

Evaluators

Section	Description
Module Context	Part of Quality Management in Genesys Cloud Workforce Engagement Management (WEM).
Purpose	The Evaluators dashboard allows quality evaluators to view assigned evaluations, review interaction recordings, and score interactions using Evaluation Forms to measure agent performance, compliance, and service quality.
Navigation	Performance → Overview → Quality Evaluator
Alt Navigation	Menu → Conversation Intelligence → Quality Management → Evaluators
Required Permission	Quality > Evaluation > Edit Score (included in the default Quality Evaluator role)

“ **Important:** The Evaluators page is a **performance dashboard** accessed through the Performance area — not an Admin configuration page. Evaluator role assignment and permissions are managed separately under [Admin](#) → [People & Permissions](#) → [Roles/Permissions](#) .

Study Notes

Topic	Explanation
Evaluators	Users assigned the Quality Evaluator role who review interactions and score them using evaluation forms.
Evaluations	Formal scoring of interactions based on evaluation forms.
Calibration	Multiple evaluators review the same interaction to ensure scoring consistency. An expert evaluator sets the benchmark.
Evaluation Assignment	Evaluations can be assigned manually or automatically through Quality Policies .
Evaluator Dashboard	Displays pending and completed evaluation activity for the logged-in evaluator.

Evaluators help organizations maintain **consistent service standards, compliance monitoring, and coaching programs.**

Navigation

Task	Navigation
Open Evaluator Dashboard	Performance → Overview → Quality Evaluator
Alt Navigation	Menu → Conversation Intelligence → Quality Management → Evaluators
Assign evaluator roles	Admin → People & Permissions → Roles/Permissions → Quality Evaluator role
Automate evaluation assignment	Admin → Quality → Policies
View interactions and recordings	Performance → Workspace → Interactions
Run calibrations	Performance → Quality → Calibration

Evaluator Dashboard — Components

The Quality Evaluator dashboard has three main sections:

Section	Description
Interactions Needing Attention	Table of interactions with evaluations assigned to the logged-in evaluator that have not yet been completed. Click the link in the Assigned Date/Time column to open a specific evaluation.
Agent Activity	Search by agent name or agent set. Shows how many evaluations were completed and the average score awarded to each agent during the configured date range.
Completed Interactions	Lists interactions the evaluator scored during the configured date range.

“ To narrow results in Agent Activity, enter an agent name in the filter box.

Evaluator Role — Permissions

Permission	Description
Quality > Evaluation > Edit Score	Required to access the Evaluator dashboard and submit evaluation scores. Included in the default Quality Evaluator role.

Default role permissions summary:

Role	Default Capabilities
Quality Administrator	Create/manage evaluation forms, quality policies, calibrations, recordings, annotations, and encryption keys
Quality Evaluator	Edit evaluations and annotations; view chats, recordings, and encryption keys

“ Roles can be customized. For example, the Quality Administrator's recording access can be restricted to specific queues by adding conditions in the role configuration.

Configuration Fields (UI — Evaluator Dashboard)

Evaluator Dashboard

UI Field	Description
Interactions Needing Attention	Table showing pending evaluations assigned to the logged-in evaluator

UI Field	Description
Assigned Date/Time	Clickable link to open the specific evaluation
Agent Activity table	Search and view evaluation metrics by agent name
Evaluations Completed (Agent Activity)	Count of evaluations completed for each agent
Average Score (Agent Activity)	Average score awarded during the date range
Completed Interactions table	List of interactions evaluated within the configured date range
Filter box	Enter agent name to reduce results in Agent Activity
Date range selector	Controls the time window for Agent Activity and Completed Interactions

Dependencies

Component	Purpose
Interaction Recording	Provides interactions for evaluation
Evaluation Forms	Defines scoring criteria used by evaluators
Quality Policies	Automates evaluation assignment to evaluators
Agent Profiles / User Accounts	Determines which agents appear in evaluation results

Platform Integration / Related Components

Component	Relationship
Evaluation Forms	Used by evaluators to score interactions
Quality Policies	Automatically assign evaluations to evaluators
Recording Management	Provides recorded interactions for review
Speech & Text Analytics	Helps identify interactions suitable for evaluation
Performance Management	Uses evaluation results for coaching and development

Related Topics / Further Reading

Topic	Purpose
Evaluation Forms	Create scoring criteria
Quality Policies	Automate evaluation assignments
Recording Management	Manage interaction recordings
Speech Analytics	Identify interactions for evaluation
Calibration	Ensure consistent scoring across evaluators

