Genii Analytics | Export Page | AQA

V1. December 2020

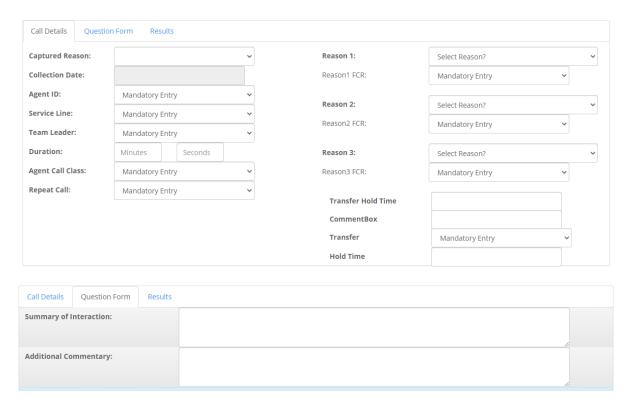## Contents

List of Assessments with Additional Commentary

This report will give you a tabular view of the data captured on the Call Details page as well Summary of Interaction and Additional Commentary data.

Each assessment will have one line of data.

Call Details	Question Form	Results

Captured Reason:		**Reason 1:**	Select Reason?
Collection Date:		Reason1 FCR:	Mandatory Entry
Agent ID:	Mandatory Entry		
Service Line:	Mandatory Entry	**Reason 2:**	Select Reason?
Team Leader:	Mandatory Entry	Reason2 FCR:	Mandatory Entry
Duration:	Minutes / Seconds	**Reason 3:**	Select Reason?
Agent Call Class:	Mandatory Entry	Reason3 FCR:	Mandatory Entry
Repeat Call:	Mandatory Entry		
		Transfer Hold Time	
		CommentBox	
		Transfer	Mandatory Entry
		Hold Time	

Call Details	Question Form	Results

Summary of Interaction:	
Additional Commentary:	

A view of one record of data

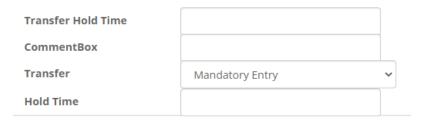|	
BIcaptureID	102151
ConnectionID	3.00167E+17
Assessor	belinda@finance.com
Date Captured	24/08/2020
Time Captured	18:08
Call Date	19/08/2020
Call Duration	299
Agent	Lindiwe Mdlalose
Agent ID	875
Team Leader	Zandile Mabanga
Team Leader ID	101
CallAgentClass	
Service Line	Customer Services
CallRepeat	No
Reason1	COVID19 | Insurance Claim Query
FCR_Reason1	No
Reason2	Payments | Payment Arrangement
FCR_Reason2	No
Reason3	
FCR_Reason3	
Reasons	COVID19 | Insurance Claim Query | Payments | Payment Arrangement
AssessmentType	Assessment
Transfer Hold Time	00:00
CommentBox	n/a
Transfer	No
Hold Time	00:00
Summary of Interaction	The customer submitted an insurance claim and wants to know how it works. The consultant asked how her salary was affected, and the customer stated that her salary was reduced. The consultant stated that it falls under short time, and stated that she can reduce the installment while they wait for the insurance to pay the
Additional Commentary	n/a

List of Assessments with Output Metrics

This report will give you a tabular view of the data captured on the Call Details page as well as the results of your output metric questions (level 2).
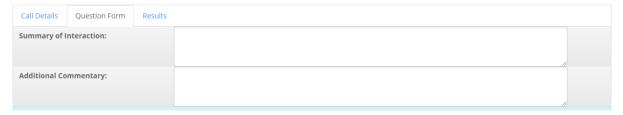
Each assessment will have one line of data.

You can select to include the following

1. User Defined additions (this is the information captured below the Reason captures) Example below

2. Main Comment boxes

You will also be able to view the output metric results as Yes or No.

It should be noted that Yes or No answers can mean either failures or accuracy depending on how the questions where set up.

