

Genii Analytics | Audit Function | AQA

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Scope

This feature was created to allow for captures to be amended/edited or deleted by the user.

You may want to delete an assessment if your target per day/agent/month has been exceeded.

You may need to update an assessment where some information has been incorrectly captured, like the agent or team leader or if the incorrect causal factor where selected or not selected.

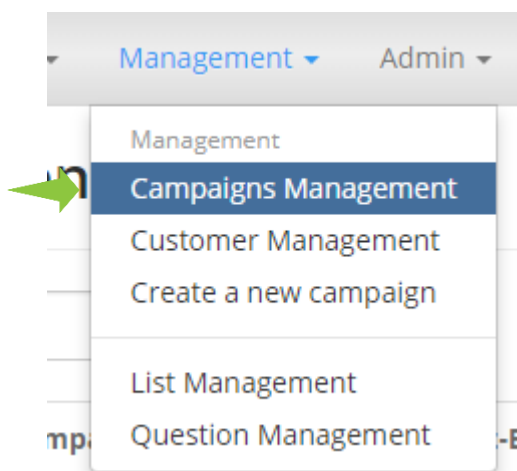
Notation: You cannot amend/edit a connection id or call date. If these inputs need to be changed you will have to delete the assessment and recapture it.

Starting off

Your best way to access the assessment you wish to change is via the Overview page.

There are other ways to get to the assessment, but this is the easiest.

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



You can access the Overview page of the campaign by clicking on any of the following hyperlinks: ID, Description or Overview.

Selected Status: RUN Create New

ID	Description	Company	Product	Revision	Status	
2	Insurance Client Care AQA	Insurance	AQA	172	RUN	Overview Reporting Dashboard Coaching Feedback Export Edit Form-Wizard Question Wizard Assign-Users Copy Edit-List Edit-Questions
12	Insurance Collections AQA	Insurance	AQA	129	RUN	Overview Reporting Dashboard Coaching Feedback Export Edit Form-Wizard Question Wizard Assign-Users Copy Edit-List Edit-Questions
13	Insurance Retentions AQA	Insurance	AQA	145	RUN	Overview Reporting Dashboard Coaching Feedback Export Edit Form-Wizard Question Wizard Assign-Users Copy Edit-List Edit-Questions
3	Insurance Sales AQA	Insurance	AQA	50	RUN	Overview Reporting Dashboard Coaching Feedback Export Edit Form-Wizard Question Wizard Assign-Users Copy Edit-List Edit-Questions

This will take you to the Overview of Campaign page.

Check that your connection id falls within the campaign dates in the breadcrumb below.

Details of Campaign Overview | Reporting | Dashboard | Coaching Feedback | Export | List Campaigns

CampaignID: 2
Description: Insurance | Client Care | AQA
Campaign Status: RUN
Configuration: AQA

Remarks:
Successful Captured: Total Count: 800
Daily Captured: Calls by lynn@geniianalytics.com captured: 0
Available Sample's: None!
Randomizer: Next Hour: 4 | Row: 306 | Val: 224 | Time: 14:56:37

Edit Campaign Reset Sample Allocation Capture Assessment Campaign Form Wizard Campaign Question Wizard Assign Users Weekly Agent Assessment Tabulated Report

Filter Assessment Details Coaching Status

Start Call Date : 01-May-2020 | End Call Date : 31-Aug-2020

Additional Information

Assessments Audits Calibration Gauge

List of Assessments done in the selected time period.

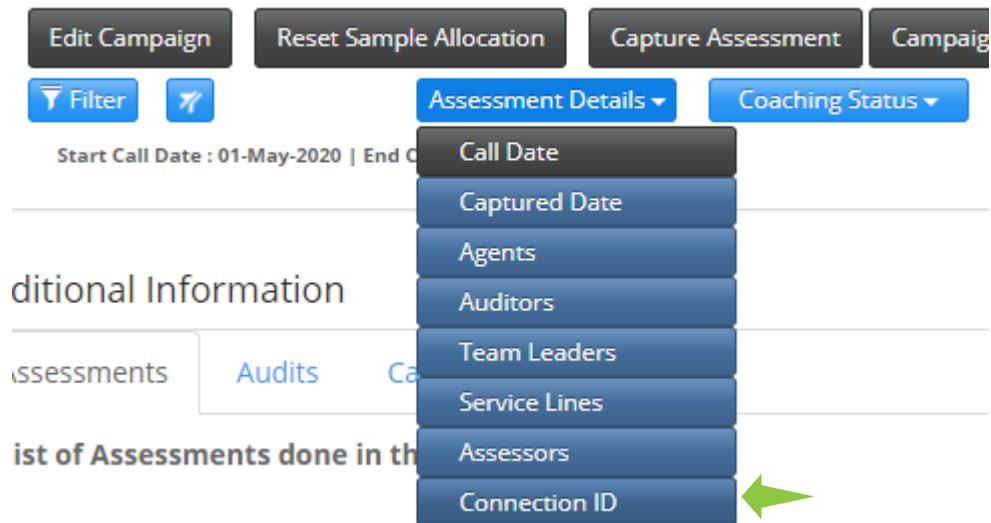
Call Date	ConnectionID	Agent Name	Service Line	Assessed By	Captured Date	Captured	
08-Jul-2020	076707162912345678	Anri Louw	Client Care	nicola@geniianalytics.com	22-Sep-2020		Audit View
21-Aug-2020	2001006267X0200821	Godfrey Maliselo	Client Care	presheh.naidu@insurance.co.za	24-Aug-2020		Audit View

