



5.8 Quality Management Overview

Bright Pattern Documentation

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Table of Contents

Table of Contents	2
General Settings	4
Completed QM Evaluations Require Confirmation (from either of)	4
Self-Evaluations Require Confirmation (from either of)	4
Evaluation form editor	4
Save AutoRecover information every	4
Agent configuration	5
Sliding window for agent's Quality Score widget is	5
Sliding window for agent's CSAT Score widget is	5
Sliding window for agent's past interactions counter is	5
Sliding window for agent's past evaluations counter is	5
List of shared evaluation areas for Quality Score widget	5
Supervisor configuration	6
Sliding window for supervisor's Supervised Quality Score widget is	6
Sliding window for supervisor's past evaluations counter is	6
List of shared evaluation areas for Supervised Quality Score widget	6
Miscellaneous	6
Set score to zero for failed forms, areas and questions	6
Evaluation Forms	7
Working with Evaluation Forms	7
How to Add a Form	8
How to Delete a Form	8
How to Clone a Form	8
How to Edit a Form	8
How to Import a Form	8
How to Export a Form	9
Properties	9
Name	9
Service	9
Survey Forms	9
Working with Survey Forms	10
How to Add a Form	10
How to Edit a Form	10
How to Delete a Form	11
How to Clone a Form	11
How to Import a Form	11
How to Export a Form	11
Properties	11
Name	11
Select Preview Language	12
Grading Categories	12
Call Recording and Monitoring	12
Settings	13
Call Recording	13
Play monitoring notification	14
Monitoring prompt	14
Play notification tone periodically	14
When call is recorded	14
When call is monitored	14
Periodic Monitoring or Recording prompt	14
period, sec	14
Play notification when recording starts	14
Start recording prompt	15
Play notification when recording stops	15
Stop recording prompt	15
Recording during supervisor monitoring	15
Recording after external transfer	15
Stop recording of calls transferred outside	15
Continue recording of calls transferred outside	15
except when calling the following numbers	15
Screen Recording	16
Screen Properties	16
Login sessions of all agents of these teams	17
Login sessions of these agents	17

Record login sessions of all agents	17
Record [X]% of sessions	17
Grayscale recording	17
Target bitrate	17
Do not record session when agent states are	17
Multiple monitors	17
Storage	18
Integration account	18

General Settings

Section *General Settings* lets you configure various settings related to the Quality Management section of Agent Desktop. Quality Management features are enabled per contact center. For more information, contact your service provider.

The screenshot shows the 'General Settings' page for Quality Management. The left sidebar contains a navigation menu with 'Quality Management' expanded to show 'General Settings'. The main content area is titled 'General Settings' and contains the following sections:

- Completed QM Evaluations Require Confirmation (from either of)**
 - Agent
 - Supervisor
- Self-Evaluations Require Confirmation (from either of)**
 - Supervisor
 - Evaluator

(a person is not allowed to confirm their self-evaluations, irrespective of their role)
- Evaluation form editor**
 - Save AutoRecover information every minutes
- Agent configuration**
 - Sliding window for agent's Quality Score widget is days
 - Sliding window for agent's CSAT Score widget is days
 - Sliding window for agent's past interactions counter is days
 - Sliding window for agent's past evaluations counter is days
 - List of shared evaluation areas for Quality Score widget [edit](#)
- Supervisor configuration**
 - Sliding window for supervisor's Supervised Quality Score widget is days
 - Sliding window for supervisor's past evaluations counter is days
 - List of shared evaluation areas for Supervised Quality Score widget [edit](#)

At the bottom of the page are 'Apply' and 'Reset' buttons.

Quality Management > General Settings

Completed QM Evaluations Require Confirmation (from either of)

This setting requires users to either confirm or reject an evaluator's score of an interaction; checkboxes are available for the roles of *Agent* or *Supervisor*. When this setting is enabled and an evaluation is not accepted, the evaluation goes back to the evaluator. For more information, see [Conducting Evaluations](#).

Self-Evaluations Require Confirmation (from either of)

For users that have the privilege to [Evaluate own interactions](#), this setting requires all self-evaluations to be confirmed; checkboxes for this setting allow you to select either *Supervisor* or *Evaluator* for confirmations. **Note:** A user is not allowed to confirm their self-evaluations, irrespective of their role. If the *Evaluator* option is selected, evaluators will see an additional [Pending confirmations](#) search preset button on the [Eval Home](#) screen in Agent Desktop.

Evaluation form editor

Save AutoRecover information every

The option *Save AutoRecover information every* allows the system to automatically save evaluations in progress at a configurable interval of minutes; the default setting is 10 minutes.

Agent configuration

The following settings apply to agents and affect configurable reporting and search periods.

Sliding window for agent's Quality Score widget is

This setting allows you to define the default number of days that display in an agent's [Quality Score](#) widget; the default is 30 days.

Sliding window for agent's CSAT Score widget is

This setting allows you to define the default number of days that display in an agent's [Satisfaction](#) widget; the default is 30 days.

