



MOMENTUM

CALL RECORDING

with **Evaluate**
Quick Reference Guide

MOMENTUM

T E L E C O M

Powered By:



22Q4_UC

About Call Recording Evaluate

The Evaluate add-on license (\$) offers organizations many tools for determining how their calls are going and for Quality Assurance monitoring. Both Manual and Automated evaluation scoring are supported.

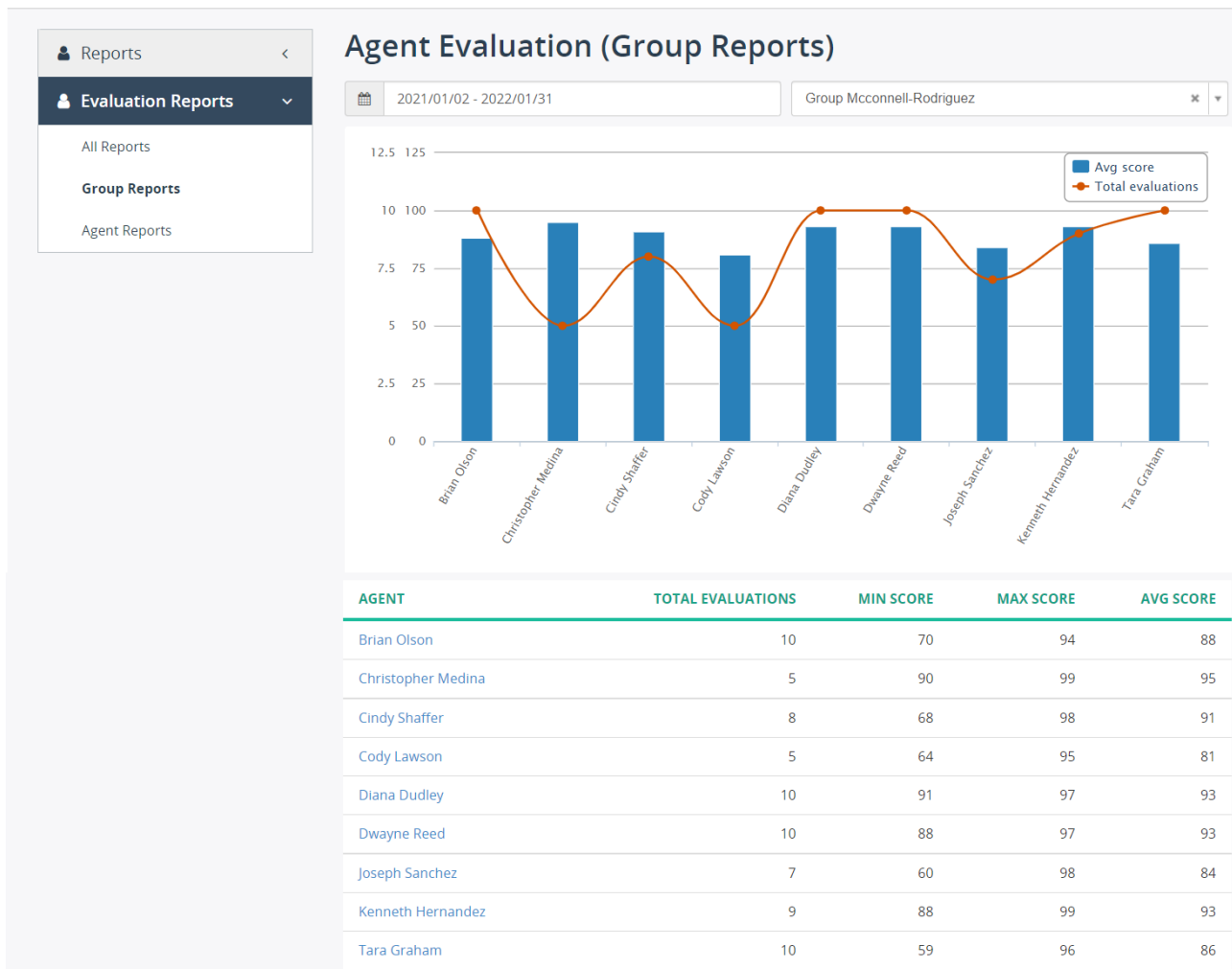
An Evaluate license is applied to the person/line being recorded that must undergo evaluation. If the line/person is not going to be evaluated, the add-on license is not needed.

Once purchased and enabled for the line/person who will undergo evaluation of their calls, Supervisors (or Admins) who have been authorized to manage that licensed line/person's call recordings can then perform evaluations of their calls using forms the organization has complete control to design and manage for this purpose.

Evaluation reports provide access to useful statistics, such as an average, minimum and maximum agent's score for the given period, total evaluations for specific agent, evaluations for groups, etc.

Reports

Wide view



Administrators (and perhaps authorized Supervisors) can easily create an Evaluation form within the **Evaluation Form Designer** found in the **Administration > Customization** section of Call Recording.

