

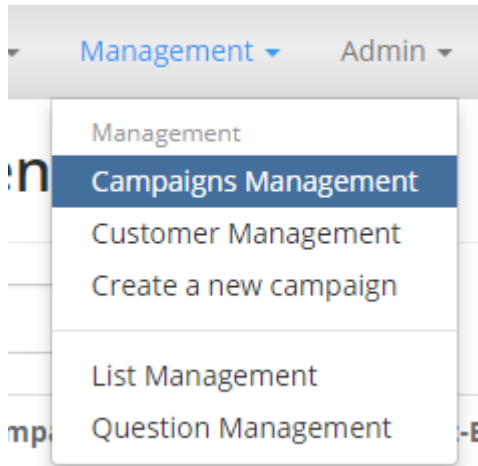
Genii Analytics | Audit Function | AQA

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Starting off

Once you have logged in, go to **Management -> Campaigns Management**



From the available list under selected status **RUN** select the Campaign with the connection id you would like to audit.

You can select the campaign by clicking any of the following info: **ID**, **Description** or **Overview**.

ID	Description	Company	Config\Type	Start-End	Target	Revision	Status	
102	Performance Review		AQA \ WhyOnly	01 Jul 2018 31 Jul 2018	0 (Daily: 0)	4	RUN	Overview Reporting Coaching Feedback Edit Form-Wizard Assign-Users Copy Edit-List Edit-Questions

This will take you to the Overview of Campaign page

Overview of Campaign

Campaign: Performance Review 1

Details of Campaign

Overview | Reporting | Coaching Feedback | List Campaigns

CampaignID:102

Description:Performance Review 1

Campaign Status:RUN

Configuration:AQA

Campaign Target:0

Daily Target:0

Remarks:

Date:01 Jul 2018 to 31 Jul 2018

Captured Calls:Total Count: 39

Daily Captured:Calls by Lynn@genianalytics.com captured: 0

Available Sample's:None!

Randomizer:Next

Hour: 15 | Row: 744 | Val: 120 | Time: 08:26:14

Edit Campaign

Reset Sample Allocation

Capture Assessment

Campaign Form Wizard











Assign Users

Additional Information

Assessments

Audited Assessments

List of Assessments done in the selected time period.

Call Date	ConnectionID	Agent Name	Service Line	Assessed By	Captured Date	Captured	
05 Jul 2018	27825142950 05Jul2018 15:50	Yoliswa Malotana		queen@genianalytics.com	18 Sep 2018	 	Audit View
05 Jul 2018	27824415337 05Jul2018 16:23PM	Cherise Issacs		serge@genianalytics.com	18 Sep 2018	 	Audit View
05 Jul 2018	27825500025 05Jul2018 16:26	Yoliswa Malotana		queen@genianalytics.com	18 Sep 2018	 	Audit View
05 Jul 2018	27720585032 05Jul2018 13:12	Wesley Figlan		queen@genianalytics.com	19 Sep 2018	 	Audit View
05 Jul 2018	27812519274 05Jul2018 15:55	Wesley Figlan		queen@genianalytics.com	19 Sep 2018	 	Audit View













From here you can use the filter to select a specific connection id

Additional Information

Assessments

Audited Assessments

List of Assessments done in the selected time period.

Call Date	ConnectionID	Agent Name	Service Line	Assessed By	Captured Date	Captured
05 Jul 2018	27825142950 05Jul2018 15:50	Yoliswa Malotana		queen@genianalytics.com	18 Sep 2018	  Audit View
05 Jul 2018	27824415337 05Jul2018 16:23PM	Cherise Issacs		serge@genianalytics.com	18 Sep 2018	  Audit View
05 Jul 2018	27825500025 05Jul2018 16:26	Yoliswa Malotana		queen@genianalytics.com	18 Sep 2018	  Audit View
05 Jul 2018	27720585032 05Jul2018 13:12	Wesley Figlan		queen@genianalytics.com	19 Sep 2018	  Audit View
05 Jul 2018	27812519274 05Jul2018 15:55	Wesley Figlan		queen@genianalytics.com	19 Sep 2018	  Audit View
05 Jul 2018	27735814213 05Jul2018 16:33PM	Danika Jessman		serge@genianalytics.com	19 Sep 2018	  Audit View

You can also move to the **Audit** page from the viewing page by selecting Audit on the top right-hand corner.

Analytical Quality Assurance

Campaign: Performance Review 1 (49)
User ID: serge@geniianalytics.com (5)
Instructions
Audit
Reset

ConnectionID: 27729315246 | 03Jul2018 | 08:01AM
Call Date: 03 Jul 2018

ConnectionID has been Captured!

