

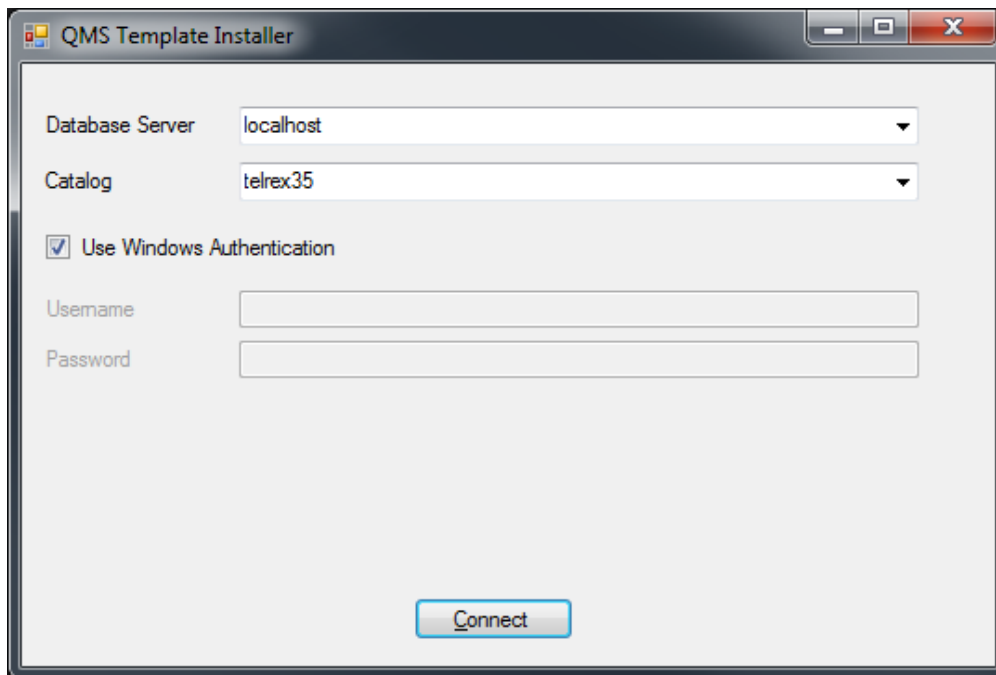
Agent Evaluation Template Installer Guide

Version 5.3

This document contains information about the Quality Management Suite (QMS) Evaluation Template Installer. The QMS Evaluation Template Installer creates two fully populated Scorecard Categories for inbound and outbound calls. To use the new Scorecards, run the installer utility and add them to your system.

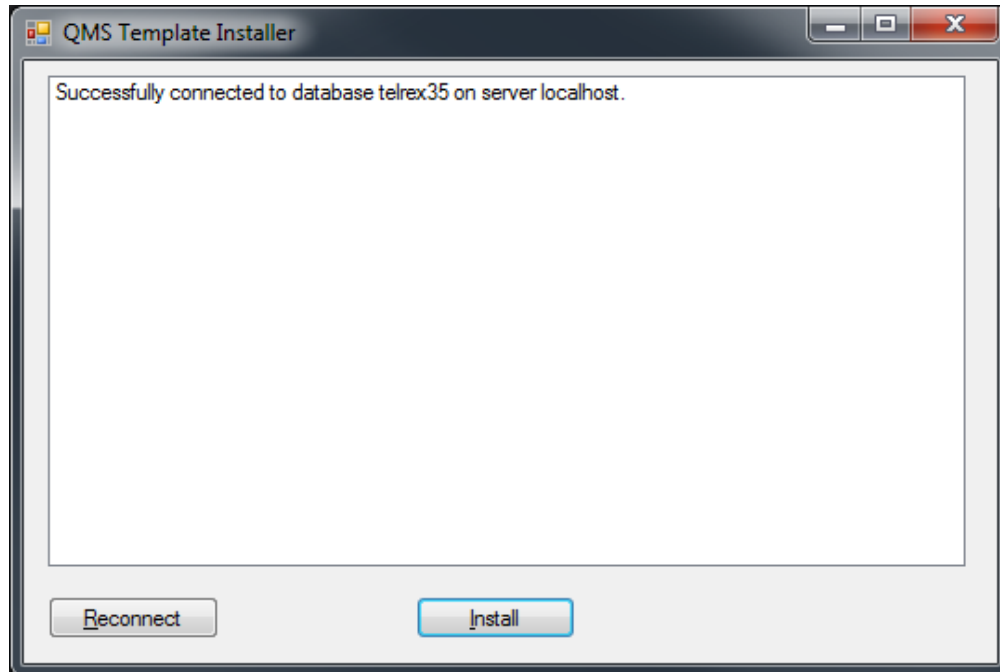
Complete the following steps to install the templates using the installer utility.

