AVAYA

Using Avaya Workforce Optimization Select

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Contents

Chapter 1: Introduction

Purpose

This document describes how to use Avaya Workforce Optimization Select features.

This document is intended for people who want to learn how to use Avaya Workforce Optimization Select features.

Chapter 2: Navigation

Logging in to the Avaya Workforce Optimization Select

About this task

Users can access the Avaya Workforce Optimization Select application through a web browser and sign in using their login credentials.

Before you begin

Get the following information from your system administrator:

- The URL of the Avaya Workforce Optimization Select web application
- The user name and password to access the application

Procedure

1. In the **Address** bar of the browser, enter the URL for your instance of Avaya Workforce Optimization Select.

   For example: `https://<host>:<port>` where

   <host> is the host name or IP address of the server on which Avaya Workforce Optimization Select is installed.

   <port> is the data port for communication.

2. On the Avaya Workforce Optimization Select login page, enter the **Username** and **Password**, and click **Sign In**.

   The system displays the Avaya Workforce Optimization Select application Home page.

Logging out of the Avaya Workforce Optimization Select application

Procedure

1. In the top-right corner of the Home page, click the icon.

2. Click **Log Out**.

   On successful log out, the system displays the Avaya Workforce Optimization SelectSign In screen.

Avaya Workforce Optimization SelectHome page

When you log in to Avaya Workforce Optimization Select, the Home page displays navigation links for quick access to the modules in the application.

> **✱ Note:**

The administrator configures module level access privileges for each user. You can see only those modules for which the system administrator provides you access.

The interface has the following sections:

- The title bar: To navigate to the My Profile settings.
- The main menu: To navigate to the different modules in the application.
- The side bar: To navigate to the submenu within each module.
- The navigation bar: To navigate to the submenu options within each module.

Menus

Main Menu

Name	Description
Home	Provides quick access to all modules in the application and back to the Home page from any page.
Notifications	Displays alerts and notifications that you have subscribed to. The alerts and notifications are system generated by the trigger of threshold values configured by the system administrator.
Interactions	Enables supervisors to automatically record and archive employee phone conversations. You can capture periodic screen shots of the employee desktop, and play back the recorded interaction for quality management and monitoring.
Live Monitoring	Enables supervisors and quality managers to monitor live interactions between employee and customers to assess employee performance in real-time, and provide instant online feedback and assistance.
Evaluate	Enables supervisors and quality managers to review and evaluate employee performance for both voice and nonvoice transactions. You can create evaluation plans, build evaluation forms, calibrate evaluations, and manage the appeals raised by the employees against the evaluations.
Coach	Enables supervisors and managers to create personalized training plans and feedback to help improve employee performance. You can define a list of skills and improvement areas, assign coaching sessions for specific groups or employees, and track improvements on team and individual performance over time.

Table continues…

Name	Description
Learn	Enables supervisors and managers to train employees in the contact center with course ware and quizzes to improve their efficiency and enhance productivity. You can create task-specific quizzes and upload training videos, slide presentations, multimedia, and other courseware and assign them to selected employees for training.
Reports	Enables supervisors and quality managers to generate on-demand and scheduled reports for detailed information on interaction analytics, voice configurations, employee performance, and quality trends.
Administration	Provides administrative owners access to the organization, employee and group configuration, call recording settings, queue management, account configuration, and general settings.

Chapter 3: Monitoring interactions in real time

Live Monitoring

With the Live Monitoring module, supervisors and managers can silently monitor real time interactions of employees to assess and measure performance. Supervisors and managers can identify trouble areas and take immediate steps to ensure customer satisfaction.

The Live Monitoring module provides the following benefits:

- Ability to silently listen to agent and customer interactions in progress and view real-time agent information and interaction status.
- Ability to respond to and mitigate caller objectives or complaints by providing instant feedback.
- Provision to create different views that define your search criteria to quickly access those live interactions you wish to listen.
- Ability to customize various columns that help quickly identify important interaction details such as extension, queue, tenure, call duration, current state, current state duration, ANI number and so on.
- Provision to allow supervisors to perform QA while monitoring to measure agent performance on aspects like average handling time and adherence to scripts provided by management. You can also flag an interaction for further evaluation.
- Ability to email an interaction as a link to anyone.

Using the Live Monitoring module, authorized users can:

- Manage Views
- Monitor live interactions
- Play live interactions

Monitor Live Interactions

Supervisors and authorized users can view and monitor the live interactions of team members and employees they have access to and provide timely feedback and coaching.

From the Silent Monitor page, you can:

- Assist new by providing immediate feedback when required.
- Track employees whose average handle time, hold count, or hold duration is high.

- View color coded interactions that are defined based on the interaction duration.
- Configure to listen to interactions of specific agents at regular intervals. The interaction will automatically play in the order of selection.
- Customize the page to add columns that display interaction details such as extension, queue, tenure, and duration.
- Filter your search on specific columns by using conditions and operators.
- Use the pagination option to specify how many records you wish to view per page.

Play Live Interactions

While playing a live interaction, you can perform the following actions:

- Record an interaction.
- Add comments and tags to an interaction.
- Provide feedback to employees about an interaction.

Supervisors or managers can subscribe to get relevant alerts about an employee whose average handle time (AHT) or hold count is high. In such cases, the supervisor can listen to the live interactions of those employees to respond and mitigate caller objectives or complaints.

Manage Views

Using Views, you can filter data by specific criteria.

Depending on the business requirement, you can create different Views with filters using logic conditions. For example, to search for live interactions that have been put on hold a number of times, you can define filters based on **No of Holds**, **Interactions Id**, and **Reporting To** with operators **Greater Than** or **Between**. The View displays the interactions that match the search criteria.

 Note:

When you log in to the application the first time, the system displays the AWFOSView configured by the system administrator. You can change the Default View or create a new Viewto search and play desired interactions.

After you create a View, you can save it for later use.

You can do the following with Views:

- Create multiple filters.
- Use the default View that comes with a preconfigured set of parameters.
- Define the search criteria with a comprehensive list of parameters.
- Use operators to add multiple filters to use multiple parameters for a View.
- Use the option to display additional columns in the live interactions list.
- Share Views that you create with other users.

Related links

Adding a View

About this task

To search for live interactions, you can use the AWFOS DefaultView, a saved View or a View that has been shared by other users. If you want a new set of filter criteria, you can create a new View.

⊛ **Note:**

The AWFOS DefaultView consists of predefined filters configured by your system administrator. You cannot modify the filters on this View.

Procedure

1. Click **Live Monitoring** > **Monitor**.

2. Click **Add**.

3. On the Create View page, type a name and description.

Next steps

Set up filters for a View.

Related links

Setting up filters for a View

About this task

Using filters in the View, you can:

- Add multiple search parameters within a single filter criteria.

- Define multiple criteria using operators.

- Add multiple values to match a single parameter separated by commas.

Procedure

1. In **Field**, select the field on which to apply the filter.

2. In **Operator**, select the operator for the filter.

3. In **Value**, enter the value that the records must match.

4. **(Optional)** To add multiple filters, click **Add Field**.

5. To save the View, click the **Save & Close** button.

Next steps

Configure display fields for a View.

Related links

Configuring display fields for a View

About this task

When you select a View, you can view the interaction details in the list. All the information on the interaction is not displayed. If you do not see the specific fields you are looking for, you can configure additional fields to display in the list.

Procedure

To move fields to the Assigned Fields list:

1. Select one or more fields from the Available Fields list.

    a. To search a field, type the first few characters of the field name in **Search**.

    b. To move a single selection from the list, use the **Move Selected** button.

    c. To move multiple selections from lists, use the **Move All** button.

To remove fields from the Assigned Fields list:

2. Select one or more fields from the Assigned Fields list.

    a. To search a field, type the first few characters of the field name in **Search**.

    b. To move a single selection from the list, use the **Remove Selected** button.

    c. To move multiple selections from lists, use the **Remove All** button.

Next steps

Share a View.

Related links

Sharing a View

About this task

Use this procedure to share a View that you created so that other users can reuse the shared View to search for interactions.

You can keep the saved View as private or share the View with specific employees, or everyone. The selected users can see the shared View in their saved Views.

Procedure

1. From **Share**, select one of the following to share the View with other users:

   • **Me**

   • **Selected Groups**

   • **Everyone**

2. To share the View with selected groups, select **Selected Groups**.

   The system displays the **Group** and **Employee** search and select options.

3. Select one or more groups from the Available Groups list.

   a. To search a group, type the first few characters of the group name in **Search**.

   b. To move a single selection from the list, use the **Move Selected** button.

   c. To move multiple selections from lists, use the **Move All** button.

4. To remove groups from the Assigned Groups list, select one or more groups and use the **Remove Selected** and **Remove All** buttons.

5. Select one or more employees from the Available Employees list.

   a. To search an employee, type the first few characters of the employee name in **Search**.

   b. To move a single selection from the list, use the **Move Selected** button.

   c. To move multiple selections from lists, use the **Move All** button.

6. To remove employees from the Assigned Employees list; select one or more employees and use the **Remove Selected** and **Remove All** buttons.

7. Click **Save and Close**.

Related links

Manage Views on page 15
Manage Views on page 15

Adding a View field descriptions

View

Name	Description
Name	The name of the View. This field is mandatory.
Default	The option to display the selected View as the default.
Description	The description of the View.
Filter	The filter criteria used to search the interactions.
Display Fields	The columns displayed in the search results.
Share	The option to share the View with selected users, with everyone, or save it as private.

Filter

Name	Description
Field	The parameters used to filter the search results. The options are: • **DP OU Type** • **Organization Units** • **Site** • **Groups** • **Reporting To** • **Employee Status** • **Tenure** • **Interactions Id** • **Queues** • **Duration** • **Calling Party** • **Called Party** • **No of Holds** • **No of Transfers** • **Hold Duration** • **Transaction Date** • **Custom Transaction Date** • **Commented** • **Archived**

Table continues…

Name	Description
	• **Extension**
	• **Department**
	• **Custom Fields**
	• **Variables 1–10**
Operators	The operator used to specify the search criteria. The options are:
	• **Equals**
	• **Not Equal To**
	• **Contains**
	• **Does not contain**
	• **Starts with**
	• **Less Than**
	• **Greater Than**
	• **Less Than or Equal**
	• **Greater Than or Equal**
	• **Between**
	• **Includes**
	• **Excludes**
Value	The value specified in the search query that is used to match the records.
	You can view the list of interactions that match the value in this list.

Fields

Name	Description
DP OU Type	To search for interactions based on the organizational unit partition.
Organization Units	To search for interactions based on the name of the organizational unit. Use the available operators to search the interactions.
	For example, when you use the **Excludes** operator and enter the name of the organizational unit, a specific organizational unit is removed from the search.
Site	To search for interactions of employees belonging to the specified site.
Reporting to	To search for interactions based on the name of the supervisor.
	For example, to search for interactions monitored by a specific supervisor, use the **Contains** operator and specify the supervisor name. The search results display the interactions by all employees assigned under the selected supervisor.
Groups	To search for interactions of employees belonging to the specified group.

Table continues…

Name	Description
Employee Status	To search for interactions based on the status of the employee. The options are:
Tenure	To search for interactions based on the tenure of the employee in weeks.
Custom Variables	
Queues	To search for interactions by the queue that the interaction is associated with.
Duration	To search by the duration of the interaction specified in the hh:mm:ss format.
Calling Party	To search by the extension number of the calling party.
Called Party	To search by the extension number of the called party. For example, to search for interactions of a specific employee, enter the extension number of the employee.
No of Holds	To search for interactions based on the number of times that the employee put the interaction on hold.
No of Transfers	To search for interactions based on the number of times that the employee transferred the interaction.
Hold Duration	To search for interactions based on the total duration for which the employee put the interaction on hold, specified in the hh:mm:ss format.

Operators

Name	Description
Equals	To search for interactions that exactly match the specified value.
Not Equal To	To search for interactions that do not match the specified value.
Contains	To search for interactions that have the string or text that match the specified value.
Does not contain	To search for interactions that do not have the specified value.
Starts with	To search for interactions that start with the specified value.
Less Than	To search for interactions that have a value less than the specified value.
Greater Than	To search for interactions that have a value that is greater than the specified value.
Less Than or Equal	To search for interactions that have a value less than or equal to the specified value.
Greater Than or Equal	To search for interactions that have a value greater than or equal to the specified value.
Between	To search for interactions that lie between the specified value.

Display Fields

Name	Description
Archived	The option to indicate if the interaction is archived.
Extension	The extension number of the employee who attended the interaction.
Department	The name of the department that the employee belongs to.
DP OU Type	The partition of the organizational unit, as set up by the system administrator.
Organization Units	The name of the organization unit that the employee belongs to.
Site	The name of the site that the employee belongs to.
Reporting to	The name of the supervisor or manager to whom the employee reports.
Groups	The name of the group that the employee belongs to.
Employee Status	The status of the employee attending to the interaction. The options are:
Queues	The queue that the interaction is associated with.
Duration	The duration of the interaction in the hh:mm:ss format.
Calling Party	The extension number of the customer.
Called Party	The extension number of the employee who is attending to the interaction.
No of Holds	The number of times that the employee put the interaction on hold.
No of Transfers	The number of times that the employee transferred the interaction.
Hold Duration	The total duration for which the employee put the interaction on hold in the hh:mm:ss format.
Is muted	The live interaction that is muted.
Is masked	The live interaction that is masked.
Custom Fields	The interaction that consists of associated custom fields.

Share

Name	Description
Me	The option to set the **View**View as private where users will not be able to view or use the View.
Selected Groups	The option to share the **View** with specific people or groups.
Everyone	The option to share the **View** with all users of the application. By sharing the view with a group or everyone, the system renders results based on the access the user with whom the view is shared. Users can only view search results and cannot edit the search results.

Related links

Manage Views on page 15
Manage Views on page 15

Viewing live interactions

About this task

On the Silent Monitor page, you can view and monitor the interaction of employees or team members in real time.

When you select a View, the search results, display live interactions based on the filter criteria defined for the View.

If the current View does not provide the appropriate search results, modify the search criteria in the selected View, or create a new View.

Procedure

1. Click **Live Monitoring** > **Monitor**.

   The system displays the live interactions in the default View.

2. From the **View** drop-down list, select a View.

   The system displays all the live interactions for the search criteria defined under the selected View.

3. View the basic details of the live interactions displayed in the columns.

4. To display or hide columns, click the ▣ icon at the top of the list, and select or clear the corresponding check boxes.

5. On the **Pagination** controls, choose the number of records that you want to view on each page.

6. To filter the live interactions, click the ▼ icon in the column by which you want to filter.

   You can filter the live interaction by interaction ID, start time, end time, and other parameters using the filters available in each column.

   😊 **Note:**

   You can filter the live interactions by any number of available fields at the same time.

7. To sort the live interactions, click the ▲ icon in the column by which you want to sort.

   The **upward arrow** indicates sorting in the ascending order. The **downward arrow** indicates sorting in the descending order.

Viewing live interactions field descriptions

Name	Description
Interaction ID	The unique ID of the interaction.

Table continues…

Name	Description
Employee	The name of the employee who is attending to the interaction.
Organization Units	The name of the organization unit that the employee belongs to.
Site	The name of the site that the employee belongs to.
Groups	The name of the group that the employee belongs to.
Department	The name of the department that the employee belongs to.
Reporting To	The name of the supervisor or manager to whom the employee reports.
Tenure	The tenure of the employee in weeks.
Start Time	The start time of the interaction in a 24–hour format: hh:mm:ss.
End Time	The end time of the interaction in a 24–hour format: hh:mm:ss.
Call Duration	The duration of the interaction in the hh:mm:ss format.
Current State	The current interaction state whether the employee is talking or has put the call on hold.
Current State Duration	The duration of the current state of interaction.
Queue	The queue that the interaction is associated with.
Queue-Queue Type	The queue and queue type that the interaction is associated with.
Employee Status	The status of the employee attending to the interaction. The options are:
ANI Number	The phone number of the incoming call.
Recordings	The field to indicate whether the interaction is enabled for recording.
Screen Title	The title in the nonvoice interaction captured during monitoring of the employee desktop on-screen activity.
Screen Captures	The field to indicate whether the screen capture of the employee desktop is enabled for recording.
Monitor Next Interaction of the Selected Agents	The option to monitor interactions of selected employees. For example, new employees whose AHT, hold count, and hold duration is high. The next interaction of the selected employee automatically plays in the Call Details page.
Monitor Selected Call Every X seconds	The option to monitor selected interactions of employees at regular intervals. The interactions automatically play in the order of selection after every 'X' seconds, where 'X' is a set duration.

Icon	Name	Description
🎧	Play	The live interactions that are available for monitoring.

Adding a tag

About this task

Use tags to classify interactions or restrict specific actions on interactions.

When adding a tag, you can associate a specific action with the tag. For example, supervisors and managers can use the **Do not allow download** tag to restrict download of recorded interactions.

✱ **Note:**

You can create a new tag, and edit or delete existing tag if you have adequate permissions.

Procedure

1. Click **Interactions** > **Playback**.

2. On the Playback page, click **Manage Interaction Tags** to view the list of all available tags.

3. On the Call Details page, click **Add Tags** to create a tag.

4. Enter the appropriate details.

5. Click **Save and Close**.

Adding tags field descriptions

Name	Description
Tags Name	The name of the tag that you want to associate with an interaction. ✱ **Note:** You cannot view the operation of a tag while tagging the interaction. Tag names must be given according to the operation defined on the tag.
Tags Description	The description of the tag.
Operation	The operation associated with the tag. The options are: • **Never delete the call**: To tag interactions that you do not want anyone to delete. • **Need training**: To tag interactions of those employees who need training. • **Do not allow download**: To tag interactions that you do not want anyone to download. • **Do not allow email**: To tag interactions that you do not want anyone to email. • **Do not allow download & email**: To tag interactions that you do not want anyone to download and email.
Status	The status of the interaction tag. The options are:

Monitor live interactions

Playing live interactions

About this task

Supervisors and managers can monitor the live interactions of employees in real-time to respond and mitigate customer objectives or complaints.

While monitoring a live interaction, you can:

- Record a live interaction.
- Provide feedback for a live interaction.
- Comment or tag a live interaction.

Procedure

1. Click **Live Monitoring** > **Monitor**.

2. On the Silent Monitor page, click the ⌒ icon next to the live interaction that you want to monitor.

   The system displays the Call Details page with the interaction streaming in the Live Monitor panel.

   ❇ **Note:**

   The live monitoring of audio and screens is supported on browsers such as Internet Explorer, Chrome, Safari and Firefox.

   The time to view a live interaction depends on the browser you are using. You might notice that in the Chrome browser, there is a slight delay experienced due to buffering of the streaming videos during live monitoring.

3. In the Live Monitor panel, click one of the following:

   - **Start**: To start recording the live interaction.
   - **Stop**: To stop the recording the live interaction.

   ❇ **Note:**

   You can record a live interaction, only if you have the appropriate permissions.

4. To view the video with the screen captures in full screen, click the Full Screen (⬌) icon.

   To return to the original resolution and size of the screen shot, click the Fit to Width (✥) icon.

5. In the Profile tab, view the details of the employee who is handling the interaction.

6. To play the previous interaction, click the Previous (◂) icon.

7. To play the next interaction in the list, click the Next (▸) icon.

Providing feedback for a live interaction

About this task

As a supervisor or manager monitoring live interactions, you can provide feedback to the agent during the live call.

You can select the recipients and delivery method of the feedback message. The message is delivered through email or as a notification message in the inbox of recipients.

Procedure

1. Click **Live Monitoring** > **Monitor**.

2. On the Silent Monitor page, click the 🎧 icon next to the live interaction that you want to comment on.

3. On the Call Details page, click **Feedback**.

4. Enter the appropriate details in the fields.

5. Click **Send**.

   The message is sent to all recipients as an email or a message in their notification inbox.

Adding comments to a live interaction

About this task

While monitoring an interaction in real time, supervisors and managers can add comments to provide specific information about the interaction.

Procedure

1. Click **Live Monitoring** > **Monitor**.

2. On the Silent Monitor page, click the 🎧 icon next to the live interaction that you want to comment on.

3. On the Call Details, click **Comments/Tags**.

4. In **comments**, enter a comment.

   You can only update or delete the comments that you add. However, if you have access to the interaction, then you can view all the comments made by others.

5. Click **Submit**.

Tagging a live interaction

About this task

Supervisors can tag an interaction to enforce a set of predefined actions. While adding a tag, you can associate one of the following predefined actions with the tag:

- **Never delete the call**
- **Need training**
- **Do not allow download**
- **Do not allow email**
- **Do not allow download & email**
- **Flag for QA**

Procedure

1. Click **Live Monitoring** > **Monitor**.
2. On the Playback page, click the 🎧 icon.
3. On the Call Details page, click **Add Tags** to create a tag.
4. Enter the appropriate details.
5. Click **Save and Close**.

Playing live interactions field descriptions

Profile

Name	Description
Employee Code	The employee ID of the person who is attending to the interaction.
Employee Name	The name of the employee who is attending to the interaction.
Extension	The extension number of the employee who is attending to the interaction.
Start Time	The start time of the interaction in a 24–hour format: hh:mm:ss.
Current State	The current interaction state indicating whether the employee is attending to the interaction or has put the interaction on hold.
Current State Duration	The duration of the current state of the interaction.
Groups	The name of the group that the employee belongs to.
Location	The name of the location that the employee belongs to.
Reporting To	The name of the supervisor or manager to whom the employee reports.
Queue	The queue that the interaction is associated with.

Feedback

Name	Description
Broadcast on	The delivery mode by which the message is sent as feedback. The options are: • **Email**: To send the feedback message to the employees mentioned in **CC** field and to the Agent mentioned in the **To** field. • **My Inbox**: To send the feedback message to the notification inbox of the selected employees.
Start Time	The start time of the interaction in a 24–hour format: hh:mm:ss.
Extension	The extension number of the employee who is attending to the interaction.
To	The email id of the agent who is handling the call and which is configured in the admin employee profile screen.
Subject	The subject of the feedback message.
Message Type	The type of message to be delivered to the recipients. The options are: • **Notifications**: To send feedback as a notification message. • **Alert**: To send feedback as an alert. • **Information**: To send feedback as an information message.
Agent Name	The name of the employee who is attending to the interaction.
From	The email id of the supervisor who is sending the feedback.
CC	The email id of employees to whom a copy of the feedback is sent.
Comments	The text message sent as feedback for the live interaction.

Comments

Name	Description
Date	The date on which the comment is added. The date is in the mm:dd:yyyy hh:mm:ss format.
Comments	The text message included as comments to the interaction.
From	The name of the employee who adds the comment.
Actions	The option to edit or delete a comment.

Tags

Name	Description
Date	The date on which the tag is added. The date is in the mm:dd:yyyy hh:mm:ss format.
From	The name of the employee who adds the tag.
Never delete the call	The tag used to specify that the interaction should never be deleted.
Need training	The tag used to specify that the employee attending to the interaction requires further training.

Table continues…

Name	Description
Do not allow download	The tag used to specify that the interaction cannot be downloaded.
Do not allow download & email	The tag used to specify that the interaction cannot be downloaded or sent by email.
Actions	The option used to delete a tag. ✳ **Note:** The deleted tag must not affect the interaction.

Chapter 4: Managing recorded interactions

Interactions

Using the Interactions module, authorized users can view and manage interactions of the employees that they have access to. During interaction playback, the supervisor can view details of each segment of an interaction to determine if the call was transferred or put on hold.