Call Details
Question Form
Results

Captured Reason: Successful Captured
Reason 1: Direct Loans Transfer
Collection Date: 20 Sep 2018 10:17 AM
Reason1 SCR: Yes

Both options will take you to the **Interaction Analytics Audit** page.

Interaction Analytics Audit

Campaign: Performance Review 1 (41)
User ID: Lynn@geniianalytics.com (0)
View
Feedback

ConnectionID: 27824415337 | 05Jul2018 | 16:23PM
Call Date: 05 Jul 2018
Agent ID: Cherise Issacs

Validate

Call Details - Review

Assessors UserID and Captured date:	serge@geniianalytics.com 18 Sep 2018 01:35:00 PM
Date of Call and Duration:	5 Jul 2018 5m 4s
Agent ID:	Cherise Issacs
Agent Classification:	
Repeat:	No
Transfer Hold Time:	00:00
CommentBox:	NA
Transfer:	No
Hold Time:	00:00
Top call driver reasons:	
Reason1:	Customer Chose to go to Bank
Reason1 SCR:	No

Scroll down to the bottom of the page and select the **Auditing** Tab

Transaction History
Auditing

Current or last Audit Status: Validated - Please select a new Audit Status or add a Comment.

Option:
Comments: Add a Audit Comment?
Update Audit

There are 5 **options** in this selection box: **Validated, Review, ScoringAudit, Delete** and **EnableEdit**

- **Validated:** Confirmation by the auditor that the assessment has been done correctly.
- **Review:** This is the auditor's instruction to the assessor to review said work and rectify.
- **Scoring Audit:** TBA
- **Delete:** Completely removing the assessment and allowing for recapture of the connection id if required.
- **Enable Edit:** updating an assessment with additional data or correcting previously made choices.

The screenshot shows a web interface with two tabs: "Transaction History" and "Auditing". The "Auditing" tab is active. Below the tabs, a message states: "Current or last Audit Status: Validated - Please select a new Audit Status or add a Comment." Below this message, there are two fields: "Option:" and "Comments:". The "Option:" field is a dropdown menu with a blue highlight on the "Validated" option. The "Comments:" field is a text input box with the placeholder text "Add a Audit Comment?". Below the form, there is a footer with copyright information: "©2018 - by Genii Analytics. All rights reserved. www.geniianalytics.com" and a database connection status: "You are connected to Database: QABIDB on server: (ia.geniianalytics.com,4433)".

Whichever option you select must be accompanied by a brief explanatory comment in the available comment box.

Delete

1. The assessment was completed wrong (incorrect call, incorrect campaign, over sample size, etc)
2. The Call Date or Connection ID was not captured correctly. (These are the only fields that can't be updated with **EnableEdit** function). The assessment will then have to be recaptured with the correct detail.

Transaction History
Auditing

Current or last Audit Status: **Validated** - Please select a new Audit Status or add a Comment.

Option: Delete
Comments: as per Lizelle
Update Audit

Once you have selected **Update Audit** you will be taken to the **Interaction Analytics Audit** page which will display confirmation of your actions (green notification bar on top of the screen below)

Please note that the **Transaction History** tab will show all changes affected using this function.

See Below

Interaction Analytics Audit

Assessment has been Deleted! The assessment can be recaptured, the Audit History has not been deleted.

Campaign: SA Commercial | Capitec | Sales | AQA 7
User ID: Lynn@geniianalytics.com 0
View Feedback

ConnectionID: 27731733943|17Apr2018|16:41
Call Date:
Agent ID:

Validate

Call Details - Review

No Capture of Question was found for this connectionID. Capture '27731733943|17Apr2018|16:41'

No Capture of Question was found for this connectionID.

Transaction History
Auditing

Audit transaction trail.

Status	Audit Comment	Score	Date	User
Captured	Analyst validated capture.		17 07 2018	Lynn@geniianalytics.com
Delete	as per Lizelle		17 07 2018	Lynn@geniianalytics.com
Captured	Analyst validated capture.		20 09 2018	Lynn@geniianalytics.com
Delete	as per Lizelle		20 09 2018	Lynn@geniianalytics.com

EnableEdit

1. Updating the body of the assessment, except for, the call date or connection id.

The screenshot shows the 'Auditing' tab in the interface. A message states: 'Current or last Audit Status: Validated - Please select a new Audit Status or add a Comment.' Below this, there is a dropdown menu for 'Option:' with the following items: Validated, Review, ScoringAudit, Delete, and **EnableEdit** (which is highlighted). To the right of the dropdown is a text input field for 'Comments:' with the placeholder text 'Add a Audit Comment?'. At the bottom of the screenshot, there is a footer that reads: '©2018 - by Genii Analytics. All rights reserved. www.geniianalytics.com' and 'You are connected to Database: QABiDB on server: (ia.geniianalytics.com,4433)'.