1. Locate the installer in the **QMS_Suite.zip** under the **Upgrade Tools** directory. The executable will be named **QMSEvalTemplateInstaller.exe**
2. Open the **QMS Template Installer**. The database connection information in the tool displays as follows.

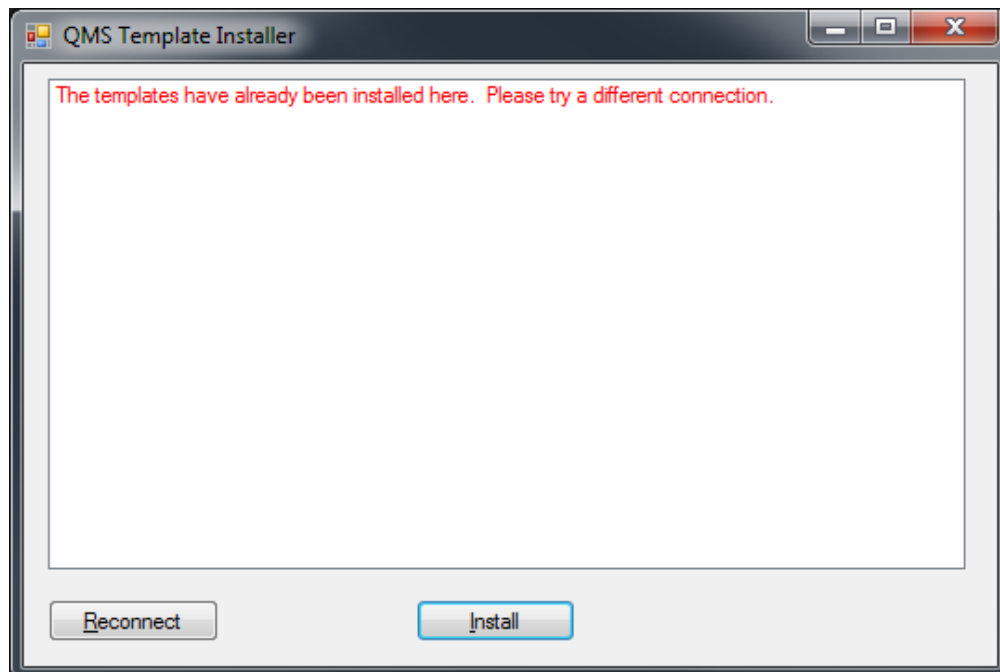


3. In the **Database Server** field enter the server name or click the drop-down for a list of servers found in the local network.
4. In the **Catalog** field manually enter the Database or click the drop-down for a list of databases found for the current server.
5. If you are not able to use built-in authentication with your database, you may uncheck the **Use Windows Authentication** checkbox and manually enter a database username and password in the fields provided.

6. Click the **Connect** button to continue. The tool attempts to connect to your database. Once connected a message stating that the connection was successful displays.



7. Click the **Install** button to install the templates.
8. Click the **Reconnect** button to return to the database selection information if you wish to change the database connection.
9. If the templates already exist on this database, a message displays in the installer log in red to indicate the templates cannot be installed on top of the existing templates.



10. When the installer has completed, a message indicating the templates have been successfully installed displays.

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