A view of one record of data (Yes/No)

BIcaptureID	102151
ConnectionID	3.00167E+17
Assessor	belinda@finance.com
Date Captured	24/08/2020
Time Captured	18:08
Call Date	19/08/2020
Call Duration	299
Agent	Lindiwe Mdlalose
Agent ID	875
Team Leader	Zandile Mabanga
Team Leader ID	101
CallAgentClass	
Service Line	Customer Services
CallRepeat	No
Reason1	COVID19 | Insurance Claim Query
FCR_Reason1	No
Reason2	Payments| Payment Arrangement
FCR_Reason2	No
Reason3	
FCR_Reason3	
Reasons	COVID19 | Insurance Claim Query | Payments| Payment Arrangement
AssessmentType	Assessment
Transfer Hold Time	00:00
CommentBox	n/a
Transfer	No
Hold Time	00:00
Summary of Interaction	The customer submitted an insurance claim and wants to know how it works. The consultant asked how her salary was affected, and the customer stated that her salary was reduced. The consultant stated that it
Additional Commentary	n/a
Issue Resolution	No
Ease of Understanding	Yes
Knowledgeable	Yes
Empathy	Yes
Friendly Courteous	Yes
Handle Time Concern	No
Repeat Concern	Yes
Business Rule Failure	No
System Update Failure	N/A
Protected Customer Privacy POPI	Yes
Regulatory SOP Adherence	Yes

List of Assessments with Output Metrics (Binary Version)

This report has the same data as the List of Assessments with Output Metrics report with the following variance.

1. Failures will display as 0 and Passes as 1. N/A as Hyphens.
2. The control type filter can be used to distinguish between agent, business, and insights.

A view of one record of data (1/0)

BIcaptureID	102151
ConnectionID	3.00167E+17
Assessor	belinda@finance.com
Date Captured	24/08/2020
Time Captured	18:08
Call Date	19/08/2020
Call Duration	299
Agent	Lindiwe Mdlalose
Agent ID	875
Team Leader	Zandile Mabanga
Team Leader ID	101
CallAgentClass	
Service Line	Customer Services
CallRepeat	No
Reason1	COVID19 | Insurance Claim Query
FCR_Reason1	No
Reason2	Payments| Payment Arrangement
FCR_Reason2	No
Reason3	
FCR_Reason3	
Reasons	COVID19 | Insurance Claim Query | Payments| Payment Arrangement
AssessmentType	Assessment
Transfer Hold Time	00:00
CommentBox	n/a
Transfer	No
Hold Time	00:00
Summary of Interaction	The customer submitted an insurance claim and wants to know how it works. The consultant asked how her salary was affected, and the customer stated that her salary was reduced. The consultant stated
Additional Commentary	n/a
Issue Resolution	0
Ease of Understanding	1
Knowledgeable	1
Empathy	1
Friendly Courteous	1
Handle Time Concern	1
Repeat Concern	0
Business Rule Failure	1
System Update Failure	--
Protected Customer Privacy F	1
Regulatory SOP Adherence	1

List of Assessments with Root Causes

This view will give you all answers of an assessment.

Each assessment will display over multiple rows, depending on the questions answered

A view of one record of data

BIcaptureID	102151
ConnectionID	3.00167E+17
Assessor	belinda@finance.com
Date Captured	24/08/2020
Time Captured	18:08
Call Date	19/08/2020
Call Duration	299
Agent	Lindiwe Mdlalose
Agent ID	875
Team Leader	Zandile Mabanga
Team Leader ID	101
CallAgentClass	
Service Line	Customer Services
CallRepeat	No
Reason1	COVID19 | Insurance Claim Query
FCR_Reason1	No
Reason2	Payments| Payment Arrangement
FCR_Reason2	No
Reason3	
FCR_Reason3	
Reasons	COVID19 | Insurance Claim Query | Payments| Payment Arrangement
AssessmentType	Assessment
ControlType	--
Summary of Interaction	The customer submitted an insurance claim and wants to know how it works. The consultant asked how her salary was affected, and the customer stated that her salary was reduced. The consultant stated that it falls under
Additional Commentary	n/a
CategoryLevel	1
QuestionIndex	1
QuestionDetails	Resolution & Satisfaction
QuestionResult	Include
QuestionComment	

List of Assessments with Coaching Feedback Comments

This report will give you a tabulated view of all the Feedback detail associated with an assessment.

Each assessment can display over multiple rows, depending on the number of feedback status capture.