Sliding window for agent's past interactions counter is

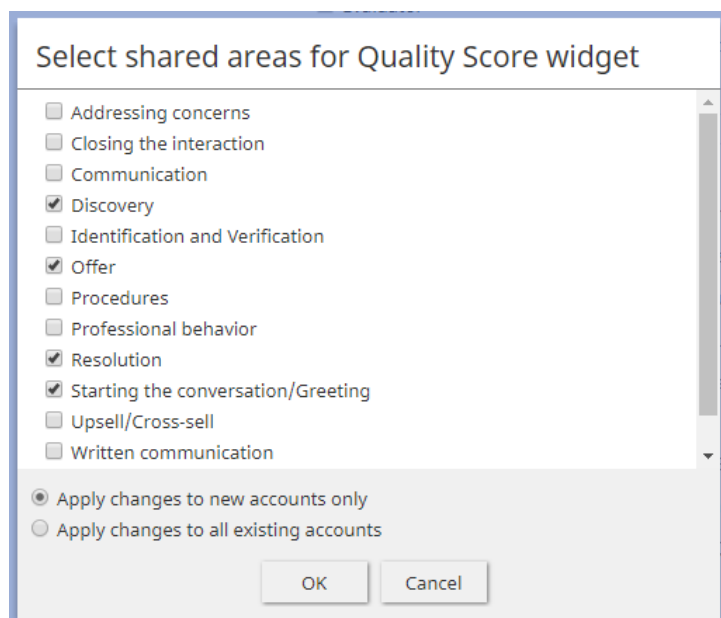
This setting allows you to define the number of days the [My Interactions](#) search present button searches for an agent's past interactions; the default is seven days.

Sliding window for agent's past evaluations counter is

This setting allows you to define the number of days the [Accepted](#), [Disputed](#), [Failed](#), and [Pending confirmations](#) search preset buttons search for an agent's past evaluations; the default is seven days.

List of shared evaluation areas for Quality Score widget

When edited, this option allows you to select specific [shared evaluation areas](#) to be displayed in an agent's Quality Score widget. Note that no shared areas are selected by default. After selecting the desired shared areas, you may choose to either **Apply changes to new accounts only** or **Apply changes to all existing accounts**. The default option is *new accounts*.



The screenshot shows a dialog box titled "Select shared areas for Quality Score widget". It contains a list of 13 shared evaluation areas, each with a checkbox. The following areas are selected: Discovery, Offer, Resolution, and Starting the conversation/Greeting. Below the list are two radio button options: "Apply changes to new accounts only" (which is selected) and "Apply changes to all existing accounts". At the bottom of the dialog are "OK" and "Cancel" buttons.

Shared Evaluation Area	Selected
Addressing concerns	<input type="checkbox"/>
Closing the interaction	<input type="checkbox"/>
Communication	<input type="checkbox"/>
Discovery	<input checked="" type="checkbox"/>
Identification and Verification	<input type="checkbox"/>
Offer	<input checked="" type="checkbox"/>
Procedures	<input type="checkbox"/>
Professional behavior	<input type="checkbox"/>
Resolution	<input checked="" type="checkbox"/>
Starting the conversation/Greeting	<input checked="" type="checkbox"/>
Upsell/Cross-sell	<input type="checkbox"/>
Written communication	<input type="checkbox"/>

Apply changes to new accounts only
 Apply changes to all existing accounts

OK Cancel

Select shared areas to display in the Quality Score widget

Supervisor configuration

The following settings apply to agents and affect the configurable reporting and search periods.

Sliding window for supervisor's Supervised Quality Score widget is

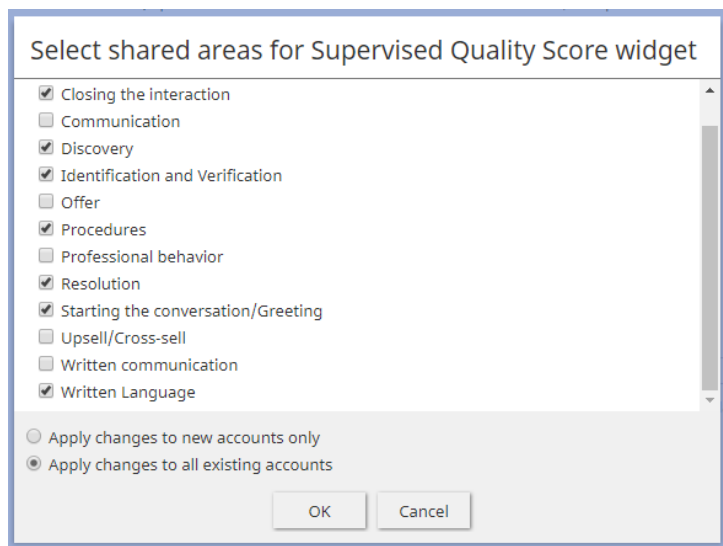
This setting allows you to define the default number of days that display in a supervisor's [Supervised Quality Score](#) widget; the default is 30 days.

Sliding window for supervisor's past evaluations counter is

This setting allows you to define the number of days the [Accepted](#), [Disputed](#), [Failed](#), and [Pending confirmations](#) search preset buttons search for an agent's past evaluations; the default is seven days.