The Call Recording **Evaluate** add-on allows contact center managers to monitor and measure the performance of individual agents in a contact center. Call Recording supports both manual and automated scoring (when combined with the Speech Analytics (\$) add-on for Quality Assurance).

Manual Quality Assurance

With manual Quality Assurance (QA), supervisors listen to a random sample of calls and evaluate them according to a predefined scorecard. The goal is generally to look for coachable moments and find areas where agents can improve.

A typical scorecard consists of several sections, like "Greeting", "Verification", "Problem resolution", etc. Each section includes questions or metrics that are evaluated by the supervisor as they review an agent's call.

Here is a sample of an evaluation form that might be created for manual evaluation usage:

Section	Questions
Greeting	Did the agent say "Thank you for calling"?
	Did the agent mention his/her name?
	Did the agent mention the company name?
	If the call was transferred, did the agent adapt the greeting accordingly?
Verification	Did the agent ask for the caller's name?
	Did the agent ask for the caller's account number?
Understanding the problem/ issues	Did the agent identify the customer's needs by active listening?
	Did the agent fully understand the request?
	Did the agent repeat back to the customer what their query or problem was?
	Did the agent show empathy to the customer's problem and reassure the customer?
	How well did the agent determine the problem/complaint and select the appropriate response?
Hold/mute/transfer	Did the agent inform the caller of the reason for the hold/transfer?
	Did the agent thank the caller for holding on return?
	Did the agent provide the name of the person or the department in case of transfer?
Problem resolution	Was the problem resolved in the first call?
	Did the agent describe clearly the resolution?
Closing	Did the agent offer to transfer to a customer satisfaction survey?
	Did the agent thank the customer for calling?

Humans performing quality assurance evaluations manually will always be essential in monitoring and measuring the quality of customer service in contact centers and other business interactions via telephone. But it has had some limitations - it is often time-consuming for Supervisors as they are able to listen to only a fraction of calls when evaluating agents - and that can lead to a less than accurate picture of their agents' performance. If a Supervisor only listens to a few bad calls but misses the stellar calls that helped keep their business growing... and vice versa... and that can skew the evaluation of an employee's performance - and the Call Center's, as well.

Automated Quality Assurance

Automated QA process uses speech analytics and artificial intelligence (AI) to automatically score every interaction performed by those with Evaluate and Speech Analytics add-on licenses, providing a fuller and more unbiased evaluation of agent performance.

By capturing, transcribing, and analyzing 100% of interactions, the Call Recording platform vastly increases insight into agent performance and offers a wealth of actionable information for call center improvement - while dramatically reducing the effort required of call center supervisors.

Despite the obvious benefits of automated QA, it should not be viewed as a complete replacement of the manual Evaluation and QA process. The best approach is to integrate both manual and automated scoring into any robust QA process.

Evaluation forms are completely customizable and configurable. A Call Recording Administrator (or properly authorized/licensed Supervisor) can create many different evaluation forms to suit various departments or groups - like Sales, Customer Service, or Technical Support - using the Evaluation Form Designer to develop the questions and answers and define the scoring to produce useful evaluation tools and reporting.

Usage Prerequisites

The Role applied to a Supervisor (and Administrator) must be set up to allow usage of Evaluate tools.

The license for Evaluate must be applied and enabled on the line/person being recorded and evaluated.

A Supervisor assigned to manage that line/person's recordings can then perform evaluation on those recordings using Evaluation forms they have been granted access to use.

An Administrator must have appropriate permissions to fully utilize the evaluation form creation and reporting functionality. The Permissions settings in their Role specify which tasks are permitted on the accessible evaluation reports. These permissions can include view (read only), create, edit, delete.

The permissions on the Role(s) in use within the tenant that need to be enabled for correct usage of Evaluate tools and reports are found within the Other Permissions section of the Edit Role dialog:

Own evaluations of agents	<input checked="" type="checkbox"/> View	<input checked="" type="checkbox"/> Create	<input checked="" type="checkbox"/> Edit	<input checked="" type="checkbox"/> Delete	set all clear all
Other managers' evaluations of agents	<input checked="" type="checkbox"/> View	<input checked="" type="checkbox"/> Edit	<input checked="" type="checkbox"/> Delete		set all clear all
Evaluations of self	<input checked="" type="checkbox"/> View				set all clear all
REST API	<input checked="" type="checkbox"/> Allow				set all clear all

[Save](#)

Own evaluations of agents

- ◆ **View** - if enabled, the Supervisor will be able to view the evaluations of their managed agents
- ◆ **Create** - if enabled, the Supervisor will be able to create new evaluation forms
- ◆ **Edit** - if enabled, the Supervisor will be able to modify or change the evaluation forms of agents under his/her supervision
- ◆ **Delete** - if enabled, the Supervisor will be able to delete the evaluations of agents under his/her supervision. Use with caution.