Implementation Checklist

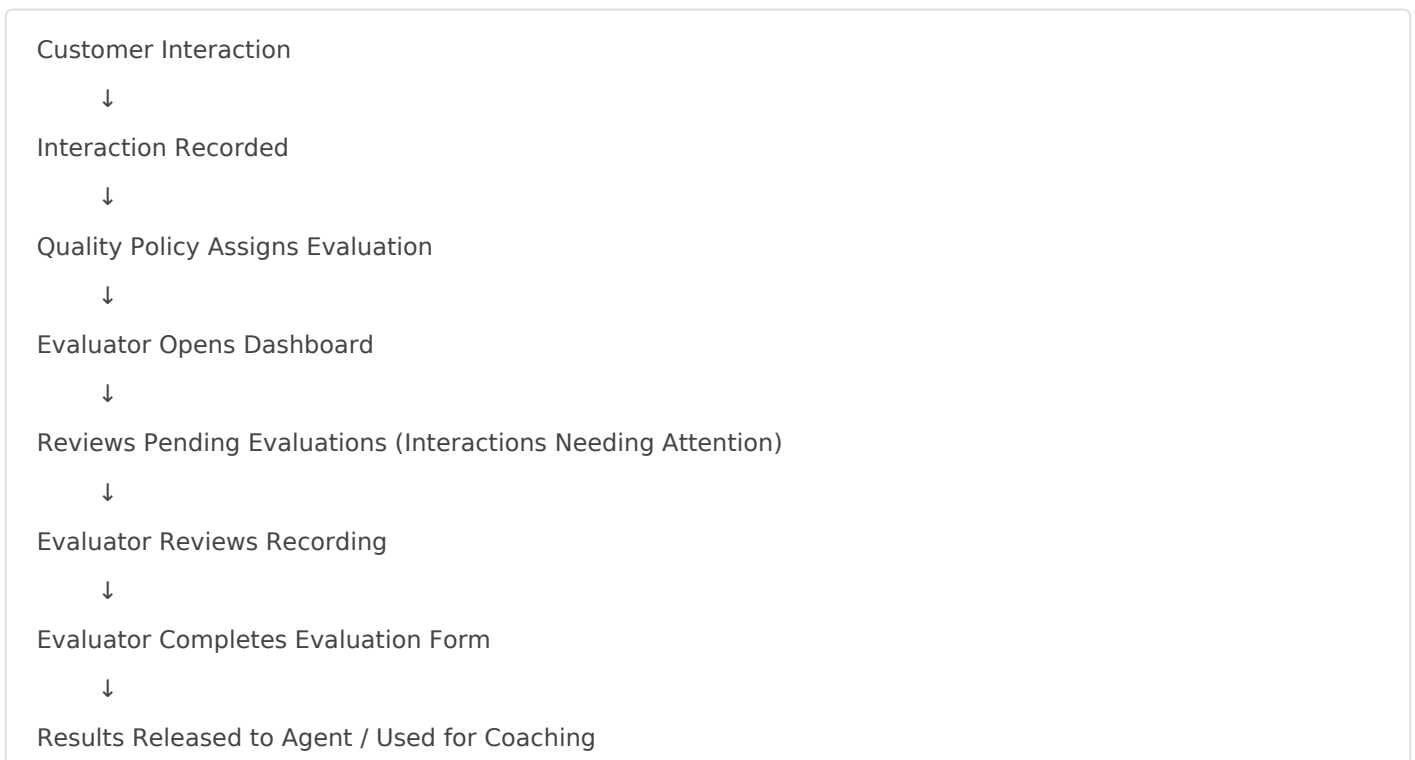
Step	Status
Assign Quality Evaluator role to users	<input type="checkbox"/>
Create evaluation forms	<input type="checkbox"/>
Enable interaction recording	<input type="checkbox"/>
Configure evaluation policies	<input type="checkbox"/>
Assign evaluations (manually or via policy)	<input type="checkbox"/>
Train evaluators on scoring standards	<input type="checkbox"/>
Run calibration sessions	<input type="checkbox"/>

