

NICE PUBLIC SAFETY SOLUTIONS

NICE INFORM EVALUATOR USER GUIDE

Release 10.1

February 2023

NICE ■ Inform

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Part number: OM812-121-10-01-02-01

Date: February 2023

MSR2437 Rev17

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1 Welcome

The NICE Inform Evaluator application enables you to:

- Evaluate call takers within a call center environment using forms that are created using NICE Inform Template Designer. Recordings that have been dealt with by call takers are added to an evaluation either via NICE Inform Reconstruction or NICE Inform Organizer.
- Once evaluated, evaluation reports can be generated using NICE Inform Reporter.

Prerequisites

In order to use the full NICE Inform Evaluator application feature set, you need to configure your users accordingly. The following prerequisites apply:

- Any user that is to be evaluated must be added as a user in NICE Inform and set as an operator. To add a user as an operator, either set the user as an operator when adding a new user to the system or by editing user details both of which can be set within *NICE Inform User Administration*.
- A user group manager can see all operators in their group and their evaluations. The manager must be added to the user group and be set as a manager. This is done when editing a user group in *NICE Inform User Administration*.
- An evaluation can be accessed by the user who created it, the operator being evaluated or by a user who has been granted **Evaluate** access rights when the evaluation was initially created (refer to [Adding recordings to a new evaluation](#) (see page 6)).

Application privileges

To use the Evaluator application, you **MUST** have the required privilege allocated to you (refer to *Application privileges* in *NICE Inform User Administration*). If not, the Evaluator option is not displayed in the Application selector bar when you log in.

1.1 Navigating NICE Inform Evaluator

The NICE Inform Evaluator application consists of two distinct panels which can be maximized and minimized to provide the desired view.

NOTE: Refer to the table below for a key to each feature.

Figure 1-1: Evaluator main screen

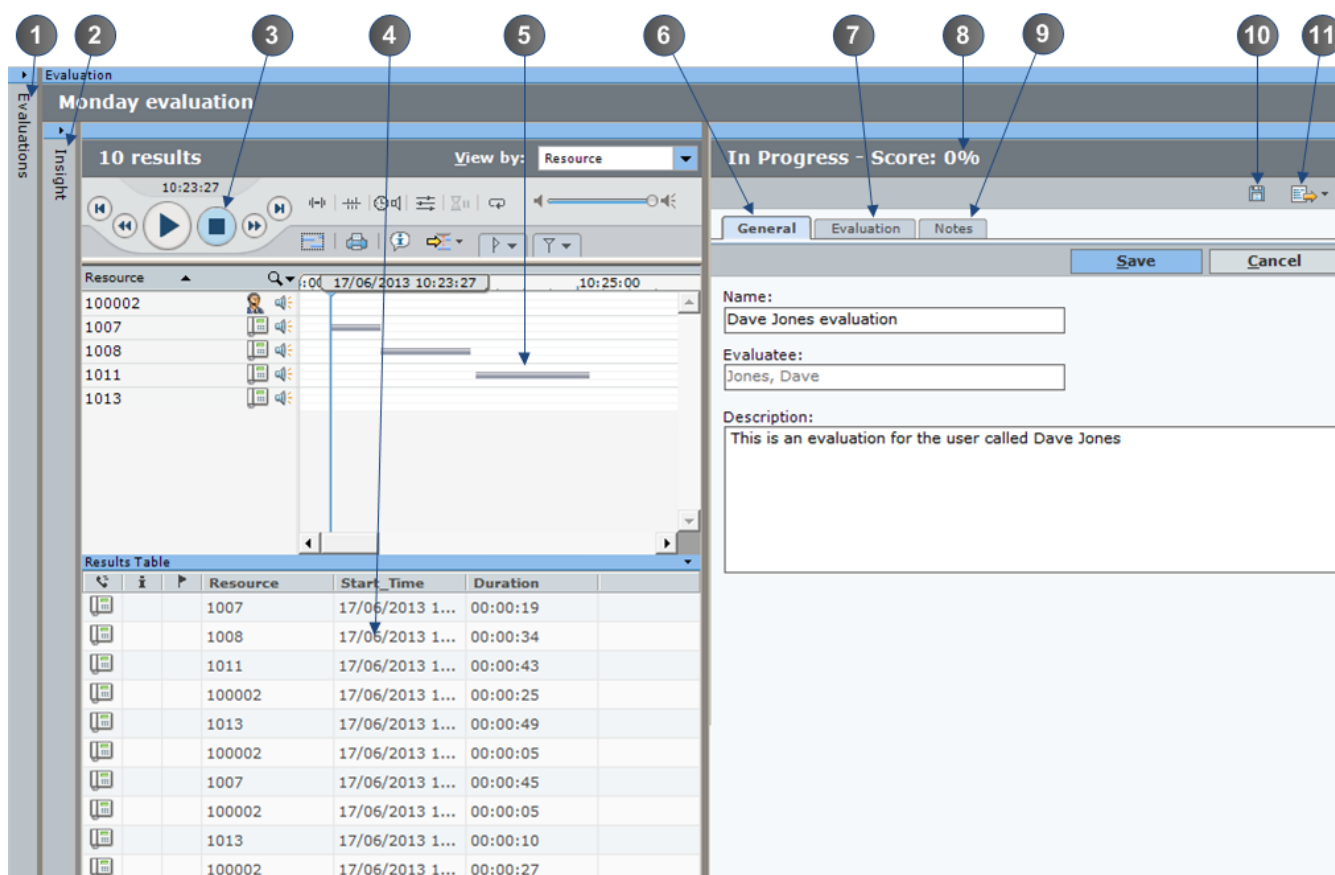




Table 1-1: NICE Inform Evaluator features

Feature number	Description
1	Evaluations panel (shown minimized) - provides access to view and update the details of the evaluation (refer to Evaluations panel (see page 5)).
2	Insight panel (shown minimized) - contains Insight windows which displays information during playback (refer to Insight panel (see page 25)).
3	Playback Control panel - provides access to replay recordings selected from the Results table and Timeline display relating to the selected evaluation (refer to Playback Control panel (see page 24)).
4	Results table - provides a tabular view of all the recordings associated to the selected evaluation (refer to Results table (see page 25)).
5	Timeline display - provides a graphical view of all the recordings associated to the selected evaluation (refer to Timeline display (see page 25)).

Feature number	Description
6	General tab - provides access to update general settings for the evaluation (refer to General page (see page 15)).
7	Evaluation tab - provides access to score the evaluation (refer to Performing an evaluation (see page 27)).
8	Current evaluation score
9	Notes tab - provides access to add note to the evaluation (refer to Managing evaluation notes (see page 30)).
10	Save evaluation button - saves the selected evaluation (refer to Saving an evaluation (see page 34)).
11	Progress the evaluation button - enables access to progress the selected evaluation (refer to Progressing an evaluation (see page 32)).

To minimize a panel, click the  button associated with the panel that is open.

To maximize a panel, click the  button associated with the panel that is closed.

Maximizing the **Evaluations** panel automatically minimizes the **Evaluation** panel to provide as much screen as possible to display the **Evaluations** panel. Similarly, when maximizing the **Evaluation** panel, the **Evaluations** panel is minimized automatically.

1.2 Adding and removing items

Adding and removing items (e.g. users) to and from selected lists is frequently used within NICE Inform Evaluator.

► To add items to the list:

1. Highlight the required item in the Available list.
2. Click the **Add >** button. The item is moved to the Selected list.
3. Repeat for each required item.

NOTE: To move all items to the Selected list, click the **Add All >>** button.

► To remove items from the Selected list:

1. Highlight the required item in the Selected list.
2. Click the **< Remove** button. The item is moved to the Available list.
3. Repeat for each item required.

NOTE: To move all items from the Selected list, click the **<< Remove All** button.

Additional Operations

- If you wish to select all but one or two items, click the **Add All >>** button to move all items to the Selected list, then remove the items not required.
- The **Quick Search** facility enables you to find the required item. Enter the required text in the box and click **Go**. The search returns all items containing that text as part of its name. The search is **NOT** case sensitive.