Other managers' evaluations of agents

- ◆ **View** - if enabled, the user will be able to view the evaluations of agents under other managers' supervision
- ◆ **Edit** - if enabled, the Supervisor will be able to modify the evaluations of agents under other managers' supervision
- ◆ **Delete** - if enabled, the Supervisor will be able to delete the evaluations of agents under other managers' supervision. Use with caution.

Evaluations of self

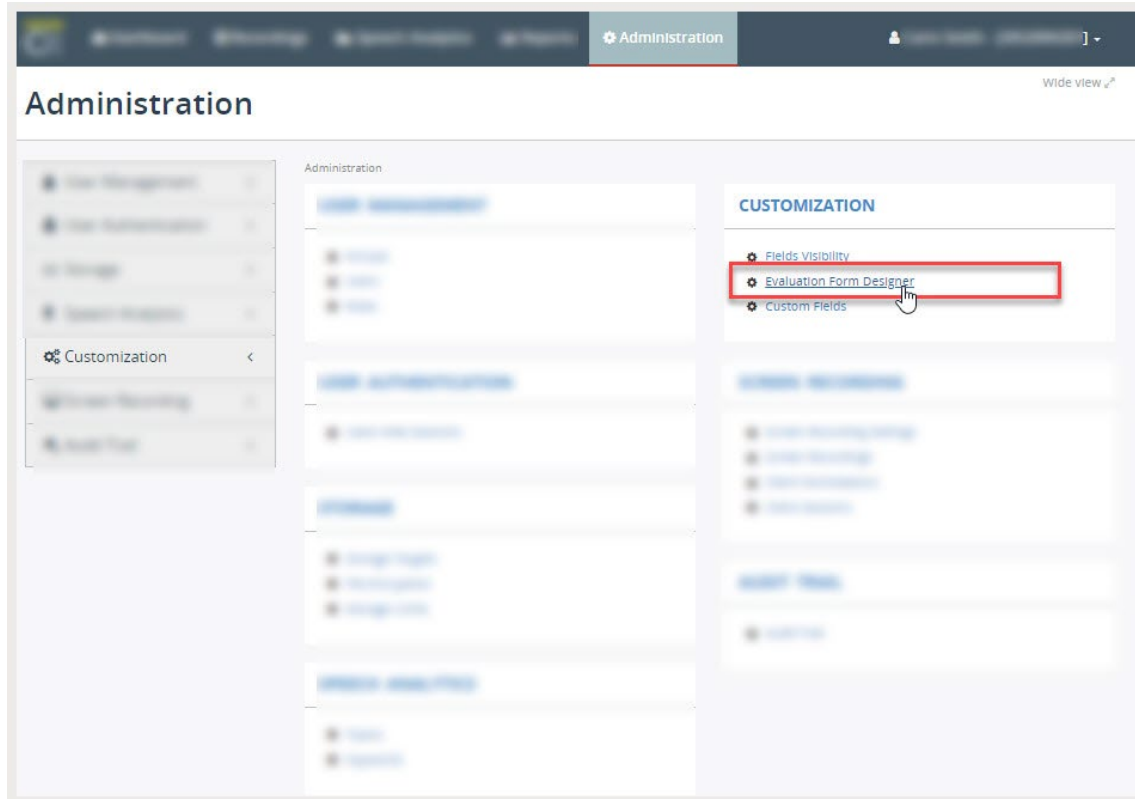
- ◆ **View** - if enabled, the Supervisor will be able to view their own evaluations. If this is the only option selected, the Supervisor will only see the results of their own evaluations but no others.

Note: All Role settings are predefined and cannot be edited.

Manage Evaluation Forms

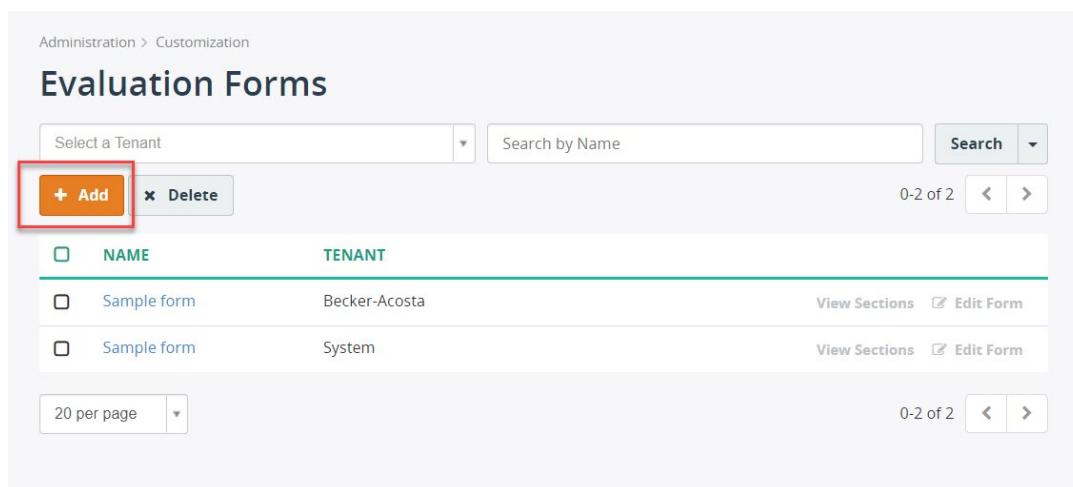
To Access Evaluation Form Designer

Go to **Administration > Customization > Evaluation Form Designer**



To Create an Evaluation Form

While viewing the **Evaluation Form Designer** section:



1. Click the **Add** button to open the **Add Evaluation Form** dialog to begin creating a new Evaluation form.

Administration > Customization > Evaluation Form Designer

Add Evaluation Form

Name *

Tenant

Description

[Save](#)

2. Enter the following information in the fields provided:
 - ◆ **Name:** Enter the form name in this field. This name displays in lists and reports.
 - ◆ **Tenant:** If available, the organization's tenant displays and does not need to be modified.
 - ◆ **Description:** Optional. Enter a short description of the purpose of this evaluation form in this field.
3. Click the **Save** button when finished so save the new form and return to the list.

To Add Sections to Evaluation Forms

While viewing the list in **Administration > Customization > Evaluation Form Designer**:

1. Click on the evaluation form to which new sections and questions will be added.
2. Click on the **Add Section** button.

Administration > Customization > Evaluation Form Designer

Evaluation Form

[Add Section](#) [Edit Form](#) [Clone Form](#) [Delete Form](#)

Name: **Inbound Sale Report**

Tenant: **System**

Description: **Sample evaluation report**

SECTIONS

[+ Add Section](#)

TITLE

No sections

*The **Add Section** dialog displays.*

Administration > Customization > Evaluation Form Designer > Inbound Sale Report

Add Section

Name *	<input type="text" value="Problem Resolution"/>
Description	<input type="text" value="This section contains the questions to address the problem resolution, if any,"/> <small>This field is required.</small>
Display N/A option	<input checked="" type="checkbox"/> Allow to mark whole section N/A
Weight *	<input type="text" value="10"/>
Order *	<input type="text" value="1"/>

- Complete the following:
 - Name:** Required. Enter the name of the form's first section in the **Name** field.
 - Description:** Optionally, provide a short description of the purpose of this section in the **Description** field.
 - Display N/A option:** Click to place a check in this box to allow Supervisors to set the section of questions as N/A (not applicable) as needed when performing evaluations.
 - Weight:** Required. Enter a numeric value defining how much this section influences the Section score. The integer value can be both positive and negative numbers within the ± 1000 allowed. Do not enter 0. The value 0 is not supported. See [Evaluation Form Scoring](#) for more about calculating the weighted score.
 - Order** field, specify the order in which the section appears in the evaluation form when performing an evaluation. Sections are ordered by lowest value first. So, 1 would display to Supervisors first, 2 would display to Supervisors after 1, and so on.
- Click **Save**.

To Add Questions to Evaluation Sections

1. Click the evaluation form where new questions will be added to a section.

Administration > Customization > Evaluation Form Designer

Evaluation Form

Add Section **Edit Form** **Clone Form** **Delete Form**

Name: **Inbound Sale Report**
 Tenant: **System**
 Description: **Sample evaluation report**

SECTIONS

+ Add Section

TITLE

▼ PROBLEM RESOLUTION Edit Delete

No questions in this section. [Add question](#)

Add Question

Question *

Description

Type Multiple choice Numeric value

Display N/A option Allow to mark question N/A

Choices *

<input type="text" value="Yes"/>	<input type="text" value="5"/>	<input type="text" value="Points"/>	<input type="checkbox"/> default	<input type="text" value="x"/>
<input type="text" value="No"/>	<input type="text" value="0"/>	<input type="text" value="Points"/>	<input checked="" type="checkbox"/> default	<input type="text" value="x"/>
<input type="text" value="N/A"/>	<input type="text" value=""/>	<input type="text" value="N/A"/>	<input type="checkbox"/> default	<input type="text" value="x"/>

[+ Add Option](#)

Display As Choice (multi-line) Choice (single-line)

Weight

Order

Save

4. Complete the following required and optional sections in the dialog:

- ◆ **Question:** Required. Type the question text in this field.
- ◆ **Description.** Optional. Type a short description of the purpose of the question this field.
- ◆ **Type:** Click to choose either Multiple Choice, or Numeric Value.

If Multiple Choice is selected, define the following:

Display N/A Option: Click to enable if the Supervisor can use N/A as needed to skip this section's questions.