> ✱ **Note:**

With appropriate permissions, employees can also view their own interactions.

The Interactions module provides the following benefits:

- Provision to playback recorded interactions to listen to them. Supervisors can pick interactions that need attention and monitor them depending on AHT, hold duration, and other such information.

- Ability to add comments to a recorded interaction especially when the Supervisor wants to provide important information to the evaluator or reviewer.

- Ability to download a recorded interaction in WAV, MP4 (Audio and Screens), and MP4 formats.

- Provision to use existing tags or create one to apply to an interaction. Using tags, you can restrict specific actions on interactions such as downloading or deleting of interactions.

- Provision to create different views to define your search criteria. You can take advantage of Views to quickly access those interactions you frequently view and listen.

- Ability to customize the Interactions page with various columns that help quickly identify important interaction details such as interaction start time, interaction end time, duration, who ended the interaction (customer or agent), number of holds, number of transfers, hold duration, and so on.

- Visual depiction of conversation graphs that provide quick identification of problem areas such as cross-talk or elevated voices.

- Availability of all interaction segments such as conference, transfers, and so on. You can also view caller experience details.

Using the Interactions module, authorized users can:

- Manage Views
- View recorded interactions
- Play recorded interactions

View recorded interactions

Supervisors can view and monitor recorded interactions and get a quick snapshot of how the team members are performing.

You can view and track recorded interactions to:

- Listen and assess recorded interactions of new hires.
- Identify employees whose average handle time and hold count is high.
- View the number of interactions handled by each employee, comments added to interactions, and interactions that are already played.
- Customize the page to add columns that display interaction details such as extension, queue, tenure, and duration.
- Filter your search on specific columns by using conditions and operators.
- Use the pagination option to specify how many records you want to view per page.

Play recorded interactions

The Avaya Workforce Optimization Select application automatically records interactions and captures screen shots of agent's desktop which appear when playing back an interaction.

While listening to a recorded interaction, you can:

- Add comments to provided information to the evaluator or reviewer.
- Download a recorded interaction in WAV, MP4 (Audio only), and MP4 formats.
- Tag a recorded interaction.
- View the conversation graph that provides quick identification of problem areas such as cross talk or elevated voices.

Manage Views

Using Views, you can filter data by specific criteria.

Depending on the business requirement, you can create different Views with filters using logic conditions. For example, to search for live interactions that have been put on hold a number of times, you can define filters based on **No of Holds**, **Interactions Id**, and **Reporting To** with operators **Greater Than** or **Between**. The View displays the interactions that match the search criteria.

  Note:

When you log in to the application the first time, the system displays the AWFOSView configured by the system administrator. You can change the Default View or create a new Viewto search and play desired interactions.

After you create a View, you can save it for later use.

You can do the following with Views:

- Create multiple filters.

- Use the default View that comes with a preconfigured set of parameters.

- Define the search criteria with a comprehensive list of parameters.

- Use operators to add multiple filters to use multiple parameters for a View.

- Use the option to display additional columns in the live interactions list.

- Share Views that you create with other users.

Related links

Adding a View

About this task

Use the View to search for interactions based on the filters you specify.

By default, the AWFOS DefaultView comes with a set of pre defined filters configured by the system administrator. You cannot modify the filters on the AWFOS DefaultView.

Procedure

1. Click **Interactions** > **Playback**.

   The system displays the interactions in the default View.

2. Click **Add** to create a new View to display interactions that match your required criteria.

   The system displays the Create View page where you can define the filter criteria and save the View.

3. In **Name**, enter the name of a View.

4. In **Description**, enter the description of a View.

Next steps

Set up filters for a View.

Related links

Manage Views on page 15

Setting up filters for a View

About this task

Using filters in the View, you can:

- Add multiple search parameters within a single filter criteria.
- Define multiple criteria using operators.
- Add multiple values to match a single parameter separated by commas.

Procedure

1. In **Field**, select the field on which to apply the filter.

2. In **Operator**, select the operator for the filter.

3. In **Value**, enter the value that the records must match.

4. **(Optional)** To add multiple filters, click **Add Field**.

5. To save the View, click the **Save & Close** button.

Next steps

Configure display fields for a View.

Related links

Manage Views on page 15
Manage Views on page 15

Configuring display fields for a View

About this task

When you select a View, you can view the interaction details in the list. All the information on the interaction is not displayed. If you do not see the specific fields you are looking for, you can configure additional fields to display in the list.

Procedure

To move fields to the Assigned Fields list:

1. Select one or more fields from the Available Fields list.

   a. To search a field, type the first few characters of the field name in **Search**.

   b. To move a single selection from the list, use the **Move Selected** button.

   c. To move multiple selections from lists, use the **Move All** button.

To remove fields from the Assigned Fields list:

2. Select one or more fields from the Assigned Fields list.

   a. To search a field, type the first few characters of the field name in **Search**.

   b. To move a single selection from the list, use the **Remove Selected** button.

   c. To move multiple selections from lists, use the **Remove All** button.

Next steps

Share a View.

Related links

Sharing a View

About this task

Use this procedure to share a View that you created so that other users can reuse the shared View to search for interactions.

You can keep the saved View as private or share the View with specific employees, or everyone. The selected users can see the shared View in their saved Views.

Procedure

1. From **Share**, select one of the following to share the View with other users:

   • **Me**

   • **Selected Groups**

   • **Everyone**

2. To share the View with selected groups, select **Selected Groups**.

   The system displays the **Group** and **Employee** search and select options.

3. Select one or more groups from the Available Groups list.

   a. To search a group, type the first few characters of the group name in **Search**.

   b. To move a single selection from the list, use the **Move Selected** button.

   c. To move multiple selections from lists, use the **Move All** button.

4. To remove groups from the Assigned Groups list, select one or more groups and use the **Remove Selected** and **Remove All** buttons.

5. Select one or more employees from the Available Employees list.

   a. To search an employee, type the first few characters of the employee name in **Search**.

   b. To move a single selection from the list, use the **Move Selected** button.

   c. To move multiple selections from lists, use the **Move All** button.

6. To remove employees from the Assigned Employees list; select one or more employees and use the **Remove Selected** and **Remove All** buttons.

7. Click **Save and Close**.

Related links

Adding a View field descriptions

View

Name	Description
Name	The name of the View. This field is mandatory.
Default	The option to display the selected View as the default.
Description	The description of the View.
Filter	The filter criteria used to search the interactions.
Display Fields	The columns displayed in the search results.
Share	The option to share the View with selected users, with everyone, or save it as private.

Filter

Name	Description
Field	The parameters used to filter the search results. The options are: • **DP OU Type** • **Organization Units** • **Site** • **Groups** • **Reporting To** • **Employee Status** • **Tenure** • **Interactions Id** • **Queues** • **Duration** • **Calling Party** • **Called Party** • **No of Holds**

Table continues…

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Name	Description
	• **No of Transfers**
	• **Hold Duration**
	• **Transaction Date**
	• **Custom Transaction Date**
	• **Commented**
	• **Archived**
	• **Extension**
	• **Department**
	• **Custom Fields**
	• **Variables 1–10**
Operators	The operator used to specify the search criteria. The options are:
	• **Equals**
	• **Not Equal To**
	• **Contains**
	• **Does not contain**
	• **Starts with**
	• **Less Than**
	• **Greater Than**
	• **Less Than or Equal**
	• **Greater Than or Equal**
	• **Between**
	• **Includes**
	• **Excludes**
Value	The value specified in the search query that is used to match the records.
	You can view the list of interactions that match the value in this list.

Fields

Name	Description
DP OU Type	To search for interactions based on the organizational unit partition.
Organization Units	To search for interactions based on the name of the organizational unit. Use the available operators to search the interactions.
	For example, when you use the **Excludes** operator and enter the name of the organizational unit, a specific organizational unit is removed from the search.

Table continues…

Name	Description
Site	To search for interactions of employees belonging to the specified site.
Reporting to	To search for interactions based on the name of the supervisor. For example, to search for interactions monitored by a specific supervisor, use the **Contains** operator and specify the supervisor name. The search results display the interactions by all employees assigned under the selected supervisor.
Groups	To search for interactions of employees belonging to the specified group.
Employee Status	To search for interactions based on the status of the employee. The options are:
Tenure	To search for interactions based on the tenure of the employee in weeks.
Custom Variables	
Queues	To search for interactions by the queue that the interaction is associated with.
Duration	To search by the duration of the interaction specified in the hh:mm:ss format.
Calling Party	To search by the extension number of the calling party.
Called Party	To search by the extension number of the called party. For example, to search for interactions of a specific employee, enter the extension number of the employee.
No of Holds	To search for interactions based on the number of times that the employee put the interaction on hold.
No of Transfers	To search for interactions based on the number of times that the employee transferred the interaction.
Hold Duration	To search for interactions based on the total duration for which the employee put the interaction on hold, specified in the hh:mm:ss format.

Operators

Name	Description
Equals	To search for interactions that exactly match the specified value.
Not Equal To	To search for interactions that do not match the specified value.
Contains	To search for interactions that have the string or text that match the specified value.
Does not contain	To search for interactions that do not have the specified value.
Starts with	To search for interactions that start with the specified value.
Less Than	To search for interactions that have a value less than the specified value.
Greater Than	To search for interactions that have a value that is greater than the specified value.
Less Than or Equal	To search for interactions that have a value less than or equal to the specified value.

Table continues…

Name	Description
Greater Than or Equal	To search for interactions that have a value greater than or equal to the specified value.
Between	To search for interactions that lie between the specified value.

Display Fields

Name	Description
Archived	The option to indicate if the interaction is archived.
Extension	The extension number of the employee who attended the interaction.
Department	The name of the department that the employee belongs to.
DP OU Type	The partition of the organizational unit, as set up by the system administrator.
Organization Units	The name of the organization unit that the employee belongs to.
Site	The name of the site that the employee belongs to.
Reporting to	The name of the supervisor or manager to whom the employee reports.
Groups	The name of the group that the employee belongs to.
Employee Status	The status of the employee attending to the interaction. The options are:
Queues	The queue that the interaction is associated with.
Duration	The duration of the interaction in the hh:mm:ss format.
Calling Party	The extension number of the customer.
Called Party	The extension number of the employee who is attending to the interaction.
No of Holds	The number of times that the employee put the interaction on hold.
No of Transfers	The number of times that the employee transferred the interaction.
Hold Duration	The total duration for which the employee put the interaction on hold in the hh:mm:ss format.
Is muted	The live interaction that is muted.
Is masked	The live interaction that is masked.
Custom Fields	The interaction that consists of associated custom fields.

Share

Name	Description
Me	The option to set the **View**View as private where users will not be able to view or use the View.
Selected Groups	The option to share the **View** with specific people or groups.
Everyone	The option to share the **View** with all users of the application. By sharing the view with a group or everyone, the system renders results based on the access the user with whom the view is shared. Users can only view search results and cannot edit the search results.

Related links

Viewing recorded interactions

About this task

On the Playback page, you can view and play the recorded interactions of employees or team members that you have access to.

When you select a View, the search results display interactions based on the filter criteria defined for the View.

If the current View does not provide the appropriate search results consider modifying the search criteria in the selected View, or create a new View.

Procedure

1. Click **Interactions** > **Playback**.

2. From the **View** drop-down, select a **View** to filter the list of interactions.

3. View the basic details of each interaction displayed in the columns.

4. On the **Pagination** controls, choose the number of records you want to view on each page.

5. To filter the interactions, click the **Filter** icon (▾) in the column by which you want to filter.

   You can filter the interaction by interaction ID, start time, end time, and other parameters using the filters available in each column. You can use **And**, and **Or** operators to add multiple search conditions.

   ✳ Note:

   Filter can be applied on two fields at the same time.

6. To sort interactions, click the **Sort** icon in the column on which you want to sort the interaction.

   The **upward arrow** indicates sorting in the ascending order. The **downward arrow** (▾) indicates sorting in the descending order.

Viewing recorded interactions field descriptions

Name	Description
Interaction ID	The unique ID of the interaction.
Employee	The name of the employee who attended to the interaction.
Reporting To	The name of the supervisor or manager to whom the employee reports.
Start Time	The start time of the interaction in a 24–hour format: hh:mm:ss.
End Time	The end time of the interaction in a 24–hour format: hh:mm:ss.
Duration	The duration of the interaction in the hh:mm:ss format.
Queue	The queue that the interaction is associated with.
DP OU Type	The partition of the organizational unit that the employee belongs to. For example, **Business**, **Client**, **Customer**, or **Line of Business**. This field is available only if you are using a data partitioned environment.
Organization Units	The name of the organization unit that the employee belongs to.
Site	The name of the site that the employee belongs to.
Groups	The name of the group that the employee belongs to.
Tenure	The tenure of the employee in the organization, in weeks.
Called Party	To search by the extension number of the called party.
Calling Party	To search by the extension number of the calling party.
No of Holds	The number of times that the employee put the interaction on hold.
No of Transfers	The number of times that the employee transferred the interaction.
Hold Duration	The total duration for which the employee put the interaction on hold in the hh:mm:ss format.
Screen Captures	The field to indicate if the interaction has screens captures. The options are: • **Yes** • **No**
Department	The name of the department that the employee belongs to.
Who Ended the Interaction	The person who ended the interaction. • Employee • Customer
Transaction Date	The date on which the interaction is recorded.
Custom Transaction Date	The custom date field used to specify the date on which the interaction is recorded.

Icon	Name	Description
🎧	**Play**	The interaction that is available to play for monitoring and evaluation.
👁	**Viewed**	The interaction that is viewed by the supervisor or manager for monitoring. The number on the icon indicates the number of times the interaction has been viewed.
🗒	**Evaluated**	The interaction that is evaluated by the supervisor or manager.
💬	**Commented**	The interaction that is commented on by the supervisor or manager. The number on the icon indicates the total number of comments received on the interaction.

Adding a tag

About this task

Use tags to classify interactions or restrict specific actions on interactions.

When adding a tag, you can associate a specific action with the tag. For example, supervisors and managers can use the **Do not allow download** tag to restrict download of recorded interactions.

✳ **Note:**

You can create a new tag, and edit or delete existing tag if you have adequate permissions.

Procedure

1. Click **Interactions** > **Playback**.

2. On the Playback page, click **Manage Interaction Tags** to view the list of all available tags.

3. On the Call Details page, click **Add Tags** to create a tag.

4. Enter the appropriate details.

5. Click **Save and Close**.

Adding tags field descriptions

Name	Description
Tags Name	The name of the tag that you want to associate with an interaction. ✳ **Note:** You cannot view the operation of a tag while tagging the interaction.

Table continues…

Name	Description
	Tag names must be given according to the operation defined on the tag.
Tags Description	The description of the tag.
Operation	The operation associated with the tag. The options are: • **Never delete the call**: To tag interactions that you do not want anyone to delete. • **Need training**: To tag interactions of those employees who need training. • **Do not allow download**: To tag interactions that you do not want anyone to download. • **Do not allow email**: To tag interactions that you do not want anyone to email. • **Do not allow download & email**: To tag interactions that you do not want anyone to download and email.
Status	The status of the interaction tag. The options are:

Manage interactions

Playing recorded interactions

About this task

During an enquiry, customer dispute, or non compliance issue, as a supervisor or manager you can listen to the recorded interaction and view the associated on screen activity.

While listening to a recorded interaction, you can:

- Comment or tag a recorded interaction to provide information to evaluator or reviewer.
- Email a recorded interaction.
- Download a recorded interaction in different formats.
- Evaluate a recorded interaction.
- View previous evaluation comments.
- View interaction segments.

Procedure

1. Click **Interactions** > **Playback**.

2. On the Playback page, click the **Play** (▶) icon.

3. On the Call Details page, in the Recorder panel, click one of the following:

   • **Play**: To listen to the recorded interaction.

- **Stop**: To stop the recorded interaction.
- **Pause**: To stop the playback of a recording and resume from where it stopped.

4. In the Call Details tab, view the interaction details.

Adding comments to an interaction

About this task

Supervisors and managers can add comments to a recorded interaction.

Procedure

1. Click **Interactions** > **Playback**.

2. On the Playback page, click the ⌢ icon.

3. On the Call Details, click **Comments/Tags**.

4. In **comments**, enter a comment.

   You can only update or delete the comments that you add. However, if you have access to the interaction, then you can view all the comments made by others.

5. Click **Submit**.

Tagging an interaction

About this task

Supervisors can tag an interaction to enforce the following set of predefined actions:

- **Never delete the call**
- **Need training**
- **Do not allow download**
- **Do not allow email**
- **Do not allow download & email**
- **Flag for QA**

Procedure

1. Click **Interactions** > **Playback**.

2. On the Playback page, click the ⌢ icon.

3. On the Call Details, click the **Comments/Tags** tab to tag an interaction.

4. From the **Tags** list, select the tag.

5. Click **Set**.

Emailing an interaction

About this task

You can email an interaction if you want other users to view or listen to the interaction. The interaction is sent as a link, and the user must log on to the application to access the interaction.

Procedure

1. Click **Interactions** > **Playback**.

2. On the Playback page, click the ⌂ icon next to the interaction that you want to play.

3. On the Call Details page, click the **Email** (✉) icon.

4. Enter the message, recipient details, and click **Send**.

Downloading an interaction

About this task

Supervisors and managers can download interactions in WAV, MP4 (audio only), and MP4 (audio and screens) formats. Use the MP4 (audio and screens) option only to download interactions with screens and for nonvoice interactions.

You can directly download the WAV file to your local machine. The MP4 (audio only) and MP4 (audio and screens) formats are available to download from the Media Downloads page.

Procedure

1. Click **Interactions** > **Playback**.

2. On the Playback page, click the ⌂ icon next to the interaction that you want to play.

3. On the Call Details page, click the **Download** (⊙) icon.

4. On the Download page, type appropriate comments for the interaction.

5. Select the format in which you want to download.

   - **WAV**: To download the interactions with recorded voice.

   - **MP4 (Audio Only)**: To download the interactions with recorded voice.

   - **MP4 (Audio and Screens)** : To download interactions with screens and for nonvoice interactions.

6. Click **Submit**.

Viewing Evaluations

About this task

Use this procedure to view evaluations on the interactions when you listen or view the interaction, and before you begin evaluating the interaction.

Procedure

1. On the Call Details page, click the **Evaluations** tab.

2. Click the (>) icon to view the details of the evaluation scores that was received for the interaction.

3. To evaluate the interaction, click **Evaluate Now**.

   The system displays a blank form name and evaluation type if you are evaluating the interaction for the first time.

Viewing interaction segments

About this task

Use this procedure to view all the segments of the interaction, including interaction transfers, conferences, and the duration for which the interaction was put on hold.

Procedure

1. On the Call Details page, click the **Segmentation** tab.

2. In **Customer Interaction Across Segments**, view the details of the interaction across segments.

3. In **Segmentation Overview**, click on the segment of the interaction that you want to listen to or view.

   The segment of the interaction plays in the Recorder pane.

Call details field descriptions

Call Details

Name	Description
Interaction ID	The unique ID of the interaction.
Start Time	The start time of the interaction in a 24–hour format: hh:mm:ss.
End Time	The end time of the interaction in a 24–hour format: hh:mm:ss.
Duration	The duration of the interaction in the hh:mm:ss format.

Table continues…

Name	Description
Employee Code	The employee code of the agent who attended to the interaction.
Employee Name	The name of the employee who attended to the interaction.
Extension	To search by the extension number of the called party.
Site	The name of the site that the employee belongs to. The system administrator associates employees working in different locations to the relevant sites. Supervisors and managers can monitor interactions of employees based on the Site to which they belong to.
Reporting To	The name of the supervisor or manager to whom the employee reports.
Screen	The field to indicate whether the screen capture is enabled for recording.
Number of Holds	The number of times that the employee put the interaction on hold.
Hold Duration	The total duration for which the employee put the interaction on hold in the hh:mm:ss format.
Number of Transfers	The number of times that the employee transferred the interaction.

Comments

Name	Description
Date	The date on which the comment is added. The date is in the mm:dd:yyyy hh:mm:ss format.
Comments	The text message included as comments to the interaction.
From	The name of the employee who adds the comment.
Actions	The option to edit or delete a comment.

Tags

Name	Description
Date	The date on which the tag is added. The date is in the mm:dd:yyyy hh:mm:ss format.
From	The name of the employee who adds the tag.
Never delete the call	The tag used to specify that the interaction should never be deleted.
Need training	The tag used to specify that the employee attending to the interaction requires further training.
Do not allow download	The tag used to specify that the interaction cannot be downloaded.
Do not allow download & email	The tag used to specify that the interaction cannot be downloaded or sent by email.

Email

Name	Description
From	The email address of the sender.

Table continues…

Name	Description
To	The email address of the user to whom you want to mail the interaction.
Subject	The subject of the email.
Comments	The body of the email.
Agent Name	The name of the agent who handled the interaction.
Interaction Id	The interaction ID that is unique to every interaction.
Extension	The phone extension number of the agent who handled the interaction.
Interaction Start Time	The start time of the interaction in a 24–hour format: hh:mm:ss.
CC	The email address of the employee to whom you want to mail a copy of the interaction.

Evaluations

Name	Description
Form	The evaluation form based on which the evaluation is performed.
Reviewer	The name of the supervisor or manager who evaluated the interaction.
Evaluation Type	The name denoting the type of evaluation. For example, Normal, Adhoc, or Training to indicate the purpose or category of evaluation.
Score	The score received by the employee during evaluation of the interaction.
Evaluation Date	The date on which the evaluation is performed.
Course/Quiz	The course or quiz that was assigned to the employee based on the previous evaluation scores.
Evaluation Modified Date	The date on which the evaluation was modified for the previous evaluation.

Segmentation

Name	Description
Total Customer Call Duration	The total duration of the interaction handled by the employee including the hold time and time to transfer the interaction.
Customer Interaction Across Segments	The time on each segment of the interaction including transfer and conferences of the interaction with other employees or agents.
Start Time	The start time of the interaction in a 24–hour format: mm:dd:yyyy hh:mm:ss.
End Time	The end time of the interaction in a 24–hour format: mm:dd:yyyy hh:mm:ss.
Dialed From	To search by the extension number of the called party. For example, to search for interactions of a specific employee, enter the extension number of the employee.
Dialed To	To search by the extension number of the calling party.
Total Duration	The total duration of the interaction in a 24–hour format: hh:mm:ss format.

Table continues…

Name	Description
Total Hold Duration	The total duration for which the interaction was put on hold in in a 24–hour format: hh:mm:ss format.
Total Transfers	The total number of times that the interaction is transferred by the employee.
Total Holds	The total number of times that the interaction is put on hold by the employee.
Total Conferences	The total number of times that the interaction is put on conference by the employee.

Viewing media downloads

About this task

Use this procedure to view the status of interactions you requested for download.

The Downloads window displays the details of the downloaded interactions and interactions that are queued for download such as file name or record ID, start and end time, status, and the request date of the downloaded interaction. You can click the **Download** button to download the interaction and save it to your local machine.

Interactions with only audio recorded are downloaded in the WAV and MP4 format. Interactions with screen captures and audio are downloaded in the MP4 format. Audio and screen recordings are encrypted for security purposes.

Procedure

1. In the top-right corner of the Home page, click **My Profile**.

2. Click **Media Downloads**.

   The system displays the Downloads window with the details of the download request.

3. Use the **Pagination** controls to navigate through the download list. You can choose the number of records that you want to view on each page.