List of shared evaluation areas for Supervised Quality Score widget

When edited, this option allows you to select specific [shared evaluation areas](#) to be displayed in a supervisor's Quality Score widget. Note that no shared areas are selected by default. After selecting the desired shared areas, you may choose to either **Apply changes to new accounts only** or **Apply changes to all existing accounts**. The default option is *new accounts*.



The screenshot shows a dialog box titled "Select shared areas for Supervised Quality Score widget". It contains a list of 13 evaluation areas with checkboxes. The checked areas are: Closing the interaction, Discovery, Identification and Verification, Procedures, Resolution, Starting the conversation/Greeting, and Written Language. The unchecked areas are: Communication, Offer, Professional behavior, Upsell/Cross-sell, and Written communication. At the bottom, there are two radio buttons: "Apply changes to new accounts only" (unselected) and "Apply changes to all existing accounts" (selected). There are also "OK" and "Cancel" buttons.

Select shared areas to display in the Supervised Quality Score widget

Miscellaneous

Set score to zero for failed forms, areas and questions

When enabled, this checkbox sets the score of [failed Omni QM evaluation forms](#) to 0; this setting is enabled by default. If disabled, the actual scores of failed evaluation forms will be presented (e.g., in [Omni QM reports](#)) while the failed element(s) of the form will be highlighted with a caution symbol. Note that an evaluation's failed status can be displayed in the [Actual Evals](#) report and the [Score](#) report by adding the optional Failed column in the [report customizer](#).

Evaluation Forms

Evaluation forms are used to evaluate and grade interactions between agents and customers. Forms are found in the Agent Desktop application, section Quality Management and are defined per [service](#).

Evaluation forms are created and edited in the [Evaluation Form Editor](#) application; forms consist of evaluation areas and each area contains questions. Evaluation areas may be shared across forms; note that this is useful for general areas (e.g., greetings, etiquette, ending calls, etc.).

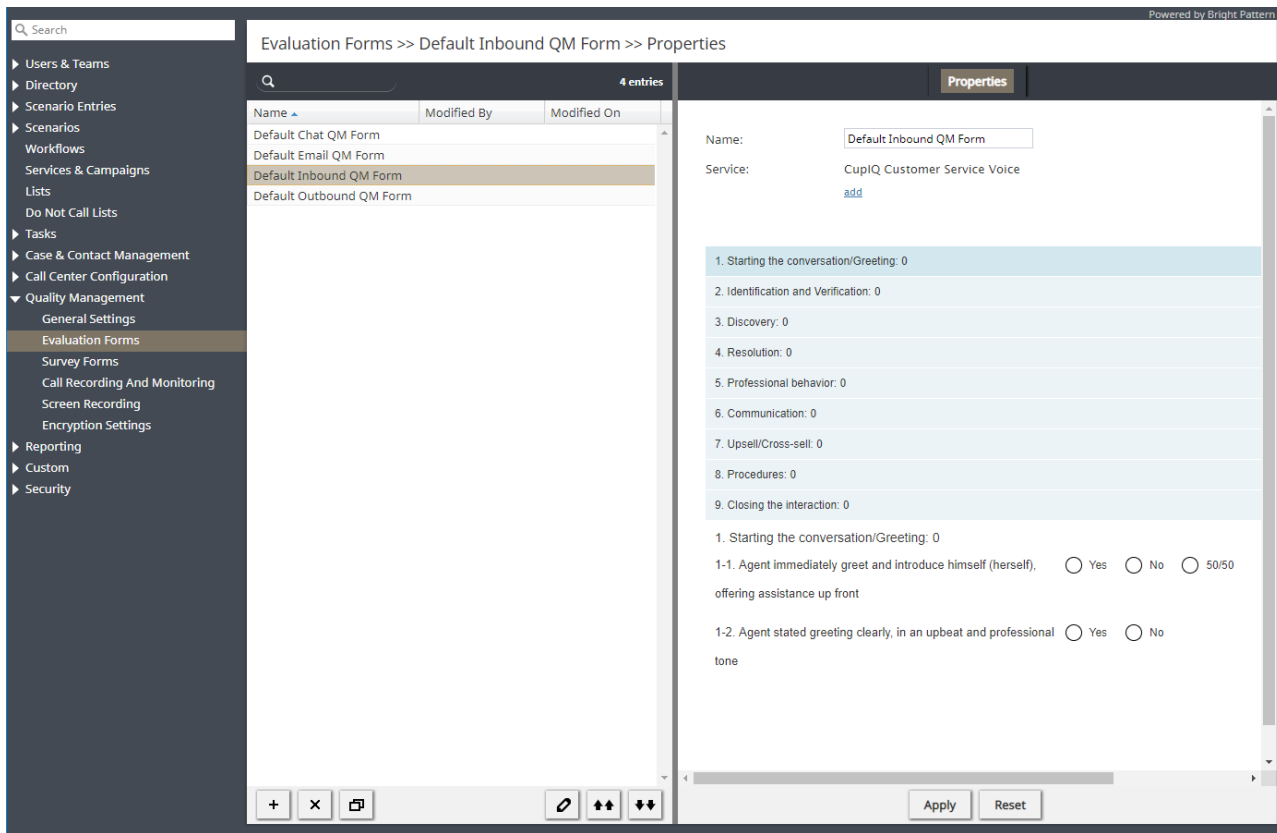
Evaluation forms are filled out by users with [Quality Management privileges](#) and the results of filled-out forms are available in reports. Note that it is possible to sum up interaction-level data to display aggregated scores for agents, teams, and services over an extended period.

