

Policies

Section	Description
Module Context	Part of Quality Management within Genesys Cloud Workforce Engagement Management (WEM).
Purpose	Policies automate recording retention, evaluation assignment, survey delivery, calibration, and screen recording based on interaction criteria.
Admin Location	Admin → Quality → Policies
Alt Navigation	Menu → Conversation Intelligence → Recording and Policies → Policies
Core Objective	Ensure consistent quality monitoring, compliance retention, and automated quality workflows .

Policies are rules that match specific interaction criteria and automatically perform actions such as **retaining recordings, assigning evaluations, creating calibration evaluations, and sending surveys**.

“ **Important behavior:** Policies only apply to interactions occurring **after** the policy is enabled — they do not apply retroactively. Interaction recordings that do not match any policy are **retained indefinitely** (or until the maximum interaction data retention time is reached, if configured).

Study Notes

Topic	Explanation
Quality Policies	Automation rules used to manage recordings, evaluations, calibrations, and surveys.
Matching Criteria	Defines which interactions the policy applies to.
Recording Retention	Determines how long recordings are stored.
Evaluation Assignment	Automatically assigns interactions for evaluation (3 methods — see below).
Calibration Evaluations	Allows multiple evaluators to review the same interaction.

Topic	Explanation
Survey Triggering	Sends surveys to customers after interactions.
Screen Recording	Enables recording of the agent desktop during ACD interactions only.
Overlapping Policies	When policies overlap, Genesys Cloud applies the longest retention period unless explicitly overridden.

Navigation

Task	Navigation
View policies	Admin → Quality → Policies
Alt navigation	Menu → Conversation Intelligence → Recording and Policies → Policies
Create policy	Admin → Quality → Policies → Create New Policy
Edit policy	Admin → Quality → Policies → Select Policy
Delete policy	Admin → Quality → Policies → Delete
Filter policies	Select Enabled or Disabled state, or enter policy name → click Apply

Configuration Fields (UI Form Fields)

Policy Creation

Field	Description	Options
Create New Policy	Creates a new quality policy	Button
Policy Name	Unique name for the policy	Text
Description	Explanation of policy purpose. Tip: describe its function (e.g., "evaluate inbound support calls")	Text

Field	Description	Options
Media Type Tabs	Enable/disable policy per interaction type	Toggle per tab

Media Types

Media Type	Description
Call	Voice interactions
Chat	Web chat interactions
Email	Email interactions
Message	Digital messaging interactions

Each media type is configured **separately** — matching criteria and actions are defined per media type tab.

Matching Criteria

Field	Description	Options / Notes
Conversation Direction	Interaction direction	Inbound / Outbound
Specific Users	Apply policy to specific agents	Dropdown (up to recommended limit)
Specific Work Teams	Apply policy to teams	Dropdown
Specific Queues	Apply policy to specific queues	Dropdown — Genesys recommends no more than 250 queues per policy
Specific Wrap-Up Codes	Apply policy based on wrap-up results	Dropdown
Date Range	Apply policy during specific dates	Calendar
Time Sets	Apply policy during specific time windows	Dropdown
Conversation Duration	Match interactions based on duration	Numeric — includes queue time and after-call work
Customer Participation	Match email/message interactions based on whether customer participated	Participated / Did not participate



Note: Policies are **not automatically modified** when an agent, queue, or wrap-up code is deleted. These should be reviewed manually after deletions.

Recording Retention (Required)

Field	Description	Options
Retain Recordings	Retain recordings for evaluation/calibration/surveys	Toggle — required if evaluations or surveys are used
Do Not Save Recordings	Interactions are not retained for long-term storage	Toggle
Delete Even if Another Policy Retains	Override overlap behavior to force delete	Toggle — only shown when "Do not save" is selected
Archive Recording After	Time before recording moves to long-term storage	Days / Months
Delete Recordings After	Days before recording is permanently deleted	Numeric
Export Copy of Recordings (AWS S3)	Export recordings automatically to an AWS S3 bucket	Toggle

“ **Overlap behavior:** When two policies match the same interaction, Genesys Cloud applies the policy that retains the recording **longest**, as long as a delete date is explicitly defined on both. To override this and force deletion, use "Delete even if another policy retains."

