab and select the answer that is set if the conditions are met.

(6) Add text-based conditions (optional)

1. Type the terms or phrases that should be spoken in an evaluated interaction. Stop words for the selected language are ignored.
2. To add additional terms or phrases that convey a similar meaning, add them separated by a comma.
3. To add the condition to the rule, press Enter.



(7) Add Events, Attributes, Employees, Interactions, Contacts, or Custom Data conditions (optional)

1. Click the relevant condition type, and in the opened pane set filters as needed.
2. To add the condition to the rule, click **Apply**.

(8) Apply a Position filter (optional)

To determine when in the interaction all the terms or phrases in the rule must be spoken, apply a Position filter to all the text-based conditions.

(9) Apply a Speaker/Phrase Match filter (optional)

To add additional criteria to a text-based condition, apply a Speaker/Phrase Match filter.

- **Speaker filter:** Determines by whom the terms and phrases should be spoken.
- **Phrase Match filter:** Determines how strictly a phrase must be matched in an interaction.

(10) Set the sequence and distance between terms, phrases, or events (optional)

To determine the sequence and distance between terms, phrases, or events in text-based conditions and Event conditions, set the **Before** operator.

1. In the operator list box, click **Before**.
2. Set the distance between the conditions.

Create an automated answer rule (slide 4 of 5)

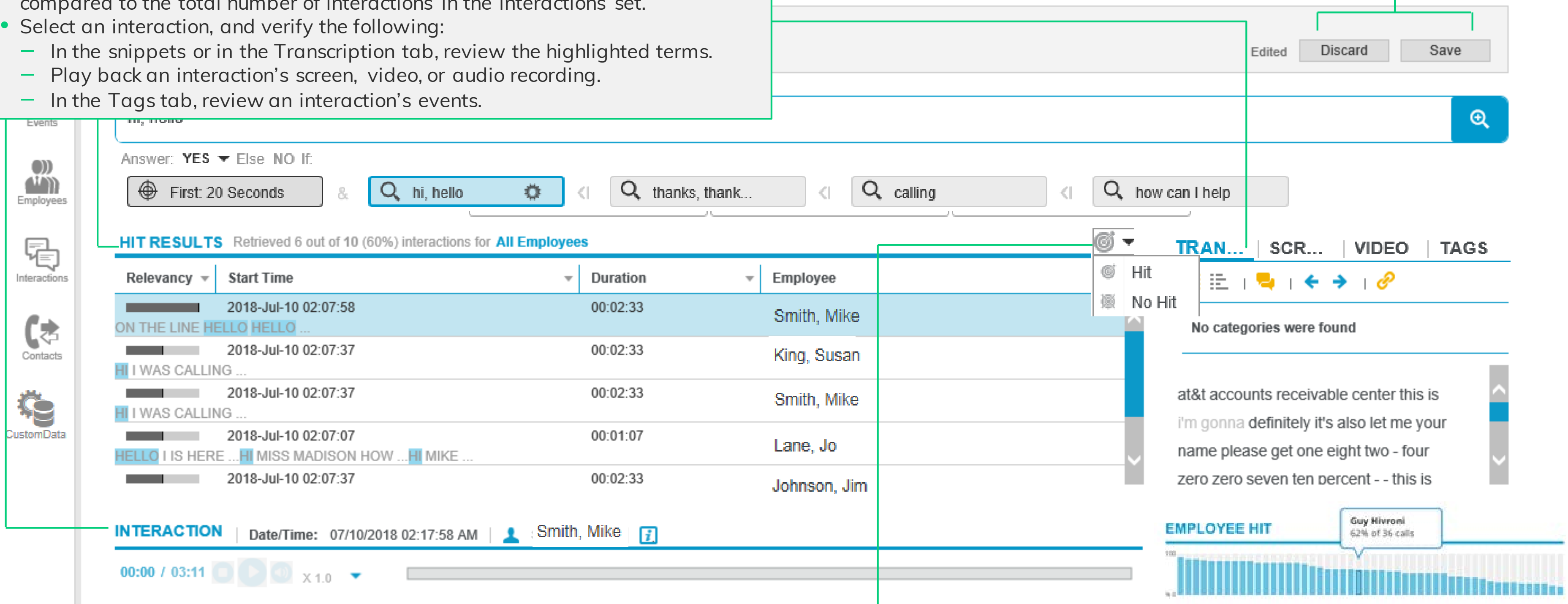
(12) Review Hit Results

As you add each condition to the rule, the rule is automatically tested against the interactions set created in step (2). Depending on the display setting in the Hit Results area, interactions that match the rule (Hit Results), or do not match or partially match the rule (No Hit Results) are displayed. The results are sorted according to relevancy to the selected condition. For text-based conditions, a snippet from the interaction is displayed containing matching terms or phrases.

- In the header, verify the number and percentage of retrieved interactions compared to the total number of interactions in the interactions set.
- Select an interaction, and verify the following:
  - In the snippets or in the Transcription tab, review the highlighted terms.
  - Play back an interaction's screen, video, or audio recording.
  - In the Tags tab, review an interaction's events.

(14) Save the rule

- When you are satisfied with the rule and the test results, click **Save**.
- To delete all the changes since the last save, click **Discard**.



(11) Set the display in the Hit Results

Set the display settings in the Hit Results.