Choices: Required. Using the 3 table view fields, define the following:

- a) Type the answer options from which the supervisor may select when performing this part of the evaluation. The Admin may click **Add Option** to include as many option choices as needed.
- b) Specify how selecting this option affects the section score using the drop-down menu (far right). The drop-down menu offers Points, N/A, Fail a report, or Fail a section.
- c) Enter an amount of points in the second field if Points was selected as the way to score for the option.
- d) Click to make the option the **default** answer selection in this section unless changed, as desired, by clicking the adjacent default checkbox.
- e) **Display As:** Optional. Choose the way the options created above display to Supervisors when they review the section in an Evaluation. The options here include Choice (Multi-Line or Single Line) or Drop-down list.

Display N/A option Allow to mark question N/A

Choices *	Points	Score	Display As	Default
Yes	10	Points	<input type="checkbox"/>	default
No	0	Points	<input type="checkbox"/>	default
N/A		N/A	<input checked="" type="checkbox"/>	default

Display As

Choice (multi-line)

Choice (single-line)

Drop-down list

If Numeric Value is selected, define the following:

- a) **Maximum Points:** Required. Define a maximum numeric value for the question
- b) **Display N/A Option:** Click to enable if the Supervisor can use N/A as needed to skip this section's questions.
- c) **Display As:** Select what the Supervisor will see - an *Input box* (a text field) or *Rating* (stars).

Maximum points *

Display N/A option Allow to mark question N/A

Display As

Input box

Rating (stars)

- In the **Weight** field, enter how much this question influences the Question Score in this evaluation. The integer value can be 1 - 1000. The value 0 is not supported. For details on calculating the weighted scores, see [Evaluation Form Scoring](#).
- In the **Order** field, specify the order in which the question appears. Questions are displayed in ascending order - by lowest value first. So, an entry of 1 here would mean this is the first question displayed in the section. A 3 entered here would display the question as third in the list of questions.
- Click **Save** when finished defining questions to submit to the Evaluation Form.

To Edit an Evaluation Form Name

At any time an Admin can edit the name or description for any form that was previously created and saved.

- Click the **Edit Form** button next to the desired form.

Administration > Customization

Evaluation Forms

Select a Tenant Search by Name Search

0-3 of 3

<input type="checkbox"/>	NAME	TENANT		
<input type="checkbox"/>	Inbound Sale Report	System	<input type="button" value="View Sections"/>	<input type="button" value="Edit Form"/>
<input type="checkbox"/>	Sample form	Becker-Acosta	<input type="button" value="View Sections"/>	<input type="button" value="Edit Form"/>
<input type="checkbox"/>	Sample form	System	<input type="button" value="View Sections"/>	<input type="button" value="Edit Form"/>

20 per page

0-3 of 3

The **Edit Evaluation Form** page displays.

- Change the name or description and click **Save**.

To Edit an Evaluation Form's Sections or Questions

At any time an Admin can edit the sections or questions in any form that was previously created and saved.

While viewing the Evaluation Forms list:

- Click the **View Sections** button next to the desired form in the list to view the form's sections and questions.

Tools are provided to allow the Admin to Add, Edit, or Delete both Sections and questions within the form, or Edit the Form name/description.

Administration > Customization > Evaluation Form Designer

Evaluation Form

Name: **Quality Assurance**
Description: This form evaluates the agent's call with the customer to meet our quality assurance standards.

SECTIONS

TITLE

At the beginning of the call, was the proper greeting used?

Did the employee use the customer's name?

Did the user have a pleasant and friendly attitude during the call?

To Clone an Evaluation Form

If authorized and enabled, Administrators can create an exact copy of an existing form and use it as the basis for a new and different evaluation form.

1. Click the evaluation form that is to be copied and reused as the basis for a new Evaluation.
2. Click on the **Clone Form** button to begin.

Administration > Customization > Evaluation Form Designer

Evaluation Form

Add Section **Edit Form** **Clone Form** **Delete Form**

Name: **Sample form**
 Tenant: **Becker-Acosta**
 Description: **Sample evaluation form**

SECTIONS

+ Add Section

TITLE	
GREETING	Edit Delete
Did the agent say "Thank you for calling"?	Edit Delete
Did the agent mention his/her name?	Edit Delete

3. Click **Continue** when prompted.
4. Use the same steps described before to name the Form appropriately and add or modify sections or questions within the form to make it useful.
5. Click **Save** when finished modifying the cloned Evaluation to make it unique.

Dashboard | Recordings | Speech Analytics | Reports | Administration

Clone Form

Tenant * [x](#) [v](#)

Continue

Name: **Sample form**
 Tenant: **Becker-Acosta**

To Delete an Evaluation Form

While viewing the Evaluations Forms list:

1. Locate the desired form.
2. Click to select the check box next to the target form
3. Click on the **Delete** button above the list.