Screen Recording

Field	Description	Options
Initiate Screen Recording	Record agent desktop during interaction	Toggle
Record After Call Work	Include ACW in screen recording	Toggle
Screen Recording Retention	Maximum retention	Up to 365 days

Note: Screen recording only applies to **ACD interactions**. Policies that initiate screen recording only perform screen recording actions — they do not also apply to non-initiating policies.

Evaluation Automation — Three Methods

Method 1: Create Evaluations by Evaluators

Field	Description	Options
Assign Evaluations by Evaluators	Creates a set number of evaluations per time period per evaluator	Toggle
Evaluation Form	Form to use	Dropdown
Evaluators	Users assigned to evaluate	Dropdown
Number of Evaluations	Per evaluator per time interval	Numeric
Time Interval	When evaluations are assigned	Daily / Weekly / Monthly

“ Agent selected: **first agent connected** to the interaction.

Method 2: Create Evaluations by Agents

Field	Description	Options
Assign Evaluations by Agents	Creates evaluations per agent listed in matching criteria	Toggle
Evaluation Form	Form to use	Dropdown
Evaluators	Evaluations distributed evenly among these users	Dropdown
Evaluations per Agent per Period	Quota per agent	Numeric

Field	Description	Options
Agent Connected Duration	Duration from agent joining to disconnect (excludes ACW and dialing, includes hold)	Numeric
Time Zone	Determines when evaluation period resets	Dropdown

“ Agent selected: **last agent** that participated in the interaction meeting the criteria. Monitors and coaches are excluded. **Requires users, teams, or queues in matching criteria.**

Method 3: Create Evaluations by Interaction

Field	Description	Options
Assign Evaluations by Interaction	Creates an evaluation for every matching interaction	Toggle
Evaluation Form	Form to use	Dropdown
Evaluators	If multiple specified, each gets the same set of interactions	Dropdown

“ Agent selected: **first agent connected** to the interaction. Useful for new hires or compliance scenarios requiring 100% evaluation coverage.

Evaluation Limits (Exam Critical)

Time Period	Maximum Evaluations per Agent
Per Day	50
Per Week	175
Per Month	700

These limits prevent policies from accidentally assigning more evaluations than an evaluator can complete. Limits apply even if more interactions match the policy.

“ **Note:** A policy does not create an evaluation for an interaction that has no recording on the agent side (e.g., agent dismisses an email without replying).

Calibration Evaluations

Field	Description	Options
Assign Calibration Evaluations	Create calibration sessions for evaluators	Toggle
Calibration Form	Evaluation form for calibration	Dropdown
Evaluators	Two or more evaluators required	Dropdown
Expert Evaluator	Benchmark scorer	Dropdown
Calibrator	Person who created the policy is default calibrator	Dropdown

Survey Trigger

Field	Description	Options
Send Web Survey	Automatically sends a survey invitation email	Toggle
Survey Form	Survey form to use	Dropdown
Survey Invite Flow	Architect flow that delivers the invitation	Dropdown
Email Domain	Domain used for invitation email	Dropdown
Number of Invitations	How many invitations to send	Numeric

“ Survey delivery requires a configured **Architect Survey Invite Flow**.

Dependencies

Component	Purpose
Interaction Recording	Required for evaluation, calibration, and retention policies
Evaluation Forms	Used when policies assign evaluations
Survey Forms	Used when policies send surveys
Architect Survey Invite Flow	Required to deliver survey invitations
AWS S3	Optional external storage for recordings
SIP Trunk (Line Recording enabled)	Required for call recording to function

Platform Integration / Related Components

Component	Relationship
Architect	Executes survey invite flows
Evaluation Forms	Used for scoring interactions
Survey Forms	Collect customer feedback
Interaction Recording	Captures interactions for evaluation
Speech & Text Analytics	Analyzes recorded conversations