A view of one record of data

BlcaptureID	101430
ConnectionID	1001684271X0200814
Assessor	belinda@finance.com
Date Captured	20/08/2020
Time Captured	12:08
Call Date	14/08/2020
Call Duration	300
Agent	Ditaelo Byang
Agent ID	845
Team Leader	Zandile Mabanga
Team Leader ID	101
CallAgentClass	
Service Line	Transactional
CallRepeat	Yes
Reason1	Settlement Query	Balance
FCR_Reason1	Yes
Reason2	Payments| Payment Arrangement
FCR_Reason2	Yes
Reason3	
FCR_Reason3	
Reasons	Settlement Query	Balance	Payments| Payment Arrangement
AssessmentType	Assessment
Summary of Interaction	The customer previously requested a settlement letter, and stated that the account was supposed to be debited today. The customer is calling to query the
Additional Commentary	The customer confirmed the debit date, and the consultant confirmed the arrangement details and provided the reference number. The consultant stated
CurrentFeedbackStatus	Completed
FeedbackDate	21/08/2020 12:45
FeedbackClass	TeamLeader Feedback
FeedbackCapturedBy	zmabanga@finance.co.za
FeedbackAssignedBy	zmabanga@finance.co.za
AnalystFeedback	Client calls in regarding paying off his accounts. You validated the client and assisted the client accordingly. You also sold self service and probed if any of the client's details have changed. You then assisted the client with the process

List of Assessments with Audit Details

This report will give you a tabulated view of all the audits done on an assessment.

An assessment can have multiple lines depending on the actions performed.

It should be noted that Captures and Validations are also classified as Audits.

A view of one record of data

BIcaptureID	101894
ConnectionID	1001652695W0200811
Agent ID	909
Agent	Paulinah Motaung-Lebakeng
Team Leader ID	97
Team Leader	Mantwa Masondo
Manager ID	0
Manager	
DateCall	11/08/2020 00:00
QAauditID	95878
AuditStatus	AllowEdit
AuditPerson	javan.moodley@geniianalytics.com
AuditComment	agent amend
DateAudit	24/08/2020 10:47
AuditScore	
AuditFlag	

Team Leader, Agent & Assessment Performance

This is a .csv version of the Team Leader Performance PDF Report, where the scores are displayed as either 100 or 0 %.

It gives the Controllable Section scores as well as the last feedback status and date.

A view of one record of data.

BIcaptureID	97628
ConnectionID	3001299899S0200801
DateCall	01/08/2020 00:00
Agent ID	966
Agent	Elizabeth Motheri
Team Leader ID	91
Team Leader	Jeffrey Moshoka
Manager ID	0
Manager	
Department	
ServiceLine	Customer Services
SegmentCampaign	
QAScore	100
Resolution & Satisfaction	100
Business Efficiency	100
Regulatory Compliance	100
Voice of the Customer	100
Additional Insights	100
DebiCheck Adherence	100
FeedBackStatus	Completed
FeedbackDate	12/08/2020 09:44
FeedBackComplete	1

User Roles

Note not all user types may have access to this report.

This report gives you a tabular view of all users created on the app, including what access each user has.

A view of one record of data.

UserName	lynn@geniianalytics.com
DisplayName	Lynn
Admin	TRUE
AQA_Reports	TRUE
DeveloperAdmin	FALSE
IA_Admin	TRUE
IA_Analyst	TRUE
IA_Auditor	TRUE
IA_Coach	TRUE
IA_User	TRUE
NONE	FALSE
Quality_Manager	FALSE
SystemAdmin	TRUE

Daily User Activity

This is a tabulated report showing the count of activities over time per user.

You can view as a summary as well as the count of each action

A view of one record of data

Summary

Date	04/08/2020
UserID	admin@geniianalytics.com
First Sign On Time	04/08/2020 20:24
Last Activity Time	04/08/2020 20:26
Total Signed On Time(HH:mm:ss)	00:02:46
Number of Activities	4