Once you have selected **EnableEdit** and added comment (preferably what you are changing and why).

You will see the following on the top of the page, confirming your selection.

Select **View** to move forward.

The screenshot shows the 'Call Details - Review' page. At the top, a green notification bar states: 'Audit details updated Audit status has been updated to EnableEdit'. Below this, there is a header section with 'Campaign: Performance Review 1' (with a '42' badge) and 'User ID: Lynn@geniianalytics.com' (with a '0' badge). There are 'View' and 'Feedback' buttons. Below the header, there is a section for 'ConnectionID: 27825142950 | 05Jul2018 | 15:50', 'Call Date: 05 Jul 2018', and 'Agent ID: Yoliswa Malotana'. Below this, there is a 'Validate' button. The main section is titled 'Call Details - Review' and contains a table with the following information:

Assessors UserID and Captured date:	queen@geniianalytics.com 18 Sep 2018 08:28:00 AM
Date of Call and Duration:	5 Jul 2018 3m 29s
Agent ID:	Yoliswa Malotana
Agent Classification:	

This will take you to the **Analytical Quality Assurance** page.

From here you can make the changes required, before **Validating** and **Submitting** the updated assessment.

Campaign: Performance Review 1 42 User ID: queen@genianalytics.com Instructions Audit Reset

ConnectionID: 27825142950 | 05Jul2018 | 15:50 Call Date: 05 Jul 2018

[Captured ConnectionID - Editing Allowed!](#)

Call Details Question Form Results

Captured Reason: Successful Captured Reason 1: Refused Already Covered

Collection Date: 18 Sep 2018 08:28 AM Reason1 SCR: No

Agent ID: Yoliswa Malotana Transfer Hold Time: 00:00

Duration: 3 29 CommentBox: n/a

Repeat Call: No Transfer: No

Hold Time: 00:00

Select another Campaign Validate Only Submit »

Analytical Quality Assurance

Campaign: Performance Review 1 42 User ID: queen@genianalytics.com Instructions Audit Reset

ConnectionID: 27825142950 | 05Jul2018 | 15:50 Call Date: 05 Jul 2018

[Captured ConnectionID - Editing Allowed!](#)

Call Details Question Form Results

Summary of Interaction: Advisor called the customer in regards of a personalised loan offered by Capitec. The customer said that he does have a loan with Homechoice of almost R200,000.00 now 3 months. The customer said he is covered for now and he does have a credit card as well. The advisor said it still early to apply for another loan, he can apply

1 - Resolution & Satisfaction

1.1 - Issue Resolution Disabled

1.2 - Ease of Understanding Yes

1.3 - Knowledgeable Yes

1.4 - Empathy Yes

1.5 - Friendly & Courteous Yes

2 - Business Efficiency

2.1 - Handle Time Concern No

2.2 - Repeat Concern No

2.3 - Business Rule Failure No

Once you have validated and submitted you will be returned to a new assessment page with a confirmation of you updated on the top of the page. (Blue notification bar on top of page)

Analytical Quality Assurance

Successful update to Assessment! Update of ConnectionID: 27825142950 | 05Jul2018 | 15:50 for user: queen@genianalytics.com was a success. ✕

Campaign: Performance Review 1 42 User ID: Lynn@genianalytics.com Instructions Audit Reset

ConnectionID: Call Date: No Sample Data

Call Details Question Form Results

Captured Reason: Reason 1: Select Reason?

Collection Date: 20 Sep 2018 09:30 AM Reason1 SCR: Mandatory Entry

Agent ID: Mandatory Entry Transfer Hold Time:

Duration: Minutes? Seconds? CommentBox:

Repeat Call: Mandatory Entry Transfer: Mandatory Entry

Hold Time:

Select another Campaign Validate Only Submit »

Validated

1. Random testing where the assessment was done correctly.

Transaction History
Auditing

Current or last Audit Status: **Validated** - Please select a new Audit Status or add a Comment.

Option:

Validated
Review
ScoringAudit
Delete
EnableEdit

Comments:
Add a Audit Comment?

©2018 - by Genii Analytics. All rights reserved. www.geniianalytics.com
You are connected to Database: QABIDB on server: (ia.geniianalytics.com,4433)

Transaction History	Auditing			
Audit transaction trail.				
Status	Audit Comment	Score	Date	User
Captured	Analyst validated capture.		18 09 2018	serge@geniianalytics.com
Validated	Test for Validating.		20 09 2018	Lynn@geniianalytics.com

Review

1. Random testing where the assessment was done incorrectly.

Transaction History
Auditing

Current or last Audit Status: **Review** - Please select a new Audit Status or add a Comment.