4. Filter the interactions by the interaction ID, start time, end time, and the download request date.

5. Click **Refresh** to view the change in status of the interaction downloads.

Media downloads field descriptions

Name	Description
Interaction ID	The unique ID of the interaction.

Table continues…

Name	Description
Download	The link to download an interaction.
Media Type	The format in which the interaction is downloaded. The options are: • **WAV**: To download the interaction audio in WAV format. • **MP4 (Audio Only)**: To download the interaction audio in MP4 format. • **MP4 (Audio and Screens)**: To download the recorded interaction video and audio in MP4 format.
Status	The status of the request to download the interaction. The options are: • **New**: A download request that is new. • **Queued**: A download request that is in queue. • **In Progress**: A download request that is in progress. • **Completed**: A download request that has completed successfully. • **Failed**: A download request that has failed due to some reason.
Start Time	The start time of the interaction download request, specified in a 24–hour format: hh:mm:ss.
End Time	The end time of the interaction download request, specified in a 24–hour format: hh:mm:ss.
Requested Date	The date on which the interaction download was requested.

Chapter 5: Evaluating interactions

Evaluate

The Evaluate module in Avaya Workforce Optimization Select provides an easy-to-use, and flexible solution for developing quality management in a contact center.

Quality managers can effectively evaluate employees by monitoring their interaction with customers in the contact center.

The interactions provide valuable information about employee performance such as:

- Customer handling skills
- Sales techniques
- Product and service knowledge
- Technical skills for effective customer service
- Knowledge of corporate process and procedures
- Adherence to policies and rules

Using the Evaluate module, you can review and evaluate agent performance.

Evaluation process checklist

This checklist provides the high-level process for creating and managing evaluations.

No.	Task	Description	Notes	✔
1	Build an Evaluation Form with flexible criteria and scoring.	Evaluation forms comprise of criteria, scoring patterns, and score weightage options. See Defining an evaluation form on page 56.		
2	Set up the Evaluation Plan.	Evaluation plan is a mechanism to automate the process of selecting interactions using predefined criteria and assigning		

Table continues…

No.	Task	Description	Notes	✔
		interactions to reviewers to evaluate. See Defining an evaluation plan on page 72.		
3	Evaluate interactions assigned through the Evaluation Plan	With Evaluation Forms, you can evaluate and score interactions. See Evaluating an interaction on page 84		
4	Manage the workflow of appeals and reevaluations.	With Appeals, you can automate the process of raising, reviewing, and approving appeals. See Appeals workflow on page 68		
5	Calibrate evaluations to ensure all evaluators provide consistent scoring and evaluations.	Calibrations allow multiple evaluators to assess a single interaction to ensure consistency in quality. See Calibrating evaluations on page 95.		
6	Generate and download reports as needed.	With Reports, you can assess and report on individual, group, and overall contact center performance. See Reports on page 123.		

Building an evaluation form

Evaluation form checklist

This checklist provides the high-level process for creating and managing an evaluation form.

No.	Task	Reference	Notes	✔
1	Create Response Sets to define scoring variables for reviewers and evaluators to score an employee against an evaluation criterion.	See Response Sets on page 53.		
2	Build evaluation forms with flexible criteria and	See Defining an evaluation form on page 56.		

Table continues…

No.	Task	Reference	Notes	✔
	scoring to track the quality of an interaction.			
3	Add header information to enable the evaluator to enter additional information about the interaction being evaluated.	See Defining Headers In An Evaluation Form on page 57.		
4	Add parent and child criteria to determine the measures on which the interaction must be evaluated.	See Defining criteria for evaluation on page 57.		
5	Define the evaluating mechanism as weighted or nonweighted.	See Defining scoring options on page 58.		

Response Sets

Response Sets are scoring variables that you can use to score agents against a criteria. Response sets can range from being a Yes/No/NA or Comply/Does not comply to a grading scale of 1 to 5. You can choose a response set while building an evaluation form to define a scoring variable for a criteria.

For example, assume that you have a criteria to measure whether or not an agent greets the customer. The response set for the criteria can be Yes or No. Hence, depending on the questions you create for every criteria, you can determine the different response sets you want to add.

When you modify a response set, the changes are reflected in the evaluation form only when you again pick the response set against a criteria. Else, the previous response set is considered. You cannot delete a response set if there are evaluations associated to the response set.

Viewing Response Sets

About this task

Use the Response Sets page to view the list of response sets that you created or have access to.

In the list, you can view the details of whether a Response Set is used in an evaluation form and in evaluations for scoring interactions.

To filter Response Sets, use the sort and filter options in the list.

You can add a new Response Set or edit and delete an existing Response Set if you have adequate permissions.

Procedure

1. Click **Evaluate** > **Setup** > **Response Sets**.

   The system displays the list of Response Sets.

2. View the details of the Response Set in the list.

   If the response set is used in an evaluation form, the status is **Yes** in the **Has Evaluations?** column.

3. To filter the response sets, click the **Filter** (▼) icon in the column by which you want to filter.

4. To edit a response set, click on the desired row.

5. To delete a response set, click **Delete**.

   You can delete a Response Set only if it is not being used in any evaluation forms.

Viewing a Response Sets field descriptions

Name	Description
Response Set	The name used to identify the Response Set used in an evaluation form.
Status	The field to indicate whether the Response Set is active and available during evaluations. The options are: • **Active**: the Response Set is available when a new form is being built. • **Inactive**: the Response Set is unavailable when a new form is being built.
Description	The description of the Response Set. You can use the option to provide reasons for adding a response set or important information about the response set you create for future reference.
Evaluations Performed	The field used to identify whether there are evaluations performed using the Response Set. The options are: • **Yes** • **No**
Has Forms	The field used to identify whether the Response Set is used in any evaluations. The options are: • **Yes** • **No**

Icon	Name	Description
⊕ Add	**Add**	To add a new Response Set.

Adding a Response Set

Procedure

1. Click **Evaluate** > **Setup** > **Response Sets**.

   The system displays the list of Response Sets.

2. On the Response Sets page, click **Add**.

3. On the Add Response Sets page, enter the appropriate details.

4. Click one of the following:

   - **Save & Add Another**: To save the Response Set that you created and add another response.
   - **Save & Close**: To save the Response Set that you created.

Adding a Response Set field descriptions

Name	Description
Response Set Name	The name used to identify the Response Set used in an evaluation form.
Control Type	The type of control used to display options in an evaluation form. The options are: • **List Box**: To create a drop down list of items for the user to select. Use this option when you have many values as the values will be collapsed. • **Radio Button**: To display options in the form of radio buttons. Use this option when you have values in small numbers and you want to display all the options.
Responses	The option used to specify the responses to the evaluation criteria defined in an evaluation form. You can add more than one responses to the set.
Description	The description of the Response Set.
Active	The option to select the Response Set as active and available when creating an evaluation form.

Evaluation forms

Evaluation Forms are instruments that you can use to track the quality of an interaction.

Building an evaluation form involves the following tasks:

- Configure the re-evaluation lock-out time to specify the number of days after which the evaluation cannot be edited. Configure the appeals lock-out time to specify the number of days, post evaluation, after which the employee cannot raise an appeal.
- Configure options that enable the evaluator to enter additional information about the interaction being evaluated.
- Enforce the evaluator to feed comments while evaluating an interaction.

- Associate departments, queues, and organization units to an evaluation form. Interactions of agents belonging to only these associations can be evaluated using the evaluation form.
- Add parent and child criteria to determine the measures on which the interaction must be evaluated. You can associate a response set (scoring variable) to a criterion. You can set a response for conditional branching to define if a particular response must trigger additional questions. You cannot associate scores to the additional questions. However, the responses to the additional questions facilitate the evaluator in deciding whether to award a bonus or penalty.
- Define scoring options like bonus, penalty, exclude from scores, and not applicable. You can add a bonus or penalty at the parent criteria level, child criteria level, or at the overall evaluation form level. The bonus or penalty will be a part of the overall score that is calculated for an evaluated interaction. Use the exclude from score option if you do not want to tie any score to a response. Use the not applicable option to restrict the user from adding a bonus or penalty to a response.
- Assign courses or quiz to agents based on the response of the evaluator.
- Define the evaluating mechanism as weighted or nonweighted. If you select nonweighted, the scores achieved at the child criteria level rolls up to the parent criteria. The overall score is a sum of all scores achieved against the criteria. If you select the weighted option, you must define weights for every criteria. Weights defined at every criteria node (parent or child) must sum up to 100. The score achieved at the criteria will be a product of the raw score and the weight.

Creating an evaluation form

Defining an evaluation form

Procedure

1. Click **Evaluate** > **Setup** > **Forms**

2. Click **Add**.

3. Enter a name and description for the help text displayed with the form.

4. Enter the number of days after which the user cannot edit the evaluation.

5. Enter the number of days post evaluation, after which the user cannot raise an appeal.

6. Select **General Comments Mandatory** if you want to make it mandatory for the evaluators to feed general comments while evaluating the interaction.

7. Select a **Queue Type**. The evaluation form is available for selection when the user evaluates interactions of agents belonging to the Queue.

8. Select a **Department**. The evaluation form is available for selection when the user evaluates interactions of agents belonging to the Department.

9. If data partition is configured by the system administrator, select the **DP OU**. The evaluation form is available for selection when the user evaluates interactions of agents belonging to the data partitioned OU.

10. Select **Organization Units** and **OU Type**. The evaluation form is available for selection when the user evaluates interactions of agents belonging to the Organization Unit.

Next steps

Add header information in the evaluation form.

Adding headers in an evaluation form

About this task

Use the header information to capture additional details about the interaction. You can use control types such as radio button, single select, or text box to predefine how you would want to capture the information.

Procedure

1. In **Field Name**, enter the name for the header.

2. In **Control Type**, select the following options:

   - **Radio Button**
   - **Single Select**
   - **Text Box**

3. In **Options**, enter the options for the user to select.

   To add multiple options, click **Add**.

4. In **Display Order**, select the order in which the fields appear as header names in the specified sequence while evaluating.

5. For the fields to display in the evaluation form, enable the field as **Active**.

6. Enter optional details in the evaluation form headers.

Next steps

Define evaluation form criteria.

Defining criteria for evaluation

Procedure

1. Click **Add Criteria** to enter the name and description for a parent criteria.

2. Click **Add Child** against the corresponding parent criterion.

   ✳ **Note:**

   You can also create multiple parent criteria first and then create one or more child criteria for each parent criterion.

3. Enter a sub-criteria name and description and click **Save**.

   The system displays the Responses and Comments tab.

4. Click **Add Responses** to add a response set.

5. In the Responses tab, specify the type of response, scoring conditions, and conditional branching based on which the interaction is evaluated.

   a. In **Response Set**, select a response set.

The system displays the options defined for the response set.

b. Select the scoring conditions for each response.

c. Specify a score and a bonus or penalty.

d. Add conditional branching for a response, if required.

e. Assign a course or quiz for each response, and click **Set**.

Next steps

Add weightages.

Adding weightages

About this task

You can define the evaluating mechanism as weighted and nonweighted. If you select nonweighted, the scores achieved at the child criteria level rolls up to the parent criteria. The overall score is a sum of all scores achieved against the criteria. If you select the weighted option, you must define weights for every criteria. Weights defined at every criteria node (parent or child) must sum up to 100. The score achieved at the criteria will be a product of the raw score and the weight.

Procedure

1. Select the **Scoring Options** as:

   • Non Weighted Scores

   • Weighted Scores

2. To calculate scores based on weights, perform the following steps:

   a. In **Formula**, enter the formula for calculating the final scores.

      The formula can only be defined at the criteria level.

   b. For each of the criteria and child criteria, specify the weightage as a percentage value.

      The parent criteria scores is the sum of all sub criteria level weights.

      The sum of weighted scores of child criteria will roll up to the parent criteria and on that sum the system applies the weight assigned to that parent criterion. Weights defined at every criteria node (parent or child) must sum up to 100.

Next steps

Preview the evaluation form.

Previewing the evaluation form

Before you begin

Assign weights for scoring evaluation criteria

About this task

Use this procedure to review all the sections, criteria and child criteria and the scoring mechanism chosen along with the scores in the evaluation form. The form will appear as it is displayed in the evaluation form preview, when you evaluate an agent or employee.

If you want to edit the evaluation form, you can go back to the respective screen and modify any of the sections.

Procedure

1. Complete the mandatory steps under the Definition, Criteria, and Weights tabs.

2. On the Preview tab, view the details of the evaluation form.

3. Click **Test Form** to validate if the evaluation form is complete and ready to be saved or published.

4. Click **Save** to save the evaluation form for future use.

   The system displays the evaluation forms in the list under the Forms page with status as Active.

5. Click **Publish** to run the evaluation form immediately.

   The evaluation form is available for evaluators to evaluate.

Evaluation form field descriptions

Definition

Name	Description
Name	The name of the evaluation form.
	This field is mandatory.
Help Text	The help text that is displayed for the evaluation form.
Re-Evaluation Lockout Time (Days)	The number of days from the date of first evaluation after which the interaction cannot be reevaluated using the form.
Appeal Lockout Time (Days)	The number of days from the evaluation date after which an appeal cannot be raised using the form.
General Comments Mandatory	The field for the user to enter comments while evaluating an interaction.
Default	The option to set the evaluation form as default for all evaluations.
	✱ **Note:**
	This field is available after you save the form.
Active	The option to mark the form as active and available for employee evaluations.
	✱ **Note:**
	This field is available after you save the form.
Department	The option to select a department. The evaluation form is available for selection when the user evaluates interactions of agents belonging to the Department.
Queue Type	The option to select a queue. The evaluation form is available for selection when the user evaluates interactions of agents belonging to the Queue.

Table continues…

Name	Description
DP OU Type	The option to select a data partitioned OU type. The evaluation form is available for selection when the user evaluates interactions of agents belonging to the data partitioned OU type.
	For example, **Business**, **Client**, **Customer**, or **Line of Business**.
	✱ **Note:**
	This field is available only if you are using a data partitioned environment.
	This field is mandatory.
Organization Units	The option to select an organization unit. The evaluation form is available for selection when the user evaluates interactions of agents belonging to the selected Organization Unit. The options are:
	• **OU Type**
	• **Organization Units**
	✱ **Note:**
	This field is available based on the **DP OU Type** you select in a data partitioned environment.

Header Information

Name	Description
Field Name	The name of the field in the header of the evaluation form.
	This field is mandatory.
Control Type	The type of control used to display options in the header of the evaluation form. The options are:
	• **Text Box**
	• **Radio Button**
	• **Single Select**
Options	The option to define values for control type. This option is available for the radio button and single select control types only. The evaluator can select from the values that you define while evaluating an interaction.
	This field is mandatory.
Display Order	The option to set the order in which the options should be displayed.
Active	The option to mark the header as active and available for selection in the evaluation form.
Help Text	The help text that describes the evaluation form.
Status	The status of the header field. The options are:
	• **Active**
	• **Inactive**

Button	Description
Add	To add a header section in the evaluation form.
Edit	To edit a header section in the evaluation form.
Delete	To delete a header section in the evaluation form.

Criteria

Name	Description
Section	The option to group one or more criteria under a category. However, it is not mandatory to enter a section while adding a criterion. For example, you might want to group criteria under sections such as Compliance, Customer Service, and Overall Service.
Criteria	The option to define a criteria that can be used to evaluate an interaction. You can create a criterion and add child criteria to the parent.

Button	Description
Reorder Form	To move criteria across or within sections.
Add	To add a criterion. For example, you can add a criterion to check if the agent greets the customer before starting a conversation.
Add Child	To add child criteria within a parent criterion. You can add more than one child criterion to a parent. However, you can add only three levels within the hierarchy. A parent criterion can have a child and the child criterion can have another child.
Add Responses	To add responses and define scoring options for a criteria. You can add responses only to the last node in the hierarchy.

Responses

Name	Description
Response Set	Associate a response set to the criteria. The system will populate the scoring variables defined for the response set.
Response	View the responses or scoring variables defined for the response set you associate.
Scoring Conditions	Define a scoring condition for a response that the evaluator can select while evaluating an interaction. The option are: • **Not Applicable**: Define a score without a bonus or penalty. • **Exclude from Score**: Exclude from defining score, bonus, or penalty. • **Bonus Criteria**: Define a bonus along with score for a response at the criteria level. • **Bonus Parent Criteria**: Define a bonus along with score for a response at the parent criteria level. • **Bonus Form**: Define a bonus along with score for a response at the form level.

Table continues…

Name	Description
	• **Penalty Criteria**: Define a penalty along with score for a response at the criteria level. • **Penalty Parent Criteria**: Define a penalty along with score for a response at the parent criteria level. • **Penalty Form**: Define a penalty along with score for a response at the form level.
Score	Enter a score for the response.
Bonus/Penalty	Enter the bonus or penalty for the scoring condition you select. The options are: • **%** • **Raw** ⊛ **Note:** Bonus and penalty can be added to individual criteria, sub-criteria, or overall form.
Comments Mandatory	Select to force the evaluator to provide comments to a response. The user building the form can predefine a set of standard comments and make it mandatory such that the evaluator must pick one while evaluating the criterion.
Conditional Branching	Define additional questions that must be triggered for a response. However, scores cannot be associated to the additional questions. After evaluating the conditional questions, the evaluator may reconsider his response to the criterion that triggered the conditional branching.
Assign Course/Quiz	Assign course or quiz to a response. Depending on the response that is selected while evaluating, the course or quiz automatically gets assigned to the employee.

Comments

Name	Description
Comments	Add comments to a criterion. Comments help evaluators to flag important information or common problems in agent performance against a response. For example, assume there is a criteria for listening. You can add a comment `Agent interrupted customer` if this is a common problem. Evaluators can either select from a pre defined list of comments available or enter comments manually.
Description	Add a description to a comment. The user who creates the comment can use this option to provide reasons for adding a comment.
Default	Mark a particular comment as default. The defalut comment gets associated against the criteria by default.
Active	Make a comment active so that they become available while evaluating an interaction.

Weightages

Name	Description
Scoring Options	Define the scoring mechanism. The options are: • **Non Weighted**: If you select nonweighted, the scores achieved at the child criteria level rolls up to the parent criteria. The overall score is a sum of scores achieved against all the criteria. • **Weighted**: If you select the weighted option, you must define weights for every criteria. Weights defined at every criteria node (parent or child) must sum up to 100. The score achieved at the criteria will be a product of the raw score and the weight.
Formula	Define the arithmetic formula to calculate the overall score.

Preview

Name	Description
Definition	Preview the evaluation form definition before publishing the form.
Header Information	Preview the header information before publishing the form.
Criteria	Preview the criteria along with the responses before publishing the form.
Weightages	Preview the weights defined for all the criteria before publishing the form.
Test Form	To validate form creation completion.

Button	Description
Save as Draft	Save the evaluation form in a draft state.

Viewing evaluation forms

About this task

Use the Forms page to view the list of evaluation forms that are Active or saved as Draft.

You can view information such as the user who created the evaluation form, the version of the evaluation form, the scoring pattern and the department and organization unit associated to the evaluation form.

To filter evaluation forms, use the sort and filter options in the list.

Procedure

1. Click **Evaluate** > **Setup** > **Form**

   The system displays the list of Evaluation Forms.

2. To filter evaluation forms, click the **Filter** (▼) icon on the field based on which you want to filter.

3. Use the **Pagination** controls to navigate through the list. You can choose the number of records that you want to view on each page.

4. To view the version history of an evaluation form, click the version number in the Version column.

   The system displays the version history of the Evaluation Form in a new window.

5. To view the details of an evaluation form, click the **View** (➤) icon in the specific row.

6. To edit an evaluation form, click **Edit**.

   The system allows you to edit an evaluation form that has no evaluations performed using the form. If there are evaluations done using an evaluation form, you can edit the form but the system creates another version and saves the form in draft mode. You have to publish the revised form to make it active.

7. To delete an evaluation form, click **Delete**.

   You cannot delete an Evaluation Form if there are any current evaluations based on the form.

Viewing evaluation forms field descriptions

Name	Description
Form	The name of the evaluation form.
Created By	The name of the employee who creates and owns the evaluation form.
OU(s)	The organization unit associated with the evaluation form. The evaluation form is available to evaluate employees belonging to the associated organization unit.
Department	The department associated with the evaluation form. The evaluation form is available to evaluate employees belonging to the associated organization unit.
Scoring Pattern	The scoring pattern used for evaluating interactions. The options are: • **Weighted** • **Non Weighted**
Status	The field to indicate whether the Evaluation Form is active and available during evaluations. The options are: • **Active** • **Inactive** • **Draft**
Default	The field to indicate if the evaluation form is set as the default. The options are: • **Yes** • **No**
Version	The number to indicate the different versions of the evaluation form that is already published.

Version

Name	Description
Form	The name of the evaluation form.
Created By	The name of the employee who owns the evaluation form.
Created Date	The date on which the employee created the evaluation form.
Updated By	The name of the employee who updated the evaluation form.
Updated Date	The date on which the evaluation form was updated.
Version	The version number of the evaluation form.

Button	Description
Duplicate Form	To create a copy of the form. You can clone an evaluation form and reuse the same with minor changes that meet your requirements.

Evaluation Types

As a Supervisor, Reviewer, or a QA specialist, before performing evaluations on interactions, you might want to perform a test or a mock evaluation. Avaya Workforce Optimization Select gives you the flexibility to create Evaluation Types to meet such specific requirements. You can create an Evaluation Type to perform evaluations for either testing or training purposes. You can use the Evaluation Type feature as a platform to train new hires within your organization.

Typically, interactions assigned through Evaluation Plan, Calibration, or Flagged interactions automatically default to the Normal evaluation type and cannot be edited. For such evaluations, the system calculates the agent's performance based on the ratings and scores given by the evaluator. However, for the evaluation types you create, you have the option to specify whether or not you wish to include scores in evaluations. For example, you might want to create a training, mock, or adhoc evaluation type to train Evaluators. In such cases, you need not include scores to be considered in reports and notifications.

Viewing Evaluation Types

About this task

Use the Evaluation Type page to view the list of evaluation types that you have created.

In the list, you can view the details of whether an Evaluation Type is used in an evaluation form and in evaluations for scoring interactions.

To filter evaluation types, use the sort and filter options in the list.

Procedure

1. Click **Evaluate** > **Setup** > **Evaluation Type**.

   The system displays the list of Evaluation Types.

2. To filter the evaluation types, click the **Filter** (▼) icon in the column by which you want to filter.

3. To edit an evaluation type, click the > icon in the desired row.

4. To delete an evaluation type, click **Delete**.

   By default, the system displays NormalEvaluation Type. You cannot edit or delete NormalEvaluation Type.

   You cannot edit or delete an Evaluation Type if there are evaluations performed using that evaluation type.

   .

Viewing Evaluation Types field descriptions

Name	Description
Evaluation Type	The name of the evaluation type. Reviewers or evaluators select an evaluation type while evaluating an interaction. ✳ **Note:** You cannot inactivate, edit or delete the default evaluation type named Normal.
Include in Score	The field that indicates that scores will be included for evaluations performed using the evaluation type.
Evaluations Performed	The field used to identify whether the Evaluation Type is used in any evaluations. The options are: • **Yes** • **No**
Status	The status of the Evaluation Type. The options are: • **Active** • **Inactive**
Description	The description of the type of evaluation.

Icon	Name	Description
⊕ Add	**Add**	To add a new Evaluation Type.

Adding an Evaluation Type

Procedure

1. Click **Evaluate** > **Setup** > **Evaluation Type**.

   The system displays the list of Evaluation Types.