2 Evaluations panel

The Evaluations panel is where the evaluations are searched for, opened from and where evaluation schedules are created as shown here.

Figure 2-1: Evaluations panel

The screenshot shows the 'Evaluations' panel with a search sidebar on the left and a results table on the right. The sidebar includes filters for Creation Date (Any, Last: 6 Minutes, From: 31/03/2015, To: 31/03/2015), Criteria (Name: evaluation, Operator: Davis, Fred, Evaluation status: In Progress, Form: Operator Call Handling, Assigned to: (All), Evaluated by: (All), Description:), and buttons for Reset and Search. The results table shows 4 results with columns: Evaluation name, Form, Operator, Assigned to, Created by, Evaluated by, and Completed by.

Evaluation name	Form	Operator	Assigned to	Created by	Evaluated by	Completed by
Brian Gibbons eval...	Call Center	Gibbons, Brian	Davis, Fred	Davis, Fred	Davis, Fred	
Dave Jones evalua...	new form	Jones, Dave	Davis, Fred	Davis, Fred		
Dave Jones evalua...	Call Center	Jones, Dave	Gibbons, Brian	Gibbons, Brian		
Fred Davis evaluati...	Call Center	Davis, Fred	Gibbons, Brian	Gibbons, Brian		

Features within the Evaluations panel include:

- [Adding recordings to Evaluator](#) (see page 5) (using NICE Inform Reconstruction/Organizer)
- [Deleting an evaluation](#) (see page 19)
- [Searching for an existing evaluation](#) (see page 19)
- [Getting your next evaluation](#) (see page 10)
- [Configuring evaluation schedules](#) (see page 11)
 - [Creating an evaluation schedule](#) (see page 11)
 - [Deleting an evaluation schedule](#) (see page 18)


2.1 Adding recordings to Evaluator

NOTE: In order to add recordings to Evaluator, you **MUST** have the **Manage Evaluations** privilege assigned to you by a NICE Inform Administrator.

You can add recordings to NICE Inform Evaluator from NICE Inform Reconstruction and NICE Inform Organizer. The procedure from either application is identical. Recordings can be added to a new evaluation or to an existing evaluation.

Within NICE Inform Reconstruction or NICE Inform Organizer, a recording or partial selection of recordings can be selected (refer to *Selecting a recording in NICE Inform Reconstruction*) in preparation for the recordings to be added to an evaluation within NICE Inform Evaluator.

► To add selected recordings to NICE Inform Evaluator:

1. Click the **Transfer**  button and select the **Evaluate** option from the drop down menu.

NOTE: The **Transfer** button is located within NICE Inform Reconstruction and NICE Inform Organizer.

Motorola Dimetra encrypted recordings **CANNOT** be added to evaluations within NICE Inform Evaluator.

Any audio recordings added to NICE Inform Evaluator that have redacted audio are replayed but the redacted sections **CANNOT** be heard. Either silence or a tone is played which is a preference set within the **Playback Settings** page within the **Preferences** control (refer to Setting Reconstruction Content preferences). You **CANNOT** edit audio redactions within NICE Inform Evaluator.

2. The Evaluate Recordings Wizard within NICE Inform Evaluator automatically starts.
3. The Evaluate Recordings Wizard branches at this point depending whether you select:
 - **Create new evaluation** - recordings are added to a new evaluation (refer to [Adding recordings to a new evaluation](#) (see page 6)).
 - **Add results to existing evaluation** - recordings are added to an existing evaluation (refer to [Adding recordings to an existing evaluation](#) (see page 8)).

2.1.1 Adding recordings to a new evaluation

For help starting the **Evaluate Recordings Wizard**, refer to [Adding recordings to Evaluator](#) (see page 5).

NOTE: You can add recordings to a new evaluation from NICE Inform Reconstruction and NICE Inform Organizer. The procedure from either application is identical.

► To add recordings to a new evaluation:

1. At the **Welcome** screen, select **Create new evaluation** and click the **Next** button.
2. At the **Create New Evaluation** screen, enter the following details for the new evaluation using the text boxes provided:
 - A name for the evaluation (optional).
 - A description for the evaluation (optional).
3. Click the **Next** button and the **Select User (Optional)** screen is presented.
4. Select the user that you wish to evaluate.

NOTE: Only users that are set as an Operator are available for selection. To add a user as an operator, either set the user as an operator when adding a new user to the system or by editing user details both of which can be set within *NICE Inform User Administration*.

If you select no user, the evaluation will be an ad-hoc evaluation i.e. not related to a specific user.

5. Select the relevant **User group** folder from the tree view. All the users associated with that group are displayed within the **Select users** list to the right.
6. Select the required user from the list.

NOTE: If there are many users within a particular user group, use the **Quick Search** text box. Enter the first or last name (or part of the first or last name) of the required user and click the **Go** button. The search results are displayed in the window below the **Quick Search** text box.

7. Click the **Next** button.
8. At the **Select Form** screen, select the required form to evaluate with and click the **Next** button.

NOTE: Forms are created within *NICE Inform Template Designer* and **MUST** be set as an **Active** state.

9. At the **Summary** screen, the following information is presented:
 - **Evaluation name** - the name of the evaluation.
 - **Evaluation form** - the form used for the evaluation.
 - **Evaluated user** - the user that is being evaluated.
 - **Number of items to add** - the number of recordings that will be added to the evaluation.
 - **Estimated space required** - an estimation of space required for the evaluation.
 - **Space available** - the space available on the storage device.
10. If you require returning to Organizer or Reconstruction once the wizard has completed, check the **Return to Reconstruction/Organizer once the wizard finishes** box.
11. Click the **Add** button and a Wizard Progress dialog is presented providing a summary of the evaluation that is being added.
12. Do one of the following:
 - Check the **Close dialog when complete** box, which causes the dialog to close automatically shortly after the evaluation has been added, unless an error has occurred.
 - Once the evaluation has been added, click the **Close** button to close the dialog.
13. At the **Wizard Complete** screen, click the **Finish** button to exit the wizard.

2.1.2 Adding recordings to an existing evaluation

For help starting the **Evaluate Recordings Wizard**, refer to [Adding recordings to Evaluator](#) (see page 5).

NOTE: You can add recordings to an existing evaluation from NICE Inform Reconstruction and NICE Inform Organizer. The procedure from either application is identical.

► To add recordings to an existing evaluation:

1. At the **Welcome** screen, select **Add results to an existing evaluation** and click the **Next** button.
2. At the **Select an In-progress Evaluation** screen, search for the existing evaluation prior to adding recordings to it (refer to [Searching for an existing evaluation](#) (see page 19)).

NOTE: You can only search for evaluations with the state of **Created** or **In progress** that you have privileges to modify. Therefore, when searching, you will only see the options **Created** and **In Progress** in the **Evaluation status** drop down list.

3. Once located, select the evaluation from the list and click the **Next** button.
4. At the **Summary** screen, the following information is presented:
 - **Evaluation name** - the name of the evaluation.
 - **Evaluation form** - the form used for the evaluation.
 - **Evaluated user** - the user that is being evaluated.
 - **Number of items to add** - the number of recordings that will be added to the evaluation.
 - **Estimated space required** - an estimation of space required for the evaluation.
 - **Space available** - the space available on the storage device.
5. If you require returning to Organizer or Reconstruction once the wizard has completed, check the **Return to Reconstruction/Organizer once the wizard finishes** box.
6. Click the **Add** button and a Wizard Progress dialog is presented providing a summary of the evaluation that is being added.
7. Do one of the following:
 - Check the **Close dialog when complete** box, which causes the dialog to close automatically shortly after the evaluation has been added, unless an error has occurred.
 - Once the evaluation has been added, click the **Close** button to close the dialog.
8. At the **Wizard Complete** screen, click the **Finish** button to exit the wizard.

2.2 Evaluations list

The Evaluations list, as shown here displays all the evaluations that have been searched for (refer to [Searching for an existing evaluation](#) (see page 19)).