- **Hit Results:** Displays interactions that match all of the rule's conditions.
- **No Hit Results:** Displays interactions that partially match or do not match the rule's conditions.

(13) Verify Employee Hit bar chart (optional)

- Verify the number and percentage of interactions retrieved per employee (from the interactions set) that match the rule, or do not match/partially match the rule (depending on the display setting in the Hit Results) to ensure the results are consistent across all employees.
- Select an employee to view their hit/not hit interactions in the Hit Results.

Create an automated answer rule (slide 5 of 5)

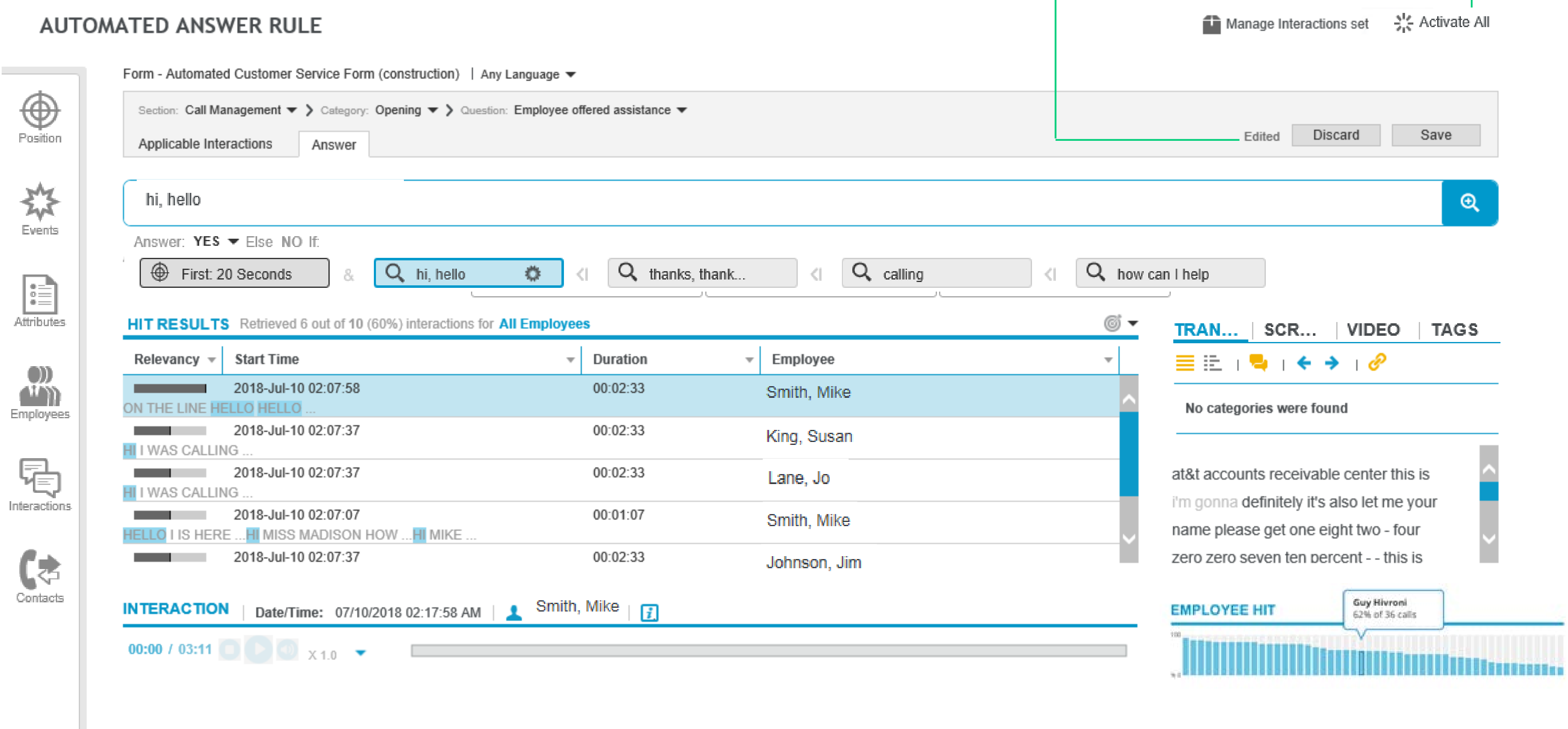
(15) Activate all rules

- Before publishing the form, activate all the rules for the selected language at once. Rules that you defined for other languages must be activated separately.
- In a fully automated form, you can only activate the rules for the selected language if each question in the form has a rule defined for it in that language.
- The activated rules take effect when the form is published.

View rule status

View the status of the rule:

- **Edited:** Rule is modified but not yet saved.
- **Draft Saved:** Rule is saved but not yet activated.
- **Activated:** Rule is activated.



Publish the form

(16) Publish the form

- **Fully automated form:** After you create and activate applicable interactions rules and automated answer rules for the form, publish the form. When the form is published, the system automatically creates automatically managed source measures and KPIs in the Scorecards application for each question in the form (set by default in the Form Designer).
- **Partially automated form:** After you create and activate automated answer rules for the questions you want to automate, publish the form. If automatic KPI creation is selected for any of the form's sections, categories, or questions, the system automatically creates the relevant automatically managed source measures and KPIs.