Edit Campaign Reset Sample Allocation Capture Assessment Campaign

Filter Assessment Details Coaching Status

Start Call Date : 01-May-2020 | End Call Date : 31-Aug-2020

You can use the filter to search for a specific id or use the date filter if you are going to delete to stay within target.



Once you have isolated the id you wish to change, you need to click on the Audit button next to the Connection Id.

Start Call Date : 01-May-2020 | End Call Date : 31-Aug-2020 | Connection ID : 1001012596X0200805

Additional Information

Assessments
Audits
Calibration
Gauge

List of Assessments done in the selected time period.

Call Date	ConnectionID	Agent Name	Service Line	Assessed By	Captured Date	Captured	
05-Aug-2020	1001012596X0200805	Mandy Manning	Client Care	presheh.naidu@insurance.co.za	06-Aug-2020		

Page 1 of 1

Record count: 30

This will take you to the audit page – view below.

Interaction Analytics Audit

Campaign: Insurance | Client Care | AQA 800
Log on: lynn@geniianalytics.com
View
Feedback

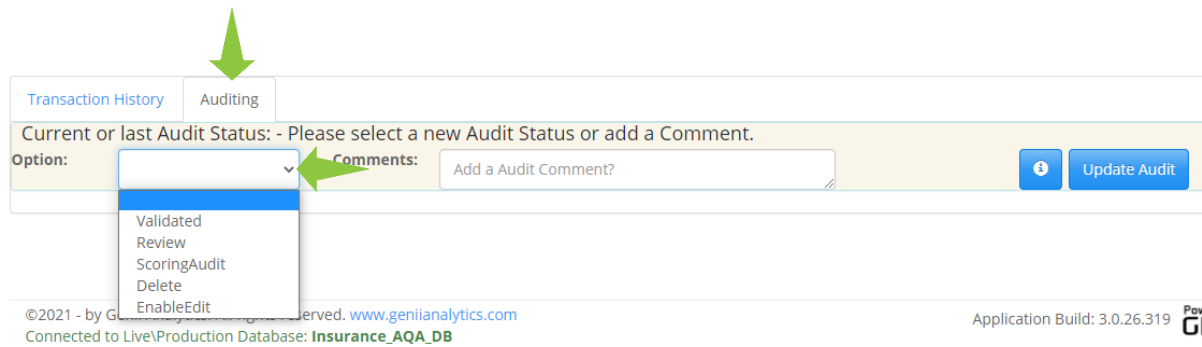
ConnectionID: 1001012596X0200805
Call Date: 05-Aug-2020
Agent ID: Mandy Manning

Validate

Call Details - Review

Assessors User ID and Captured date:	presheh.naidu@insurance.co.za 06-Aug-2020
Date of Call and Duration:	05-Aug-2020 04m 24s
Agent ID:	Mandy Manning
Agent Classification:	
Customer Service Line:	Client Care
Repeat:	No
System Reference Number:	IC2550883
Team Leader Details	Kushen Govender
Transfer Hold Time:	N/A
Comment Box:	N/A
Transfer:	No

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



The screenshot shows the 'Auditing' tab selected. A green arrow points to the 'Auditing' tab. Below it, a message says 'Current or last Audit Status: - Please select a new Audit Status or add a Comment.' There is a dropdown menu labeled 'Option:' with a green arrow pointing to it. The dropdown menu is open, showing five options: 'Validated', 'Review', 'ScoringAudit', 'Delete', and 'EnableEdit'. To the right of the dropdown is a text input field labeled 'Comments:' with the placeholder text 'Add a Audit Comment?'. There are two buttons: a blue button with an 'i' icon and a blue button labeled 'Update Audit'. At the bottom, there is a footer with copyright information, a website URL, and application build details.

By engaging the drop-down you can see the options available.

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: To be announced
- 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.

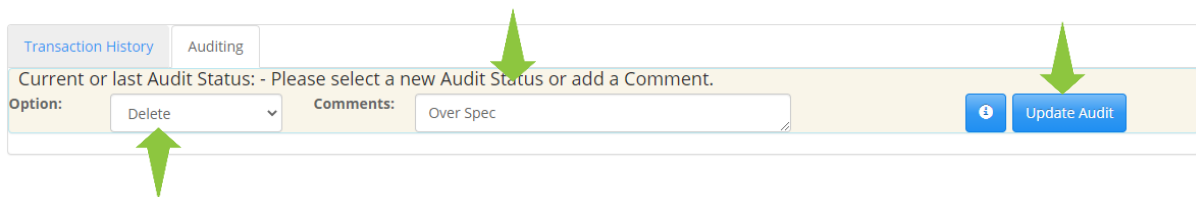
Whichever option you select should be accompanied by a brief explanatory comment in the available comment box.