Figure 2-2: Evaluations list

i	Evaluation name ▲	Form	Operator	Assigned to	Created by	Evaluated by	Completed by
	Brian Gibbons eval...	Call Center	Gibbons, Brian	Davis, Fred	Davis, Fred	Davis, Fred	
	Dave Jones evalua...	new form	Jones, Dave	Davis, Fred	Davis, Fred		
	Dave Jones evalua...	Call Center	Jones, Dave	Gibbons, Brian	Gibbons, Brian		
	Fred Davis evaluati...	Call Center	Davis, Fred	Gibbons, Brian	Gibbons, Brian		

The following information is displayed within the Evaluations list:

NOTE: Each column can be sorted in descending or ascending order by clicking the column heading. You can also reorder the columns by dragging them to the required location.

Table 2-1: Evaluations list columns

Column	Description
Evaluation name	The name of the evaluation. NOTE: For evaluation schedules the name is the evaluation schedule name.
Form	The name of the form used in the evaluation.
Operator	The name of the Operator (user) that is being evaluated. If this is an Ad hoc evaluation, this field is displayed as (Ad hoc) as there is no Operator associated with the evaluation.
Assigned to	The user who created the evaluation or the user or user group who was assigned the evaluation in the evaluation schedule that created the evaluation. User groups are only supported when the evaluation is in the Created state. This user or user group is responsible for the completion of the evaluation but is not necessarily the user who performs the evaluation.
Created by	The user who created the evaluation or the user who created the schedule that created the evaluation. This field cannot be searched
Evaluated by	The user who moved the evaluation to the Review state. If the evaluation is still in the In progress, Autocomplete or Incomplete states this column is blank.
Completed by	The user who moved the evaluation to the Complete state. If the evaluation is still in the In progress, Autocomplete or the Incomplete states this column is blank. This field cannot be searched.
Creation date	The date and time the evaluation was created.
Status	The evaluation status (In Progress, In Progress (Reconsider) Awaiting Review, Complete, Completed Without Agreement, Incomplete or Autocomplete).
Earliest recording	The date and time of the earliest recording in the evaluation.
Items contained	The number of items (recordings) in the evaluation.

Column	Description
Score	The current percentage score for the evaluation is displayed above the Evaluation tab. This score updates after each question is answered. The percentage score cannot go lower than zero percent. If the calculation results in a negative score this is recorded and displayed as zero.
Actual score	The actual score. For example, if the Score is 10% the actual score is 1 (out of 10). This score unknown until the evaluation is saved.
Possible score	The possible score is the maximum potential score that is achievable (for example, 10).
Description	The description added to the evaluation when it was created.
Evaluation type	The type of evaluation, either Manual (created manually) or Automatic (created by the evaluation schedule). This field cannot be searched.
CAD metadata	up to 5 CAD metadata fields may be displayed (e.g. CAD incident number) if this is a CAD evaluation and if CAD metadata fields have been configured (refer to <i>Evaluator</i> within <i>NICE Inform System Administration</i>).

Once the required evaluation has been located in the Evaluations list it can be opened. To achieve this, do one of the following:


- Double-click anywhere within the associated row of the evaluation.
- Select the evaluation and open the [Evaluation panel](#) (see page 24).

The NICE Inform Evaluator application changes to display the details of the evaluation within the [Evaluation panel](#) (see page 24).

2.3 Getting your next evaluation

Use the get your next evaluation feature for a quick and easy way to get the next available to you.

► To get your next available evaluation:


1. Click the **Get next evaluation**  button within the [Evaluation panel](#) (see page 24). A search is automatically performed to find the oldest evaluation that is either assigned to you or to a user group that you are a member of.
2. A Search Progress dialog is presented. Do one of the following:
 - Check the **Close dialog when complete** box, which causes the dialog to close automatically shortly after the search process completes, unless an error has occurred.
 - Once the search process is complete, click the **Close** button to close the dialog.

Once located, the evaluation is opened within the [Evaluations panel](#) (see page 5) on the **Evaluation** page ready for you perform the evaluation (refer to [Performing an evaluation](#) (see page 27)). The evaluation is also automatically moved to the **In progress** state and is locked to you.

In the event that there is not an available evaluation for you, a message is displayed informing you that there are currently no evaluations in the Created state and assigned to you.

2.4 Configuring evaluation schedules

Evaluations can be scheduled for users. Once configured, the evaluations are automatically created for a user to perform the evaluation (refer to [Performing an evaluation](#) (see page 27)).

To configure evaluation schedules within the [Evaluation panel](#) (see page 24), click the **Configure evaluation schedules**  button and the **Configure schedules** control is presented.

Before creating an evaluation schedule, there are some important things to note:

- If the NICE Inform server is not running, evaluation schedules will **NOT** run during that period.
- Only the first 10,000 recordings are searched for when a scheduled evaluation is created.
- Evaluation schedule global settings such as what time in the day the schedule is run are configured on the Evaluator application *General page* within *NICE Inform System Administration*.




The Configure schedules control consists of:

- An evaluation schedules tree view.
- Editable details relating to the selected evaluation schedule within a series of tabbed pages (refer to [Editing an evaluation schedule](#) (see page 14)).
- A button bar to assist evaluation schedule configuration.

Button bar


There are a number of available buttons within the Configure schedules control.

Table 2-2: Configure schedules control button bar

Button	Description
	New schedule - starts the New Evaluation Schedule Wizard (refer to Creating an evaluation schedule (see page 11)).
	Delete schedule - deletes the selected evaluation schedule (refer to Deleting an evaluation schedule (see page 18)). The button remains inactive until you select an evaluation schedule.
	Refresh - refreshes all evaluation schedules.

2.4.1 Creating an evaluation schedule

► To create an evaluation schedule:

1. Within the Configure schedules control, click the **New**  button and select **New Schedule** from the drop down menu. The **New Evaluation Schedule Wizard** opens at the **Welcome** screen.
2. Enter a name for the schedule using the **Schedule name** text box provided.
3. Select one of the following:

- **Select calls for evaluation using Telephony data** - select this option if your scheduled evaluations are to contain calls and skip to step 5.

NOTE: The **Select calls for evaluation using Telephony data** option is automatically selected and grayed out if you are not licensed for CAD and therefore this is the only available evaluation data option.

- **Select calls for evaluation using CAD data** - select this option if your scheduled evaluations are to contain CAD incidents. Once selected the **CAD System to use for evaluations** option is enabled (step 4) whereby you must select the required CAD system for evaluations.

NOTE: The **Select calls for evaluation using CAD data** option is **ONLY** available if you are licensed for CAD, have a CAD data source added in NICE Inform System Administration and have the **Allow user to schedule CAD incidents for evaluation** privilege assigned to you by a NICE Inform Administrator.

4. Click the **CAD system to use for evaluations** down arrow and select the required CAD system from the list that the evaluation schedule will use for evaluations.

NOTE: The **CAD system to use for evaluations** option is **NOT** available if you have selected the **Select calls for evaluation using Telephony data** option.

5. **At the** Evaluation generation rate option, select one of the following:

- **All calls that meet criteria** - all calls have to meet the criteria settings that are specified on the **Call Section Criteria** page.
- **Desired number of evaluations to generate per operator** - number of evaluations to be generated per user in a period of time. Enter the value in the text box provided. Entry is assisted by using the up/down arrows. Click the drop down arrow and select either **Per day**, **Per week** or **Per month**.
- **Exclude screen recordings** - (relevant to CAD evaluations only) check the box and any screen recordings found as associated search results for a CAD incident are ignored when creating the evaluation. Checking this box, disables the **Prefer calls with matching screen recording** option.
- **Prefer calls with matching screen recording** - check the box and calls with matching screen recordings are preferred over calls with no matching screen recordings. This is only relevant if you are capturing screen recordings.

NOTE: Screen recording are created for NICE Recording/NICE Inform Recorder or NICE Perform data source resources only.

