Service Quality Institute

Customer Service Performance Standards

Service Quality Institute

User Manual

Accessing the System:

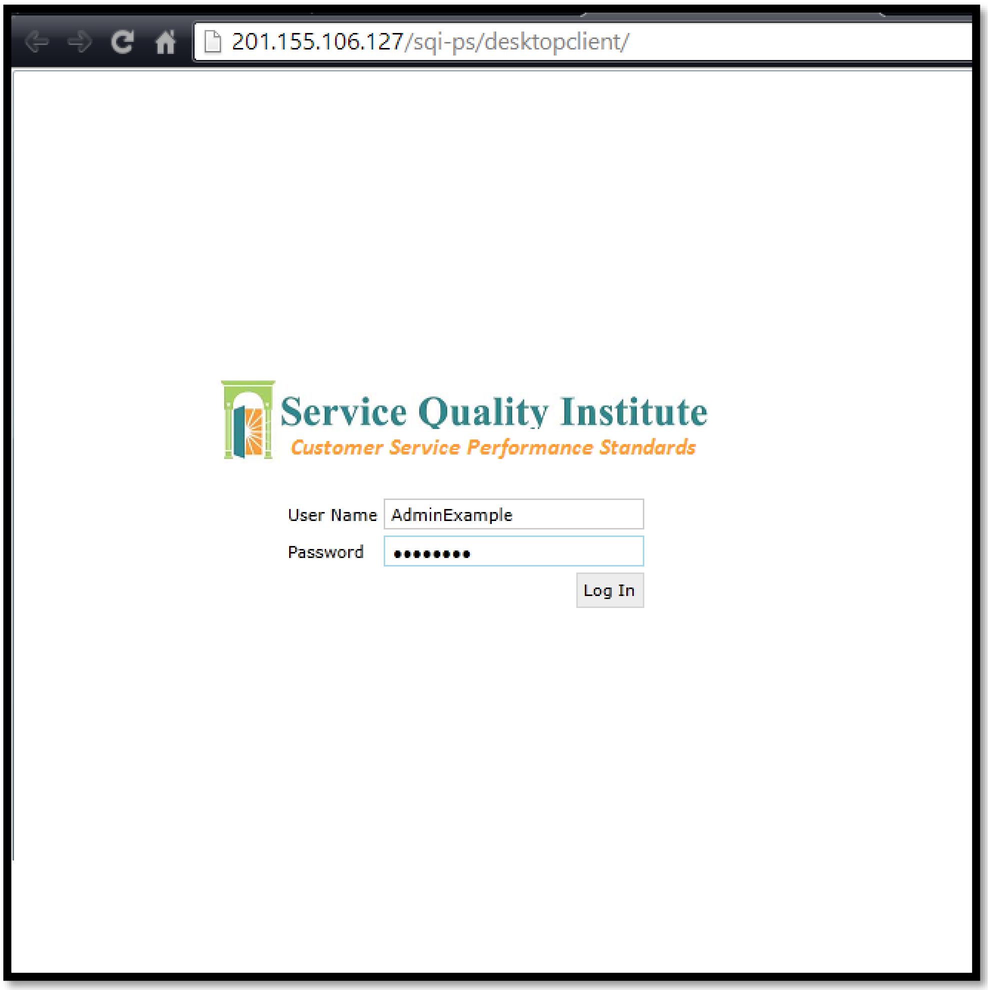
(System Compatibility with latest versions of Mozilla Firefox, Google Chrome, Internet Explorer and Safari)

In your Internet Browser enter:

- http://sqi.servicequality.com/PerformanceStandards/english/DesktopClient

Note: If your system doesn't have **Silverlight** installed, you will be asked to allow it. This component is necessary for the execution of the system, so you must allow it to be installed. It will take few minutes to install. *(Loading the homepage for the first time might take a while)*

1.- Log in screen



- Enter your **User Name** and **Password** (check them with your Company's or Location's Coordinator)

Menus & Functions

These are visible or not depending on user's permissions. As follows:

- Administration:
  - Users
  - Company
  - Catalogs
  - Program Configurator

- Coaching:
    - Employees & Programs

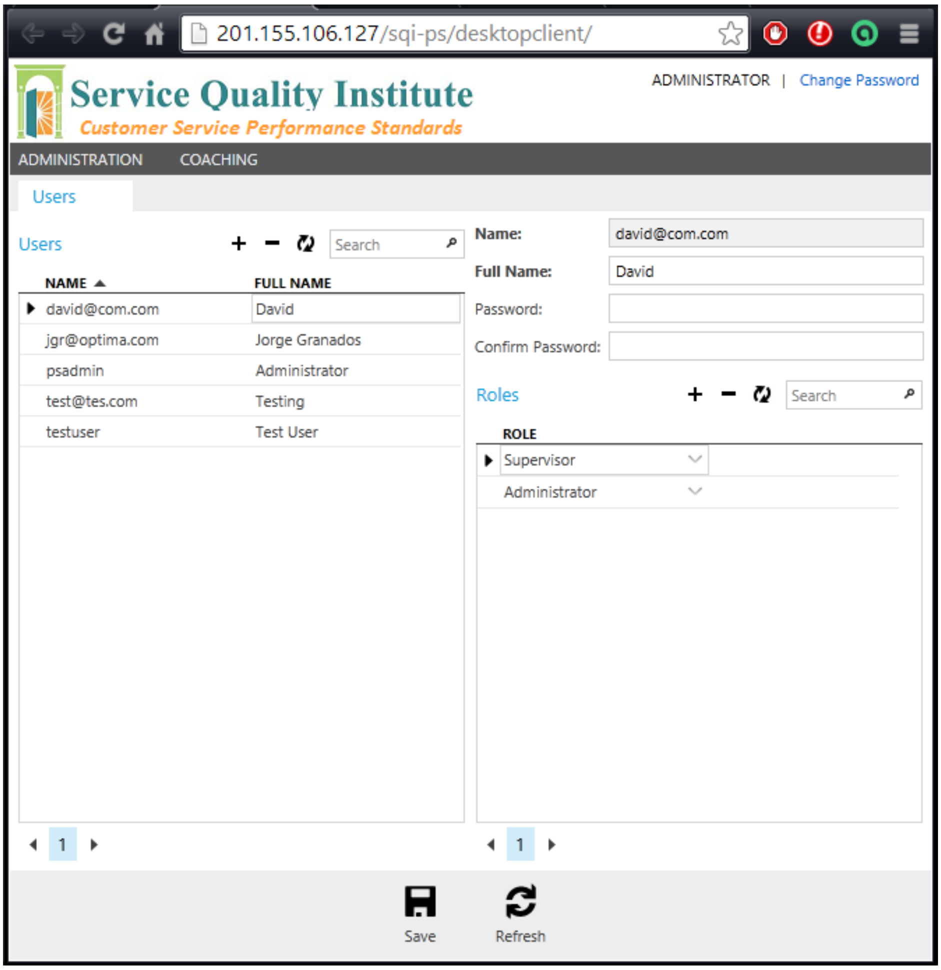
Administration-Users

The Users tab is designed for administration use only, here the Admin will be able to add, edit and delete all the users basic information (Employees, Supervisors, Administrators). The left column contains each user basic information, while the right column allows you to edit their user name, its full name and password, giving the option of enrolling each user into supervisor or administrator.

*If the user is not given any role, the system will automatically enrolls it as a basic employee.

Each one of them contains 4 edition keys:

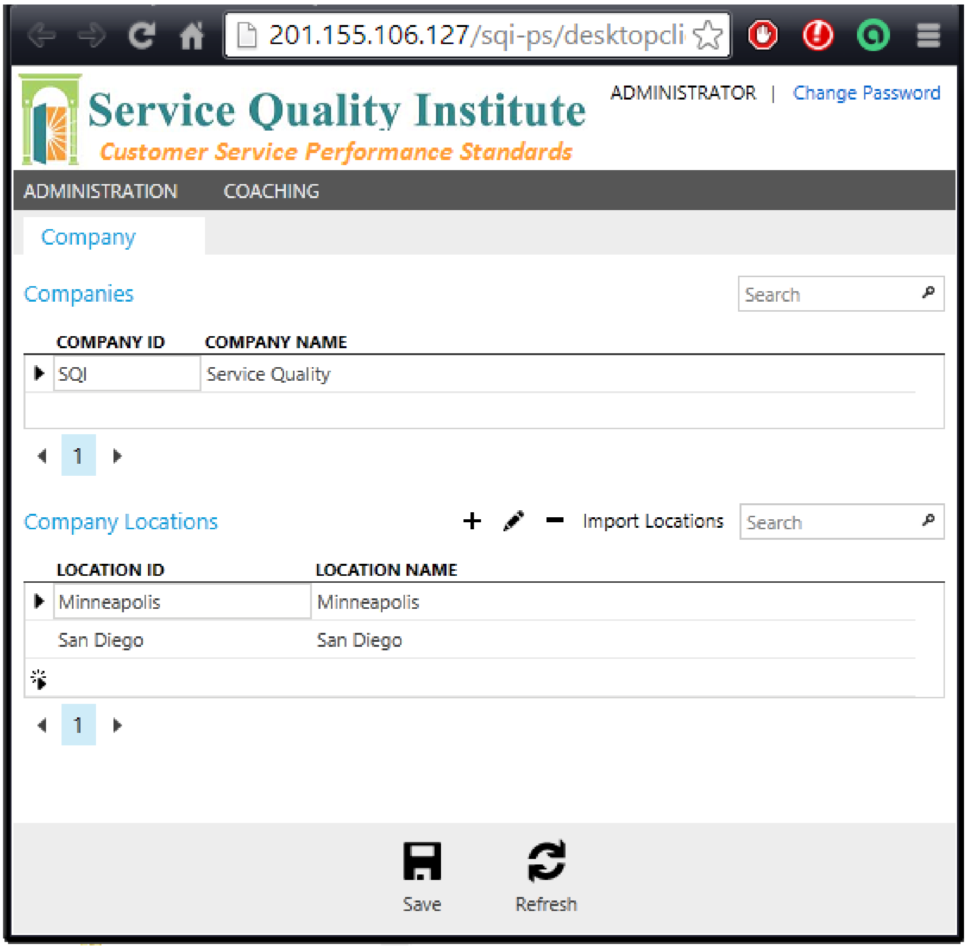
(See *Appendix A* for proper explanation.)



Administration-Company

This tab allows the Admin to Add new companies and company locations.

*The system just allows ONE Company at a time, but offers wide range allowing more than one Company Location.