For the purposes of this document, we will be focussing on the EnableEdit and Delete functions.

Delete

Why delete an assessment?

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 cannot 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: - Please select a new Audit Status or add a Comment.

Option: Delete Comments: Over Spec Update Audit

Select Delete from the drop-down and add your comments and select 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.

See Below

Interaction Analytics Audit

Campaign: Insurance | Client Care | AQA 799 Log on: lynn@geniianalytics.com View Feedback

ConnectionID: Call Date: Agent ID:

Validate

No Assessment and no answers found for this connectionID.

Transaction History Auditing

Audit transaction trail.

Status	Audit Comment	Score	Date	User
Captured	Analyst validated capture.		2020-08-06 11:58:08	preshen.naidu@insurance.co.za
Delete	Over Spec		2021-03-16 14:42:24	lynn@geniianalytics.com

EnableEdit

Why EnableEdit?

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

This includes updating causal factors or metadata on the call details page.

Transaction History Auditing

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

Option: EnableEdit Comments: Update agent Update Audit

Select EnableEdit from the drop-down and add detailed comments (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.

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

Campaign: Insurance | Client Care | AQA 799 Log on: lynn@geniianalytics.com View Feedback

ConnectionID: 2001006267X0200821 Call Date: 21-Aug-2020 Agent ID: Godfrey Maliselo

Validate

Call Details - Review

Assessors User ID and Captured date:	preshen.naidu@insurance.co.za 24-Aug-2020
Date of Call and Duration:	21-Aug-2020 02m 23s
Agent ID:	Godfrey Maliselo
Agent Classification:	
Customer Service Line:	Client Care

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.

For this exercise we will updated the agent id from Godfrey to Yaseen.

Note the blue notification bar advising that you can edit this assessment.

Before

Analytical - Interaction Analytics

Campaign: Insurance | Client Care | AQA 799 / User ID: preshen.naidu@insurance.co.za 0 Audit Reset

ConnectionID: 2001006267X0200821 Call Date: 21-Aug-2020

Captured ConnectionID - Editing Allowed!

Call Details Question Form Results

Captured Reason:	Successful Captured	Reason 1:	Policy Enquiry
Collection Date:	2020-08-24 15:31:49	Reason1 FCR:	Mandatory Entry
Agent ID:	Godfrey Maliselo	Reason 2:	Select Reason?
Service Line:	Client Care	Reason2 FCR:	Mandatory Entry
Team Leader:	Kushen Govender	Reason 3:	Select Reason?
Segment\Campaign:	Mandatory Entry	Reason3 FCR:	Mandatory Entry
Duration:	02 23		

After

Analytical - Interaction Analytics

Campaign: Insurance | Client Care | AQA 799 / User ID: preshen.naidu@insurance.co.za 0 Audit Reset

ConnectionID: 2001006267X0200821 Call Date: 21-Aug-2020


Captured ConnectionID - Editing Allowed!

Call Details Question Form Results

Captured Reason:	Successful Captured	Reason 1:	Policy Enquiry
Collection Date:	2020-08-24 15:31:49	Reason1 FCR:	Mandatory Entry
Agent ID:	Yaseen Bhoolia	Reason 2:	Select Reason?
Service Line:	Client Care	Reason2 FCR:	Mandatory Entry
Team Leader:	Kushen Govender	Reason 3:	Select Reason?
Segment\Campaign:	Mandatory Entry	Reason3 FCR:	Mandatory Entry
Duration:	02 23		

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

Analytical - Interaction Analytics


 **Successful update to Assessment!** Update of ConnectionID: 2001006267X0200821 for user: preshen.naidu@insurance.co.za was a success. ×

Campaign: Insurance | Client Care | AQA **799 /** User ID: lynn@geniianalytics.com **0** Reset

ConnectionID: Call Date:

On the Overview page you can now see that the Agent Name has shows the updated agent name.

Additional Information

Assessments	Audits	Calibration	Gauge
List of Assessments done in the selected time period.			
Call Date	ConnectionID	Agent Name	Service Line
08-Jul-2020	076707162912345678	Anri Louw	Client Care
 21-Aug-2020	2001006267X0200821	Yaseen Bhoolia	Client Care
21-Aug-2020	1001995916X0200821	Genivee Luren Langendorf	Client Care

Other Audit Functions

The only documentation linked to these actions are on the Audit Export.

Review and Scoring Audit has been replaced with [Calibration](#)

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.

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:

Submit 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 <input type="text"/> Comments: Test <input type="text"/> Pas: <input type="button" value="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

FIN