6. Click the **Next** button and either the **Call Selection Criteria** screen is presented or the **CAD Selection Criteria** depending on whether you selected the **Select calls for evaluation using Telephony data** or **Select calls for evaluation using CAD data** on step 3. Select one of the following:

- **All criteria** - All calls have to match all criteria that have been configured within this screen.
- **One or more criteria** - All calls have to match one or more criteria that have been configured within this screen.

NOTE: If you have selected the **All calls the meet criteria** option within the **Welcome** screen, you must add at least one criteria.

If you have selected the **Desired number of evaluations to generate per operator** within the **Welcome** screen, the **Call Selection Criteria** screen is optional.

7. To add a new criteria, do the following:
 - a. Click the **Add criteria** button. A new editable row is presented in the **Criteria** table.
 - b. Click the drop down arrow within the **Field** row and select field option from the list. The **Operator** and **Value** rows update accordingly so you can either enter free text or select further options.
 - Examples as to what criteria you could add (depending on the available field options):
For evaluations containing single calls example:
 - **Field** - Duration
 - **Operator** - Greater than
 - **Value** - 60 (seconds)
 - For evaluations containing CAD incidents example:
 - **Field** - IncidentType
 - **Operator** - Equals
 - **Value** - DISO
8. To delete a criteria, do the following:
 - a. Select the required criteria (or multiple criteria using Microsoft Windows standard Shift and Ctrl methods) from the **Criteria** table.
 - b. Click the **Delete** criteria button.
9. Once you have configured the required criteria, click the **Next** button and the **Select Form** screen is presented.
10. Expand the **Forms** tree and select the evaluation form that is required for this evaluation schedule.

NOTE: Forms are created within *NICE Inform Template Designer* and **MUST** be set as an **Active** state.

11. Click the **Next** button to continue and the **Select Evaluating User** screen is presented.
12. Expand the **User Groups** tree and either select the required user group or select the **All Users** node which displays all users and user groups. Users and user groups are displayed in the **Available users** list.
13. Select the user or user group who will be assigned the evaluation. This user or users within the user group will then see these evaluations by default when they launch NICE Inform Evaluator or search for evaluations (refer to [Searching for an existing evaluation](#) (see page 19)).

NOTE: Refer to [Adding and removing items](#) (see page 3) on how to add or remove selected users and user groups from the list.

This automatic searching is applied if the user has the **Manage evaluations** privilege assigned to them.

14. Click the **Next** button to continue and the **Select Operators** screen is presented.

NOTE: The Select Operator screen is not displayed if you have selected the **Select calls for evaluation using CAD data** and **All calls that meet criteria** options on the **Welcome** screen.

15. Expand the **User Groups** tree and select the required user group. All the users associated with that user group are displayed in the **Available users** list.

16. Select the required operators (users) to be evaluated.

NOTE: Refer to [Adding and removing items](#) (see page 3) on how to add or remove selected users from the list.

17. Click the **Next** button to continue and the **Summary** screen is presented. Check the details for the evaluation schedule are correct. Once satisfied, click the **Add** button. If any of the information within the Summary screen is incorrect, click the **Back** button to make any changes.

18. A Wizard Progress dialog is presented providing a summary of the evaluation schedule that is being created.

19. Do one of the following:

- Check the **Close dialog when complete** box, which causes the dialog to close automatically shortly after the creation process completes, unless an error has occurred.
- Once the creation process is complete, click the **Close** button to close the dialog.


20. At the **Wizard Complete** screen, click the **Finish** button to exit the wizard.

The evaluation schedule will attempt to generate evaluations based on whether you have selected a CAD record or telephony call.

2.4.2 Editing an evaluation schedule

Once an evaluation schedule has been created (refer to [Creating an evaluation schedule](#) (see page 11)) you can edit its details.

- To edit an evaluation schedule:

1. Within the [Evaluation panel](#) (see page 24), click the **Configure evaluation schedules**  button and the **Configure schedules** control is presented.
2. In the evaluation schedules tree view, select the required evaluation schedule to be edited.

3. The following tabbed pages are available in the right-hand pane to assist you in editing the evaluation schedule:
 - [General page](#) (see page 15)
 - [Call Selection Criteria page](#) (see page 16)
 - [CAD Selection Criteria page](#) (see page 17)
 - [Form page](#) (see page 17)
 - [Evaluator page](#) (see page 17)
 - [Operator page](#) (see page 18)
4. Once the evaluation schedule has been edited, click the **OK** button. You are presented with a confirmation message.
5. Click the **Yes** button.

NOTE: You are informed if any required information is missing when either clicking the **OK** button, navigating to another tabbed page or evaluation schedule. Ensure that you enter all the required information for your evaluation schedule.

2.4.2.1 General page

Edit one or more of the following options within the General page:

- **Schedule name** - the name for the evaluation schedule.
- **Select calls for evaluation using Telephony data** - select this option if your scheduled evaluations are to contain calls.

NOTE: The **Select calls for evaluation using Telephony data** option is automatically selected and grayed out if you are not licensed for CAD and therefore this is the only available evaluation data option.

- **Select calls for evaluation using CAD data** - select this option if your scheduled evaluations are to contain CAD incidents. Once selected the **CAD System to use for evaluations** option is enabled whereby you must select the required CAD system for evaluations.

NOTE: The **Select calls for evaluation using CAD data** option is **ONLY** available if you are licensed for CAD, have a CAD data source added in NICE Inform System Administration and have the **Allow user to schedule CAD incidents for evaluation** privilege assigned to you by a NICE Inform Administrator.

- **CAD system to use for evaluations** - click the down arrow and select the required CAD system from the list that the evaluation schedule will use for evaluations.

NOTE: The **CAD system to use for evaluations** option is **NOT** available if you have selected the **Select calls for evaluation using Telephony data** option.

- **Evaluation generation rate** - select one of the following:
 - **All calls that meet criteria** - all calls have to meet the criteria settings that are specified on the **Call Section Criteria** page.

- **Desired number of evaluations to generate per operator** - number of evaluations to be generated per user in a period of time. Enter the value in the text box provided. Entry is assisted by using the up/down arrows. Click the drop down arrow and select either **Per day**, **Per week** or **Per month**.
- **Exclude screen recordings** - (relevant to CAD evaluations only) check the box and any screen recordings found as associated search results for a CAD incident are ignored when creating the evaluation. Checking this box, disables the **Prefer calls with matching screen recording** option.
- **Prefer calls with matching screen recording** - check the box and calls with matching screen recordings are preferred over calls with no matching screen recordings. This is only relevant if you are capturing screen recordings.

NOTE: Screen recording are created for NICE Recording/NICE Inform Recorder or NICE Perform data source resources only.

2.4.2.2 Call Selection Criteria page

- ▶ To edit one or more of the following options within the Call Selection Criteria page:
 1. Select one of the following:
 - **All criteria** - All calls have to match all criteria that have been configured within this screen.
 - **One or more matching criteria** - All calls have to match one or more criteria that have been configured within this screen.
 2. To edit an existing criteria, do the following:
 - a. Select the required criteria from the Criteria table.
 - b. Edit the required content either using an available free text box or drop down list.
 3. To add a new criteria, do the following:
 - a. Click the **Add criteria** button. A new editable row is presented in the **Criteria** table.
 - b. Click the drop down arrow within the **Field** row and select field option from the list. The **Operator** and **Value** rows update accordingly so you can either enter free text or select further options.
 - Examples as to what criteria you could add (depending on the available field options):
 - **Field** - Duration
 - **Operator** - Greater than
 - **Value** - 60 (seconds)
 4. To delete a criteria, do the following:
 - a. Select the required criteria (or multiple criteria using Microsoft Windows standard Shift and Ctrl methods) from the **Criteria** table.
 - b. Click the **Delete** criteria button.