Note: This feature is enabled per contact center. For more information, contact your service provider.

Working with Evaluation Forms


To create or edit an evaluation form, navigate to *Quality Management* in the root menu and select the **Evaluation Forms** option. The list in the left pane will list the existing forms. Note that there are four default evaluation forms:

- [Default Chat QM Form](#)
- [Default Email QM Form](#)
- [Default Inbound QM Form](#)
- [Default Outbound QM Form](#)




Quality Management > Evaluation Forms configuration


How to Add a Form

1. Click the **Add new form**  button.
2. In the Evaluation Form Editor application that opens, customize the form by dragging controls onto the form canvas and editing their properties.


How to Delete a Form

1. In the list of forms that appears, select the form you wish to remove.
2. Click the **Delete**  button.


How to Clone a Form

1. In the list of forms that appears, select the form you wish to duplicate.
2. Click the **Clone form**  button.
3. The duplicated form will appear in the list with name "Clone of <Name of Original Form>".


How to Edit a Form

1. Select a form in the list of forms that appears.
2. Click the **Edit**  button.
3. In the Evaluation Form Editor application that opens, customize the form by dragging controls onto the form canvas and editing their properties.



How to Import a Form

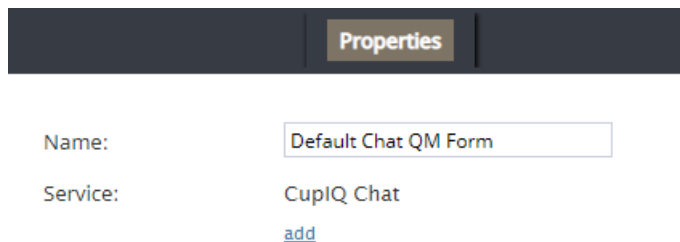
1. Click the **Import form**  button.
2. In the dialog that appears, enter the name of the form you wish to import, browse for the file, and click **Upload**.
3. The imported form will appear in the list.

How to Export a Form

1. In the list of forms that appears, select the form you wish to export.
2. Click the **Export form**  button.
3. The form will be downloaded immediately.

Properties

The following is a list of editable properties for evaluation forms. Note that a preview of a configured form will appear in this window. To accept changes made to the properties, click the **Apply**  button. To cancel changes before they have been applied, click the **Reset**  button.



Properties

Name:

Service: CupIQ Chat
[add](#)

Evaluation Forms Properties tab

Name

Name is the name of your evaluation form. Note that your evaluation name can be changed in the Evaluation Form Editor.

Service

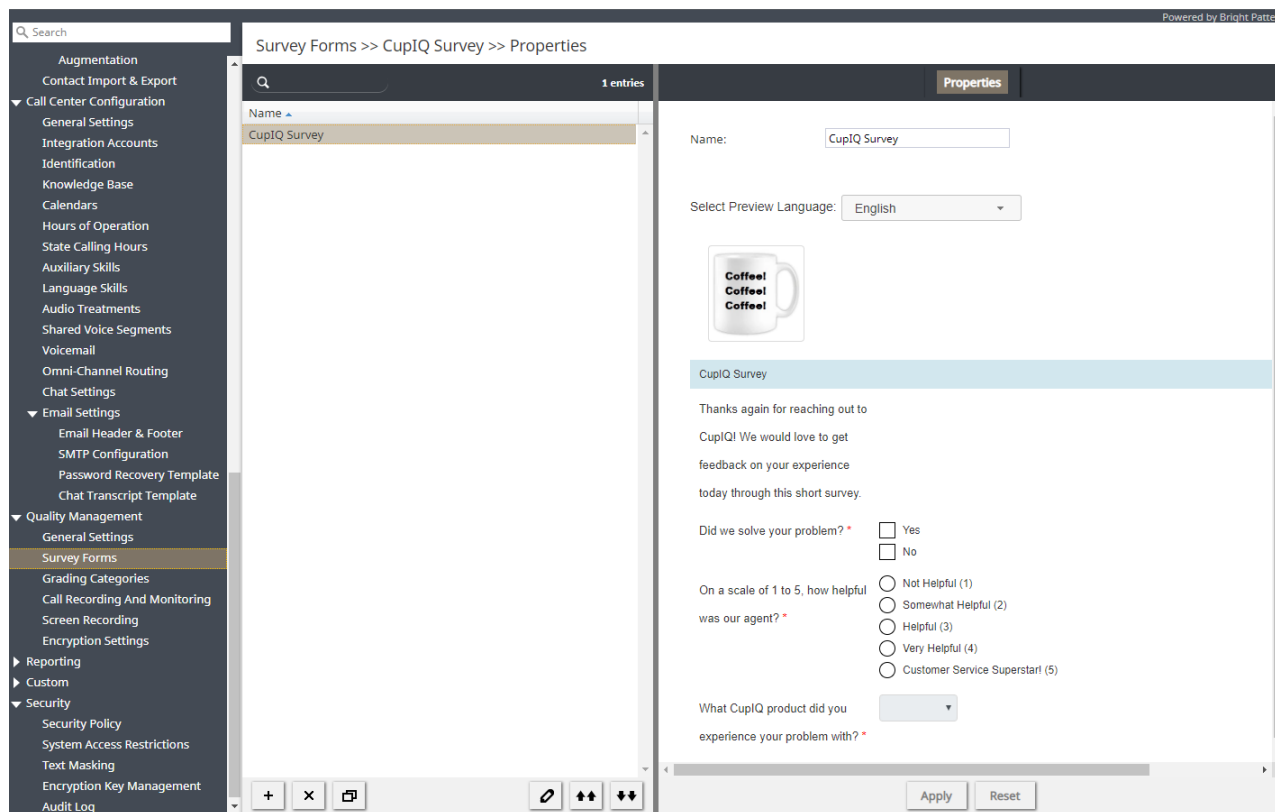
Service is where you associate a configured service or campaign with an evaluation form. To configure this setting, click **add** and select from the drop-down list of available campaigns or services, then select **OK**. Note that it is possible to associate an evaluation form with a service in section [Services & Campaigns > Properties tab](#).