2. On the Evaluation Type page, click **Add**.

3. On the Add Evaluation Type page, enter the appropriate details.

4. Click one of the following options:

- **Save & Add Another**: To save the Evaluation Type that you created and add another type.

- **Save & Close**: To save the Evaluation Type that you created.

Evaluation Type field descriptions

Name	Description
Evaluation Type	The name of the evaluation type. Reviewers or evaluators select an evaluation type while evaluating an interaction.
Description	The description of the type of evaluation.
Evaluation Type Category	The option to select the Evaluation Type for scoring interactions. The options are: • **Include in Score**: Selecting this option has the following impacts: - The system measures agent performance based on the scores rated by the evaluator. - You can generate evaluation specific reports. - You can build an evaluation form such that courses or quizzes are assigned to an agent based on the Evaluation score. - You cannot edit this option if there are evaluations performed using this evaluation type. • **Exclude from Score**: Selecting this option has the following impacts: - The system will not calculate agent performance based on the scores rated by the evaluator. - You cannot generate evaluation specific reports. - Course and quiz assignments to agents will be ignored. - Agents will not be able to raise an appeal against evaluations that are excluded from scores. - Evaluators can calibrate an evaluation even if the evaluation type is excluded from scores. - You can delete an evaluation type even if there are evaluations performed using this evaluation type. The evaluations performed using this evaluation type will also be deleted. - You cannot edit this option if there are evaluations performed using this evaluation type. - The evaluator evaluating an interaction that is excluded from scores will be prompted with a message.

Table continues…

Name	Description
Active	The option to select the Evaluation Type as active and available when evaluating interactions. • **Active**: Makes the evaluation type available for selection while evaluating an interaction. • **Inactive**: Deactivates an evaluation type. You cannot deactivate the Normal evaluation type that is active by default. You cannot perform evaluations against an evaluation type that is inactive. If there are evaluations tied to an evaluation type prior to deactivating it, you can continue to view such evaluations. You can change the status of the evaluation types you create. You will be prompted with a message if you change the status of an evaluation type that has evaluations associated.

Appeals workflow

The appeals workflow is a mechanism that you can use to automate the appeals process. Using the appeals workflow, you can define who can appeal, who can review, who can approve, who can escalate, and who can finally approve.

Every appeal raised moves through specific workflow states before it is finally approved by the Final Approver who has the permissions to finally approve the appeal.

The permissions in the appeals workflow is defined at the role level. The Reviewer can be the supervisor who provides feedback on the appeal, while the Approver is the Manager who reviews and approves the appeal.

For more information on the appeals process, see Appeals on page 97.

✳ **Note:**

You can create an appeals workflow for each data partitioned OU.

The following table describes the appeal workflow roles and permissions that are assigned based on role:

Appeal workflow permissions

Appeal Process Role	Allowed Actions
Creator	Select one or more roles as the creator. Employees belonging to the role and who have access to the data partitioned organization unit for which the appeals workflow is created can raise an appeal.
Reviewer	Review, Accept, Draw, and Decline Select only one role as the reviewer. However, you can add multiple named users or employees outside of the role hierarchy to review an appeal. Named

Table continues…

Appeal Process Role	Allowed Actions
	users comprise of employees who belong to the data partitioned organization unit for which the appeals workflow is created. Agents will not be part of the named users list. The reviewer provides an input to the approver who can consider or ignore the input.
Approver	Accept, Draw, and Decline. Select either a role or multiple named users as the approver. Employees belonging to the role and who have access to the data partitioned organization unit for which the appeals workflow is created can approve or reject an appeal. The approver is usually the original evaluator or the roles above in the hierarchy of the evaluator.
Final Approver	Final Accept, Final Draw, and Final Decline. Select either a role or multiple named users as the final approver. Employees belonging to the role and who have access to the data partitioned organization unit for which the appeals workflow is created can do a final approve or a final reject.

Viewing appeals workflow

About this task

Use the Appeal Workflow screen to view the roles and users defined in the workflow.

Procedure

Click **Evaluate** > **Setup** > **Appeals Workflow**.

The system displays the Appeals Workflow page.

Viewing appeals workflow field descriptions

Name	Description
Workflow Name	The name of the appeal workflow.
Creator	The name of the employee who has raised the appeal.
Reviewer	The name of the supervisor or manager who reviews the appeal.
Final Approver	The name of the employee who approves or rejects the appeal.
Status	The status of the appeal. The options are: • **Active** • **Inactive**

Defining an appeals workflow

Procedure

1. Click **Evaluate** > **Setup** > **Appeals Workflow**.

   The system displays the Appeals Workflow page.

2. Select the **DP OU Type** for which you want to create the appeals workflow.

   You can create a separate workflow for each data partitioned OU.

3. In **Appeal Duration**, select the number of days by which the appeals process can be completed.

   However, the system allows the appeal to be completed post the due date too.

   ✱ **Note:**

   Employees cannot raise fresh appeals against an evaluation when there is an appeal already in progress.

4. To set the appeal workflow in active status, select **Active**.

5. In **Appeal Process Role**, view the appeal roles that are available in the workflow.

6. In **Allowed Actions**, view the permissions assigned for the roles in appeals process.

7. Select **Roles** and named users to assign users to the appeal process roles such as creator, reviewer, approver, and final approver.

   ✱ **Note:**

   The appeals process roles are configured at role level, and not at employee level.

Appeals workflow field description

Name	Description
Business [DP OU Type]	The name of the data partitioned OU for which you want to define the appeals workflow. This field is mandatory.
Appeal Duration (Days)	The number of days within which an appeal must to be completed. There will be notifications sent 48 hours, 24 hours before the due date and on the due date. However, the system processes the appeal even after the due date. Appeals do not become inactive after the duration specified. This field is mandatory.
Active	The option to make the workflow open for the appeals process.
Appeal Process Role	The role of the users in the appeals process.
Role	The role selected to perform the assigned tasks in the appeals process.
Named User	The employees selected to perform the assigned tasks in the appeals process.
Allowed Actions	The set of actions defined for the specific role in the appeals process.

Manage evaluations

Planning evaluation

Evaluation Plans

Using Evaluation Plans, you can track agent performance from recorded interactions. Evaluation plans provide insight into the performance improvements made in your contact center operations.

Using evaluation plan, you can take advantage of the following features:

- Define target number of evaluations a reviewer needs to perform for an agent.
- Define which interactions to choose to evaluate.
- Distribute evaluation plan automatically to QA agents and reviewers to save time and improve workflow.
- Define evaluation plans by Queue with the ability to create multiple evaluation plans for a single Queue.
- Execute the evaluation plan for the selected employees and push calls through the distribution pool.
- Assign interactions to QA reviewers from the distribution pool.

Evaluation plan checklist

This checklist provides the high-level process for creating and managing an evaluation plan.

No.	Task	Description	Notes	✔
1	Define evaluation plans to set targets for reviewers to evaluate agents and interactions.	See Defining an evaluation plan on page 72.		
2	Identify employees whose interactions must be picked as part of the evaluation plan.	See Selecting employees for evaluation on page 72.		
3	Define the target number of interactions to be picked for each selected employee.	See Setting employee targets for evaluation on page 73.		
4	Select a specific set of interactions for evaluation.	See Selecting interactions for evaluation on page 74.		

Table continues…

No.	Task	Description	Notes	✔
5	Assign interactions to reviewers and evaluators for scoring.	See Assigning interactions for evaluation on page 74.		
6	Review and publish the evaluation plan.	See Reviewing and publishing an evaluation plan on page 75.		
7	Schedule to execute the evaluation plan so that the interactions get assigned as tasks to the evaluator.	See Scheduling evaluation plans on page 79.		

Defining an evaluation plan

Procedure

1. Click **Evaluate** > **Management** > **Plans**.

2. Click **Create A Plan**.

3. Enter a name and description for the plan.

4. In **Target Period**, select the option to define the target period. The options are:

   • **Weekly**

   • **Monthly**

5. If you are using a data partitioned environment, select the **DP OU Type**, for example, **Client** for whom you want to create the evaluation plan.

6. In **Week Begins From**, select the start day of the work week.

   ⊛ **Note:**

   By default, the administrator sets the start day of the week. You can change the day to reflect your work week.

7. To publish the evaluation plan, select Active.

   After you publish the plan, you can change the status to Inactive if you do not want to run any evaluations based on the evaluation plan.

Next steps

Select employees whose interactions are picked as part of the evaluation plan.

Selecting employees for evaluation

About this task

Employee selection refers to selection of employees whose interactions must be picked as part of the plan.

Selection criteria can be the organizational unit, site, departments, groups, role, reporting to hierarchy, employee name, tenure of the employee, and custom fields.

Procedure

1. Click the **Employee Section** tab.

2. In the Employee Filter section, specify the search criteria to filter employees.

   a. In **Field**, select the fields by which you want to filter employees to assign to the plan.

   b. In **Operator**, select the operator for the filter.

   c. In **Value**, enter the value that the records must match.

   d. To add multiple filters, click the **Add Field** (⊙ Add) icon.

   e. Click **Apply Filter**.

      The system displays the list of employees that match the search criteria in the Employee List tab.

3. In the Employee List section, select the employees you want to be evaluated under the evaluation plan.

   An employee who is no longer with the organization is not included in the evaluation plan.

Next steps

Define the evaluation plan target.

Setting employee targets

About this task

Use this procedure to specify the target number of interactions that must be picked and assigned for each of the employees selected.

You can perform the following tasks:

• Specify the interaction distribution to be random or specific. If the interaction distribution is specific, depending on the target period you define for the plan, you can further specify the interaction distribution.

• Define the interaction distribution for a given day of the week, if the target period is weekly. The distribution across the week must not exceed the target.

• Define the interaction distribution for a week of the month, if the target period is monthly. The distribution across the month must not exceed the target.

• Force the system to meet the distribution target. The system will try to check for interactions from previous days of the week or weeks of a month to meet the distribution target.

Procedure

1. In **Employee**, view the total number of employees selected for evaluation.

2. In **Target**, specify the number of interactions that the plan must assign on a weekly or monthly basis.

3. Select the method of sampling interactions for evaluation. Choose one of the following options:

   - **Random** : To randomly select interactions for evaluation.
   - **Specific** : To select a specific number of interactions on a week day in case of a weekly plan or on a week in case of a monthly plan.

4. Select the following options for specific distribution:

   a. In **Distribution**, select the week day or the week in a month.
   b. In **Must meet distribution target**, you can specify if the weekly or monthly distribution target must be met at any cost or not.

Next steps

Select interactions for evaluation.

Defining the interaction selection criteria

Procedure

In the **Interaction Selection** tab, specify the search criteria to filter interactions to be evaluated.

   a. In **Field**, select the fields by which you want to filter interactions to assign to the plan.
   b. In **Operator**, select the operator for the filter.
   c. In **Value**, enter the value that the records must match.
   d. To add multiple filters, click the **Add Field** (⊙ Add) icon.

Next steps

Assign interactions to be evaluated.

Assigning interactions for evaluation

Procedure

1. In the **Assignment** tab, select the default form to be associated with the evaluation plan.

2. In **Assignments**, select the option to assign interactions to reviewers or send the interactions to the Distribution Pool.

3. Select **To Reviewers** to view a list of eligible reviewers who have access to the interactions and can evaluate the interactions.

   The system displays the reviewers, assignments under the current plan, and total assignments across all plans.

4. From the list, select the reviewers that you want to assign to evaluate the interactions.

   The system displays the interactions in the **Evaluate** > **Evaluations** > **My Assignment** page of reviewers.

5. To add interactions to the distribution pool, select **To Distribution Pool**.

Next steps

Preview and publish an evaluation plan.

Reviewing and publishing an evaluation plan

Procedure

1. Complete the mandatory steps in the Definition, Employee Selection, Target, Interaction Selection, and Assignment tabs.

2. On the Preview tab, view the details of the evaluation plan.

3. Click **Publish** to publish the evaluation plan. The plan starts running from the moment you publish the evaluation plan. Depending on the plan definition, the system looks for interactions and starts assigning interactions.

    The system displays the evaluation plan in the list on the View Plans page with Active status.

4. Click **Publish & Schedule** to set the plan for execution. From the scheduled data and time, the plan runs everyday and assigns tasks to the selected reviewers.

    The system assigns interactions to reviewers and evaluators for evaluation on the scheduled date and time.

    😶 **Note:**

    The evaluation plans run according to the time zone configured by the administrator in **Administration** > **Settings** > **General Settings**.

Evaluation Plan field descriptions

Definition

Name	Description
Name	The name of the evaluation plan.
Description	The description of the evaluation plan.
Target Period	The frequency at which interactions are assigned. The options are: • **Weekly** • **Monthly**
DP OU Type	The organization units that are tied to the data partitioned OU type. For example, **Business**, **Client**, **Customer**, or **Line of Business**. 😶 **Note:** This field is available in a data partitioned environment based on the settings configured by the system administrator.
Week begins from	The start of the work week. The options are: • **Monday to Sunday**

Table continues…

Name	Description
	• **Sunday to Saturday**
	✳ **Note:**
	This options you see depend on the settings configured by your system administrator.
Active	The status of the evaluation plan.
	✳ **Note:**
	This option is available after you save the plan as Draft.

Employee Selection

Name	Description
Employee Filter	The field to filter and search employees to add to the evaluation plan.
	You must specify the following before you apply filters:
	• **Field**: The fields used to filter the search.
	• **Operator**: The operator used in the search criteria.
	• **Value**: The value to match in the search.
Employee List	The list that displays the search results for employees.
	You can select one or more employees from the list.

Employee search

Name	Description
Field	The fields for searching employees. The options are:
	• **Organizational Units**
	• **Site**
	• **Group**
	• **Department**
	• **Role**
	• **Employee**
	• **Reporting To**
	• **Tenure**

Using Avaya Workforce Optimization Select

Target

Name	Description
Employee	The total number of employees selected for evaluation as part of the plan.
Target	The target number of interactions that are assigned from the selected plan.
Distribution	The method of sampling interactions for evaluation. The options are: • **Random**: Interactions are picked randomly when the plan is run during the defined period. • **Specific**: Interactions are assigned based on the distribution target selected during the defined period.
Distribution On	The number of interactions to be evaluated during the work week or month.
Meet Distribution Target	The option to specify if the weekly or monthly distribution target must be met at any cost or not. The options are: • **Yes**: Forces the system to meet the distribution target. For example, assume you define the target as 5 interactions for each employee, a weekly distribution of 2 interactions on Monday and 3 on Thursday, and the option to meet distribution target as Yes. The system picks 2 interactions for the selected employees on Monday. If there are no interactions for a particular employee on Monday, the system checks for interactions from the previous days of the week and tries to meet the distribution target. Similarly, for a monthly distribution, the system checks for interactions from the previous weeks of the month and tries to meet the distribution target. If the distribution target is not met due to unavailability of interactions, the system will not roll over the target to the next week or month. • **No**: Tries to meet the distribution target. If the distribution target is not met, the system continues to move ahead. The system will not check for interactions from previous days of a week or weeks of a month.
Supervisor	The supervisor to whom the employee reports.
Department	The department to which the employee belongs.

Interaction Selection

Name	Description
Field	The fields used to filter the interactions. The options are: • **Calling Party** • **Called Party** • **Channel** • **Commented** • **DNIS** • **Duration** • **Hold Duration** • **No of Holds** • **No of Transfers** • **Queue** • **Screen Captures** • **Tagged** • **Variables 1 to 10**
Operator	The operator used in the search criteria.
Value	The value to match in the search.

Assignment

Name	Description
Default Form	The evaluation form that is set as the default for the evaluation plan.
Assignments	The total number of calls assigned to each reviewer.
Reviewer	The employees who have access to the interactions of the selected agents and who possess evaluation permission. ⊛ **Note:** Only supervisors or managers of the employees selected to be evaluated are listed.
Number of interactions equally assigned from this plan	The number of interactions the system equally assigns to reviewers based on the target you specify for the evaluation plan.
Total assignments across plans	The number of interactions evaluated across different plans during the last 30 days.

Preview

Name	Description
Definition	Defines the plan and sets the visibility.
Employee Selection	Selects specific agents for evaluation.
Target	Defines the targets for agents.
Interaction Selection	Selects the interactions to be evaluated.
Assignment	Assigns interactions to reviewers or push to the distribution pool for evaluation.

Scheduling an evaluation plan

About this task

Use this procedure to schedule the evaluation plan to run on a scheduled date and time. The plan runs everyday at the specified time from the effective date and assigns interactions to the selected reviewers.

Procedure

1. Select the saved evaluation plan and navigate to the Preview tab.

2. Click **Publish & Schedule** to set the plan for execution.

3. Select **Run on a Schedule** to enable the scheduler.

4. Select or enter the option to schedule the evaluation plan on specific date and time. The options are:

   • **Effective Date**

   • **Run At**

   By default, the date is set to current date. You can schedule the plan to run on any date beyond the current date.

   ⊛ **Note:**

   The scheduled evaluation plans run according to the time zone configured by the administrator in **Administration** > **Settings** > **General Settings**.

5. Click **Save** to save the evaluation plan.

Viewing evaluation plans

About this task

Use this procedure to view the list of evaluation plans along with details like the plan owner, status, and employees covered.

You can also view the details of the last run date and period during which the plan is run.

From the Plans page, you can perform the following actions:

- Create an evaluation plan.
- Delete an evaluation plan.
- Run a plan instantaneously. You can select the **Run now** option to run a plan at that moment. You can also select the **Run** option to run a plan from a previous date to the current date. The system picks and assigns interactions to reviewers based on the date range you specify. In both the cases, the assignment happens just once.

Procedure

1. Click **Evaluate** > **Management** > **Plans**.

    The system displays the list of saved and published evaluation plans.

2. To filter evaluation plans, click the **Filter** (▼) icon on the field based on which you want to filter.

3. Use the **Pagination** controls to navigate through the list. You can choose the number of records you want to view on each page.

4. To edit an evaluation plan, click the **>** icon on the desired row.

    The system displays the evaluation plan in **Edit** mode allowing you to make changes to the plan.

5. To delete an evaluation plan, select the evaluation plan you choose to delete, and click **Delete**.

6. To run a plan, select the evaluation plan with Active status, and click **Run Plan**.

    You can run the plan on the current date or for a specified period.

Viewing evaluation plans field descriptions

Name	Description
Plan Name	The name of the evaluation plan.
Period	The period during which the interactions of agents are evaluated.
Created By	The name of the employee who owns the evaluation plan.
Employee Coverage	The total number of employees that are selected for evaluation as part of the plan.
Target	The total number of interactions that are to be evaluated as part of the plan.
Assigned	The total number of interactions that are assigned to reviewers for evaluation as part of the plan.
Run At	The date and time when the evaluation plan is scheduled to run.
Last Run	The date on which the evaluation plan was last run.

Table continues…

Name	Description
Last Run By	The name of the employee by whom the evaluation plan was last run.
Status	The status of the evaluation plan. • Active • Inactive

Viewing Employee Coverage

About this task

Use the Employee Coverage page to view the list of employees covered under different evaluation plans.

The list displays the quality scores, average handle time, number of evaluations covered, and the projected coverage in the next 30 days for all the employees that you have access to.

To filter evaluations, use Views and the sort and filter options in the list.

Procedure

1. Click **Evaluate** > **Management** > **Employee Coverage**.

2. Click **View** to view a list of employees covered across all plans.

3. To filter the evaluations, click the **Filter** (▼) icon in the column by which you want to filter.

4. Use the **Pagination** controls to navigate through the list. You can specify the number of records that you want to view on each page.

Viewing Employee Coverage field descriptions

Name	Description
Employee	The name of the employee who is evaluated.
Tenure (Weeks)	The tenure of the employee in the organization, in weeks.
Quality Score	The score received by the employee during evaluation.
Avg Handle Time	The average duration from the start of the interaction till the end including the hold time.
Past Coverage	The total number of interactions assigned for evaluations in the last 30 days. The interactions might have been assigned through different plans, distribution pool or ad hoc evaluations.
Projected Coverage	The total number of evaluations targeted for the employee across different evaluation plans.

Table continues…

Name	Description
	The value is the total number of interactions expected to be completed within the next 30 days.

Viewing QA Coverage

About this task

Use the QA Coverage page to view the list of all reviewers who have their evaluations tasks either in pending or draft state. You can reassign tasks to another reviewer.

To filter evaluations, use Views and the sort and filter options in the list.

Procedure

1. Click **Evaluate** > **Management** > **QA Coverage**.

   The system displays a list of evaluations covered for various employees.

2. To filter the evaluations, click the **Filter** icon in the column by which you want to filter.

3. Use the **Pagination** controls to navigate through the list. You can specify the number of records that you want to view on each page.

4. Select the evaluations that you want to reassign to other reviewers from the **Re-assign To** drop-down list, and click **Assign**.

   The system displays the evaluation task under the My Assignment screen for the assigned employee.

   A notification is sent to the assigned employee for evaluating the interaction.

Viewing QA Coverage field descriptions

Name	Description
Reviewer	The name of supervisor or manager who evaluates the interactions.
Employee	The name of the employee who is evaluated.
Supervisor	The name of the supervisor or manager to whom the employee reports.
Transaction Date	The date on which the interaction is recorded.
Transaction Type	The type of channel on which the interaction is delivered. The options are:
Queue	The queue that the interaction is associated with.
Origin	The field to indicate the origin of the evaluation. The options are:
Screens	The field to indicate if the interaction has screens captures. The options are:
Interaction ID	The unique ID of the interaction.

Table continues…

Name	Description
Status	The field to indicate the status of the evaluation. The options are: • New • Draft

Assigning evaluations from Distribution Pool

About this task

Use this procedure to view and select interactions that you want to assign to reviewers for evaluation.

To filter interactions, use Views and the sort and filter options in the list.

The interactions in the Distribution Pool are available when:

- A Supervisor flags interactions for QA while monitoring live interactions.
- An evaluator declines evaluations in the My Assignment page.

From the interaction list, you can select and evaluate an interaction that is not assigned to you.

Procedure

1. Click **Evaluate** > **Management** > **Distribution Pool**.

   The system displays the list of interactions available in Distribution Pool.

2. Select the evaluations that you want to assign to other reviewers from the list, and click **Assign**.

   The system displays the evaluation task in the My Assignment screen for the assigned employee.

   A notification is sent to the assigned employee for evaluating the interaction.

3. To assign an interaction to yourself , click **Add to My Assignments**.

4. To delete an interaction from Distribution Pool, select the interaction and click **Delete**.

   You can delete an interaction only if you have the relevant privileges.

Distribution Pool field descriptions

Name	Description
Plan Name	The name of the plan that is used for evaluating the interactions.
Interaction ID	The unique ID of the interaction.
Interaction Date	The date on which the interaction takes place.

Table continues…

Name	Description
Supervisor	The name of the supervisor or manager to whom the employee reports.
Origin	The field to indicate the origin of the evaluation. The options are: • **Plan** • **Interaction Playback** • **Live Monitoring**
Duration	The duration of the interaction in the hh:mm:ss format.
Screens	The field to indicate if the interaction has screens captures. The options are:

Evaluations

Evaluate Interactions

Evaluating an interaction

About this task

When you evaluate an interaction, you can score the interaction on each evaluation criteria and sub-criteria. You can view snippet comments, employee profile and interaction details, and each segment of the interaction.

You can evaluate an interaction in any of the following ways:

- Evaluate when playing back audio recording and screen captures from a previously recorded interaction.
- Evaluate an employee's performance in real time, while listening to the employee while they are attending to the interaction.
- Evaluate interactions from your My Assignment page.