Option: Review
Comments: Handle Time selected as No. Should have been Yes: • Upstream – Technical Issue – Excessive Background Noise (The advisor even mentioned that there was background noise and it added almost 40 sec on the call)

Update Audit

This allows the assessor to add a comment to the review.

Transaction History
Auditing

Audit transaction trail.

Status	Audit Comment	Score	Date	User
Captured	Analyst validated capture.		18 09 2018	queen@geniianalytics.com
Review	Handle Time selected as No. Should have been Yes: • Upstream – Technical Issue – Excessive Background Noise (The advisor even mentioned that there was background noise and it added almost 40 sec on the call)		18 09 2018	Lizelle@geniianalytics.com
AllowEdit	Test		20 09 2018	Lynn@geniianalytics.com
Edit	Edited and re-submitted.		20 09 2018	Lynn@geniianalytics.com
Review	Handle Time selected as No. Should have been Yes: • Upstream – Technical Issue – Excessive Background Noise (The advisor even mentioned that there was background noise and it added almost 40 sec on the call)		20 09 2018	Lynn@geniianalytics.com

Analyst Review Required:

Submitt Audit Review
Please review your comments.
A audit comment can be added.

I will review

Interaction Analytics Audit

Audit details updated Audit status has been updated to **Validated**

Campaign: Performance Review 1 **51**
User ID: Lynn@geniianalytics.com **0**
View Feedback

ConnectionID: 27825142950 | 05jul2018 | 15:50
Call Date: 05 Jul 2018
Agent ID: Yoliswa Malotana

Validate

Call Details - Review

Assessors UserID and Captured date:	queen@geniianalytics.com 18 Sep 2018 08:28:00 AM
Date of Call and Duration:	5 Jul 2018 3m 29s
Agent ID:	Yoliswa Malotana
Agent Classification:	

Transaction History

Auditing

Audit transaction trail.				
Status	Audit Comment	Score	Date	User
Captured	Analyst validated capture.		18 09 2018	queen@geniianalytics.com
Review	Handle Time selected as No. Should have been Yes: • Upstream – Technical Issue – Excessive Background Noise (The advisor even mentioned that there was background noise and it added almost 40 sec on the call)		18 09 2018	Lizelle@geniianalytics.com
AllowEdit	Test		20 09 2018	Lynn@geniianalytics.com
Edit	Edited and re-submitted.		20 09 2018	Lynn@geniianalytics.com
Review	Handle Time selected as No. Should have been Yes: • Upstream – Technical Issue – Excessive Background Noise (The advisor even mentioned that there was background noise and it added almost 40 sec on the call)		20 09 2018	Lynn@geniianalytics.com
Validated	I will review		20 09 2018	queen@geniianalytics.com
Validated	I will review		20 09 2018	Lynn@geniianalytics.com

ScoringAudit

1. Random testing where an assessment was done, and a pass/fail flag can be attached.

Transaction History
Auditing

Current or last Audit Status: **Validated** - Please select a new Audit Status or add a Comment.

Option: ScoringAudit
Comments:
Pas: ▼
Update Audit

Interaction Analytics Audit

Audit details updated Audit status has been updated to *ScoringAudit*

Campaign: **Performance Review 1** 52
User ID: **Lynn@geniianalytics.com** 0
View Feedback

ConnectionID: 27825142950|05jul2018|15:50
Call Date: 05 Jul 2018
Agent ID: Yoliswa Malotana

Validate	
Call Details - Review	
Assessors UserID and Captured date:	queen@geniianalytics.com 18 Sep 2018 08:28:00 AM
Date of Call and Duration:	5 Jul 2018 3m 29s
Agent ID:	Yoliswa Malotana
Agent Classification:	

Transaction History	Auditing			
Audit transaction trail.				
Status	Audit Comment	Score	Date	User
Captured	Analyst validated capture.		18 09 2018	queen@geniianalytics.com
Review	Handle Time selected as No. Should have been Yes: • Upstream – Technical Issue – Excessive Background Noise (The advisor even mentioned that there was background noise and it added almost 40 sec on the call)		18 09 2018	Lizelle@geniianalytics.com
AllowEdit	Test		20 09 2018	Lynn@geniianalytics.com
Edit	Edited and re-submitted.		20 09 2018	Lynn@geniianalytics.com
Review	Handle Time selected as No. Should have been Yes: • Upstream – Technical Issue – Excessive Background Noise (The advisor even mentioned that there was background noise and it added almost 40 sec on the call)		20 09 2018	Lynn@geniianalytics.com
Validated	I will review		20 09 2018	queen@geniianalytics.com
Validated	I will review		20 09 2018	Lynn@geniianalytics.com
ScoringAudit	Test	100	20 09 2018	Lynn@geniianalytics.com