Survey Forms

Survey forms are designed to be sent to your customers via email after interactions are completed. Email interactions are not dictated by [scenario](#), so while it is not possible to utilize the interactive survey features associated with chat or voice scenarios, survey forms provide you an opportunity to request satisfaction input.

Survey forms are created and edited in the Survey Form Editor application and can be distributed by post-transaction [workflows](#). Additionally, a single survey form may be configured in any number of languages you need. For more information, see the [configuration example](#).

Note: This feature is enabled per contact center. For more information, contact your service provider.




Quality Management > Survey Forms configuration


Working with Survey Forms

To create or edit a survey form, navigate to *Quality Management* in the root menu and select the **Survey Forms** option. The list in the left pane will list the existing forms. For general information about creating forms, see our [configuration example](#).


How to Add a Form

1. Click the **Add new form**  button.
2. In the Survey Form Editor application that opens, customize the form by dragging controls onto the form canvas and editing their properties.


How to Edit a Form

1. Select a form in the list of forms that appears.
2. Click the **Edit**  button.
3. In the Survey Form Editor application that opens, customize the form by dragging controls onto the form canvas and editing their properties.


How to Delete a Form

1. In the list of forms that appears, select the form you wish to remove.
2. Click the **Delete**  button.


How to Clone a Form

1. In the list of forms that appears, select the form you wish to duplicate.
2. Click the **Clone form**  button.
3. The duplicated form will appear in the list with the name "Clone of <Name of Original Form>".



How to Import a Form

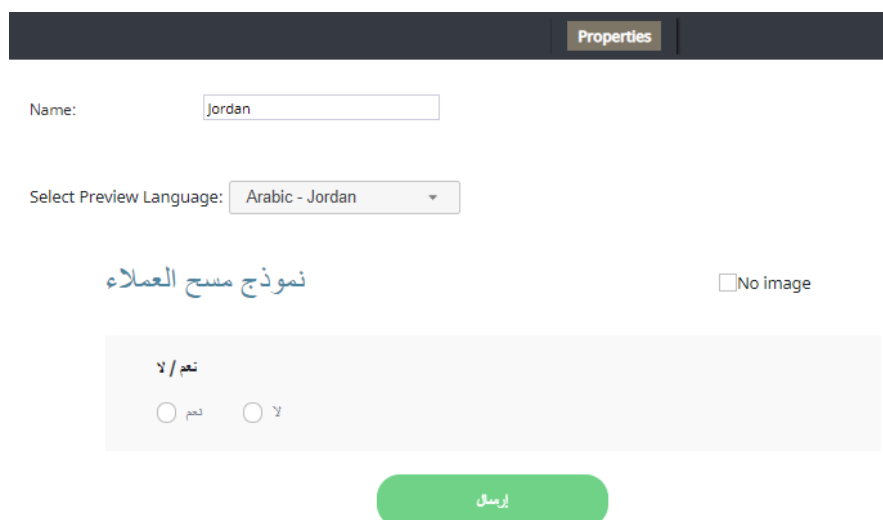
1. Click the **Import form**  button.
2. In the dialog that appears, enter the name of the form you wish to import, browse for the file, and click **Upload**.
3. The imported form will appear in the list.

How to Export a Form

1. In the list of forms that appears, select the form you wish to export.
2. Click the **Export form**  button.
3. The form will be downloaded immediately.

Properties

The following is a list of editable properties for Survey Forms. To accept changes made to the properties, click the **Apply**  button. To cancel changes before they have been applied, click the **Reset**  button.