Procedure

1. To evaluate a recorded interaction:

    a. Click **Interactions** > **Playback**.

    b. On the Playback page, click the **Play** ( ) icon next to the recorded interaction that you want to evaluate.

    c. On the Call Details page, click **Evaluate Now**.

2. To evaluate a live interaction:

    a. Click **Live Monitoring** > **Monitor**.

b. On the Monitor page, click the **Play** (▶) icon next to the live interaction that you want to evaluate.

c. On the Call Details page, click **Evaluate Now**.

3. To evaluate interactions from My Assignment:

a. Click **Evaluate** > **Evaluations** > **My Assignment**.

b. Click the **View** (➤) icon in the specific row.

4. On the Call Details page, click the **Evaluation** tab.

The system displays the interaction in the Recorder pane.

The there is no evaluation form associated for evaluation, the section below the Recorder pane appears blank.

5. From **Form** drop-down list, select any active evaluation form.

6. From **Evaluation Type** drop-down list, select any active evaluation type.

The system displays the evaluation criteria for the form.

7. For each evaluation criteria, select a response and score the interaction.

8. To view previous evaluations on the interaction during evaluation, click the **Previous Evaluations** tab.

9. To add comments to the interaction during evaluation, click the **Comments/Tags** tab, and enter comments and tags.

10. To view the interaction details during evaluation, click the **Call Details** tab.

11. To view the interaction segment details, click the **Segmentation** tab.

Adding evaluation comments

About this task

Evaluators, managers, and supervisors can add comments to an evaluation either while they are scoring it, or after complete scoring the form. Agents can add comments to an evaluation after the evaluation is scored.

There are two types of comments that you can add when evaluating an interaction.

- Form comments: General comments that apply to the entire evaluation form.
- Evaluation criteria comments: Comments that apply to a specific criteria that you are evaluating.
- Snippet comments: Comments that you can add to a particular segment of the interaction. You can specify the start time, end time, and severity for a snippet comment.

Procedure

1. Click the **Comments** (▣) icon to the right of the evaluation criteria, and enter comments.

The system displays a text area to enter comments. You can see the comments after you save the evaluation form.

2. In **General Comments** , enter overall comments for the evaluation.

   > ⊛ **Note:**
   >
   > You can also add comments in the **Snippet Comments** and **Comments/Tags** tab for live and recorded interactions.

Evaluation score calculation

The evaluator or reviewer scores the interaction by selecting appropriate responses against criteria. The evaluator scores the interaction by responding to the evaluation questions in the form and analyzing how the employees handle the interaction with customers.

The scoring mechanism can be weighted or nonweighted and the final score is awarded differently for each scoring mechanism.

The overall score is calculated accordingly:

- For nonweighted evaluations, the scores achieved at the child criteria level roll up to the parent criteria. The overall score is a sum of all scores achieved for the criteria.

- For weighted evaluations, weights are defined for every parent criteria, criteria and child criteria. The weights must sum up to 100.

  The score achieved at the criteria is a product of the raw score and the weight.

- The bonus or penalty is calculated at the parent or child criteria level, or at the overall evaluation form level.

  If the evaluation form has an associated bonus or penalty as a percentage of the criteria score, the overall score is calculated accordingly.

Example

Consider the following evaluation form with criteria and sub-criteria:

Section A: Greeting

- C1: Did the agent or employee greet the customer properly?

- C2: Did the agent or employee identify themselves with the customer?

- C3: Did the agent or employee mention that the interaction is being recorded?

Section B: Customer Service

- C1: Did the agent or employee verify the information provided by the customer?

- C2: Did the agent or employee rush or talk over the customer voice?

- C3: Did the agent or employee show empathy towards the customer?

- C7: How was the overall performance of the employee?

A bonus and penalty is given for evaluation responses 1, 2, and 3 at the parent criteria level. For response 1 and 3 from the evaluator, a bonus of 2% and 3 points is awarded. For response 2, a penalty of 1% is awarded.

The evaluation form is a weighted form, with the weightage given to criteria C4 to C7 towards the overall scores given as 20, 10, 10, and 50.

The employee receives scores 3, 5, 2, 8, 5, 5, 10 for the evaluation criteria C1 to C7 based on the evaluator scoring the interaction.

The total score is displayed after the evaluator scores each question in the form.

The overall scores are calculated as follows:

Criteria score with bonus and penalty

For bonus and penalty given as percentage, the score is calculated as:

Criteria score = Bonus or penalty percentage/100 plus or minus the actual score that is awarded.

For bonus and penalty given as raw score, the score is calculated as:

Criteria score = Bonus or penalty raw score plus or minus the actual score that is awarded.

- Bonus score for criteria C1 = 2 percent of 3 = 0.06.

  Criteria C1 score = 3 + 0.06 = 3.06

- Penalty score for criteria C2 = 1 percent of 5 = 0.05

  Criteria C2 score = 5 - 0.05 = 4.95

- Bonus score for criteria C3 = 1 points.

  Criteria C3 score = 2 + 1 = 3

Criteria score based on weightage

For criteria C4 to C7, the score is calculated as weighted score x the actual score that is awarded.

Weightage score = weightage percentage/100

Criteria score = weighted percentage/100 x actual score that is awarded.

The scores for criteria are:

- Criteria C4 score = 8 x 0.2 = 1.6
- Criteria C5 score = 5 x 0.1 = 0.5
- Criteria C6 score = 5 x 0.1 = 0.5
- Criteria C7 score = 10 x 0.5 = 5

The overall form score is the total of all criteria (parent) and sub-criteria (child criteria) scores in each section of the form. 3.06 + 4.95 + 3 + 1.6 + 0.5 + 0.5 + 5 = 18.61 points.

The overall score is rounded off to 19 points.

Evaluation details field descriptions

Evaluation

Name	Description
Form	The form based on which the evaluation is performed.
Evaluation Type	The type of evaluation. For example, Training, Ad-hoc, Mock, or Normal.
General Comments	The comments that are entered by the evaluator during evaluation.

Table continues…

Name	Description
Section	The section that groups the parent criteria and sub-criteria that must be evaluated.
Criteria	The parent criteria and sub-criteria that must be evaluated.
	✱ **Note:**
	You can successfully save the evaluation only when you complete evaluating all the criteria.

Previous Evaluations

Name	Description
Form	The form based on which the evaluation is performed.
Reviewed By	The name of the supervisor or manager who evaluated the interaction.
Evaluation Type	The type of evaluation. For example, Training, Ad-hoc, Mock, or Normal.
Score	The score that is received by the employee during evaluation of the interaction.
Evaluation Date	The date on which the evaluation is performed.
Course/Quiz	The course or quiz that is assigned to the employee based on the evaluation scores.

Comments

Name	Description
Date	The date on which the comment is added. The date is in the mm:dd:yyyy hh:mm:ss format.
Comments	The text message included as comments to the interaction.
From	The name of the employee who adds the comment.

Tags

Name	Description
Date	The date on which the tag is added. The date is in the mm:dd:yyyy hh:mm:ss format.
From	The name of the employee who adds the tag.
Never delete the call	The tag used to specify that the interaction should never be deleted.
Need training	The tag used to specify that the employee attending to the interaction requires further training.
Do not allow download	The tag used to specify that the interaction cannot be downloaded.
Do not allow download & email	The tag used to specify that the interaction cannot be downloaded or sent by email.

Call details

Name	Description
Interaction ID	The unique ID of the interaction.
Start Time	The start time of the interaction in a 24–hour format: hh:mm:ss.
End Time	The end time of the interaction in a 24–hour format: hh:mm:ss.
Duration	The duration of the interaction in the hh:mm:ss format.
Employee Code	The employee code of the agent who attended to the interaction.
Employee Name	The name of the employee who attended to the interaction.
Extension	To search by the extension number of the called party.
Location	The name of the site the employee belongs to.
Group Belongs To	The name of the group that the employee belongs to.
Supervisor	The name of the supervisor or manager to whom the employee reports.
Channel	The type of channel on which the interaction is delivered. The options are:
Screen	The field to indicate if the interaction has screens captured. The options are: • **Yes** • **No**
Number of Holds	The number of times that the employee put the interaction on hold.
Hold Duration	The total duration for which the employee put the interaction on hold in the hh:mm:ss format.
Number of Transfers	The number of times that the employee transferred the interaction.

Emailing an evaluation

About this task

You can email an evaluation if you want other users to view or give feedback on the evaluation. The evaluation appears as a link, and the user must log on to the application to access the evaluation.

Procedure

1. Click **Evaluate** > **Evaluations** > **View Evaluations**.

2. Click the **View** ( ) icon in the specific row.

   The system displays the Call Details page.

3. In the Evaluations tab, click the **Email** ( ) icon.

4. Enter the message, recipient details, and click **Send**.

Printing an evaluation

About this task

You can print evaluations that you have access to.

Procedure

1. Click **Evaluate** > **Evaluations** > **View Evaluations**.

2. To view the details of an evaluation, click the **View** (➤) icon in the desired row.

   The system displays the Call Details page.

3. In the Previous Evaluations tab, view the details of evaluations by other users for the same interaction.

4. In the Evaluations tab, view the details of the current evaluation before printing.

5. Click the **Print** (🖨 Print) icon.

   The system prints the evaluation criteria, responses, and scores given to the interaction.

Viewing My Assignment

About this task

Use the My Assignment screen to view the interactions that are assigned to you for evaluation.

You can view the evaluations already performed and search for interactions that you want to add to My Assignment. The list displays all the evaluations that are New or saved as Draft. To filter evaluation assignments, use the sort and filter options in the list.

Choose the interaction that you want to evaluate or decline the interactions that are assigned to you. The evaluation that a user declines moves to the distribution pool and will be available for assignment. After you complete evaluating the interaction, the status of the evaluation assignment is displayed as Completed.

Procedure

1. Click **Evaluate** > **Evaluations** > **My Assignment**.

   The system displays a list of evaluations that are assigned to you.

2. To filter the evaluations, click the **Filter** (▼) icon in the column by which you want to filter.

3. Use the **Pagination** controls to navigate through the list. You can choose the number of records that you want to view on each page.

4. Perform the following actions:

   a. To view the details of an interaction to evaluate, click on the **View** (➤) icon in the desired row.

   b. To view the interaction details and previous evaluations on the interaction, click the Call Details tab.

   c. To begin evaluation, on the Evaluate tab, select an evaluation form, evaluation type, responses for the criteria.

   d. To add comments or tag to the interaction, click the Comments/Tags tab.

5. To decline an evaluation assigned to you, select the interaction from the list and click **Decline Selected Evaluations**.

   The evaluation moves to the Distribution Pool and will be available for assignment.

Viewing My Assignment field descriptions

Name	Description
Employee	The name of employee whose interaction is evaluated.
Supervisor	The name of the supervisor or manager to whom the employee reports.
Transaction Date	The date on which the interaction is recorded. • Chat • Email • Voice
Transaction Type	The type of channel in which the interaction is recorded. The options are:
Queue	The queue that the interaction is associated with.
Type	The name of the evaluation type. Reviewers or evaluators select an evaluation type while evaluating an interaction.
Screens	The field to indicate if the interaction has screens captures. The options are:
Interaction ID	The unique ID of the interaction that is evaluated.
Status	The status of the evaluation that is assigned. The options are:

Button	Description
Decline Selected Evaluations	To decline the selected interactions for evaluations.

Viewing evaluations

About this task

Use the View Evaluations page to view the list of evaluations completed by the employees that you have access to.

To filter evaluations, use Views and the sort and filter options in the list.

You can create a new Evaluation and edit or delete an existing Evaluation if you have adequate permissions.

Procedure

1. Click **Evaluate** > **Evaluations** > **View Evaluations**.

2. Click **View** to search for evaluations that match the filter criteria defined in the View.

The system displays a list of completed evaluations in the selected View.

3. To view the details of an evaluation, click the **View** (❯) icon in the specific row.

4. To edit an evaluation, select the interaction and click **Edit**.

   Depending on your privileges, you can edit the evaluation scores, interaction comments, and tags for the interaction.

5. To delete an evaluation, select the interaction and click **Delete**.

   Depending on your privileges, you can either delete evaluations assigned to you or all evaluations.

Viewing evaluations field descriptions

Name	Description
Employee	The name of employee whose interaction is evaluated.
Supervisor	The name of the supervisor or manager to whom the employee reports.
Evaluation Date	The date on which the interaction is evaluated.
Transaction Type	The type of channel in which the interaction is recorded. The options are: • **Chat** • **Email** • **Voice**
Evaluation Type	The name of the evaluation type. Reviewers or evaluators select an evaluation type while evaluating an interaction.
Form	The form based on which the evaluation is performed.
Score	The score received by the employee during evaluation.
Queue	The queue that the interaction is associated with.
Screens	The field to indicate if the interaction has screens captures. The options are:
Interaction ID	The unique ID of the interaction that is evaluated.

Button	Description
Edit	To edit the selected evaluation.
Delete	To delete the selected evaluation.

Performing ad hoc evaluations

About this task

Use the Adhoc Evaluations page to search and list the interactions that you want to evaluate.

From the interaction list, you can select and evaluate an interaction that is not assigned to you.

To filter evaluations, use Views and the sort and filter options in the list.

Procedure

1. Click **Evaluate** > **Evaluations** > **Ad hoc Evaluations**.

2. Select a **View** to search for evaluations that match the filter criteria defined in the View.

   The system displays a list of evaluations under the selected View.

3. To evaluate an interaction, click the **View** (➤) icon in the specific row.

   The system displays the New Evaluation page.

4. To assign an interaction to yourself for evaluation, select an interaction and click **Add to My Assignment**.

   The **Type** column in the My Assignment page displays whether the interaction is from Plans or Ad hoc.

   You can evaluate the interaction using any evaluation form available for ad hoc evaluations.

Performing ad hoc evaluations field descriptions

Name	Description
Employee	The name of employee whose interaction is evaluated.
Reporting To	The name of the supervisor or manager to whom the employee reports.
Transaction Date	The date on which the interaction is recorded.
Transaction Type	The type of channel in which the interaction is recorded. The options are:
Queue	The queue that the interaction is associated with.
Screens	The field to indicate if the interaction has screens captures. The options are:
Interaction ID	The unique ID of the interaction that is evaluated.

Evaluation History

Name	Description
Form	The form based on which the evaluation is performed.
Evaluated By	The name of the employee who has evaluated the interaction.
Status	The status of the evaluation. The options are:
Score	The score received by the employee during evaluation.
Evaluation Date	The date on which the interaction is evaluated. The date is in the mm:dd:yyyy format.
Course/Quiz	The course or quiz assigned to the employee who is being evaluated.

Button	Description
Add to My Assignments	To add the selected evaluation to the My Assignments page.

Calibration

Calibrations

To maintain the quality of interactions with customers, supervisors, and Quality Assurance (QA) reviewers, you can evaluate agents for their performance at regular intervals. However, since these evaluations involve a level of subjectivity, consistency becomes a challenge.

The Calibration functionality helps different evaluators assess interactions similarly. It enables you to measure a single transaction among multiple users, to ensure that all managers and supervisors are using the evaluation form correctly and applying the quality criteria consistently. Avaya Workforce Optimization Select provides the user with the flexibility to perform calibrations for non voice interactions such as email and chat transactions

Viewing calibrations

About this task

Use the Calibration page to view the evaluations that you have calibrated.

You can edit or delete a calibration from the list.

Procedure

1. Click **Evaluate** > **Calibration**.

   The system displays list of all calibrations that you have created.

2. To edit a calibration, click the **View** (➤) icon in the desired row.

   You can change interactions selected for calibration, reviewers, moderator, evaluation form, due date, lock on due date, and the option to flag the task as calibration.

3. To delete a calibration, select the interaction that is already calibrated, and click **Delete**.

   A calibration can be deleted, if there are active evaluations or pending tasks associated with that calibration.

Viewing calibrations field descriptions

Name	Description
Interaction ID	The ID of the interaction that is calibrated.
Assigned Date	The date on which the calibration was assigned.
Updated On	The date on which the calibration status is last updated.
Recommended Form	The evaluation form based on which the calibration is performed.
Due Date	The date by which the calibration needs to be completed.
Status	The status of the calibration. The options are: • Active • Completed • In progress

Calibrating evaluations

About this task

Use this procedure to create and manage calibrations for voice based interactions as well as non-voice interactions, such as email and chat transactions.

If you have adequate privileges to calibrate an interaction, you can assign the same interaction to different evaluators. The evaluators can view the calibration tasks and evaluate that interaction.

Once the evaluators complete the evaluation, you can set the final consensus score and standards for evaluating similar interactions.

Procedure

1. Click **Evaluate** > **Calibration**.

2. In the Select Interaction section, select the interactions that you want to assign from calibration.

3. Filter the interactions you want to assign using Views.

4. In the Select Reviewers section, select the moderators who will evaluate the interaction.

   You must select at least one reviewer and one moderator for calibrating the interaction.

5. Select the evaluation form that you want to assign for scoring the interaction.

6. In **Due Date**, select the date by when the moderators and reviewers must complete the calibration task.

7. If you do not want evaluators to calibrate post the due date, enable **Lock On Due Date** option.

8. If you want the system to display the evaluation as a Calibration, enable **Show it as a Calibration** option.

   The system displays the evaluation as Calibration in the My Assignment page of the evaluators.

   If the user does not select the option, the evaluation appears in the My Assignment screen as a task that has come from Evaluation Plan.

Calibration field descriptions

Select Interactions

Name	Description
View	The option that displays the filters used for the selected view.
Employee	The name of the employee who is evaluated.
Supervisor	The name of the supervisor or manager the employee reports to.
Transfers	The name of the employee to whom the interaction was transferred.
Queue	The queue to which the interaction belongs.
Screens	The field to indicate whether the recording has screen capture. The options are: • **Yes** • **No**
Interaction ID	The record ID of the interaction.
Start Time	The start time of the interaction.
End Time	The end time of the interaction.
Duration	The total duration of the interaction.

Select Reviewers

Name	Description
Moderator	The name of the employee who is assigned as the moderator for the calibration process.
Reviewer	The name of the employees who will evaluate the interaction as part of the calibration task.
Evaluation Form	The form based on which the evaluation is performed.
Due Date	The due by which the calibration needs to be performed.

Table continues…

Name	Description
Lock On Due Date	The date until which the calibration remains active.
Show it as a Calibration	The option to mark the evaluation as a calibrated.

Appeals

Appeal summary

The **Appeals** feature in Avaya Workforce Optimization Select allows an employee with appropriate permissions to appeal against an evaluation. An employee can raise an appeal from the View Evaluations screen against each criterion.

The appeals process can be summarized as follows:

- An employee who belongs to the creator role defined in the appeals workflow, can raise an appeal against an evaluation. It is not necessary that only agent can raise an appeal. Any user who has access to the data partitioned organization unit of the agent can also raise an appeal. When a user raises an appeal from the View Evaluations screen, the status of the appeal appears as **New**. A notification is sent to users who are assigned the reviewer role in the appeals workflow once an appeal is raised. Users within the hierarchy of the employee who has handled the interaction for which appeal has been raised are also notified.

- The next step in the appeals process is to review the appeal. At least one of the employees defined as the reviewer role in the appeals workflow must review the appeal. Reviewers can view the list of all the appeals raised on the Appeals page. Reviewers can select options like Accept, Decline, Draw-score change, Draw-no score change. Post review, the status of the appeal changes to In Review state. Note that agents only view the appeal status on the Appeals page. Agents cannot view the reviewer name or the comments and actions that the reviewer has taken. A notification is sent to the evaluator who evaluated the interaction after reviewers provide their feedback. The verdict given by the reviewer is only a recommendation to the approver. The approver is not bound by the verdict of the reviewer.

- Once reviewed, the appeal needs to be approved. Users who belong to the approver role defined in the appeals workflow can approve or decline an appeal. The approver can select options like Accept, Decline, Draw-score change, Draw-no score change.

  - If the approver accepts all the criteria against which the appeal is raised, the status of the appeal changes to Approved.

  - If the approver declines all the criteria against which the appeal is raised, the status of the appeal changes to Declined.

  - Even if the approver accepts one criteria and marks the others as Decline, Draw - score change, Draw - no score change, the status of the appeal changes to Partially Approved.

- Even if the approver selects one criteria as Draw - score change and marks the others as Decline or Draw - no score change, the status of the appeal changes to Partially Draw - score change.

- Even if the approver selects one criteria as Draw - no score change and marks the others as Decline, the status of the appeal changes to Partially Draw - no score change.

• Post approval, the appeals process allows you to escalate. Only the roles above the employee, whose interaction was appealed, can escalate. The status of the appeal changes to Escalated. A notification is sent to users who are assigned the final approver role in the appeals workflow once an appeal is escalated.

• Post approval, decline, or escalation, the appeal moves to the final approve, final decline, or final draw state. Users who belong to the final approver role defined in the appeals workflow can change the state of the appeal to final approve, final decline, or final draw. The final approver can select options like Accept, Decline, Draw-score change, Draw-no score change.

- If the final approver accepts all the criteria against which the appeal is raised, the status of the appeal changes to Final Approved.

- If the final approver declines all the criteria against which the appeal is raised, the status of the appeal changes to Final Declined.

- Even if the final approver accepts one criteria and marks the others as Decline, Draw - score change, Draw - no score change, the status of the appeal changes to Partially Final Approved.

- Even if the final approver selects one criteria as Draw - score change and marks the others as Decline or Draw - no score change, the status of the appeal changes to Partial Final Draw - score change.

- Even if the final approver selects one criteria as Draw - no score change and marks the others as Decline, the status of the appeal changes to Partial Final Draw - no score change.

• Post approval or decline, a notification is sent to the agent who handled the interaction and the supevisor.

If the user who raised the appeal is not satisfied with the reevaluation scores and feedback by the evaluator, the user can reappeal against the evaluation.

For more information on appeal role definitions, see Appeals Workflow on page 68

Processing appeals

About this task

Depending on the role defined in the appeals workflow, you will be able to process appeals from the Appeals page. Users with the appropriate role can review, accept, decline, draw, and escalate an appeal request. You can track the status of the appeal from the Appeals page.

For more information, see Appeals on page 97.

Procedure

1. Click **Evaluate** > **Appeals**.

The system displays the list of appeals raised.

2. To filter the list, click the **Filter** (▼) icon on the field based on which you want to filter.

3. Use the **Pagination** controls to navigate through the appeal list. You can choose the number of records you want to view on each page.

4. To delete an appeal, select the appeal from the list, and click **Delete**.

5. To view the appeal details, click the > icon in the desired row.

6. Enter your comments in the **Your Comments** text box.

7. Select the **Approval Status** for the appeal.

8. Click **Submit**to save the changes.

The appeal status changes and appears on the Appeals page.

Raising an appeal

About this task

Use this procedure to raise an appeal against the evaluation scores by selecting a criteria and adding comments to the criteria.

Once you raise an appeal, employees who are defined as reviewers in the workflow, get notified. Only these employees can review and provide comments.

⊛ **Note:**

You can raise an appeal if you have the necessary permission. You can raise multiple appeals against the same evaluation. However, while an appeal in process, you cannot simultaneously raise another appeal for the same evaluation.

Procedure

1. Click **Evaluate** > **Evaluations** > **View Evaluations**.

2. In the View Evaluations page, click the > icon in the desired row.

3. Click **Appeals** in the recorded call pane of the evaluation screen.

The system displays the New Appeal page.