Related Topics / Further Reading

Topic	Purpose
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Evaluation Forms	Score agent interactions
Survey Forms	Collect customer feedback
Speech & Text Analytics	Analyze interaction transcripts
Recording Management	Configure recording storage
Workforce Engagement Management	Manage agent coaching and development

Implementation Checklist

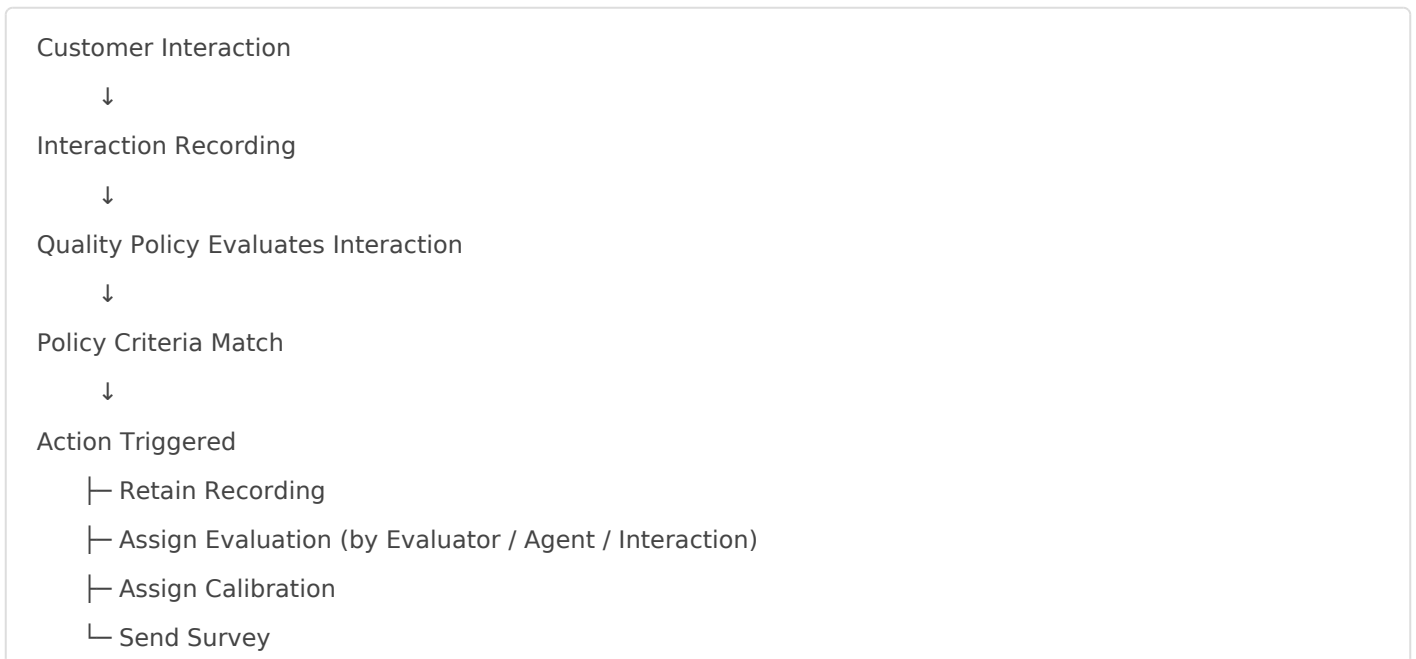
Step	Status
Enable interaction recording (Line Recording on SIP trunk)	<input type="checkbox"/>
Create evaluation forms	<input type="checkbox"/>
Create survey forms	<input type="checkbox"/>
Create quality policy	<input type="checkbox"/>
Configure matching criteria	<input type="checkbox"/>
Configure retention rules	<input type="checkbox"/>
Select evaluation assignment method	<input type="checkbox"/>
Enable survey automation	<input type="checkbox"/>
Test policy behavior	<input type="checkbox"/>

Implementation Guide

Step	Action
Step 1	Navigate to <code>Admin → Quality → Policies</code>
Step 2	Click Create New Policy
Step 3	Enter name and description
Step 4	Click media type tab and enable/disable per type
Step 5	Configure matching criteria
Step 6	Configure recording retention
Step 7	Select evaluation method (by Evaluators / by Agents / by Interaction)