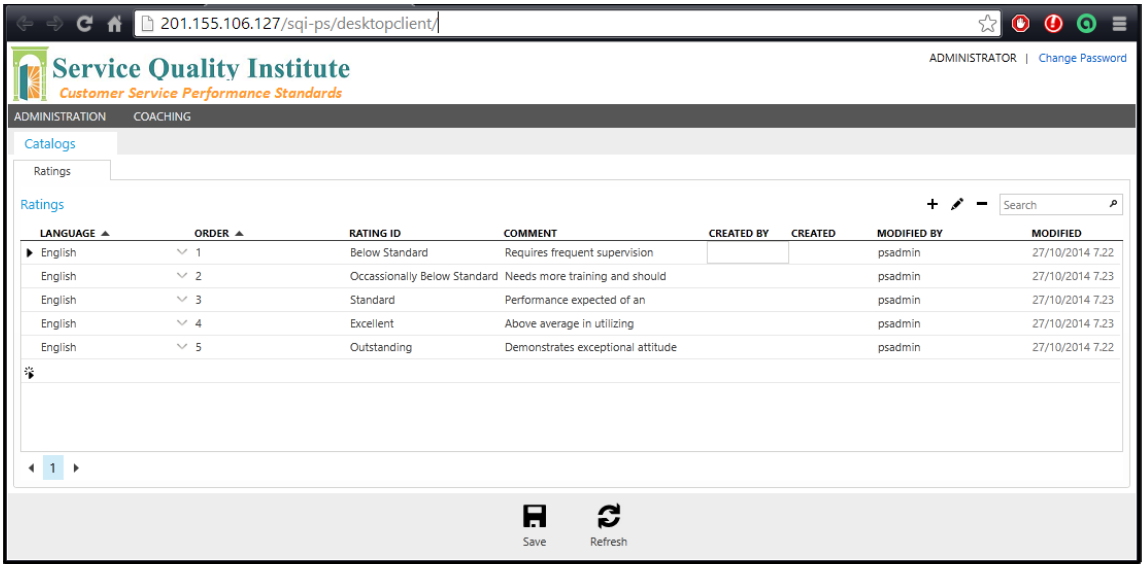


Administration-Catalogs

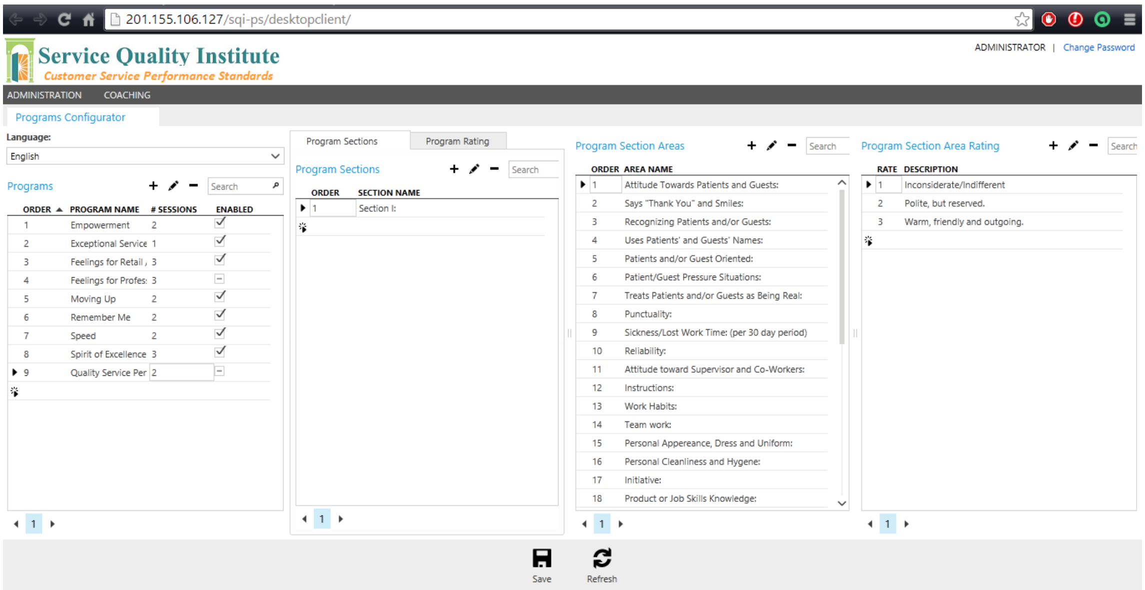
The Catalogs section allows you to change the "Ratings" in each program, allowing configuration in each language , in its overall score and the meaning of each value. Also it allows each coach to be aware of how much supervision each employee needs.

*It also contains 4 edition keys:

(See *Appendix A* for proper explanation.)



Administration-Program Configurator



This Menu divides in Four basic Columns *(each with proper sub-columns)*:

Programs

Order-Program Name-Description

Program Sections/*Program Rating*

Order-Section Name/*Low Score-High Score-Rating*

Program Section Areas

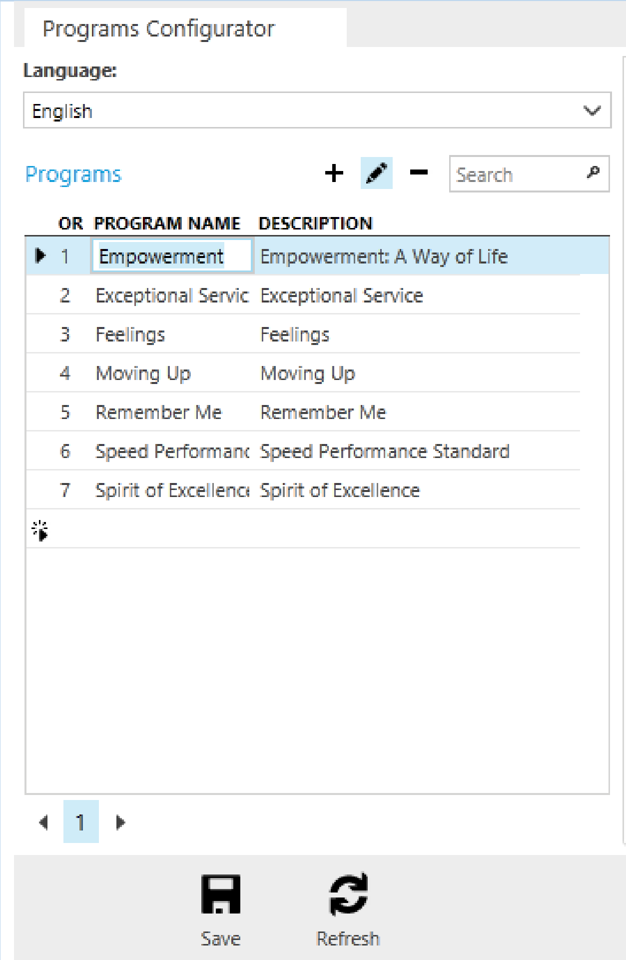
Order-Area Name

Program Section Area Rating

Rate-Description

Each one of them contains 4 edition keys:

(See *Appendix A* for proper explanation.)



The first Column "Order" should always be filled in, this determines the actual position and can vary between alphabetical order and importance of Item.

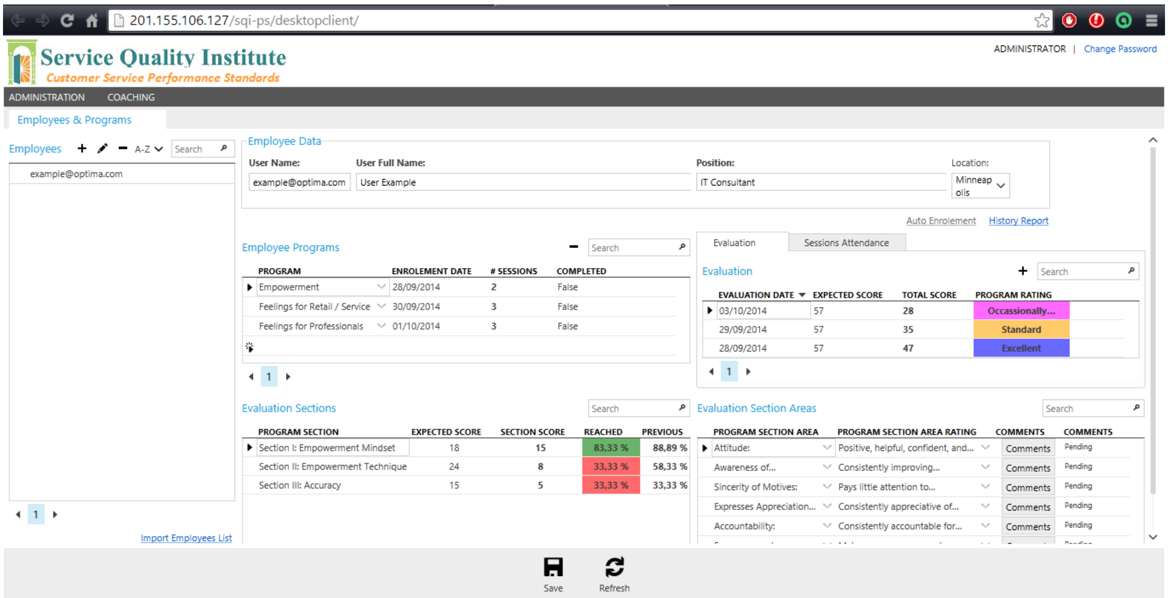
To edit any Item on the column, place your cursor over it and click the Edition button. *(For an easy shortcut you may also click twice over the cell)*

**Notice in the upper left corner you can choose between English/Spanish languages.*

**Remember: Each Item in Program column is divided in Sections, each section is divided in Areas, and each Area is divided in Ratings.*

**Remember: Save each time you have a chance too much information without being saved might lower browsers performance.*

Coaching-Employees & Programs



This Menu divides in Four basic Columns *(each with proper sub-columns)*:

Employees

User Names *(Adding, editing and deleting users)*

Employee Data

Users data *(Username - Employee Full Name - Position - Location)*

Employee Programs

Programs needed to be checked by each Employee (Coach Supervision) *(Program - Enrolment Date - Number of sessions need to be taken - If the User has met the requirements scheduled)*

Evaluation Sections

Allows coach to establish goal scores in each required section, checking user progress

(Program Section names - Users Expected Score - Section Score - Percentage Reached - Previous Percentage)

Evaluation / *Sessions Attendance*

Keeps evaluation and attendance records *(Evaluation Dates - Score progress - Program Rating / Session Attendance Information and Comments)*

Evaluation Section Areas

Allows the coach to give feedback comments in each Program Section Area depending on its Rating.