4. Enter your comments in the **Your Comments** field for the appropriate performance criteria and click **Save**.

Notification is sent to the employees who are selected as reviewers in the appeal reviewer role.

Appeals field descriptions

Appeals

Name	Description
Interaction ID	The unique ID of the interaction being evaluated.
Employee	The name of the employee whose performance is being evaluated.
Reporting To	The name of the supervisor or manager the employee reports to.
Evaluation Date	The date on which the evaluation is performed.
Form	The evaluation form based on which the evaluation is performed.
Score	The score received by the employee during evaluation.
Status	The current status of the appeal.

Appeal Details

Name	Description
Section	The section of the evaluation for which an appeal is raised.
Criteria	The evaluation criteria for which an appeal is raised.
Score	The score received by the agent for the evaluation criteria.
Agent Comments	The comments by the employee who raises the appeal.
Your Comments	The comments or feedback you can provide during the review of the appeal process.
Approval Status	The approval status of the appeal that you can select during the review of the appeal process. The options are: • **Accept**: The option that allows the user to modify the scores for the evaluation. • **Decline** • **Escalate** • **Draw - score change**: The option that allows the user to modify the scores for the evaluation. • **Draw - no score change** The options you see differ based on your role.

Appeal History

Name	Description
Recommendation	The name of the reviewer who reviews or evaluates the appeal.
Role	The role defined in the appeals workflow who has permissions to review or finally approve the appeal.

Table continues…

Name	Description
Comment	The comments or feedback provided by the reviewers or evaluators during the review of the appeal.
Recommendation	The recommendation provided by the reviewer or evaluator.

Chapter 6: Managing learning

Learn

Using the Learn module, you can put knowledge in the hands of those who need it, when they need it the most. Contact centers will have better trained, motivated, and empowered agents, resulting in improved customer satisfaction, retention, advocacy, and profitability. You can train the agents in your contact center with courseware and quiz to help improve their efficiency.

The benefits of the Learn module include:

- Provision to upload videos, slide presentations, and other courseware to assign to selected employees.
- Ability to attach a quiz with randomization of questions for courses.

Viewing course and quiz library

About this task

Use the Library screen to view the list of courses and quizzes that you have created or have access to.

Procedure

Click **Learn** > **Library**.

The system displays the Library page.

Library field descriptions

Name	Description
Format	The format of the course or quiz.
Title	The name of the course or quiz.
Topic	The topic of the course or quiz.
	Courses and quizzes can be grouped into topics when they are created.

Table continues…

Name	Description
Duration	The duration of the course or quiz that is assigned.
Type	The type of assignment. The options are: • **Course** • **Quiz** • **Course & Quiz**

Assigning a course or a quiz

About this task

Use this procedure to assign a course or quiz to employees that you have access to.

Procedure

1. Click **Learn** > **Library**.

   The system displays the Library page.

2. Select the courses or quizzes that you want to assign from the listing of directories.

3. Click **Assign**.

4. On the Assign Course/Quiz page, filter the employees you want to assign the course or quiz to using the**Department**, **Role**, and **Employees**drop-down list.

5. For completion of the course or quiz, select a **Due Date**.

6. Click **Assign**.

   The system displays the course or quiz in the inbox of the assigned employee, as well as on the My Assignment screen of the employee.

Adding a quiz

Procedure

1. Click **Learn** > **Library**.

2. On the Library screen, click **Add Quiz**.

   The system displays the Add Quiz page .

3. On the Definitions screen, enter the appropriate details.

4. Click **Questions**.

5. On the Questions screen, click **Add** to do the following:

   a. In the **Questions** text field, enter the question.

   b. In the **Options(s)** text field, enter an answer. Click **Add** to add as many options as you want to provide to the employee.

   c. Select the option that denotes the correct answer.

   d. Click **Save & Add another** to add as many questions to the quiz as you want.

6. Click **Grading**.

7. On the Grading screen, to enter a grade for the quiz as given in the page, click **Add**.

8. To view the summary of the quiz and to review the data for accuracy, click **Preview**.

9. Click one of the following:

   • **Save Quiz**

   • **Save as Draft**

Adding a quiz field descriptions

Definition

Name	Description
Name	The unique identifying name for the quiz. You can enter up to 500 characters in this field. This field is mandatory.
Description	A brief description of the function of the quiz. You can enter up to 1000 characters in this field.
Topic	The topic of the quiz. You can enter up to 100 characters in this field. This field is mandatory.
Duration (Mins)	The time that the employee has to complete the quiz. This field cannot exceed 4 digits.
Pass (%)	The percentage that the employee needs to pass the quiz. You can enter a value that is less than or equal to 100. This field is mandatory.
Quiz Lockout duration (Days)	The number of days that the quiz remains valid after it has been assigned. If a quiz is used in multiple courses, an assigned user or employee does not have to retake a quiz that they have already been assigned or completed. This field cannot exceed 4 characters.

Table continues…

Name	Description
Number of Questions to be assigned	The value to assign a certain number of questions in the quiz on a random basis. For example, you may have 30 questions in the quiz and want to assign only 10 randomly. This field cannot exceed 3 characters. This field is mandatory.
Assigned Questions Lockout (Weeks)	The value to maintain the history of quiz questions assigned for a certain period (in weeks) so that the quiz is not reassigned within that particular period. The questions assigned previously will not appear in the reassigned quiz. It starts from the date of first assignment of quiz. For example, consider a quiz with 30 questions, of which 10 questions are assigned, and a tracking period of 3 weeks. If a user is assigned Quiz ABC four times within the 3–week period, the first time the user will be assigned 10 questions. The second time the user will be assigned 10 questions from the remaining 20 unassigned questions, and the third time the user will be assigned the remaining 10 questions. On the fourth assignment, any 10 questions from the 30 questions will be assigned. Any assignment after the expiration of the 3–week tracking period can contain any group of 10 questions. If a value is not entered for the tracking period, any 10 questions might appear in the assignment. This field cannot exceed 3 characters.

Questions

Name	Description
Question	The unique question in the quiz. You can enter up to 1000 characters in this field. This field is mandatory.
Option(s)	The response to the question in the quiz. You can enter up to 500 characters in this field. This field is mandatory.

Grading

Name	Description
Grade	The unique identifying name for the grade. You can enter up to 100 characters in this field. This field is mandatory.
Minimum value	The lowest range of the score of the grade in the quiz. This field cannot exceed 100 characters. This field is mandatory.

Table continues…

Name	Description
Maximum value	The highest range of the score of the grade in the quiz. This field cannot exceed 100 characters. The grade ranges must ensure 100% coverage. For example, Grade A is 91.00 to 100, Grade B is 81.00 to 90.99, and Grade C is 0 to 80.99. This field is mandatory.

Adding a course

About this task

Use this procedure to add courses in the Learn module. Courses can either be links to external URLs, file documents that are copied into the system, or system quizzes. After you add the course, the system displays it in Library, where the course can be assigned to employees.

Procedure

1. Click **Learn** > **Library**.

2. On the Library screen, click **Add Course**.

3. On the Add Course page, enter the appropriate details and click one of the following:

   • **Save**: To save the course.

   • **Save & Add Another**: To add another course.

Adding a course field descriptions

Name	Description
DP OU Type	The partition of the organization unit for which the course is made available.
Name	The unique identifying name of the course. You can enter up to 500 characters in this field. This field is mandatory.
Description	A brief description of the function of the course. You can enter up to 1000 characters in this field.
Topic	The topic of the course. You can enter up to 500 characters in this field. This field is mandatory.

Table continues…

Using Avaya Workforce Optimization Select

Name	Description
Type	The type of file. The options are: • **File**: To upload a file. • **URL**: To enter the location or the source of the course. This field is mandatory.
File	The location or the source of the course. You can specify the complete path or select the file from the desired location. This field is mandatory.
Associated Quiz	The quiz that you must assign to the course. You can assign multiple quizzes that are available. However, associating a quiz with a course is not mandatory.
Reassignment Lockout (days)	The number of days for which the assigned course is restricted from being reassigned. The maximum limit is 4 digits.
OU(s)	The name of the organization units who can access the course.
Skill / Competencies	The skill or competency that you want the employee to develop. ✱ **Note:** Skills are created in the Parameters section.

Viewing team assignments

About this task

Use the Team Assignment screen to view the list of courses and quizzes assigned to employees that the logged in user has access to.

The list displays all the courses and quizzes that are Completed, New, or Pending.

Procedure

Click **Learn** > **Team Assignment**.

The system displays the Team Assignment page.

Viewing team assignments field descriptions

Name	Description
Format	The format of the course or quiz.

Table continues…

Name	Description
Level	The level of the course selected. If it is a quiz, there will not be any value.
Employee	The name of the employee who is taking the assignment.
Reporting To	The reporting manager of the employee to whom the course or quiz is assigned.
Name	The name of the course or quiz.
Topic	The topic of the course or quiz. Courses and quizzes can be grouped into topics when they are being created.
Assigned By	The name of the user who assigned the course or quiz.
Assigned Date	The date and time on which the course or quiz was assigned.
Assigned From	The source from where the course or quiz is assigned. Courses and quizzes can be assigned from Coach, Learn, or Evaluate modules.
Due Date	The date by which the course or quiz must be completed.
Duration	The duration of the course or quiz that is assigned.
Score	The score of the employee. Scores show only if the assignment has a quiz.
Type	The type of assignment. The options are: • **Course** • **Quiz** • **Course & Quiz**
Status	The status of the course or quiz. The options are: • **New** • **Pending** • **Completed**

Viewing courses assigned to you

About this task

Use the My Assignment screen to view the list of courses and quizzes that are assigned to the logged in user. The list displays all the courses and quizzes that are Completed, New, or Pending.

After the logged in user has gone through the course, the user can click **Done** and then take a quiz if there is one associated to it.

Procedure

Click **Learn** > **My Assignment**.

The system displays a list of courses or quizzes that are assigned to you.

Viewing My Assignment field descriptions

Name	Description
Format	The format of the course or quiz.
Title	The name of the course or quiz.
Topic	The topic of the course or quiz.
	Courses and quizzes can be grouped into topics when they are created.
Assigned By	The name of the user who assigned the course or quiz.
Assigned Date	The date and time on which the course or quiz was assigned.
Assigned From	The source from where the course or quiz is assigned.
	Courses and quizzes can be assigned from Coach, Learn, or Evaluate.
Due Date	The date by which the course or quiz must be completed.
Duration	The duration of the course or quiz that is assigned.
Score	The score of the employee.
	Scores show only if the assignment is a quiz.
Type	The type of assignment.
	The options are:
	• **Course**
	• **Quiz**
	• **Course & Quiz**
Status	The status of the course or quiz.
	The options are:
	• **New**
	• **Pending**
	• **Completed**

Taking a course or a quiz
Procedure

1. Click **Learn** > **My Assignment**.

   The system displays a list of courses or quizzes that are assigned to you.

2. Click the course or quiz.

   The system plays the course or quiz directly in your web browser using Windows Media Player.

   ✳ **Note:**

   For the course or quiz to play successfully, you must first install the Windows Media Player plugin for your browsers.

3. View the course status on completion.

   If a particular course is not yet completed, the quiz details associated to that course displays in red.

Chapter 7: Managing coaching

Coach

The Coach module provides an automated framework for building personalized agent training programs using quality and performance data. Supervisors and Managers can provide guidance and critical feedback to agents who require improvement in specific areas of performance. Support to define a list of performance attributes and create coaching plans for specific groups or employees is also available. The alerts and reports in Avaya Workforce Optimization Select ensure follow-up is done on time.

To take advantage of the Coach module, you must:

1. Identify areas of focus that a coaching needs to address and create parameters accordingly in Avaya Workforce Optimization Select . Parameters are of two types, Skills and Reasons for coaching.
2. Create a coaching plan to define the number of coaching sessions agents or employees need to complete within a specified period.
3. Create Coachings which are task-oriented action plans and assign them to agents to improve on specific areas of their performance. Coachings are usually Instructor Led Training (ILT) sessions that you can track in Avaya Workforce Optimization Select . However, you can also link Coachings to e-Learning courses and quizzes.

As a result, Supervisors can generate relevant summary reports to view a snapshot of all the accepted and completed coachings in the system.

Manage Coaching

Adding Skills

About this task

Use this procedure to create a list of skills or competencies. Skills are used for selection while defining a coaching session.

Procedure

1. Click **Coach** > **Parameters**.
2. On the Skills page, click **Add Skill**.

3. On the Add New Skills page, enter the appropriate details and click one of the following:

   • **Save & Add Another**: To save the skill that you created and add another skill.

   • **Save & Close**: To save the skill that you created.

   The system displays the skills in the Skills page.

Adding Skills field descriptions

Name	Description
Skill	The unique name of the skill that you are creating.
	You can enter up to 100 characters in this field.
	This field is mandatory.
Description	A brief description of the skill.
	You can enter up to 500 characters in this field.
Active	The option to select the skill as an active skill.
	By default, **Active** is selected.

Adding Reasons for Coaching

About this task

Use this procedure to create a list of reasons for coaching. Reasons for coaching are used for selection while defining a coaching session.

Procedure

1. Click **Coach** > **Parameters**.

2. Click **Reasons for Coaching**.

3. On the Reasons for Coaching screen, click **Add Reason**.

4. On the Add New Reason screen, enter the appropriate details and click one of the following:

   • **Save & Add Another**: To save the reason that you created and add another reason.

   • **Save & Close**: To save the reason that you created.

Adding Reasons for Coaching field descriptions

Name	Description
Reason	The unique name of the reason that you are creating.

Table continues…

Name	Description
	You can enter up to 100 characters in this field.
	This field is mandatory.
Description	A brief description of the reason.
	You can enter up to 500 characters in this field.
Active	The option to flag the reason as active and make it available for selection while creating coachings.
	By default, **Active** is selected.

Coaching Plans

Viewing coaching plans

About this task

Use this procedure to view coaching plans that are used by Supervisors to assign employees or groups of employees a certain number of coaching assignments within a specified period.

Users (Supervisors, Quality analysts etc.) can use the Coaching plans to plan the number of coaching assignments that the employees need to take.

Procedure

Click **Coach** > **Plans**.

The system displays the list of coaching plans.

Viewing coaching plans field descriptions

Name	Description
Coaching Plan	The coaching plan that is assigned to the coaching assignment.
Target	The number of coaching assignments that the assigned employees are expected to complete.
Created By	The name of the user who created the coaching assignment.
Created On	The date in mm/dd/yyyy format on which the coaching assignment was created.
Updated By	The user who has updated the coaching assignment.
Updated On	The date on which the coaching assignment was updated. The date is in the mm:dd:yyyy format.

Creating a coaching plan

About this task

Use this procedure to create coaching plans for employees that you have access to. Use Coaching plans to assign employees or groups of employees a certain number of coaching assignments within a specified period.

Procedure

1. Click **Coach** > **Plans**.

   The system displays the list of coaching plans.

2. Click **Create**.

3. On the Definition page, enter the appropriate details.

4. Click **Employee Section** and enter the appropriate details .

5. To apply the filter that you defined to the list of employees to be assigned to the coaching plan, click **Apply Filter**.

6. Assign the number of coaching assignments that the assigned employees are expected to complete in the **Target** field. You must filter the employees based on the criteria available and define the number of assignments to be taken by them as part of the plan.

7. To review the data for accuracy and a summary of the details of the coaching plan, click **Preview & Save**.

8. Click **Save**.

9. The system saves the coaching plan to the Plans list.

Creating a coaching plan field descriptions

Definition

Name	Description
Coaching Plan	The coaching plan that is associated with the coaching. Depending on the plan selected, coaching assignments will be created for the employees who were targeted as part of plan.
	You can enter up to 100 characters in this field.
	This field is mandatory.
Plan Period (Days)	The duration in which the user is planning to ramp up the employee. The number of days during which the coaching assignments must be completed by the employees.

Table continues…

Name	Description
	If the targeted number of assignments are not met, alerts are sent to the creator of the coaching plan and the reporting manager. Alerts are sent in 48 hours, 24 hours, and on the last day of the plan.
	You can enter up to a 4 digits in this field.
	This field is mandatory.
DP OU Type	The employees belonging to the data partition OU type that the plan will be applied.
	This field is mandatory.
Description	A brief description of the plan function.
	You can enter up to 500 characters in this field.
Active	The option to select the plan as an active plan.
	By default, **Active** is selected.
	This field is mandatory.

Employee Filter

Name	Description
Field	The option to select one of the filters for employees to add a coaching assignment.
	The options are:
	• **Department**
	• **Employee**
	• **Groups**
	• **Organization Unit**
	• **Role**
	• **Site**
	• **Reporting To**
	• **Tenure (Weeks)**
Operator	The Operator relative to the field selected. The options are:
	• **Equals**
	• **Not Equal To**
	• **Contains**
	• **Does not contain**
	• **Starts with**
	The default value is **Equals**.

Table continues…

Name	Description
	This field is mandatory if you select **Field**.
Value	The numerical value or value ranges selected for the **Field** and **Operator** selected.
	This field cannot exceed 500 characters.
	This field is mandatory if you select **Field**.

Employee List

Name	Description
Target	The number of coaching assignments that the assigned employees are expected to complete.
	The target is evenly distributed to all the employees listed. However, the user can alter the target for each employee.
	This field cannot exceed 2 digits.
	This field is mandatory.
Number of Coaching assignment	The number of coaching assignments that you want the employee to complete.
	You must type `0` in the **Number of Coaching assignment** field if an employee need not take any assignments even if the employee is part of the plan.
Employee	The name of the employee to whom the coaching assignment is assigned.
Tenure (Weeks)	The tenure in weeks of the employee in the organization.
Reporting to/Supervisor	The reporting manager of the employee.
	This field is mandatory.
Department	The department that the employee belongs to.

Viewing coaching assignments

About this task

Use this procedure to view the Coaching screen that lists all coaching sessions set up for the employees that the logged user has access to. The list displays all the coaching assignments that are Completed, New, or Pending.

To filter coaching sessions, use the following options in the list:

- **Views**
- **Sort**
- **Filter**

You can create a new coaching assignment, edit or delete existing coaching sessions if you have adequate privileges.

Procedure

1. Click **Coach** > **Coachings**.

   The system displays a list of coaching sessions.

2. To view the details of a coaching assignment, click the **View** (❯) icon in the desired row.

3. To delete a coaching assignment, click **Delete**.

Viewing coaching assignments field descriptions

Name	Description
Coaching Purpose	The reason for creating the coaching assignment.
Coaching Level	The level of the coaching assignment. The options are: 1, 2, or 3.
Coaching Plan	The coaching plan that is assigned to the coaching assignment.
Employee	The name of the employee to whom the coaching assignment is assigned.
Delivery Date	The expected completion date of the coaching assignment. The date is in the mm:dd:yyyy format.
Completion Date	The expected completion date of the coaching assignment. The date is in the mm:dd:yyyy format. By default, the nearest completion date assignment shows on top of the list.
Updated On	The date on which the coaching assignment was updated. The date is in the mm:dd:yyyy format. By default, the most recent date shows on top.
Coach	The name of the coach assigned to the employee for coaching.
Created By	The name of the user who created the coaching assignment.
Follow up date	The follow-up date after the coaching session was completed. The date is in the mm:dd:yyyy format.
Status	The status of the coaching assignment.

Creating coaching assignments

About this task

Use this procedure to create coaching assignments for employees that the logged in user has access to.

You can select the employees and assign coaching. You can also associate parameters such as metrics, skills or competencies, reasons for coaching, provide an action plan, and schedule the coaching assignments. You can also assign quiz to a coaching. You can attach e-learning courses and documents or even provide URLs to courses that are deadline driven.

A notification is sent to the selected employees when you assign the coaching assignment. The employees can view the coaching assigned on the My Assignment page.

Procedure

1. Click **Coach** > **Coachings**.

   The system displays a list of coaching sessions.

2. Click **Create**.

3. Enter the appropriate details on the page.

4. Click **Save**.

5. The system saves the coaching assignment and displays on the Coaching screen. Employees whom you have assigned this coaching assignment receive a notification in their inbox that a new coaching assignment is available for them.

Creating coaching assignments field descriptions

Coaching

Name	Description
DP OU Type	The partition of the organizational unit that the employee belongs to.
	This field is mandatory in a data partitioned environment.
Coaching Plan	The coaching plan to assign to the coaching assignment.
Coaching Level	The level of the coaching assignment. The options are:
	• 1
	• 2
	• 3
	A higher level coaching indicates that the selected employees need rigorous coaching.
	The default level is 1.
	This field is mandatory.
Coaching Purpose	The reason for creating the coaching assignment.
	This field cannot exceed 500 characters.
	This field is mandatory.
Coach	The name of the coach assigned to the employee for coaching .

Employee Filter

Name	Description
Field	The option to select one of the filters for employees to add a coaching assignment. The options are: • **Department** • **Employee** • **Groups** • **Organization Unit** • **Role** • **Site** • **Reporting To** • **Tenure (Weeks)**
Operator	The Operator relative to the field selected. The options are: • **Equals** • **Not Equal To** • **Contains** • **Does not contain** • **Starts with** The default value is **Equals**. This field is mandatory if you select **Field**.
Value	The numerical value or value ranges selected for the **Field** and **Operator** selected. This field cannot exceed 500 characters. This field is mandatory if **Field** is selected.

Employee List

Name	Description
Target	The number of coaching assignments that the assigned employees are expected to complete. The target is evenly distributed among all the employees listed. However, you can alter the target for each employee. This field cannot exceed 2 digits. This field is mandatory.

Table continues…

Name	Description
Number of Coaching assignment	The number of coaching assignments that you want the employee to complete.
	You must enter `0` in the **Number of Coaching assignment** field if an employee need not take any assignments even if the employee is part of the plan.
Employee	The name of the employee to whom the coaching assignment is assigned.
Tenure (Weeks)	The tenure in weeks of the employee in the organization.
Reporting To/Supervisor	The reporting manager of the employee.
	This field is mandatory.
Department	The department that the employee belongs to.

Parameters

Name	Description
Reasons for Coaching	The reasons for coaching parameters defined in the Parameter section of the Coach module.
Skill / Competencies	The skills or competencies parameters defined in the Parameter section of the Coach module.

Action Plan

Name	Description
Action Plan	A brief description of the action that the employee is expected to perform. For example, Take a quiz or Enroll in class.
	This field cannot exceed 1000 characters.
	This field is mandatory.
Expected Improvement	The improvement you expect to see in the performance of the employee after the coaching is complete. For example, decreased AHT.
	This field cannot exceed 1000 characters.
Schedule	The schedule of the coaching assignment. You can set the schedule for a particular day and time and also define the duration of the coaching session.
Completion Date	The expected completion date of the coaching assignment.
	The deadline must be met by the coach and employee.
	This field is mandatory.
Duration (Mins)	The duration of the coaching session.

Follow-up

Name	Description
On	The date of follow-up.
	You can select a date to follow up the coaching to monitor if the purpose of coaching is met and also track the improvement.
__ days after the completion of the Coaching	The number of days from the coaching session after which the follow-up session must be performed.
	The default value is 15.

Comments

Name	Description
Enter comments	The option to enter the comments regarding the coaching.
	This field cannot exceed 1000 characters.

Viewing My Assignment

About this task

Use the My Assignment screen to view the list of coaching sessions that is assigned to you.

After you complete the assignment, you must go to the respective assignment on the My Assignment page and click **Complete**. Only then the status of the assignment is updated to **Completed**. You can also enter your comments before accepting the coaching session.

Procedure

Click **Coach** > **My Assignment**.