Step	Action
Step 8	Enable calibration if required
Step 9	Enable survey automation if required
Step 10	Save and test policy behavior

Workflow



Evaluation Method Decision Guide

Use Case	Recommended Method
Fixed number of evals per evaluator per period	Create Evaluations by Evaluators
Fixed quota of evals per agent per period	Create Evaluations by Agents
Evaluate every matching interaction (e.g., new hires, compliance)	Create Evaluations by Interaction
Consistent scoring across evaluators	Calibration Evaluations

Best Practices

Practice	Reason
Use clear policy names and descriptions	Improves administrative clarity
Apply policies to specific queues	Avoid unnecessary evaluations
Separate retention and evaluation policies	Keeps policies focused and manageable
Divide large queue sets into multiple policies	Genesys recommends no more than 250 queues per policy; consider 100 for best practice
Use evaluation quotas	Prevent evaluator overload
Review policies after agent/queue/wrap-up deletions	Policies are not auto-updated
Combine surveys and evaluations in separate policies	Gain full quality insight without conflicting retention rules

Naming Convention

Resource	Example
Policy	Inbound_Call_Evaluation_Policy
Compliance Policy	Call_Recording_Compliance
Survey Policy	Post_Call_CSAT_Policy
Calibration Policy	Monthly_Calibration_Policy

Naming Pattern:

```
<InteractionType>_<Purpose>_Policy
```

Security Considerations

Control	Description
Recording Encryption	Protect interaction recordings
Access Permissions	Restrict policy configuration to admins
Retention Compliance	Ensure regulatory retention requirements are met

Control	Description
Data Privacy	Protect customer interaction data

Limitations / Constraints

Constraint	Description
Policy Scope	Only affects interactions after activation
Screen Recording	ACD interactions only — max 365 days retention
Survey Delivery	Requires Architect survey invite flow
Evaluation Limits	Max 50/day, 175/week, 700/month per agent
Queue Recommendation	No more than 250 queues per policy
Overlapping Policies	Longest retention wins unless explicitly overridden
Recordings with no policy	Retained indefinitely (up to org maximum if set)

Troubleshooting

Issue	Cause	Resolution
Evaluations not assigned	Matching criteria incorrect	Verify queue/user/team filters
Surveys not triggered	Survey invite flow missing or not selected	Configure and assign Architect survey invite flow
Recordings not retained	Retention setting not configured	Update retention configuration
Screen recording missing	Feature not initiated by policy	Enable screen recording in the initiating policy
Evaluation missing for email interaction	Agent never replied — no agent-side recording	Manually assign evaluation if needed
Too many evaluations assigned	Policy quota too high or method too broad	Use "by Agents" method with explicit quotas

Interview Cheat Sheet

Question	Answer
What is a quality policy in Genesys Cloud?	An automation rule that manages recordings, evaluations, calibrations, and surveys.
What are the three evaluation assignment methods?	By Evaluators, By Agents, By Interaction
What are the evaluation assignment limits?	50/day, 175/week, 700/month per agent
What media types are supported?	Call, Chat, Email, and Message
Do policies apply to existing interactions?	No — only to interactions occurring after the policy is enabled
What happens when no policy matches a recording?	It is retained indefinitely (or up to org maximum)
What happens when overlapping policies have different retention?	Genesys applies the longest retention period
What is required for screen recording?	ACD interactions only; initiated by the policy
What is required for surveys?	An Architect Survey Invite Flow must be configured

Key Takeaways

Topic	Summary
Policies	Automate quality monitoring tasks
Matching Criteria	Determines which interactions trigger policies — includes Duration and Customer Participation
Three Evaluation Methods	By Evaluators / By Agents / By Interaction — each serves a different use case
Evaluation Limits	50/day, 175/week, 700/month per agent
Overlapping Policies	Longest retention wins by default
No-Match Behavior	Recordings without a matching policy are retained indefinitely
Survey Automation	Requires Architect Survey Invite Flow
Recording Retention	Required field for all policies — retention rules cannot be skipped

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