Administration > Customization

Evaluation Forms

Select a Tenant Search by Name **Search** ▾

+ Add **x Delete** Selected rows: 1 0-3 of 3 < >

<input type="checkbox"/>	NAME	TENANT		
<input checked="" type="checkbox"/>	Inbound Sale Report	System	View Sections	Edit Form
<input type="checkbox"/>	Sample form	Becker-Acosta	View Sections	Edit Form
<input type="checkbox"/>	Sample form	System	View Sections	Edit Form

20 per page ▾ 0-3 of 3 < >

NOTE: Deleting an evaluation form will delete all report results based on this form as well. The popup notification dialog displays noting that the form has been deleted.

Clicking the **Undo** link that displays in the notification dialog will restore the form to the list for future use.

Evaluation Form Scoring

Each evaluation is scored based on a point system. By default, the sections and questions are not weighted; that is, the number of points gained by the agent determines its weight. Alternatively, each section and question could have its own weight that determines how much it influences the total score for the evaluation report. These weights are applied *after* all sections are scored to arrive at the overall score for the evaluation. The calculated total score is displayed as a percentage in the evaluation report.

EVALUATION REPORT	GREETING	200/250
Agent: Joseph Sanchez	Did the agent say "Thank you for calling"?	yes (5 of 5)
Group: Group McConnell-Rodriguez	Did the agent mention his/her name?	no (0 of 5)
Evaluator: Bonnie Edwards	Did the agent mention the company name?	yes (5 of 5)
Evaluation Form: Sample form	If the call was transferred did the agent adapt the greeting accordingly?	yes (5 of 5)
Report Date: Sep 15, 2021	Did the agent say "This call may be recorded..." (outbound only)?	yes (5 of 5)
Report Status: Completed		
Score: 96 %		
CALL DETAILS	VERIFICATION	200/200
Call Date/Time: Aug 28, 2021, 8:50:20 AM	Did the agent ask for the caller's name?	yes (5 of 5)
Call Duration: 5:58	Did the agent ask for the caller's company name?	yes (5 of 5)
Caller Party: 3211337794	Did the agent ask for the caller's telephone number?	yes (5 of 5)
Called Party: +2089557883 (Joseph Sanchez)	Verification completed with open-ended questions?	yes (5 of 5)

Question Score Calculations

Question scores are calculated based on the applied weights and use the following formula:

$$\text{Weighted Question Score} = \text{Question Score} \times \text{Question Weight}$$

If an evaluator answers N/A, Call Recording treats the score as if the question does not exist.

The following table shows the potential points that a question with a 0–5 answer scale could earn if it has a weight of 1 or 5.

Scale Answer	Points Earned (Question Weight of 1)	Points Earned (Question Weight of 5)
N/A	—	—
0	0	0
1	5	25
2	10	50
3	15	75
4	20	100
5	25	125

The following table shows the potential points that a Yes/No question could earn if it has a weight of 1 or 5.

Answer	Points Earned (Question Weight of 1)	Points Earned (Question Weight of 5)
Yes	10	50
No	5	25
N/A	—	—

Section Score Calculations

Section scores are calculated by aggregating the question responses within the section altogether. The example below illustrates the section score with no weighting applied (or weighting of **1**).

GREETING

25/25

Did the agent say "Thank you for calling"?	yes (5 of 5)
Did the agent mention his/her name?	yes (5 of 5)
Did the agent mention the company name?	yes (5 of 5)
If the call was transferred did the agent adapt the greeting accordingly?	yes (5 of 5)
Did the agent say "This call may be recorded..." (outbound only)?	yes (5 of 5)

To calculate weighted section scores, the system will multiply the section score by its weight. The example below illustrates the section score with a weighting of **10**.

GREETING

250/250

Did the agent say "Thank you for calling"?	yes (5 of 5)
Did the agent mention his/her name?	yes (5 of 5)
Did the agent mention the company name?	yes (5 of 5)
If the call was transferred did the agent adapt the greeting accordingly?	yes (5 of 5)
Did the agent say "This call may be recorded..." (outbound only)?	yes (5 of 5)

Total Score Calculations

The total score is calculated by aggregating the section scores altogether. Evaluation forms use the following formula for calculating the total score:

$$[\text{Total Score} / \text{Maximum possible score}] * 100$$

The following table shows the results for several sections in a sample evaluation form.

Section	Weight	Score	Weighted Score
1	1	10 of 10	10 of 10
2	1	20 of 20	20 of 20
3	2	10 of 10	20 of 20
4	2	20 of 20	40 of 40
5	3	5 of 10	15 of 30

Section Score: $105/120 \times 100 = 88\%$

The following table shows the results for several sections with the first section marked as “not applicable” (N/A).

Section	Weight	Score	Weighted Score
1	1	N/A	N/A
2	1	20 of 20	20 of 20
3	2	10 of 10	20 of 20
4	2	20 of 20	40 of 40
5	3	5 of 10	15 of 30

Section Score: $95/110 \times 100 = 86\%$

Manage Evaluation Reports

To Access Evaluation Reports

The Call Recording Evaluation Reports section has the following structure:

- ♦ **All Reports** - lists all available evaluation reports.
- ♦ **Group Reports** - lists the evaluation reports from the specified group.
- ♦ **Agent Reports** - lists the evaluation reports by a specific agent.