2.4.2.3 CAD Selection Criteria page (evaluation schedule)

- ▶ To edit one or more of the following options within the CAD Selection Criteria page:
 1. Select one of the following:
 - **All criteria** - all calls have to match all criteria that have been configured within this screen.
 - **One or more criteria** - all calls have to match one or more criteria that have been configured within this screen.
 2. To edit an existing criteria, do the following:
 - a. Select the required criteria from the Criteria table.
 - b. Edit the required content either using an available free text box or drop down list.
 3. To add a new criteria, do the following:
 - a. Click the **Add criteria** button. A new editable row is presented in the **Criteria** table.
 - b. Click the drop down arrow within the **Field** row and select field option from the list. The **Operator** and **Value** rows update accordingly so you can either enter free text or select further options.
 - Examples as to what criteria you could add (depending on the available field options):
 - **Field** - IncidentId
 - **Operator** - Equals
 - **Value** - Incident ID value
 4. To delete a criteria, do the following:
 - a. Select the required criteria (or multiple criteria using Microsoft Windows standard Shift and Ctrl methods) from the **Criteria** table.
 - b. Click the **Delete** criteria button.

2.4.2.4 Form page

Use the Form page to change the evaluation form used by the evaluation schedule.

To change the evaluation form, expand the **Forms** tree and select the required evaluation form.

NOTE: Forms are created within *NICE Inform Template Designer* and **MUST** be set as an **Active** state.

2.4.2.5 Evaluator page

Use the Evaluator page to change the user who is assigned to the evaluation.

- ▶ To change the user assigned to the evaluation:
 1. Expand the **User Groups** tree and either select the required user group or select the **All Users** node which displays all users and user groups. Users and user groups are displayed in the **Available users** list.
 2. Select the user or user group who will be assigned the evaluation. This user or users within the user group will then see these evaluations by default when they launch NICE Inform Evaluator or search for evaluations (refer to [Searching for an existing evaluation](#) (see page 19)).

NOTE: Refer to [Adding and removing items](#) (see page 3) on how to add or remove selected users and user groups from the list.

This automatic searching is applied if the user has the **Manage evaluations** privilege assigned to them.

2.4.2.6 Operator page


Use the Operator page to change the operators (users) that are to be evaluated.

NOTE: The Operator tab is not available for selection if you have selected the **Select calls for evaluation using CAD data** and **All calls that meet criteria** options on the **General** page.

- ▶ To change the operators to be evaluated:
 1. Expand the **User Groups** tree and select the required user group. All the users associated with that user group are displayed in the **Available users** list.
 2. Select the required operators to be evaluated.


NOTE: Refer to [Adding and removing items](#) (see page 3) on how to add or remove selected users from the list.

2.4.3 Deleting an evaluation schedule

- ▶ To delete an evaluation schedule:
 1. Within the Configure schedules control, select the evaluation schedule from the tree view.
 2. Click the **Delete schedule**  button. A message is presented confirming the deletion.
 3. Click the **Yes** button.

The evaluation schedule is now deleted from the evaluation schedules tree view.

2.5 Deleting an evaluation


- ▶ To delete an evaluation (or evaluations):
 1. Within the [Evaluation panel](#) (see page 24), select the required evaluation or evaluations (using Microsoft Windows standard Shift and Ctrl methods) from the [Evaluations list](#) (see page 9) and click the **Delete evaluation**  button. A message is presented confirming the deletion.
 2. Click the **Yes** button and a progress dialog is presented providing a summary of the evaluations that have been deleted.
 3. Do one of the following:
 - Check the **Close dialog when complete** box, which causes the dialog to close automatically shortly after the deletion process completes, unless an error has occurred.
 - Once the deletion process is complete, click the **Close** button to close the dialog.

2.6 Searching for an existing evaluation

There are a number of search criteria that can be used to locate an existing evaluation.

To perform a search, navigate to the **Search** panel within the **Evaluations** panel.

When searching for an existing evaluation there are some important and useful things to note:

- When the application is opened a search is automatically performed returning any evaluations that are assigned to you if you have the **Managed evaluations** privilege assigned to you. Evaluations with the **Awaiting review** state are returned when you do not have this privilege assigned to you.
- Search settings are saved for the next time you log back in to NICE Inform.
- To clear any search criteria, click the **Reset** button.
- Click the **Refresh search options**  button to refresh any of the search options such as the user lists in the drop down menus.

The Search panel (as shown here) is divided into the following sections:

Figure 2-3: Search panel

Search ^

↻

– **Creation Date**

☒ Any

☐ Last:

6 Minutes

☐ From:

31/03/2015

To:

31/03/2015

– **Criteria**

Name:

evaluation

Operator:

Davis, Fred

Evaluation status:

In Progress

Form:

Operator Call Handling

Assigned to:

(All)

Evaluated by:

(All)

Description:


Reset Search

- [Creation date](#) (see page 20)
- [Criteria](#) (see page 21)
- [Running the search](#) (see page 22)

Each section can be expanded using the button and collapsed using the button. Once customized, this state is remembered for the next time you use the Search panel.

2.6.1 Creation date

Select one of the following:

- **Any** - does not restrict the results to a particular time period.
- **Show last** - defines a range between now and a period in the past. Using the up/down arrows, set the number of units and then click the drop down arrow and select either Minutes, Hours, Days, Weeks, Months or Years.
- **From** - defines a time range between two specific dates and times. Time entry is assisted by using the up/down arrows and date entry is assisted by clicking the **Calendar**  button. A calendar control is presented to aid in choosing a particular date (refer to *Using the calendar control in NICE Inform Reconstruction*).


NOTE: When entering a **From** date, the **To** date automatically changes to the same date if the new **From** date is greater than the **To** date.

To perform a successful search, the **To** date **MUST** be greater than or equal to the **From** date.

2.6.2 Criteria


The following options are available within the Criteria section:

NOTE: A combination of one or more fields can be used to narrow down the search results.


- **Name** - an optional search field, enter all or part (using wildcards) of the evaluation name. This can be an alphanumeric value.
- **Operator** - the name of the Operator that is being evaluated. To select the required user, do one of the following:
 - Click the drop down arrow and select the required Operator (user) from the list. Selecting **All** returns all Operators.
 - Click the **Browse**  button and at the **Select Users** dialog, select the user group from the **User Groups** tree and then select the required user (or users) using standard selection methods. Click the **OK** button upon completion.

NOTE: This searching method is particularly useful if there are many users to search for or when you would rather search for a particular user that resides within a user group. Refer to [Adding and removing items](#) (see page 3) on how to add or remove selected users from the list.

- **Evaluation status** - click the drop down arrow and select the status for the evaluation (In Progress, Awaiting Review, Complete, Completed without agreement, Incomplete or Autocomplete). Selecting **All** returns all evaluation statuses.
- **Form** - click the drop down arrow and select the form that was used when the evaluation was created. Selecting **All** returns all forms.
- **Assigned to** - the user that has the evaluation assigned to them. To select the required user, do one of the following:

- Click the drop down arrow and select the required user from the list. Selecting **All** returns all users.
- Click the **Browse**  button and at the **Select Users** dialog, select the user group from the **User Groups** tree and then select the required user (or users) using standard selection methods. Click the **OK** button upon completion.

NOTE: This searching method is particularly useful if there are many users to search for or when you would rather search for a particular user that resides within a user group. Refer to [Adding and removing items](#) (see page 3) on how to add or remove selected users from the list.

- **Evaluated by** - the user that has performed the evaluation. To select the required user, do one of the following:
 - Click the drop down arrow and select the required user from the list. Selecting **All** returns all users.
 - Click the **Browse**  button and at the **Select Users** dialog, select the user group from the **User Groups** tree and then select the required user (or users) using standard selection methods. Click the **OK** button upon completion.

NOTE: This searching method is particularly useful if there are many users to search for or when you would rather search for a particular user that resides within a user group. Refer to [Adding and removing items](#) (see page 3) on how to add or remove selected users from the list.

- **Description** - enter all or part (using wildcards) of the evaluation description.

Performing wildcard searches

If not all of the information is known, then a wildcard search can be performed.

A '%' wildcard can be used to denote one or more characters. For example, if the evaluation name is called 'monday evaluation' by typing '**monday%**' all evaluation names beginning with '**monday**' are displayed including the evaluation name in question.