The system displays the list of coaching sessions that is assigned to you.

Viewing My Assignment field descriptions

Name	Description
Coaching Purpose	The reason for creating the coaching assignment.
Coaching Level	The level of the coaching assignment. The options are: 1, 2, or 3.
Coaching Plan	The coaching plan that is assigned to the coaching assignment.
Employee	The name of the employee to whom the coaching assignment is assigned.

Table continues…

Name	Description
Delivery Date	The expected completion date of the coaching assignment. The date is in the mm:dd:yyyy format.
Completion Date	The expected completion date of the coaching assignment. The date is in the mm:dd:yyyy format. By default, the nearest completion date assignment shows on top of the list.
Updated On	The date on which the coaching assignment was updated. The date is in the mm:dd:yyyy format.
Coach	The name of the coach assigned to the employee for coaching.
Created By	The name of the user who created the coaching assignment.
Follow up date	The follow-up date after the coaching session was completed. The date is in the mm:dd:yyyy format.
Status	The status of the coaching assignment.

Chapter 8: Managing reports

Reports

Contact centers need efficient and powerful tools to translate data to business intelligence. Executives need to gain insight into how the organization as a whole is performing. Supervisors and managers need statistics around individual or team performance. Use the Reports module in Avaya Workforce Optimization Select to generate different types of report views that are essential to business success.

The Reports module consists of the following features:

- Predefined set of report templates for each module.
- Report output in various formats such as PDF, Excel, HTML, and CSV.
- Reports scheduled to run automatically at the specified time.
- Reports shared with selected employees or groups, or all employees.
- Intuitive titles in the report output.

Default reports

The predefined set of report templates are:

- Interaction Details
- Interaction Summary
- Interaction Trend
- AHT Trend
- Evaluations Summary
- Evaluations Trend
- Evaluations Details
- EHT Trend
- Coaching Summary
- Course & Quiz Summary
- Web Usage Audit
- User Access
- Employee Voice Configuration

Report templates

Interactions

Name	Description
Interactions Details	The report highlights details about all recorded interactions for a site, organization unit, group, and employee depending on the filter criteria that you select.
	Supervisors can:
	• Get a snapshot of the hold count and hold duration of all the interactions of the employees that the supervisor has access to.
	• View the report output grouped by Organization Units, Sites, Groups, and Employees.
	The report output displays the following details about the interaction:
	• Start and end time of the interaction
	• Name of the employee who attended the interaction
	• Name of the employee who ended the interaction
	• Name of the supervisor that the employee reports to
	• Duration of the interaction in the hh:mm:ss format
	• Number of holds and the hold duration of an interaction
	• Called party, calling party, and call type of the interaction
	• Interaction ID, queue, and queue type of the interaction
Interactions Summary	The report highlights a summary of all recorded interactions for a site, organization unit, group, and employee depending on the filter criteria that you select.
	Supervisors can:
	• Get a snapshot of the AHT, hold count, transfers, screens, and the number of interactions made by an employee.
	• View the report output grouped by Organization Units, Sites, Groups, and Employees.
	The report output displays the following details about the interaction:
	• Names of the employees who attended the interaction
	• Number of interactions handled by each employee
	• Duration of the interaction in the hh:mm:ss format
	• Average handle time of the interaction in seconds
	• Number of holds, transfers, and screens for an interaction

Table continues…

Name	Description
Interactions Trend	The report displays the interactions recorded for employees in the contact center over a specific period of time such as quarterly, monthly, weekly or daily. The report output displays the interaction count and duration for the specified time period depending on the filter criteria that you select.
AHT Trend	The report displays the average handle time between the employee and customer based on organization unit, group, and employees, over a specific period of time. Supervisors or managers can choose to view the output in a graphical or data format displaying the trend.

Evaluate

Name	Description
Evaluations Summary	The report highlights details about all evaluations for interactions for a site, organization unit, group, and employee depending on the filter criteria that you select. Supervisors can: • Get a snapshot view on total number of evaluations, average score of all evaluations and percentage of evaluations for various Queues, Organization Units, Groups and Employees. • View the report output grouped by Organization Units, Sites, Groups, and Employees. The report output displays the following details about the evaluation: • Total evaluations • Total evaluations summary • Average score • Average score summary • Average percentage • Average percentage summary
Evaluations Trend	The report trend view of how many evaluations are performed for specific period and what are the average scores achieved, based on the options you select. Supervisors can: • Get a snapshot of the number of evaluations, average score and the total evaluations performed by an employee. • View the report output grouped by Organization Units, Sites, Groups, and Employees.

Table continues…

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Name	Description
	The report output displays the following details about the interaction: • Number of evaluations • Average score • Total number of evaluations • Total average score
EHT Trend	The report displays the trend of the total number of evaluations and the average evaluation handle grouped by Organization Units, Sites, Groups, and Employees for the specified period of time. Supervisors or managers can choose to view the output in a graphical or data format. The report output displays the evaluation handle time and duration for the specified period of time.
Evaluation Details	The report highlights details about all evaluations for a site, organization unit, group, and employee depending on the filter criteria that you select. Supervisors can: • Get a snapshot of evaluations on all the interactions of the employees that you have access to. • View the report output grouped by Organization Units, Sites, Groups, and Employees. The report output displays the following details about the interaction: • Overall scores for evaluation • Scores for primary performance criteria • Scores for individual scoring criteria • Overall average score of selected employees

Learn

Name	Description
Course and Quiz Summary	The report highlights details of the number of courses and quizzes assigned to the employees depending on the filter criteria that you select. It also displays the number quizzes an employee had taken, their status and corresponding scores. The report output displays the following details: • Start and end time of the learning assignments • Name of the employee who attended the learn sessions • Purpose of assigning the learning sessions • Evaluation plan based on which the agent was evaluated

Coach

Name	Description
Coaching Summary	The report highlights details of the number of coaching sessions assigned to the employees depending on the filter criteria that you select. The report output displays the following details about the evaluation: • Start and end time of the coaching sessions • Name of the employee who attended the coaching sessions • Purpose of assigning the coaching sessions • Evaluation plan based on which the agent was evaluated • Name of the employee assigned to coach the agents

Administration

Name	Description
User Access	The report displays the details of the users' access and all the privileges enabled for employees. The user who generates the report can view all the privileges enabled for employees that the user has access to.
Employee Voice Configuration	The report provides information of all the voice configuration options enabled for employees. The user who generates the report can view all the voice configuration options enabled for employees that the user has access to.
Web Usage Audit	The report displays the details of the web application access and user activity.

Create a new report

Selecting a report template

Procedure

1. Click **Reports** > **Reports** > **Templates**.

2. To select the template category, click **Interactions**, **Evaluations**, **Coach**, **Learn** or **Administration**.

   The system displays the available templates in each category.

3. To create a report of contact center use and agent performance, select a template from **Interactions**.

   • **Interactions Details**

   • **Interactions Summary**

- **Interactions Trend**

- **AHT Trend**

4. To create a report on agent evaluations, select a template from **Evaluations**.

- **Evaluation Details**

- **Evaluations Summary**

- **Evaluations Trend**

5. To create a report on agent coaching, select a template from **Coach**.

- **Coaching Summary**

6. To create a report on agent learning and assessment, select a template from **Learn**.

- **Course and Quiz Summary**

7. To create an administrative report of user access and voice configuration settings, select a template from **Administration**.

- **Employee Voice Configuration**

- **User Access**

- **Web Usage Audit**

Next steps

Set up criteria for a new report.

Setting up criteria for a new report

About this task

The system displays the report template with the Criteria tab selected.

The filter criteria on each report is predefined based on the nature of the report. Some common parameters include the date range and export format options.

Procedure

1. In **Criteria**, enter the parameters for the report from the available report criteria.

   The parameters define the columns available in the report output.

2. From the **Export** drop-down menu, select the output format:

- **HTML**

- **PDF**

- **CSV**

- **Excel**

Next steps

Save report settings.

Report template - Interactions Details field descriptions

Name	Description
Range	The time range of a report. The options are: • **Today** • **Last Day** • **Current Week** • **Last Week** • **Current Month** • **Last Month** • **Custom** This field is mandatory.
DP OU Type	The partition of the organization unit that the user generating the report has access to. For example, **Business**, **Client**, **Customer**, or **Line of Business**. This field is mandatory.
Organization Units	The organization units that the user generating the report has access to. This field is available based on the **DP OU Type** you select in a data partitioned environment. This field is mandatory.
Sites	The available sites. This field is mandatory.
Groups	The groups that the user generating the report has access to. This field is mandatory.
Employees	The employee list available for selection, which is based on the organization unit and group that the user selects. This field is mandatory.
Group by	The order in which you want to group the report data. The options are: • **Organization Units** • **Sites** • **Groups** • **Employees** This field is mandatory.
Export	The report output format. The options are: • **HTML** • **PDF**

Table continues…

Name	Description
	• **Excel**
	• **CSV**
	This field is mandatory.

Report template - Interactions Summary field descriptions

Name	Description
Range	The time range of a report. The options are:
	• **Today**
	• **Last Day**
	• **Current Week**
	• **Last Week**
	• **Current Month**
	• **Last Month**
	• **Custom**
DP OU Type	The partition of the organization unit that the user generating the report has access to.
	For example, **Business**, **Client**, **Customer**, or **Line of Business**.
	This field is mandatory.
Organization Units	The organization units that the user generating the report has access to.
	This field is available based on the **DP OU Type** you select in a data partitioned environment.
	This field is mandatory.
Sites	The available sites.
	This field is mandatory.
Groups	The groups that the user generating the report has access to.
	This field is mandatory.
Employees	The employee list available for selection, which is based on the organization unit and group that the user selects.
	This field is mandatory.
Group by	The order in which you want to group the report data. The options are:
	• **Organization Units**
	• **Sites**
	• **Groups**
	• **Employees**

Table continues…

Name	Description
	This field is mandatory.
Export	The report output format. The options are:
	• **HTML**
	• **PDF**
	• **Excel**
	• **CSV**
	This field is mandatory.

Report template - Interactions Trend field descriptions

Name	Description
Trend	The trend of the report. The options are:
	• **Quarterly**
	• **Monthly**
	• **Weekly**
	• **Daily**
	The trend period for interactions. The options are:
	• **Call Duration**: Select the duration for which the trend must be calculated.
	• **Base Date**: Specify a date from when the interaction trend must be calculated.
	This field is mandatory.
DP OU Type	The partition of the organization unit that the user generating the report has access to.
	For example, **Business**, **Client**, **Customer**, or **Line of Business**.
	This field is mandatory.
Organization Units	The organization units that the user generating the report has access to.
	This field is available based on the **DP OU Type** you select in a data partitioned environment.
	This field is mandatory.
Sites	The available sites.
	This field is mandatory.
Groups	The groups that the user generating the report has access to.
	This field is mandatory.
Employee	The employee list available for selection, which is based on the organization unit and group that the user selects.

Table continues…

Name	Description
	This field is mandatory.
Group By	The order in which you want to group the report data. The options are: • **Organization Units** • **Sites** • **Groups** • **Employees** This field is mandatory.
Display	The format in which you want to display the report output. The options are: • **Chart** • **Date** • **Both** This field is mandatory.
Export	The report output format. The options are: • **HTML** • **PDF** • **Excel** • **CSV** This field is mandatory.

Report template - AHT Trend field descriptions

Name	Description
Trend	The time period for which you want to generate the trend report. The options are: • **Quarterly** • **Monthly** • **Weekly** • **Daily** This field is mandatory.
Trend Period	The duration within the particular trend period for which you want to analyze the trend. • **Call Duration**: Select the duration for which the trend must be calculated. • **Base Date**: Specify a date from when the trend must be calculated.

Table continues…

Name	Description
DP OU Type	The partition of the organization unit that the user generating the report has access to.
	For example, **Business**, **Client**, **Customer**, or **Line of Business**.
	This field is mandatory.
Organization Units	The organization units that the user generating the report has access to.
	This field is available based on the **DP OU Type** you select in a data partitioned environment.
	This field is mandatory.
Sites	The available sites.
	This field is mandatory.
Groups	The groups that the user generating the report has access to.
	This field is mandatory.
Employees	The employee list available for selection, which is based on the organization unit and group that the user selects.
	This field is mandatory.
Group By	The order in which you want to group the report data. The options are:
	• **Organization Units**
	• **Sites**
	• **Groups**
	• **Employees**
	This field is mandatory.
Display	The format in which you want to display the report output. The options are:
	• **Chart**
	• **Date**
	• **Both**
	This field is mandatory.
Export	The report output format. The options are:
	• **HTML**
	• **PDF**
	• **Excel**
	• **CSV**
	This field is mandatory.

Report template - Evaluations Summary field descriptions

Name	Description
Range	The time range of a report. The options are: • **Today** • **Last Day** • **Current Week** • **Last Week** • **Current Month** • **Last Month** • **Custom** This field is mandatory.
DP OU Type	The partition of the organization unit that the user generating the report has access to. For example, **Business**, **Client**, **Customer**, or **Line of Business**. This field is mandatory.
Organization Units	The organization units that the user generating the report has access to. This field is available based on the **DP OU Type** you select in a data partitioned environment. This field is mandatory.
Sites	The available sites. This field is mandatory.
Groups	The groups that the user generating the report has access to. This field is mandatory.
Employees	The employee list available for selection, which is based on the organization unit and group that the user selects. This field is mandatory.
Forms	The evaluation forms available for selection, which is based on the organization unit and group that the user selects.
Reviewers	The supervisors or managers who have the privileges to evaluate an employee.
Status	The status of the assigned coaching. The options are: • **All** • **Completed** • **New**

Table continues…

Name	Description
Export	The report output format. The options are: • **HTML** • **PDF** • **Excel** • **CSV** This field is mandatory.

Report template - Evaluations Trend field descriptions

Name	Description
Trend	The trend of the report. The options are: • **Quarterly** • **Monthly** • **Weekly** • **Daily** The trend period for evaluations. The options are: • **Call Duration**: Select the call duration for last two, three, or four quarters. • **Base Date**: Specify a date from when the interaction trend must be calculated.
DP OU Type	The partition of the organization unit that the user generating the report has access to. For example, **Business**, **Client**, **Customer**, or **Line of Business**. This field is mandatory.
Organization Units	The organization units that the user generating the report has access to. This field is available based on the **DP OU Type** you select in a data partitioned environment. This field is mandatory.
Sites	The available sites. This field is mandatory.
Groups	The groups that the user generating the report has access to. This field is mandatory.
Employees	The employee list available for selection, which is based on the organization unit and group that the user selects. This field is mandatory.

Table continues…

Name	Description
Forms	The evaluation forms available for selection, which is based on the organization unit and group that the user selects.
Reviewers	The employees who have the privileges to evaluate an employee.
Group By	The order in which you want to group the report data. The options are: • **Organization Units** • **Sites** • **Groups** • **Employees** This field is mandatory.
Export	The report output format. The options are: • **HTML** • **PDF** • **Excel** • **CSV** This field is mandatory.

Report template - EHT trend field descriptions

Name	Description
Trend	The time period for which you want to generate the trend report. The options are: • **Quarterly** • **Monthly** • **Weekly** • **Daily** This field is mandatory.
Trend Period	The duration within the particular trend period for which you want to analyze the trend. • **Call Duration**: Select the duration for which the trend must be calculated. • **Base Date**: Specify a date from when the trend must be calculated.
DP OU Type	The partition of the organization unit that the user generating the report has access to. For example, **Business**, **Client**, **Customer**, or **Line of Business**. This field is mandatory.
Organization Units	The organization units that the user generating the report has access to.

Table continues…

Name	Description
	This field is available based on the **DP OU Type** you select in a data partitioned environment. This field is mandatory.
Sites	The available sites. This field is mandatory.
Groups	The groups that the user generating the report has access to. This field is mandatory.
Employees	The employee list available for selection, which is based on the organization unit and group that the user selects. This field is mandatory.
Forms	The evaluation forms available for selection, which is based on the organization unit and group that the user selects.
Reviewers	The employees who have the privileges to evaluate an employee.
Group By	The order in which you want to group the report data. The options are: • **Organization Units** • **Sites** • **Groups** • **Employees** This field is mandatory.
Export	The report output format. The options are: • **HTML** • **PDF** • **Excel** • **CSV** This field is mandatory.

Report template - Evaluation Details field descriptions

Name	Description
Range	The time range of a report. The options are: • **Today** • **Last Day** • **Current Week** • **Last Week** • **Current Month** • **Last Month**

Table continues…

Name	Description
	• **Custom**
DP OU Type	The partition of the organization unit that the user generating the report has access to.
	For example, **Business**, **Client**, **Customer**, or **Line of Business**.
	This field is mandatory.
Organization Units	The organization units that the user generating the report has access to.
	This field is available based on the **DP OU Type** you select in a data partitioned environment.
	This field is mandatory.
Sites	The available sites.
	This field is mandatory.
Groups	The groups that the user generating the report has access to.
	This field is mandatory.
Employees	The employee list available for selection, which is based on the organization unit and group that the user selects.
	This field is mandatory.
Forms	The evaluation forms available for selection, which is based on the organization unit and group that the user selects.
Reviewers	The supervisors or managers who have the privileges to evaluate an employee.
Group By	The order in which you want to group the report data. The options are:
	• **Organization Units**
	• **Sites**
	• **Groups**
	• **Employees**
	This field is mandatory.
Export	The report output format. The options are:
	• **HTML**
	• **PDF**
	• **Excel**
	• **CSV**
	This field is mandatory.

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Report template - Coaching Summary field descriptions

Name	Description
Range	The time range of a report. The options are: • **Today** • **Last Day** • **Current Week** • **Last Week** • **Current Month** • **Last Month** • **Custom** This field is mandatory.
DP OU Type	The partition of the organization unit that the user generating the report has access to. For example, **Business**, **Client**, **Customer**, or **Line of Business**. This field is mandatory.
Organization Units	The organization units that the user generating the report has access to. This field is available based on the **DP OU Type** you select in a data partitioned environment. This field is mandatory.
Sites	The available sites. This field is mandatory.
Groups	The groups that the user generating the report has access to. This field is mandatory.
Employees	The employee list available for selection, which is based on the organization unit and group that the user selects. This field is mandatory.
Forms	The evaluation forms available for selection, which is based on the organization unit and group that the user selects.
Reviewers	The supervisors or managers who have the privileges to evaluate an employee.
Group By	The order in which you want to group the report data. The options are: • **Organization Units** • **Sites** • **Groups** • **Employees**

Table continues…

Name	Description
	This field is mandatory.
Export	The report output format. The options are: • **HTML** • **PDF** • **Excel** • **CSV** This field is mandatory.

Report template - Course and Quiz Summary field descriptions

Name	Description
Range	The time range of a report. The options are: • **Today** • **Last Day** • **Current Week** • **Last Week** • **Current Month** • **Last Month** • **Custom** This field is mandatory.
DP OU Type	The partition of the organization unit that the user generating the report has access to. For example, **Business**, **Client**, **Customer**, or **Line of Business**. This field is mandatory.
Organization Units	The organization units that the user generating the report has access to. This field is available based on the **DP OU Type** you select in a data partitioned environment. This field is mandatory.
Sites	The available sites. This field is mandatory.
Groups	The groups that the user generating the report has access to. This field is mandatory.
Employees	The employee list available for selection, which is based on the organization unit and group that the user selects. This field is mandatory.

Table continues…

Name	Description
Status	The status of the course and quiz completion. The options are: • **All** • **Completed**
Export	The report output format. The options are: • **HTML** • **PDF** • **Excel** • **CSV** This field is mandatory.

Report template - User Access field descriptions

Name	Description
Groups	The groups that the user generating the report has access to. This field is mandatory.
Employees	The employee list available for selection, which is based on the organization unit and group that the user selects. This field is mandatory.
Modules	The modules in the application. This field is mandatory.
Sub modules	The sub modules for each module.
Export	The report output format. The options are: • **HTML** • **PDF** • **Excel** • **CSV** This field is mandatory.

Report template - Employee Voice Configuration field descriptions

Name	Description
Groups	The groups that the user generating the report has access to.
Employees	The employee list available for selection, which is based on the organization unit and group that the user selects.

Table continues…

Name	Description
Recordings	The interaction recording options for employees. The options are: • **Yes**: View the list of employees for whom the interaction recording option is enabled • **No**: View the list of employees for whom the interaction recording option is disabled
Screen Capture	The screen recording options for employees. The options are: • **Yes**: View the list of employees for whom the screen recording option is enabled • **No**: View the list of employees for whom the screen recording option is disabled
Recording Type	The interaction recording rules.
Screen Capture Type	The screen recording rules.
Export	The report output format. The options are: • **HTML** • **PDF** • **Excel** • **CSV** This field is mandatory.

Report template - Web Usage Audit field descriptions

Name	Description
Range	The time range of a report. The options are: • **Today** • **Last Day** • **Current Week** • **Last Week** • **Current Month** • **Last Month** • **Custom** This field is mandatory.
Groups	The groups that the user generating the report has access to. This field is mandatory.
Employees	The employee list available for selection, which is based on the organization unit and group that the user selects. This field is mandatory.

Table continues…

Name	Description
Modules	The modules in the application.
Sub modules	The sub modules for each module.
Export	The report output format. The options are: • **HTML** • **PDF** • **Excel** • **CSV** This field is mandatory.

Saving a report

About this task

You can modify an existing report template and save the template as a report with another name. You can specify the required criteria that meets your business requirement and generate the report. You can also share the report with other users.

Procedure

1. In the Save Settings tab, in **Report Name**, enter the name by which you want to save the report.

2. **(Optional)** In **Description**, enter a description of the report.

Next steps

Share report.

Saving reports field descriptions

Name	Description
Report Name	The name of the report.
Description	The description of the report.

Sharing a report

About this task

Use this procedure to share a saved report with other employees of the group.

You can share a report with user groups that you can access or with everyone available in the system.

Procedure

1. From Share, select one of the following to share the report with other users.

   - **Me**: To set the report as private and restrict other users to view the report.
   - **Selected Groups**: To share the report with the groups that you have access to. Employees belonging to the group can use the report.
   - **Everyone**: To share the report with all available users.

2. To share the report with specific employees and groups, select **Selected Groups**.

   The system displays the **Group** and **Employee** search and select options.

3. Select one or more groups from the Available Groups list.

   a. To search a group, type the first few characters of the group name in **Search**.

   b. To move a single selection from the list, use the **Move Selected** button.

   c. To move multiple selections from lists, use the **Move All** button.

4. To remove groups from the Assigned Groups list, select one or more groups and use the **Remove Selected** and **Remove All** buttons.

5. Select one or more employees from the Available Employees list.

   a. To search an employee, type the first few characters of the employee name in **Search**.

   b. To move a single selection from the list, use the **Move Selected** button.

   c. To move multiple selections from lists, use the **Move All** button.

6. To remove employees from the Assigned Employees list; select one or more employees and use the **Remove Selected** and **Remove All** buttons.

Next steps

Schedule a report.

Scheduling a report

About this task

Use this procedure to schedule a report to run on a one-time basis, hourly, daily, weekly, or monthly. You can email reports in PDF, Excel and CSV format to users in your organization.

Before you begin

Define the report criteria and save the report before scheduling.

Procedure

1. In **Scheduler**, select the options to schedule the report.

2. Select **Enable Schedule**.

3. Under **Scheduler**, select or enter the options to schedule the report on one-time, hourly, daily, weekly, or monthly basis.