Administrators can access each report group via the **Evaluation Reports** navigation tree or clicking a specific group on the **Reports** home page.

Reports Wide view

The screenshot shows the 'Reports' page. On the left is a navigation menu with 'Reports' and 'Evaluation Reports' (expanded to show 'All Reports', 'Group Reports', and 'Agent Reports'). The main content area is titled 'REPORTS' and contains links for 'Recent reports', 'My reports', 'All reports', and 'Global reports'. To the right, there is a box titled 'EVALUATION REPORTS' containing links for 'All Reports', 'Group Reports', and 'Agent Reports'. Red boxes highlight the 'Evaluation Reports' menu item and the 'EVALUATION REPORTS' content box.

To Search Evaluation Reports

To search for an existing evaluation report, enter the name of the evaluation form in the search field, and click the **Search** button. Also, to narrow down the search results, search the report by a specific user or group.

Reports

The screenshot shows the 'Evaluation Reports' page. The navigation menu on the left has 'Evaluation Reports' selected. The main content area has a search bar with 'inbound' entered and a 'Search' button highlighted with a red box. Below the search bar is a 'Delete' button and a pagination indicator '0-20 of 74'. A table of reports is displayed with columns for 'CALL DATE/TIME', 'AGENT', 'GROUP', 'EVALUATION FORM', and 'SCORE'. Each row includes a checkbox, the date and time, the agent's name, the group name, the evaluation form name, and the score, along with 'View' and 'Edit' links.

<input type="checkbox"/>	CALL DATE/TIME	AGENT	GROUP	EVALUATION FORM	SCORE	
<input type="checkbox"/>	Sep 15, 2021, 10:46 AM	Brian Olson	Group Mcconnell-Rodriguez	Sample form	70	View Edit
<input type="checkbox"/>	Sep 15, 2021, 10:46 AM	Brian Olson	Group Mcconnell-Rodriguez	Sample form	89	View Edit
<input type="checkbox"/>	Sep 10, 2021, 11:49 AM	Brian Olson	Group Mcconnell-Rodriguez	Sample form	89	View Edit
<input type="checkbox"/>	Sep 10, 2021, 11:42 AM	Brian Olson	Group Mcconnell-Rodriguez	Sample form	94	View Edit
<input type="checkbox"/>	Aug 28, 2021, 8:50 AM	Joseph Sanchez	Group Mcconnell-Rodriguez	Sample form	96	View Edit
<input type="checkbox"/>	Aug 28, 2021, 8:16 AM	Cindy Shaffer	Group Mcconnell-Rodriguez	Sample form	98	View Edit
<input type="checkbox"/>	Aug 27, 2021, 4:15 PM	Joseph Sanchez	Group Mcconnell-Rodriguez	Sample form	90	View Edit

The page refreshes to display only the evaluation reports that match the search criteria.

Reports

The screenshot shows the 'Evaluation Reports' page. On the left is a sidebar with 'Reports' and 'Evaluation Reports' (selected). The main area has a search bar with 'inbound' entered and a 'Search' button. Below the search bar is a 'Delete' button and a '0-1 of 1' indicator. A table lists reports with columns: CALL DATE/TIME, AGENT, GROUP, EVALUATION FORM, and SCORE. One report is shown: Nov 15, 2021, 1:51 PM, Brian Olson, Group Mcconnell-Rodriguez, inbound Sale Report. At the bottom, there is a '20 per page' dropdown and another '0-1 of 1' indicator.

To reset the search criteria, click the **Search** button drop-down arrow and then select **Reset search**.

This screenshot is similar to the first one but highlights the search dropdown menu. The 'Search' button has a dropdown arrow, and the dropdown menu is open, showing 'Reset search' as an option, which is enclosed in a red rectangular box.

To Filter Evaluation Reports by Group or Agent

By clicking **Group Reports** in the navigation tree and then specifying the group name, evaluation reports can be filtered by the target group. The summary chart with the evaluation performance is provided at the top of the page.

Wide view ²

Reports <

- Evaluation Reports >
- All Reports
- Group Reports
- Agent Reports

Agent Evaluation (Group Reports)

2021/01/02 - 2022/01/31

Group McConnell-Rodriguez

AGENT	TOTAL EVALUATIONS	MIN SCORE	MAX SCORE	AVG SCORE
Brian Olson	10	70	94	88
Christopher Medina	5	90	99	95
Cindy Shaffer	8	68	98	91
Cody Lawson	5	64	95	81
Diana Dudley	10	91	97	93
Dwayne Reed	10	88	97	93
Joseph Sanchez	7	60	98	84
Kenneth Hernandez	9	88	99	93
Tara Graham	10	59	96	86

By clicking **Agent Reports** in the navigation tree and then specifying the Agent name, evaluation reports can be filtered by the target agent. The summary chart with the evaluation performance is provided at the top of the page.