A '?' wildcard can be used to replace a single character that is unknown. For example if it is known that as part of the evaluation name consists of five characters which begins with a 'da' and ends with 'id' then by entering the search of '**da?id**' returns all possible results that resolve that missing character (e.g. david). It is possible to specify multiple '?' wildcards in a search. '**da?i?**' resolves the 2 missing characters (e.g. david).

When using multiple '?' wildcards, two consecutive '?' symbols look for the literal '?' symbol rather than as a wildcard. For example, entering '**1??5**' searches for the single result '**1?5**', and '**1???5**' searches for results like '**1?_5**' where '_' is resolved with any character.

Using a combination of '%' and '?' wildcards within the same search is also possible to aid in the search for a particular evaluation.

2.6.3 Running the search

► To run the search:

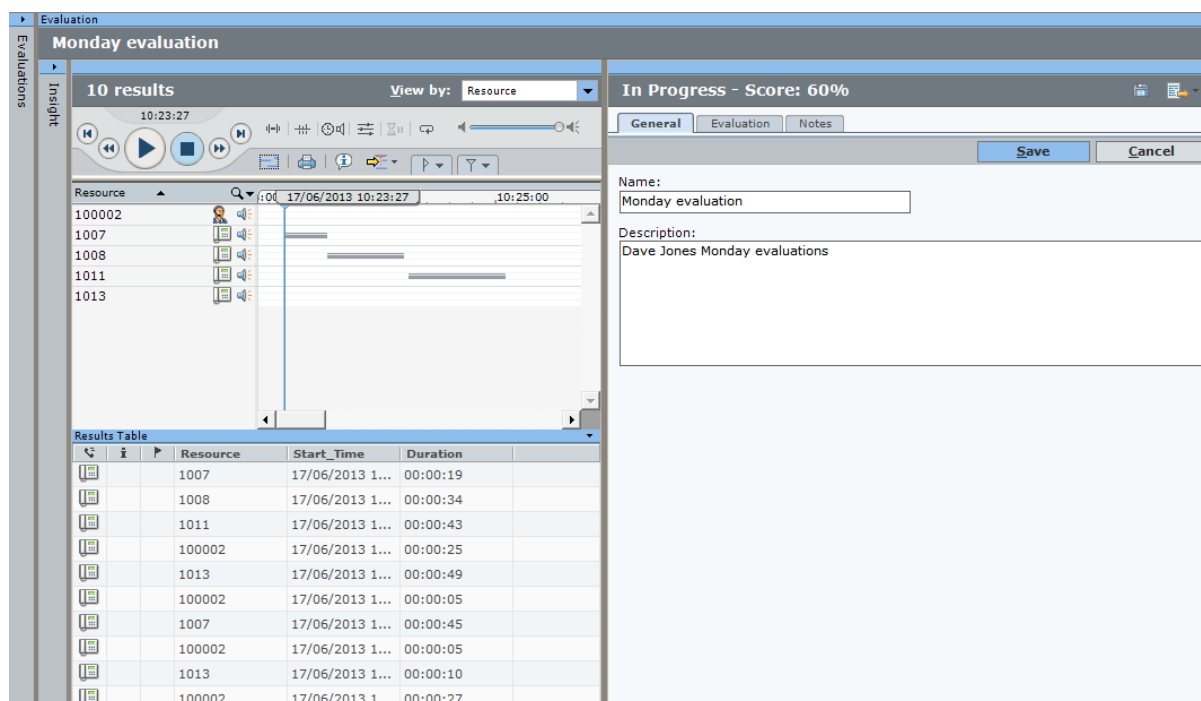
1. Click the **Search** button.
2. A progress dialog is presented providing a summary of the searched evaluations.
3. Do one of the following:
 - Check the **Close dialog when complete** box, which causes the dialog to close automatically shortly after the search process completes, unless an error has occurred.
 - Once the search process is complete, click the **Close** button to close the dialog.

All results are displayed in the [Evaluations list](#) (see page 9).

3 Evaluation panel

The Evaluation panel is where the details of the evaluation are displayed and where the evaluation is updated, as shown here.

Figure 3-1: Evaluation panel



Features and sections of the of the Evaluation panel include:

- [Playback Control panel](#) (see page 24)
- [Timeline display](#) (see page 25)
- [Results table](#) (see page 25)
- [Insight panel](#) (see page 25)
- [Viewing and configuring metadata](#) (see page 25)
- [Editing evaluation details](#) (see page 26)
- [Performing an evaluation](#) (see page 27)
- [Managing evaluation notes](#) (see page 30)
- [Progressing an evaluation](#) (see page 32)

3.1 Playback Control panel

Use the Playback Control panel within the Evaluation panel (refer to *Playback Control panel* in *NICE Inform Reconstruction*) to replay recordings selected from the Results table and Timeline display relating to the selected evaluation, as all the functionality is the same within NICE Inform Evaluator.

You can replay one or more recordings whilst you are [Performing an evaluation](#) (see page 27).

Any calls that have redacted audio are replayed but the redacted sections **CANNOT** be heard. Either silence or a tone is played instead which is a user preference set within the **Playback Settings** page within the **Preferences** control (refer to *Setting Reconstruction preferences* in *NICE Inform Reconstruction*). For help creating audio redactions within NICE Inform Reconstruction or NICE Inform Organizer, refer to *Redaction panel* in *NICE Inform Reconstruction*).

3.2 Timeline display

All recordings associated with the selected evaluation are displayed in the Timeline display. The Timeline display shows the recordings in a graphical form of horizontal strips (recording bars).

Refer to the information provided within *NICE Inform Reconstruction* regarding the Timeline display (refer to *Timeline display* in *NICE Inform Reconstruction*) as all the functionality is the same within NICE Inform Evaluator.

Feature unique to NICE Inform Evaluator

The following feature is unique to NICE Inform Evaluator:



- If media is deleted from the storage location, the Timeline display displays a message stating evaluation media has been deleted and why. If so, evaluation age based deletion has been set. To set this feature, refer to *Managing incident and evaluation storage for file sharing* in *NICE Inform System Administration*.

3.3 Results table

All recordings associated with the selected evaluation are displayed in the Results table. Refer to the information provided within *NICE Inform Reconstruction* regarding the Results table (refer to *Results table* in *NICE Inform Reconstruction*) as all the functionality is the same within NICE Inform Evaluator.

3.4 Insight panel

The Insight panel contains Insight windows displaying information during playback. The window displays information that is relevant to the resource and shows the associated data of any selected item from that resource currently beneath the cursor (at the current replay position).

The Insight panel can be maximized by clicking on the  button and minimized by clicking the  button.

Refer to *Insight panel* within *NICE Inform Reconstruction* as all the functionality within the Insight panel is the same within NICE Inform Evaluator.

3.5 Viewing and configuring metadata

If the currently opened evaluation is a CAD evaluation and/or there is shift metadata configured for the operator, a Metadata table is displayed at the top of the [Evaluation panel](#) (see page 24):

Figure 3-2: Metadata table

Metadata	
Metadata	Value
Time to enter	Enter text here
CAD incident number	Enter text here
CAD case number	Enter text here
Latitude	Enter text here
assigned units	Enter text here

Shift metadata


Use the Metadata table to select the appropriate shift that applies to the operator that is being evaluated.

NOTE: Shift metadata are added on the *General page* and are enabled on the *Metadata page* in the *Evaluator Applications* section within *NICE Inform System Administration*.

CAD metadata

Use the Metadata table to enter the appropriate CAD metadata values for this CAD evaluation in the text boxes provided and once completed, click the **Save** button.

NOTE: The CAD metadata fields are configured on the *Metadata page* within *NICE Inform System Administration*.

To minimize the Monitoring panel, click the  button.

To maximize the Monitoring panel, click the  button.

3.6 Editing evaluation details

► To edit the details for the selected evaluation:

1. Click the **General** tab and the **General** page is presented.
2. Edit one or more of the following and where applicable use the text boxes provided:

NOTE: Any fields can be edited by a user with evaluate access rights and the manage evaluations privilege while the evaluation is in the **Created** state.