Implementation Guide

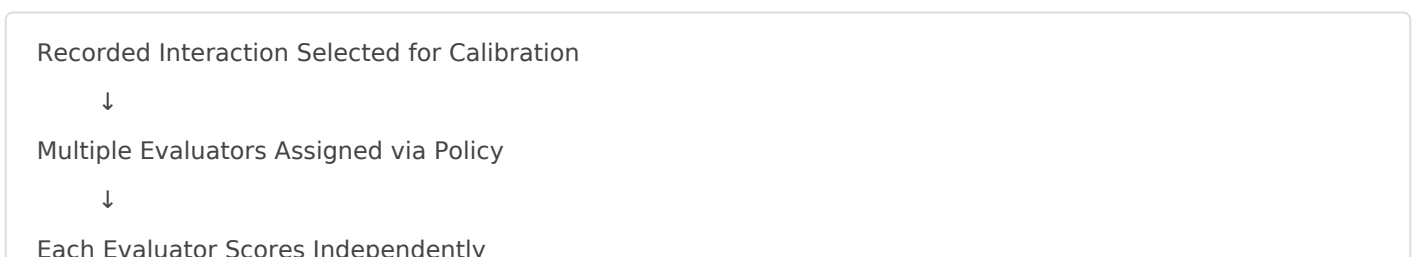
Step	Action
Step 1	Navigate to Admin → People & Permissions → Roles/Permissions
Step 2	Assign Quality Evaluator role to intended users
Step 3	Create evaluation forms (Admin → Quality → Evaluation Forms)

Step	Action
Step 4	Enable interaction recording
Step 5	Configure quality policies to assign evaluations automatically
Step 6	Train evaluators on scoring standards and calibration process
Step 7	Conduct calibration sessions periodically to maintain consistency

Workflow



Calibration Workflow



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Expert Evaluator Sets Benchmark

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Calibration Session Conducted

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Scoring Variations Compared and Discussed

Usage Scenarios

Scenario	Description
Quality Assurance	Monitor and score agent performance
Compliance Monitoring	Verify adherence to regulatory or script requirements
Coaching Programs	Identify knowledge gaps and improvement areas
Performance Tracking	Evaluate agent service quality over time
Calibration Sessions	Ensure consistent scoring standards across evaluators

Best Practices

Practice	Reason
Conduct calibration sessions regularly	Ensures scoring consistency across evaluators
Train evaluators on form intent	Improves accuracy and reduces subjective scoring
Monitor evaluator activity	Ensures evaluations are being completed on time
Use the Agent Activity view	Provides quick aggregate view of how agents are performing
Limit evaluator workload with quotas	Prevents evaluation fatigue and missed assignments

Naming Convention

Resource	Example
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Evaluator Role	Quality_Evaluator
Evaluation Form	Support_Call_Evaluation
Calibration Program	Monthly_Calibration

Security Considerations

Control	Description
Role Permissions	Only users with the Quality Evaluator role can access the dashboard and submit scores
Recording Access	Evaluators can view recordings of interactions they are assigned to evaluate
Evaluation Visibility	Results can be restricted; agents see evaluations only when released
Conditions on Roles	Quality Administrators can be restricted to recordings from specific queues

Limitations / Constraints

Constraint	Description
Dashboard access	Requires <code>Quality > Evaluation > Edit Score</code> permission
Recording availability	Interaction must have been recorded for an evaluation to be created
Calibration requirement	Requires two or more evaluators plus an expert evaluator
Arabic dialect limitation	Dates/times do not currently display in standard Arabic format — to be resolved in a future update

Troubleshooting

Issue	Cause	Resolution
Evaluator cannot access the dashboard	Missing <code>Quality > Evaluation > Edit Score</code> permission	Assign the Quality Evaluator role or add the permission directly

Issue	Cause	Resolution
Evaluations not appearing in Interactions Needing Attention	Policy not assigning evaluations	Verify policy criteria and ensure policy is enabled
No recordings visible	Recording not enabled or evaluator lacks recording access	Check recording settings and role permissions
Calibration scores inconsistent	Evaluators interpreting form differently	Conduct calibration training and review evaluation form help text

Interview Cheat Sheet

Question	Answer
Where is the Evaluator dashboard accessed?	Performance → Overview → Quality Evaluator or Menu → Conversation Intelligence → Quality Management → Evaluators
What permission is required?	Quality > Evaluation > Edit Score (included in the Quality Evaluator role)
What are the three sections of the dashboard?	Interactions Needing Attention / Agent Activity / Completed Interactions
What is calibration?	Process where multiple evaluators score the same interaction to ensure consistent scoring; an expert evaluator sets the benchmark
How are evaluations assigned?	Manually or automatically through quality policies

Key Takeaways

Topic	Summary
Evaluators	Users with the Quality Evaluator role who review and score recorded interactions
Dashboard Location	Performance → Overview → Quality Evaluator (NOT under Admin)
Required Permission	Quality > Evaluation > Edit Score
Dashboard Sections	Interactions Needing Attention / Agent Activity / Completed Interactions
Calibration	Ensures scoring consistency; requires expert evaluator as benchmark
Evaluation Assignment	Via quality policies (automatic) or manually

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