Reports <

- Evaluation Reports >
- All Reports
- Group Reports
- Agent Reports

Agent Evaluation (User Reports)

2021/01/02 - 2022/01/31

Diana Dudley (+2089553867)

10

Total evaluations

91

Min Score

97

Max Score

93

Avg Score

Delete 0-10 of 10 < >

<input type="checkbox"/>	CALL DATE/TIME	AGENT	GROUP	EVALUATION FORM	SCORE	
<input type="checkbox"/>	Aug 27, 2021, 12:19 PM	Diana Dudley	Group McConnell-Rodriguez	Sample form	93	View <input type="checkbox"/> Edit <input type="checkbox"/>
<input type="checkbox"/>	Aug 27, 2021, 8:04 AM	Diana Dudley	Group McConnell-Rodriguez	Sample form	97	View <input type="checkbox"/> Edit <input type="checkbox"/>
<input type="checkbox"/>	Aug 27, 2021, 7:42 AM	Diana Dudley	Group McConnell-Rodriguez	Sample form	91	View <input type="checkbox"/> Edit <input type="checkbox"/>
<input type="checkbox"/>	Aug 26, 2021, 7:19 AM	Diana Dudley	Group McConnell-Rodriguez	Sample form	92	View <input type="checkbox"/> Edit <input type="checkbox"/>
<input type="checkbox"/>	Aug 25, 2021, 1:18 PM	Diana Dudley	Group McConnell-Rodriguez	Sample form	93	View <input type="checkbox"/> Edit <input type="checkbox"/>
<input type="checkbox"/>	Aug 25, 2021, 12:35 PM	Diana Dudley	Group McConnell-Rodriguez	Sample form	94	View <input type="checkbox"/> Edit <input type="checkbox"/>
<input type="checkbox"/>	Aug 22, 2021, 6:26 PM	Diana Dudley	Group McConnell-Rodriguez	Sample form	91	View <input type="checkbox"/> Edit <input type="checkbox"/>
<input type="checkbox"/>	Aug 22, 2021, 6:26 PM	Diana Dudley	Group McConnell-Rodriguez	Sample form	96	View <input type="checkbox"/> Edit <input type="checkbox"/>
<input type="checkbox"/>	Aug 18, 2021, 6:14 AM	Diana Dudley	Group McConnell-Rodriguez	Sample form	92	View <input type="checkbox"/> Edit <input type="checkbox"/>
<input type="checkbox"/>	Aug 17, 2021, 9:21 PM	Diana Dudley	Group McConnell-Rodriguez	Sample form	96	View <input type="checkbox"/> Edit <input type="checkbox"/>

20 per page 0-10 of 10 < >

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17

888.538.3960

To Review an Evaluation Report

Authorized Supervisors or Admins may open and review the details in an evaluation report by clicking the **View** button next to a report.

Reports

Wide view

The screenshot shows the 'Evaluation Reports' page. On the left is a sidebar with 'Reports' and 'Evaluation Reports' (selected). The main area has a search bar, a 'Delete' button, and a table of reports. The first row is selected, and its 'View' button is highlighted with a red box.

<input type="checkbox"/>	CALL DATE/TIME	AGENT	GROUP	EVALUATION FORM	SCORE	
<input checked="" type="checkbox"/>	Nov 15, 2021, 1:53 PM	Brian Olson	Group Mcconnell-Rodriguez	Sample form	34	View
<input type="checkbox"/>	Nov 15, 2021, 1:51 PM	Brian Olson	Group Mcconnell-Rodriguez	Inbound Sale Report		View
<input type="checkbox"/>	Sep 15, 2021, 10:46 AM	Brian Olson	Group Mcconnell-Rodriguez	Sample form	63	View

To Delete an Evaluation Report

1. Go to **Administration > Reports > Evaluation Reports**.
2. Locate the report to be deleted within the list of reports that have been created.
3. Click to place a check in the box next to the report of choice
4. Click the **Delete** button above the list.

Reports

Wide view

The screenshot shows the 'Evaluation Reports' page with the first report selected. The 'Delete' button is highlighted with a red box, and the text 'Selected rows: 1' is visible next to it.

<input type="checkbox"/>	CALL DATE/TIME	AGENT	GROUP	EVALUATION FORM	SCORE	
<input checked="" type="checkbox"/>	Nov 15, 2021, 1:53 PM	Brian Olson	Group Mcconnell-Rodriguez	Sample form	34	View
<input type="checkbox"/>	Nov 15, 2021, 1:51 PM	Brian Olson	Group Mcconnell-Rodriguez	Inbound Sale Report		View
<input type="checkbox"/>	Sep 15, 2021, 10:46 AM	Brian Olson	Group Mcconnell-Rodriguez	Sample form	63	View