- **Name** - the name of the evaluation.
- **Operator** - the name of the operator (user) being evaluated. If *Ad hoc* is displayed there is no operator associated with this evaluation. To change, click the drop down arrow and select a different operator from the list.

NOTE: The operator being evaluated as part of the evaluation, can be changed while the evaluation is in the **In progress** state by the **Assigned to** user.

- **Assigned to** - the user assigned to the evaluation. This user is responsible for the completion of the evaluation but is not necessarily the user who performs the evaluation. To change the assigned to user, click the drop down arrow and select a different user to be assigned to this evaluation.
- **Form** - the evaluation form used by the evaluation. When changing the form, you are presented with a confirmation message. Click the **Yes** button. Once the evaluation form has been changed, all existing answers and question/section notes are lost. The form can be changed while the evaluation is in the **In progress** state and has not had the **Revert evaluation to 'In Progress' (evaluator)/ Request to reconsider evaluation (Evaluatee)** state selected.

NOTE: For information about evaluation states refer to [Progressing an evaluation](#) (see page 32).

- **Description** - the description for the evaluation.
3. On completion, click the **Save** button.

3.7 Performing an evaluation

The following conditions apply in order to perform an evaluation:

- It is recommended that the evaluation be in the **In progress** state. However, you can start answering an evaluation that is in the **Created** state and as soon as it is saved, it is moved to the **In progress** state and locked to you.
- The user performing the evaluation **MUST** have the **Manage evaluations privilege** assigned to them (refer to Application privileges in *NICE Inform User Administration*).
- The user **MUST** either have created the evaluation or been granted Evaluate access rights by using the Access Privileges control (refer to [Setting access privileges](#) (see page 31)).

Click the **Evaluation** tab and the **Evaluation** page is presented. A form with questions is provided for you to answer relating to the operator (user) that is being evaluated. Once you have completed the evaluation, click the **Save** button.

The following information is useful to assist you when performing an evaluation:

- The available questions depend on the form that is being used. The form can be changed within the **General** page (refer to [Editing evaluation details](#) (see page 26)).
- The questions can be answered whilst one or more recordings are being replayed using the [Playback Control panel](#) (see page 24).
- The current percentage score for the evaluation is displayed above the Evaluation tab. This score updates after each question is answered. The percentage score cannot go lower than zero percent. If the calculation results in a negative score this is recorded and displayed as zero.
- You can go back at any time and update the evaluation until it is moved to the **Awaiting review** status (refer to [Progressing an evaluation](#) (see page 32)).

The following image is an example of an evaluation form. Refer to the table below this image for a key to each feature.



Figure 3-3: Evaluation form






The screenshot shows the 'Evaluation' tab of the NICE Inform interface. It contains several sections for evaluating call quality. Numbered callouts point to the following features:

- 1**: Points to the 'Show/hide description' icon (a document with a pencil) in the top left of the evaluation panel.
- 2**: Points to the 'New Note' icon (a notepad with a star) in the top left of the evaluation panel.
- 3**: Points to the text input field for a section note, containing the text 'The correct script was used but was slightly rushed'.
- 4**: Points to the text input field for an overall note, containing the text 'Overall this was done well'.
- 5**: Points to the question '2.1 Was the operator courteous?' and its radio button options (No, Yes).
- 6**: Points to the question '2.3 Did the operator listen and understand the issue?' and its radio button options (No, Yes, N/A).
- 7**: Points to the section header '3 Closing script' and the section header '4 Additional information'.

The form includes sections for '1 Answer script', '2 Call quality', and '4 Additional information'. Each section contains specific questions and a 'Section note' field for additional comments.

Table 3-1: Evaluation form features

Feature number	Description
1	<p>Show/hide description</p> <p>Any descriptions that have been added for sections and question when they were added to the evaluation form within NICE Inform Template Designer can be toggled on/off within the evaluation. These descriptions are displayed in line with the associated question and section in the evaluation form.</p> <p>To toggle all available descriptions on/off, click the Show/hide description  button or use the short cut keys of Ctrl + D.</p>
2	<p>New note</p> <p>Click the New Note  button to add a question note. Refer to 3 for more information.</p>

Feature number	Description
3	<p>Question notes</p> <p>To add a question note, select the required question and click the New note  button. A new text box is provided underneath the question for you to enter the required text for the note.</p> <hr/> <p>NOTE: Use the short cut keys of Ctrl + N to also display the question note text box.</p> <hr/> <p>The question note text box is hidden unless you have either clicked the New note  button or have previously entered a note which has been saved.</p> <hr/> <p>NOTE: The New note  button is only available if the user is an evaluator, the evaluation is in the In progress state and the question has been selected.</p> <p>For evaluatees, any notes created are visible but are read-only.</p>
4	<p>Section</p> <p>The section header.</p>
5	<p>Questions</p> <p>Select the answers for the questions using either:</p> <ul style="list-style-type: none"> Radio buttons Drop down arrows and select the answers from the associated lists Slider bar <hr/> <p>NOTE: Questions may have conditional responses whereby the form may automatically skip to the next section or to the end of the form. Questions that are skipped are grayed out.</p>
6	<p>Section notes</p> <p>To add a section note, locate the Section note text box at the end of the section and enter the required text for the note.</p> <p>For evaluatees, any notes created are visible but are read-only.</p> <hr/> <p>NOTE: Section and question notes are duplicated on the Notes page (refer to Managing evaluation notes (see page 30)). They can be edited and deleted using the same buttons as a general evaluation note but only while the evaluation is in the In progress state and by the user who created the note or who has been granted access evaluate access rights for the evaluation (refer to Setting access privileges (see page 31)).</p> <p>For evaluatees any notes created are visible but are read-only.</p>
7	<p>Expand and collapse sections and questions</p> <p>To expand a section or a question, click the  button and to collapse a section or a question, click the  button.</p>

3.8 Managing evaluation notes

Within the **Notes** page, each row in the list corresponds to a separate note created for the selected evaluation (general note) or for an evaluation section or question.

Although it is not mandatory to create a note, it may be beneficial to provide a brief overview as to the contents of the evaluation (or section/question) for other users who have access to it. The Notes section also is used to display notes that are created when either the evaluatee has requested to reconsider an evaluation and moved the evaluation back to the In progress state or an evaluator who has reverted the evaluation back to the In progress state (refer to [Progressing an evaluation](#) (see page 32)).

The Notes page is useful for users (operators) that are reviewing an evaluation that has been performed on them and have any feedback or questions.

Notes can be added for section and questions within the evaluation itself (refer to [Performing an evaluation](#) (see page 27)). These are displayed in the Notes list in the same order that they are displayed in the evaluation form.

General notes created are displayed in the order they were created in.

The information displayed within the **Notes** list includes:

- **Creation date** - the date and time the note was created.
- **Section.Question** - the section or question in the evaluation where the note was created. If the note has been added to a question, both the question number and the section number that the question relates to is displayed. For section notes, the question number is displayed as a dash (-).

NOTE: This field is blank if it is a general evaluation note or it is one that has been created due to a request to move the note back to the In progress state.


- **Created by** - the user who created the note.
- **Note** - the first few words of the note itself.

Creating a note

It is possible to create a note which corresponds to the selected evaluation.

NOTE: Only the user performing the evaluation and the user being evaluated can create a note for the selected evaluation.

► To create a note:

1. Click the **Notes** tab.
2. Click the **New note**  button and the **New Note** dialog is presented.

TIP: Use the short cut keys of Ctrl + N to also display the New Note dialog.

3. Enter a note in the text box and click the **OK** button.


The note is now displayed within the **Notes** list.

NOTE: After the word *Notes* in the Notes tab, a figure in brackets is displayed indicating the number of notes for this evaluation.

Editing a note

NOTE: Only the user who created the note can edit it.