The screenshot shows the 'Properties' tab for a survey form. It includes a 'Name' field with the value 'Jordan', a 'Select Preview Language' dropdown menu set to 'Arabic - Jordan', a preview area displaying the text 'نموذج مسح العملاء' (Customer Survey Model) and a 'No image' checkbox, and a radio button group for 'نعم / لا' (Yes / No) with 'نعم' (Yes) selected. A green 'إرسال' (Send) button is at the bottom.

Survey Forms Properties tab

Name

Name is the name of your survey form. Note that your survey name can be changed in the Survey Form Editor.

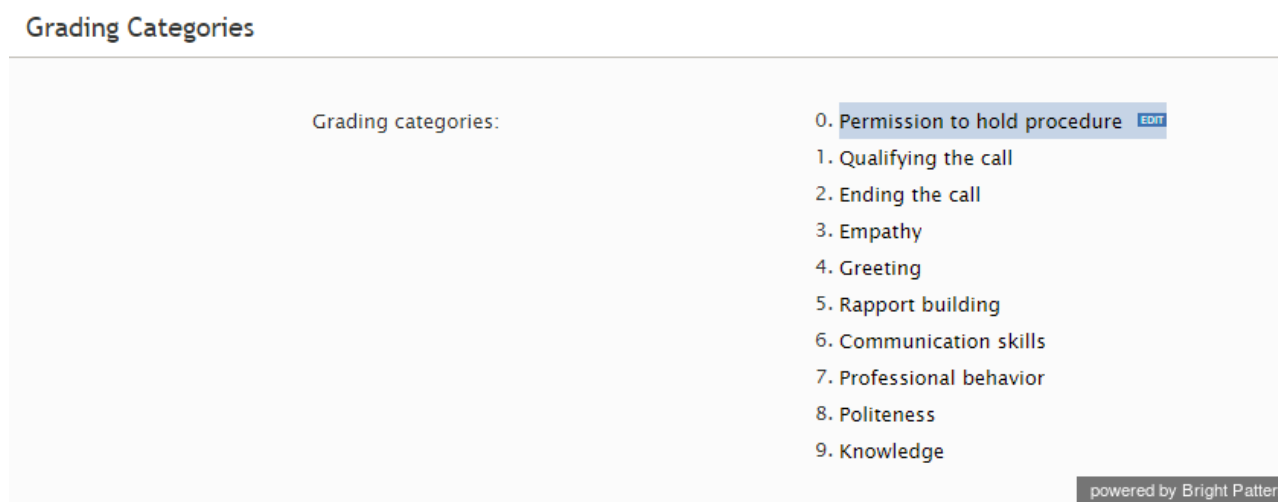
Select Preview Language

The *Select Preview Language* drop-down menu allows you to preview a form in any of the languages the form was configured in. Note that if your contact center maintains survey forms in different languages, it is possible to change the text of the Submit button in the survey form editor.

Grading Categories

In contact centers, quality management refers to the process of evaluation of agent performance based on review of call recordings, chat transcripts, and email replies. You can define up to 10 different categories of evaluation. These categories will be available to contact center personnel during the interaction review process. For more information, see chapter [Quality Management](#) of the *Bright Pattern Contact Center Reporting Reference Guide*.

To view and edit evaluation categories, select **Grading Categories** from the *Quality Management* menu.



The screenshot shows a web interface titled "Grading Categories". On the left, it says "Grading categories:". On the right, there is a list of 10 categories, numbered 0 through 9. Category 0, "Permission to hold procedure", is highlighted in blue and has a small "EDIT" button next to it. The other categories are: 1. Qualifying the call, 2. Ending the call, 3. Empathy, 4. Greeting, 5. Rapport building, 6. Communication skills, 7. Professional behavior, 8. Politeness, and 9. Knowledge. In the bottom right corner of the interface, there is a small grey box that says "powered by Bright Pattern".

Quality Management > Grading Categories

Bright Pattern Contact Center provides a set of default categories. To change a default category, hover over it and click **EDIT**.

Note: Some service configuration changes that affect agent behavior are not picked up dynamically by Agent Desktop. Thus, after making a change to grading categories and evaluation areas, we recommend that all affected logged-in agents refresh their browser page.

Call Recording and Monitoring

Call recording and monitoring settings are configured in *Quality Management > Call Recording and Monitoring* in the Contact Center Administrator application.