Each one of them contains 4 edition keys:

+ ✎ − Search

(See *Appendix A* for proper explanation.)

APPENDIX A

Common Functionalities

- Each time you select a Menu option it will open a new screen in a new tab. The screen will remain open until you close it by clicking in the right X located in the upper corner of each tab.
- A star aside the tab titles indicates that there are pending changes not saved yet. If you try to close the screen you will be prompt to save, discard the changes or cancel the closing operation.
- The next buttons appear almost on each screen and – when enabled – they allow to:

+	**ADD A NEW RECORD TO THE RESPECTIVE COLLECTION SHOWN ABOVE IT.**
✎	**EDIT THE SELECTED RECORD FROM THE COLLECTION ABOVE IT.**
−	**DELETE THE SELECTED RECORD FROM THE COLLECTION ABOVE IT.**
▲ ▼	**SORT THE COLLECTION BY THE SELECTED ORDER AND COLUMN (CLICK ON THE ARROW.**
Search	**LOOK UP FOR A TEXT.**

- These other buttons appear at bottom of each page:

Save	**Save all pending changes on current page.**
Refresh	Refresh current page data. If there are pending changes you will be prompt to save or discard them or cancel the operation.

User's Credentials

These are composed by **User Name** and **Password**.

User name must be unique across the system. It is recommended to use the email address of the user to avoid duplicities.

Password must have at least 7 characters with a mixture of capital letters, numbers and special characters (*, #, $, or so). It cannot contain spaces.

When a user is added by the first time, the Password is set to [**PSuser2016***] (see the composite of the characters). **It is highly recommended to change it after logged in the first time.**

Importing Large Lists

When there is necessary to enter large lists of items for a Company, it can be accomplished by importing them from a CSV formatted file.

Follow the next steps to save a list from Excel to CSV text format file:

Export data to a text file by saving it

You can convert an Excel worksheet to a text file by using the **Save As** command.

1. Click the **Microsoft Office Button** , and then click **Save As**.

The **Save As** dialog box appears.

2. In the **Save as type** box, choose the text file format for the worksheet.

For example, click **Text (Tab delimited)** or **CSV (Comma delimited)**.

Note The different formats support different feature sets. For more information about the feature sets that are supported by the different text file formats, see Excel formatting and features that are not transferred to other file formats.

3. **On a computer that is running Windows Vista**

- In the **Address bar**, browse to the location where you want to save the new text file, and then click **Save**.

On a computer that is running Microsoft Windows XP

- In the **Save in** box, browse to the location where you want to save the new text file, and then click **Save**.

4. A dialog box appears, reminding you that only the current worksheet will be saved to the new file. If you are certain that the current worksheet is the one that you want to save as a text file, click **OK**. You can save other worksheets as separate text files by repeating this procedure for each worksheet.
5. A second dialog box appears, reminding you that your worksheet may contain features that are not supported by text file formats. If you are interested only in saving the worksheet data into the new text file, click **Yes**. If you are unsure and would like to know more about which Excel features are not supported by text file formats, click **Help** for more information.

Locations List

Click on the **Import Locations** button. You'll be prompted to provide the access path to the file containing the CSV formatted file to be imported. Columns mapping will be shown to confirm the correspondence of data.

A sample for the Locations' import list:

Location	Prefix
MEXICO	MEX
MINNEAPOLIS	MIN

Note: The columns headers must be equal to this sample.

Users List

Click on the **Import Users** button. You'll be prompted to provide the access path to the file containing the CSV formatted file to be imported. Columns mapping will be shown to confirm the correspondence of data.

A sample for the Users' importing list:

User Name	User Full Name	User Location	User Role
email1@domain.com	user1 name	MEXICO	Location Coordinator
email2@domain.com	user2 name	MEXICO	Team Leader

Note: The columns headers must be equal to this sample.

Team Members

Click on the **Import Members** button. You'll be prompted to provide the access path to the file containing the CSV formatted file to be imported. Columns mapping will be shown to confirm the correspondence of data.

EmployeeName
John Doe
Jane Doe

Note: The columns headers must be equal to this sample.