► To edit a note:

1. Click the **Notes** tab:
2. Select the required note in the **Notes** list and double click or click the **Edit note**  button and the **Edit Evaluation Note** dialog is presented.
3. Edit the evaluation note in the text box provided.
4. On completion, click the **OK** button.

Deleting a note

NOTE: Only the user who created the note can delete it.

► To delete a note:


1. Click the **Notes** tab.
2. Select the required note in the **Notes** list and then click the **Delete note**  button. A confirmation message is presented confirming the deletion.
3. Click the **Yes** button.

The note is now deleted.

3.9 Setting access privileges

Any evaluation created is associated with the user who created it who has full control access rights. Whilst creating the evaluation, further users can be granted customizable access. The Access Privileges control provides this functionality.

► To set access privileges for the selected evaluation:

1. Within the Evaluation panel, click the **Access privileges**  button and the **Access Privileges** control is presented.
2. Select the relevant **User group** folder from the tree view. All the users and sub user groups associated with that group are displayed within the **Available users** list to the right.

NOTE: Selecting a user group is useful if you require all users in the group to have the same access privileges for the evaluation as you only need to set the access rights once.

3. Select the required user or user group from the list.
4. Move the required users or user group to the **Selected users** list.

NOTE: If there are many users within a particular user group, use the **Quick Search** text box. Enter the first or last name (or part of the first or last name) of the required user and click the **Go** button. The search results are displayed in the window below the **Quick Search** text box.

Refer to [Adding and removing items](#) (see page 3) on how to add or remove selected users or user groups from the list.

- a. Within the **Access rights** section, select each user from the **Selected users** list and choose one of the following:
 - **View** - provides read-only access for the evaluation.
 - **Evaluate** - provides full access to the evaluation except providing the ability to complete the evaluation (unless it is an ad-hoc evaluation and/or you have the **Complete any evaluation** privilege assigned to you). For help, completing an evaluation, refer to [Progressing an evaluation](#) (see page 32).

3.10 Progressing an evaluation

An evaluation has many states during its progression:


- **Created** - the evaluation has been created and is ready for answering (refer to [Performing an evaluation](#) (see page 27)). Any user who has rights to this evaluation can update the notes (refer to [Managing evaluation notes](#) (see page 30)) or edit the details for the evaluation (refer to [Editing evaluation details](#) (see page 26)) and its state will remain in the **Created** state.
- **In progress** - evaluation is currently in progress. Once a question has been answered and the evaluation saved, the evaluation is automatically assigned to the current user and change the state to **In progress**. The **In Progress** state changes slightly due to the following condition:
 - In Progress is appended with the text (*Reconsider*) if the evaluatee has moved the evaluation back to the **In progress** state.
- **Awaiting review** - the user that is being evaluated can now review the evaluation.
- **Complete** - the evaluation has been completed. The **Complete** state changes slightly due to the following condition:
 - Complete is appended with the text (*Media missing*) if any media transfers failed and the evaluation has been kept.
- **Completed Without Agreement** - if an evaluation is set to **Complete** by a user other than the evaluated operator. The user **MUST** have provided **Evaluate** access rights for the evaluation and also have the **Allow user to complete evaluations** privilege assigned to them.
- **Incomplete** - when an evaluation that is in the **In Progress** state, has its media deleted by evaluation age based deletion.
- **Autocomplete** - when an evaluation that is in the **Awaiting Review** state, has its media deleted by evaluation age based deletion.


NOTE: To configure evaluation age based deletion, refer to *Managing incident and evaluation storage for file sharing* in *NICE Inform System Administration*.

Once the evaluation has been added with recordings (refer to [Adding recordings to Evaluator](#) (see page 5)), it enters the **Created** state. As soon as you start answering questions when

[Performing an evaluation](#) (see page 27), the state changes to the **In progress** state and this evaluation is locked to you. Once locked to you, you can no longer assign the Evaluation to another user/user group. Once finished, the evaluation needs progressing further.


► To progress the evaluation further:

1. Within the Evaluation panel, click the **Progress the evaluation**  button.
2. Select **Move evaluation to review** which is the only option available for selection from the list and you are presented with a confirmation message.

NOTE: Unless there are conditional questions, all questions need answering before you can move the evaluation to the **Awaiting review** state. If there are questions that require answering, a message is displayed informing you of this and an  icon is displayed alongside each unanswered question on the evaluation form. You must answer these questions before continuing.


3. Click the **Yes** button and the evaluation is moved to the **Awaiting review** state.

NOTE: Once in the **Awaiting review** state the user being evaluated can review the evaluation and use the Notes page to provide any feedback on their evaluation (refer to [Managing evaluation notes](#) (see page 30)).

4. Once reviewed the final evaluation state is the **Complete** state. To move the evaluation to this state, click the **Progress the evaluation**  button and select the **Complete evaluation** option which is the only option available for selection from the list and you are presented with a confirmation message.
5. Click the **Yes** button and the evaluation is moved to the **Complete** state.

NOTE: The user who is being evaluated or any user that has been provided **Evaluate** access rights for the evaluation and also has the **Allow user to complete evaluations** privilege assigned to them can complete the evaluation. If any user other than the user who is being evaluated completes the evaluation, the state is **Completed without agreement**.

[Additional evaluation progressing states](#)

There are a number of additional options when clicking the **Progress the evaluation**  button. These are:

- **Move evaluation to 'In progress'** - the evaluation that is in the **Created** state is moved to the **In progress** state as long as you have been provided **Evaluate** access rights for the evaluation (refer to [Setting access privileges](#) (see page 31)). You now become the assigned to user and only you can perform the evaluation (refer to [Performing an evaluation](#) (see page 27)).
- **Revert evaluation to 'Created'** - the evaluation is reverted back to the **Created** state and any answers or comments are removed. You must have **Evaluate** access rights for the evaluation (refer to [Setting access privileges](#) (see page 31)) and the **Move 'In Progress evaluations back to 'Created'** privilege assigned to you by a NICE Inform Administrator. For help reverting an evaluation to the **Created** state, [click here](#).

► To revert an evaluation back to the Created state:

1. At the confirmation message, click the **Yes** button to continue.
2. If this evaluation has one or more answers made and/or notes added, a message is presented asking if you want to keep them. Click **Yes** to keep them and **No** to discard them.
3. A final dialog message is presented for you to select the user or user group to assign the evaluation to. Click the down arrow and select the required user or user group from the list and click the **OK** button.

The evaluation is now reverted back to the **Created** state.


- **Revert evaluation to 'In Progress'/Request to reconsider evaluation** - an evaluation can be moved from **Awaiting review** state to **In progress** state by an evaluator (as long as they have been provided **Evaluate** access rights for the evaluation (refer to [Setting access privileges](#)) (see page 31)) when selecting **Revert evaluation to In Progress** or by an evaluatee when selecting **Request to reconsider evaluation**. A **Move to In Progress** dialog is presented where you must enter a note as to why the evaluation is to be moved back to the In progress state. Click the **OK** button and the evaluation is moved back to the In progress state. Clicking the **Cancel** button, closes the dialog and cancels the request.

NOTE: The note is added to the **Notes** tab for the evaluation (refer to [Managing evaluation notes](#) (see page 30)).

3.11 Saving an evaluation

At any stage after an evaluation has been started, its details can be saved as a PDF file.

► To save an evaluation:

1. Within the Evaluation panel, click the **Save evaluation**  button and the **Save Evaluation** dialog is presented.
2. Enter a filename for the evaluation in the **Filename** text box.

NOTE: By default, the name of the evaluation is pre-populated in the Filename text box.

3. Do one of the following:
 - Click the **Browse** button, select a location to save the evaluation file and click the **Save** button.
 - Leave the default location: *Documents\NICE Inform\My Evaluations*
4. Click the **OK** button.
5. A Progress dialog is presented providing a summary of the evaluation that is being saved.
6. Do one of the following:

- Check the **Close dialog when complete** box, which causes the dialog to close automatically shortly after the save process completes, unless an error has occurred.
- Once the save process is complete, click the **Close** button to close the dialog.



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