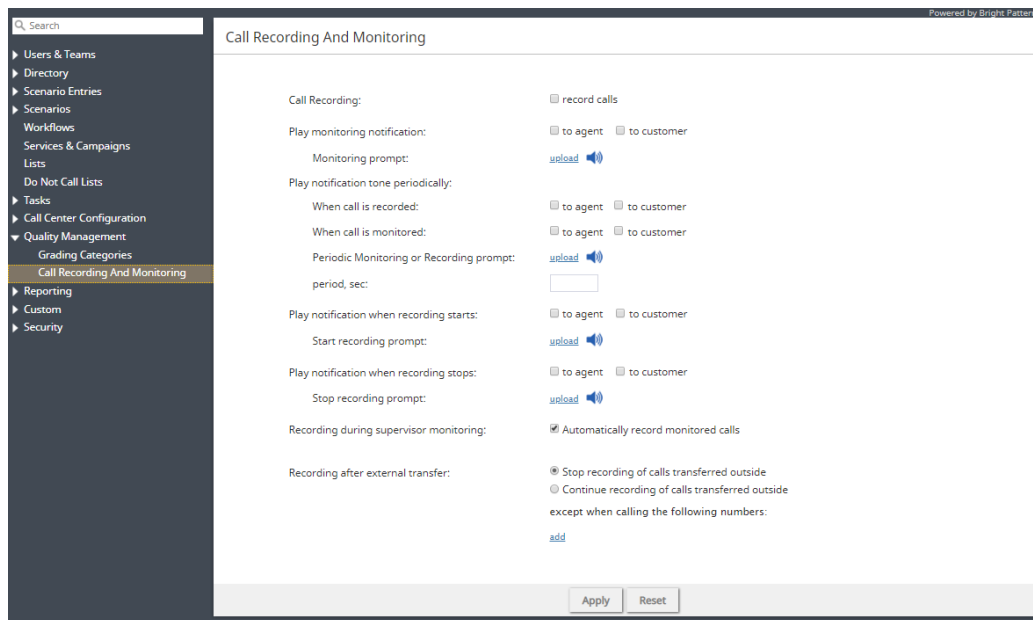
Voice recordings can be subsequently played back via:

- Contact Center Administrator, in the Interaction Record (requires privilege "Listening to all call recordings and view all chat transcripts" or "Listening to call recordings and view chat transcripts on services" in reviewer role; the latter is typically used for BPO client access).
- Agent Desktop, in the contact's Activities (requires privilege "Listen to call recordings and view chat transcripts on assigned services" or "Listening to own call recordings and view own chat transcripts").

Voice recordings can also be exported to an external storage.

Note: [Call Recording](#) is enabled automatically when a supervisor begins [monitoring](#) unless the [Recording during supervisor monitoring](#) setting is disabled.

Settings



Call Recording and Monitoring settings

Call Recording

Select the record calls checkbox to enable call recording. If this property is checked, all voice calls will be recorded (inbound, outbound, and internal).

Regular call recording, where speech of all call participants is recorded to the same file, is performed in the GSM format. Your service provider may also enable multichannel recording for you, where speech of each call participant is recorded to a separate file and is performed in uncompressed PCM 16-bit format. If enabled, the multichannel recording will be performed in parallel with the regular recording and will be controlled by the same recording settings and controls. Note, however, that due to their large size, multichannel recordings are usually stored locally for a limited time (check with your service provider) and can be exported via the [Multichannel Recording](#) API method only.

Additionally, note that this configuration setting can be overridden by the following actions (listed in the order from least to most powerful):

- Configuration settings for a specific service
- Configuration settings for a specific user
- Value of scenario variable *\$(doNotRecord)*
- Manual pause/resume recording commands by Agent/Supervisor
- Automatic recording when a call is monitored
- Presume recording using corresponding desktop API methods
- Value of scenario variable *\$(banVoiceRecording)*

If a call is transferred, the call recording state is determined by the highest level override present in the main or consult call after transfer. If two or more calls are merged into a conference, the call recording state is determined by the highest level override present in any merged call. Once recording is manually started via API, it can be stopped by only API call or by setting the *\$(banVoiceRecording)* variable. Adding or removing services or other users would not stop the recording started by API.

Play monitoring notification

Select the checkbox for **to agent**, **to customer**, or both to specify who should hear the monitoring notification.

Monitoring prompt

The *Monitoring prompt* is the sound or other audio message that will be used for the monitoring notification. Click **upload** to add a voice file (in WAV format).

Play notification tone periodically

When call is recorded

Select the checkbox for **to agent**, **to customer**, or both to specify who should hear a tone when a call is being recorded.

When call is monitored

Select the checkbox for **to agent**, **to customer**, or both to specify who should hear a tone when a call is being monitored.

Periodic Monitoring or Recording prompt

The *Periodic Monitoring or Recording prompt* is the sound or other audio message that will be used as the notification tone. Click **upload** to add a voice file (in WAV format).

period, sec

Period, sec is the period of time (in seconds) to wait before playing the periodic monitoring or recording prompt again. For example, specifying 10 seconds here causes the periodic monitoring or recording prompt to be played every 10 seconds.

Play notification when recording starts

Select the checkbox for **to agent**, **to customer**, or both to specify who should hear the notification when the recording starts. Note that this notification will play after the manual start of recording only.

Start recording prompt

The *Start recording prompt* is the sound or other audio message that will be played when recording begins. Click **upload** to add a voice file or sound (in WAV format, no more than 3 MB).

Play notification when recording stops

Select the checkbox for **to agent**, **to customer**, or both to specify who should hear the notification when the recording stops. Note that this notification will play after the manual stop of recording only.

Stop recording prompt

The *Stop recording prompt* is the sound or other audio message that will be played when recording ends. Click **upload** to add a voice file or sound (in WAV format, no more than 3 MB).