A view of one record of data

Detailed

Date	07/08/2020
UserID	admin@geniianalytics.com
First Sign On Time	07/08/2020 08:54
Last Activity Time	07/08/2020 11:12
Total Signed On Time(HH:mm:ss)	02:18:47
Number of Activities	8
Login	2
StartAssessment	
SaveAssessment	
EditQuestion	2
CreateQuestion	
DeleteQuestion	
ViewDashboard	
ViewPDFReports	
LoadQuestion	4
ValidateAssessmentBeforeSubmit	
ValidateAssessmentAfterSubmit	
ValidateAssessmentOnAudit	
CreateCampaign	
CreateCustomer	
ChangeDBConnectorPassword	
DisableDBConnectorUser	
ViewPeopleManager	
ViewPerson	
ViewCampaignOnPM	
EditPerson	
EditCampaignUsers	
EditCampaign	
EditRole	
RemoveUsersCampaignAccess	
GiveUserCampaignAccess	
GiveUserCustomerAccess	
DisablePersonnel	
EnablePersonnel	
DeletePersonnel	
RemoveUsersCustomerAccess	
ViewedInteractiveDashboard	
ViewedInteractivePerformanceMetricResults	
ViewedInteractiveContactDispositionMatrix	
ViewedInteractiveRootCause	
ViewedInteractiveLiftOpportunities	
ViewedInteractivePerformanceTracker	

Agent Metrics

This is a tabulated agent focused version of the Interactive Performance Metric Results.

Note that this report only notes the last date selected and give you 3 full months data from that date retrospectively.

A view of one record of data

Agent	Alphina Ramalo
Section	Resolution & Satisfaction
Performance_Metric	Issue Resolution
Target	60
Year	2020
Jun	16.67
Jul	0
Aug	33.33

Report view

Agent	Section	Performance_Metric	Target	Year	Jun	Jul	Aug
Alphina Ramalo	Resolution & Satisfaction	Issue Resolution	60	2020	16.67	0	33.33
Alphina Ramalo	Resolution & Satisfaction	Ease of Understanding	98	2020	100	100	100
Alphina Ramalo	Resolution & Satisfaction	Knowledgeable	95	2020	100	100	100
Alphina Ramalo	Resolution & Satisfaction	Empathy	95	2020	100	100	100
Alphina Ramalo	Resolution & Satisfaction	Friendly & Courteous	98	2020	100	100	100
Alphina Ramalo	Business Efficiency	Handle Time Concern	10	2020	16.67	33.33	0
Alphina Ramalo	Business Efficiency	Repeat Concern	5	2020	0	100	0
Alphina Ramalo	Business Efficiency	Business Rule Failure	10	2020	0	0	0
Alphina Ramalo	Business Efficiency	System Update Failure	10	2020	--	--	--
Alphina Ramalo	Regulatory Compliance	Protected Customer Privacy (POPI)	99.5	2020	100	100	100
Alphina Ramalo	Regulatory Compliance	Regulatory SOP Adherence	99.5	2020	100	100	100
Alphina Ramalo	Regulatory Compliance	Regulatory Violation	99.5	2020	100	100	100
Alphina Ramalo	Voice of the Customer	Expression of Dissatisfaction	10	2020	0	0	0
Alphina Ramalo	Additional Insights	COVID-19 Impact	0	2020	100	100	100
Alphina Ramalo	Additional Insights	Website Insight	0	2020	100	100	100
Alphina Ramalo	DebiCheck Adherence	Account Type	0	2020	--	--	--
Alphina Ramalo	DebiCheck Adherence	DebiCheck Knowledge Gap	0	2020	--	--	--

Assessor Efficiency

This is a tabulated assessor focused report.

There are two reports, a daily summary, and an Efficiency detailed report

Efficiency % Calculation = (Interaction Duration) /(Action Duration - Interactive duration)

A view of one record of data

Daily Summary

Date	02/12/2020
User Name	fisherc@geniianalytics.com
No.Completed Assessments	3
Total Action Duration(hh:mm:ss)	00:16:14

A view of one record of data

Efficiency detailed report

User Name	fisherc@geniianalytics.com
ConnectionID	7038008448|01Dec2020|12:29
Campaign ID	125
Date	02/12/2020
Action	Completed Assessment
Action Start Time(dd-mm-yyyy HH:mm:ss)	02-12-2020, 13:44:30
Action Complete Time(dd-mm-yyyy HH:mm:ss)	02-12-2020, 13:47:19
Action Duration(hh:mm:ss)	00:02:49
Interaction Duration(HH:mm:ss)	00:02:31
Time Difference(HH:mm:ss)	00:00:18
Efficiency Percentage(%)	89.35

General

Our dynamic filter is available on this page and will change according to the campaign settings.

The Control Type filer is currently limited to a few exports. Please read the blurb on each report to see whether it is enabled on this report.