Recording during supervisor monitoring

This setting allows you to control whether agents are recorded during [supervisor monitoring](#) or not. Prior to version 5.3.12, when a supervisor began a call-monitoring session, the recording of such a call would begin unconditionally. While this continues to be the default behavior, you can now disable automatic recording of monitored calls by deselecting the *Automatically record monitored calls checkbox*. Please note that if the *Automatically record monitored calls checkbox* is selected, monitored calls will be recorded whether the [Call Recording](#) option is enabled for your contact center or not.

Recording after external transfer

Stop recording of calls transferred outside

For voice services, you can discontinue call recording upon transferring a call to an external number.

Instances in which you may not want to record calls include when:

- Customers require calls not to be recorded after transfer to an external number.
- Customers require just the consult portion of the call to be recorded in order to have reference data for the agent.
- Agents must not record calls when transferring to a specific agent.

Continue recording of calls transferred outside

This selection specifies that the call will be recorded even after the transfer.

except when calling the following numbers

To create exceptions to your call recording/stopping selections, click **add**.

Screen Recording

Bright Pattern Contact Center can capture videos of agents' desktop screens during their working sessions and store them for subsequent viewing. Such videos can be used for quality management and training purposes.

The VP8 codec is used for screen recordings. For screen recording playback (when merging call recording audio and screen recording video), audio is transcoded from the GSM codec to the Vorbis audio codec, and audio and video are saved in the WebM format.

For more information about viewing, see section [Screen Recordings](#) of the *Bright Pattern Contact Center Reporting Reference Guide*.

Note that before you can use the screen recording capability, it must be enabled for your contact center at the service provider level. Even if this capability is enabled, the space allocated for storage of screen recordings may be limited by the service provider. It is recommended that you use the options below to enable screen recording only for your planned quality management and/or training tasks (i.e., recording sessions of individually selected agents) and disable them as soon as those tasks are completed.

To configure screen recording settings, select **Screen Recording** from the *Quality Management* menu.

Screen Recording

Login Sessions

Login sessions of all agents of these teams: [edit](#)

Login sessions of these agents: gerald.valentine
[edit](#)

Record login sessions of all agents

Record: % of sessions

Grayscale recording

Target bitrate: kbps

Do not record session when agent states are:

- Ready
- Not Ready
- Busy
- After Call Work
- Supervision

Multiple monitors

- Record all
- Record primary monitor only
- Record largest monitor only

Storage

- Local storage
- Amazon AWS

Integration account:

Quality Management > Screen Recording

Screen Properties

The *Screen Recording* screen properties are described as follows.

Login sessions of all agents of these teams

The system will perform screen recording of complete login sessions of all members of the teams selected. Click **edit** to add teams.

Login sessions of these agents

The system will perform screen recording of complete login sessions of the individual agents you select here. Click **edit** to add agents.

Record login sessions of all agents

Select this checkbox if you intend to record all login sessions of all agents of your contact center. When you select this checkbox, the above two options will change their values to *record all*, regardless of their previous settings.

Note that because the space allocated for storage of screen recordings may be limited, you should consult your service provider before enabling this option.

Record [X]% of sessions

Specifying the percentage value allows the system to record a percentage of the total logged-in agents. For example, entering a value of 30 will cause the system to record 30% of sessions from all agents who are logged-in to Agent Desktop.

Grayscale recording

Select this checkbox to specify that Agent Desktop screen recordings will be saved in grayscale instead of color.

Target bitrate

This parameter sets the maximum bitrate for the screen recording. It can be used to achieve the desired ratio between the video quality and size of the screen recordings. Note that the service provider may set a limit for the maximum bitrate, which may affect what you can set for your screen recordings.

Do not record session when agent states are

You can specify which sessions should not be recorded when the agent is in a particular state:

- Ready
- Not Ready
- Busy
- After Call Work
- Supervision

Multiple monitors

In some contact centers, agents use multiple monitors, and all screens are recorded and compiled into a single view. Because the screens are compacted into this view, it can be difficult to see the contents of each screen.

The following options make it easier to view the recordings of multiple screens:

- **Record all** - All screens are recorded (default setting)
- **Record primary monitor only** - Only the screen defined as primary in the OS settings shall be recorded
- **Record largest monitor only** - Only the screen with the highest resolution shall be recorded (if all screens have the same resolution, the primary screen shall be selected for recording)

Storage

You can select where screen recordings will be uploaded and stored.

Choose from one of the following options:

- **Local storage** - Keeps screen recordings on local hosts (default)
- **Amazon AWS** - Available if an AWS integration account is configured (see *Integration account* below)

When **Amazon AWS** is selected, then screen recorder will continue to write screen recording files locally but will try to upload 15-minute segments to Amazon AWS as soon as each segment is completed on disk. As soon as they are successfully uploaded, the screen recorder will remove the local copy and write the corresponding record to the database. If recordings are encrypted, the screen recorder does not decrypt them before uploading to S3.

Bright Pattern's screen recorder treats Amazon AWS as a hard drive (i.e., if a file cannot be uploaded to AWS during the first attempt, it will be removed from AWS and error information will be written in the log file.

Integration account

The [integration account](#) selector is available only when you select the *Amazon AWS* storage option (see above). This selector will be grayed out upon selecting *Local storage*.