4. Click **Save and Close** to save and close the report

5. Click **Run** to run the report.

Scheduling reports field description

Scheduler

Name	Description
Once	The option to generate the report once. For **Once**, you can specify the following parameters: • **Time**: Specify the time of day to run the report in hh:mm format. • **Begin Schedule On**: Specify the date when the generation of the scheduled report must begin.
Hour	The option to generate the report on an hourly basis. For **Hour** recurrence, you can specify the following parameters: • **Run the Schedule Every X Hours**: Specify the hourly interval at which the report must be generated periodically. • **Time**: Specify the time of day to run the report in hh:mm format. • **Begin Schedule On**: Specify the date when the generation of the scheduled report must begin. • **End Schedule On**: Specify the date when the generation of the scheduled report must end.
Daily	The option to generate the report at specified intervals each day. For **Daily** recurrence, you can specify the following parameters: • **Every _ day(s)**: Specify the interval at which the report must be generated periodically. • **Every Week day**: Specify to run the scheduled report on all week days excluding weekend. • **Time**: Specify the time of day to run the report in hh:mm format. • **Begin Schedule On**: Specify the date when the generation of the scheduled report must begin. • **End Schedule On**: Specify the date when the generation of the scheduled report must end.
Weekly	The option to generate the report on the specified day of the week. • **On Day**: Specify the day of the week to run the scheduled report. • **Time**: Specify the time of day to run the report in hh:mm format. • **Begin Schedule On**: Specify the date when the generation of the scheduled report must begin. • **End Schedule On**: Specify the date when the generation of the scheduled report must end.

Table continues…

Name	Description
Monthly	The option to generate the report on the specified day of the month. • **Months**: Specify the month to run the scheduled report. • **Enter Day(s)**: Specify the day(s) of the week to run the scheduled report. • **Time**: Specify the time of day to run the report in hh:mm format. • **Begin Schedule On**: Specify the date when the generation of the scheduled report must begin. • **End Schedule On**: Specify the date when the generation of the scheduled report must end.

Email Option

Name	Description
Name	The name of the employee scheduling the report.
To	The recipients of the report.
Subject	The subject of the scheduled email.
Messages	The message of the scheduled email.
Report Name	The name of the scheduled report.
Output Type	The output format in which the report is delivered.

View report results

Viewing reporting results

About this task

Use this procedure to view the results of the published reports indicated by type, report name, module, report generation details, and report status.

You can view a report with the **Completed** status in any chosen format. You can also view the different versions of a published report.

Procedure

1. Click **Reports** > **Results**.

2. From the list of published reports, click the **Status** link of the report.

   The system displays the report in the specified format.

3. Click the **Status** link to view the details of a report.

The system displays the report in one of the following formats selected at the time of publishing the report:

- **HTML**
- **PDF**
- **Excel**
- **CSV**

4. Use the **Pagination** controls to navigate through the report list. You can choose the number of records you want to view on each page.

Viewing reporting results field descriptions

Name	Description
Report Name	The name of the report.
Module	The category of the report that is generated.
Last Run	The date on which the report was last run.
xRun	The number of times the report was generated.
Status	The status of the report generation. The options are:

Icon	Name	Description
⏱	**Schedule**	The report that runs at a scheduled interval.
👥	**Public**	The report that is shared with all users in the selected group.

Downloading a report

About this task

Supervisors or managers can download published reports.

Procedure

1. Click **Reports** > **Results**.

2. From the list of published reports, click the **Status** link of the report.

   The system displays the report in the specified format.

3. Click the **Download** (⊙) icon.

   The system downloads the report on your machine.

Printing a report

About this task

Supervisors or managers can print published reports.

Procedure

1. Click **Reports** > **Results**.

2. From the list of published reports, click the **Status** link of the report.

   The system displays the report in the specified format.

3. Click **Print** to print a report.

4. To print reports that are in PDF output, click the **Print** (🖨 Print) icon.

   The system sends the report to the printer connected to your machine.

Editing a report

About this task

Users can edit saved reports by modifying the criteria, settings information, and scheduler details.

Procedure

1. Click **Reports** > **Reports** > **Saved Reports**.

   The system displays the list of saved reports.

2. Select the report that you want to modify and click the **edit** (✏) icon.

3. Modify the appropriate fields in the following tabs:

   • **Criteria** : Lists the report trend options.

   • **Save Settings** : Lists the report name, description, and report sharing options.

   • **Scheduler** : Lists the frequency and email delivery options of a report.

4. In the Criteria or Save Settings tabs, click one of the following:

   • **Cancel** : To discard the modification and close the report.

   • **Run** : To generate the report.

   • **Save and Close**.

5. In the Scheduler tab, click one of the following:

   • **Cancel** : To discard the modification and close the report.

   • **Reset** : To discard the scheduled details.

• **Schedule** : To set the frequency and email delivery options of a report.

Chapter 9: Managing notifications

Notifications

Using the Notifications feature in Avaya Workforce Optimization Select, users can receive real-time alerts and notices for predefined contact center conditions, both mission-critical and informational. Based on the Avaya Workforce Optimization Select modules purchased, users can subscribe to alerts to manage and control contact center activities. Users can also specify if they want these alerts and notices to appear in the notification inbox or sent through email. The notifications inform the user about issues or situations that require immediate attention or notify the user on general information about interactions.

The types of notifications are:

- Alerts: System-generated, real-time notifications that trigger when users cross the defined threshold value. For example, you can configure alerts that inform you about the exceeded number of holds, hold duration, and AHT by your team. The alerts that you can subscribe to depend on the threshold values set by the administrator.

- Notices: Custom messages that can be sent to users that you have access to. Notices provide more information including general information and feedback.

Supervisors can use notifications to:

- Assess and measure employee performance to improve customer satisfaction.

- Send custom notices to employees that supervisors have access to, apart from system-generated alerts.

- Broadcast messages to users through email or have messages delivered to the notification inbox. Supervisors can broadcast messages as an alert or a notice and also send a custom message to members in the team.

- Send notifications during live monitoring of interactions to provide instant email feedback to the employee.

Viewing notifications

About this task

Use this procedure to view notifications that you receive as alerts or notices in your notifications inbox. When the user exceeds the threshold value of defined rule, the system triggers an alert through email or directly to the notifications inbox. Users can also receive notices about general feedback or information during live interactions.

Comments on this document? infodev@avaya.com

Procedure

1. Click **Notifications**.

2. On the View Notification page, click the appropriate option in the **Show** drop-down list to display alerts, notices, or all messages.

3. Click the appropriate option in the **Actions** drop-down menu to specify an action for the notifications you receive.

Viewing notifications field descriptions

General

Name	Description
Date	The date and time of the notification. You can sort the notifications by date or use the search criteria to filter your search results.
Count	The number of times that the notification alert is triggered.
Message	The message of the notification.

Icon	Name	Description
	Type	The type of notification. The options are: • **Alerts**: System-generated messages for AHT, hold count, hold duration, notifications from the **Appeals**, **Coach**, **Learn**, and **Evaluate**modules. There is no subscription for supervisor or agent to receive these notifications. • **Notices**: Custom messages that users can send to provide feedback or any other general information that the receiver needs to know.

Actions

Name	Description
Mark as Read	To mark the selected notifications as read.
Mark as Unread	To mark the selected notifications as unread.
Mark as Helpful	To mark the selected notifications as helpful notifications.
Mark as Not-Helpful	To mark the selected notifications as not helpful.
Delete	To delete the selected notifications.

Show

Name	Description
All	To select all notifications.
Alerts	To select only alerts.
Notices	To select only notices.

Managing notifications

About this task

Use Manage Notifications to manage the type of notifications that you want to receive through email or to your notifications inbox.

Procedure

1. Click **Notifications** > **Manage Notifications**.

2. In the **Email** column, click the appropriate option.

3. In the **Inbox** column, click the appropriate option.

4. Click **Save**.

Managing notifications field descriptions

Name	Description
Message	The message of the notification that is triggered when the threshold value is exceeded. Users can subscribe to the following alerts: • **My AHT exceeded by Queue (mins)**: When the user exceeds the AHT. • **Number of holds placed by me in Queue**: When the user exceeds the number of holds placed during the interaction. • **My hold duration by Queue (mins)**: When the user exceeds the hold duration during the interaction. Supervisors can subscribe to the following alerts: • **AHT exceeded by my team in Queue (mins)**: When members in the supervisor's team exceed the AHT. • **Number of holds by Queue for my team**: When members in the supervisor's team exceed the number of holds placed during the interaction.

Table continues…

Name	Description
	• **Hold duration by Queue for my team (mins) for my team**: When members in the supervisor's team exceed the hold duration during the interaction.
Edit Messages	The option to add a message to an existing notification message. The content you add will appear as an extension to the existing message.
Email	The option to select the notifications that you want to receive through email.
Inbox	The option to select the notifications that you want to receive directly to your inbox.

Icon	Name	Description
🛈	**Type**	The type of notification. The options are: • **Alerts**: System-generated messages for AHT, hold count, hold duration, notifications from the **Appeals**, **Coach**, **Learn**, and **Evaluate** modules. There is no subscription for supervisor or agent to receive these notifications. • **Notices**: Custom messages that users can send to provide feedback or any other general information that the receiver needs to know.

Chapter 10: Monitoring agent desktop

Desktop Analytics

Desktop Analytics is a client-server solution to capture, monitor and analyze agent desktops to identify how well your agents perform their daily interactions, and access customer information from native and web-based applications.

Desktop Analytics requires no additional programming or customization for monitoring user activity on their desktop.

It operates in two distinct modes:

- Learning Mode installed on the server or the supervisor or manager's desktop for monitoring interactions of employees.
- Monitoring Mode running on agents' desktop or employees attending to voice and non-voice interactions in the contact center.

Benefits

- Enables PCI compliance and security during event monitoring.
- Monitors and reports on compliance, adherence, and other business requirements.
- Improves business processes, workflow, and rules.
- Identifies and measures training requirement of agents or employees.
- Enhances agent productivity by close monitoring and coaching.

Features

- Provides an easy-to-use, browser-based interface to configure the monitoring project.
- Configures automatic detection and masks confidential information such as credit card details.
- Captures and monitors actions, events, triggers, and navigation in real time.
- Integrates with third-party applications such as a Workforce Management tool.

Architecture

Desktop Analytics architecture consists of the following components:

- Learning Console
- Native resource files

- Web resource files
- Resource Generator
- Home Agent screen
- Unified Messaging
- Recorder
- Database

Learning mode

In the Learning mode, there is one instance of the Desktop Agent Service that runs on each supervisor machine, and one instance of Desktop Agent Application that runs for each agent or employee for every screen that they access.

For example, if there are more than one users that log on to the same machine, then multiple Desktop Agent Application instances are created.

The sequence of execution in the Learning mode:

1. The supervisor configures the events and controls that need to be monitored and captured using the Learning Console.
2. The Desktop Agent Service starts the Desktop Agent Application on the supervisor desktop.
3. On the agent desktop, the Desktop Agent Application injects the learning code into the application that must be configured for monitoring.

   Desktop Analytics supports monitoring of web-based applications and native windows.

   The injected code monitors user activities and captures the data coming from add-ons or DLLs and sends it to the Desktop Agent Application.
4. The Desktop Agent Application collects the incoming data and sends it to the Learning Console.
5. The Learning Console processes the data, generates an XML file, and sends the file to Resource Generator to generate project resource files.
6. The project resource files are sent to the Database through the Desktop Agent Server.

Monitoring mode

In the Monitoring mode, there is one instance of Desktop Agent Application for each agent or employee to be monitored.

The sequence of execution in the Monitoring mode:

1. When the agent logs on to the desktop, the Desktop Agent Service sends a notification to the Desktop Agent Server.

2. The Desktop Agent Server copies all the project resource files and XML files to the Desktop Agent Service and Desktop Agent Application locally.

3. The Desktop Agent Application processes these files and injects the code into the running instances to capture the user activities. It sends back the captured data and triggers to the Desktop Agent Application.

4. The Desktop Agent Application collects and processes the data and generates events such as Pause, Resume, Call Data, Start and Stop.

5. The event triggers are sent to the Desktop Agent Server through a Desktop Agent Service.

6. The Desktop Agent Server saves these events in the database.

7. The program resource files and XML files have the list of URLs. When an agent opens a document or application, the browser sends the URL information to the Desktop Agent Application. The Desktop Agent Application verifies the URL in the program resource files and XML files and injects the code into the browser.

8. Based on the triggers configured, you can capture:

   • Application start and stop events.

   • Contextual data such as application name, user ID, and machine name.

   • Events with data and time.

   • Changes to fields or data within the application.

   • Navigation information such as Click, Mouse over and Mouse out.

Learning Console

Learning Console configuration

To successfully implement Desktop Agent, you must identify the applications that you must monitor and track and then configure the Learning Console.

In the Learning mode, you can configure the Learning Console to capture:

   • Web applications and native applications that a user visits.

   • Screen images that a user browses or visits.

   • Application-specific data such as specific button clicks or field changed events.

   • Business data associated with interactions.

You can configure all user-level activity and export it to agent desktops that are to be monitored.

Use Projects as a placeholder to define the applications that you must monitor, track, and analyze. Each Project is an abstract entity that contains a collection of automation rules configured for the Desktop Agent. Depending on the business problem that you want to address or the business process that you want to improve, you can create more than one project.

Learning Console configuration checklist

This checklist provides the steps for configuring the Learning Console in Learning mode.

No.	Task	Description	Notes	✔
1	Create a Project to monitor applications on agent desktop.	See Creating a Project on page 157.		
2	Add applications.	See Adding an Application on page 158.		
3	Add a page or pages to monitor.	See Adding a Document on page 159.		
4	Add a form from which you want to capture data.	See Adding a Default Form on page 160 and Adding a Custom Form on page 160.		
5	Add controls to track and analyze user actions.	See Adding Controls on page 161.		
6	Add actions on which you want to capture user actions.	See Adding Actions on page 162.		
7	Add payloads to capture data from agent desktop.	See Adding a Payload on page 163		
8	Save and export the Learning project.	See Saving and exporting a Project on page 164		
9	Execute Database scripts, and push projects to agent desktops to monitor.	For more information, see *Deploying Avaya Workforce Optimization Select*.		

Creating a project

About this task

Use this procedure to configure projects that define what applications you want to monitor on an agent desktop.

Procedure

1. Start the Learning Console, and select one of the following:

   • **New Project**

   • **Recent Projects**

2. For a new project, enter a name and description.

3. Click **OK**.

Example

For example, if you want to create a project that captures back office desktop processes for banking transactions, create a project named Back Office.

Adding an application

Before you begin

Create a project.

About this task

Use this procedure to add applications that you want the Desktop Analytics Application to monitor and capture.

You can add more than one application to a project.

Procedure

1. Right-click the project, and select **Add Application**.

2. Enter the required details.

3. On the Add Application page, drag and drop the spy (⊕) icon on the control that you want to monitor.

4. Click **OK** to save the application.

5. Click **OK & Add Another** to add another application.

Application field descriptions

Name	Description
Alias	The alias name of the application.
Name	The name of the application.
Domain	The domain name of the application.
Category	The category of the application. The options are: • **Web**: Applications that run within a browser. • **Native**: Applications that are native such as CRM and ERP.
Type	The type of application within a specific category.
User Actions	The user actions within the application. The options are: • **Open** • **Close**

Table continues…

Name	Description
	For each user action, you can map Action triggers such as **PAUSE**, **RESUME**, and **CALLDATA**. For example, you can configure the Desktop Analytics Application to resume screen capture when the user opens the browser to access a web-based application.

Adding a document

Before you begin

Add an application to a project

About this task

In a Learning project, the Learning Console will capture agent activities from the URL of the application.

Use this procedure to create a document to capture the URL of the application. You can add multiple documents to capture different pages within a single application.

Procedure

1. Open the web application you want to monitor on the agent machine.

2. Enter the appropriate information in the fields.

3. Click **OK** to save the document.

4. Click **OK & Add Another** to add another document.

5. Click **OK & Add Form** to add a form to the document.

Document field descriptions

Name	Description
Alias	The alias name for the document.
Name	The name of the application.
Path/URL	The path or URL of the application.
URL Match	The options used to search and match the URL of the application that is monitored. The options are: • **Exact** The Learning Console searches for the exact match of the URL as specified in the **Path/URL** field. For example, if you set the **Path/URL** is `http://google.com` and select this option, the Learning Console will capture only the controls and triggers defined for this page. • **Partial Match**

Table continues…

Name	Description
	The Learning Console searches for keywords or strings to match in the URL as specified in the Path/URL field.
Match Value	The value to match when searching for **Path/URL**. The default is the value captured by the Spy tool. You can change the value from the default value to another value.
User Actions	The user actions for the document. The options are: • **Open** • **Close** • **Unload** For each of the above user actions, you can map actions such as **PAUSE**, **RESUME**, and **CALLDATA**. For example, you can configure the application to pause when the page loads, and resume when the page unloads.

Adding a default form

Before you begin

Add a document

About this task

A form defines what you want to monitor or capture within a document. Add controls to define the user activity that needs to be captured within a document. You can add multiple controls within a form.

Procedure

1. Right-click on the document and select **Add Form**.

2. Enter the name and alias name for the form.

3. To save the form, click **OK**.

4. To add another form, click **OK & Add Another**.

5. To add controls to the document, click **OK & Add Controls**.

Adding a custom form

Before you begin

Add a document

About this task

You can add forms under the default or custom categories.

A web page which has different sections within the page is captured as a custom form.

Procedure

1. Drag and drop the spy (⊕) icon to add a control to a form.

   The system displays a message to confirm whether you want to add a custom form.

2. Type the required details.

3. To save the form, click **OK**.

4. To add another form, click **OK & Add Another**.

5. To add controls to the document, click **OK & Add Controls**.

Custom form field descriptions

Name	Description
Alias	The alias name for the form.
Name	The name of the form.
Form ID	The class ID of the form. This field is automatically populated when you capture the page using the spy tool.
Form Class	The name of the class. This field is automatically populated when you capture the page using the spy tool.
User Actions	The user actions to be captured for the form. The options are: • **Load** • **Unload** For each of the above user actions, you can map actions such as **PAUSE**, **RESUME**, and **CALLDATA**.

Adding controls

Before you begin

Add form to a document.

About this task

Add controls within a form to capture a particular action such as a click or a text input in the application or page. Controls can be Input Text Boxes, Radio Buttons, Check Boxes, and so on. You can also add multiple controls to a form.

Procedure

1. Right-click on the document, and select **Add Form**.

2. To add a control, drag the spy (⊕) icon to the section in the page you want to capture.

   The Learning Console automatically identifies the control properties.

3. On the web application page, drag and drop the spy tool on the control you want to monitor.

   The Learning Console automatically identifies the properties of the control.

4. If you want to enable monitoring of sibling control types, select **Enable Sibling**.

5. Select the appropriate user action that you want to monitor, and click **OK**.

Controls field descriptions

Name	Description
Alias	The alias name for the control.
Name	The name of the control.
Type	The type of the control. This field is automatically populated when you drag and drop the spy tool.
	If you drop the spy tool on a button, the field is populated as Button.
ID	The identifier that is unique to the type of the control. This field is automatically populated.
Value	The value, position, width, height of the control. This field is automatically populated.
Class Name	The class name of the control. This field is automatically populated.
Enable Sibling	The option to enable monitoring of sibling control types. For example, select the check box if you want to monitor when the agent clicks on any or all of the buttons in a document.
User Actions	The user actions for the control. The options are: • **Click** • **Mouseover** • **Mouseout** For each of the above user actions, you can map actions such as **PAUSE**, **RESUME**, and **CALLDATA**.

Adding Actions

Before you begin

Add user actions

About this task

You can manually map **Action** to every user action.

Procedure

1. In **User Action**, select a user action on which you want to map an**Action**

2. Click the (+) icon on **User Action**.

3. On the Actions screen, select the **Action** to map.

    You can add one or more than one Actions to the same user action.

Actions field descriptions

Name	Description
PAUSE	To capture critical information entered in the control that is mapped within an application. For example, to pause or mute voice recordings especially when the customer is providing critical information like credit card details over the phone.
RESUME	To resume the capture of events within an application. For example, you can use the action specifically after using the **PAUSE** action.
CALLDATA	To capture the text entered by a user in the application that is configured for monitoring.
START SCREEN	To start screen capture on the user desktop.
STOP SCREEN	To stop screen capture on the user desktop.

Adding a Payload

Before you begin

Add Actions

About this task

When you map a user action with **Actions** such as **Pause**, **RESUME** or **CALLDATA**, you can add **Payload** to define whether the text content to capture must be static or dynamic.

Procedure

1. In **Actions**, select a user action on which you want to map a **Payload**.

2. Click the **(+)** icon on **User Action**.

3. On the Actions screen, select the **Payload**.

    You can add one or more than one **Payload** for the same user action.

Payload field descriptions

Name	Description
Static	To capture a static text from the screen. For example, when you map the text box where the user enters data in the form, and enter the text box name as Var1, and value as ABC, the Learning Console captures the value entered in Var1.
Dynamic	To capture text dynamically from the screen. For example, when you map the text box where the user enters data in the form, the Learning Console dynamically captures the input by the user in the text box.

Saving and exporting a project

About this task

You can save a copy of the project to create a backup, or export the project for sharing the project with other users.

The supervisors with whom you share the project can the monitor configured agents.

Procedure

1. Click **File** > **Save** to save the project.

   The system saves the project with a .kdmb extension.

2. Click **File** > **Export** to export the project.

   The system saves the project with a .kdmb extension.

Monitor agent desktop

Once you configure the Learning Console and complete creating appropriate projects, you need to push the project XML files onto agent machines.

Chapter 11: Customization

Updating profile

About this task

You can view your profile information such as name, reporting hierarchy, hire date, and other details. You can change the time zone and language preferences.

Procedure

1. In the top-right corner of the **Home** page, click **My Profile**.

   The system displays the basic profile information linked to your Avaya Workforce Optimization Select account.

2. In **Time Zone**, select the time zone of your preference and click **Set**.

3. In **Language**, select the language of your preference and click **Set**.

Updating profile field descriptions

Name	Description
Employee Code	The code of the employee who is logged in.
First Name	The name of the employee who is logged in.
User Name	The user name of the employee who is logged in.
Hire Date	The date when the employee joined the organization in the dd:mm:yy format.
Department	The name of the department that the employee belongs to.
Time Zone	The default time zone setting.
Language	The preferred default language setting.
Reporting To	The name of the manager to whom the employee reports.
Group Belongs to	The group that the employee belongs to.
Groups Access To	The groups that the employee has access to.
Organization Units Access To	The organization units that the employee has access to.

Modifying password

About this task

Use this procedure to modify your password and set additional security on your account with secret question settings.

Procedure

1. In the top-right corner of the Home page, click **My Profile**.

2. Click **Settings**.

3. In the Password section, type the old and new passwords.

4. Reenter the new password to confirm.

5. In the Secret Question section, select the question of your choice.

   You can choose two secret questions. Ensure that the answers are private and easy to remember.

6. Click **Save**.

Modifying password field descriptions

Password

Name	Description
Current Password	The current password used to log on to the application.
New Password	The new password. The new password must adhere to the password policy.
Confirm New Password	The new password. Retype your new password to confirm.

Security Questions

Name	Description
Secret Question 1	The first secret question.
Answer	The answer to the selected first secret question. The answer is not case sensitive.
Secret Question 2	The second secret question.
Answer	The answer to the selected second secret question. The answer is not case sensitive.

Broadcasting messages

About this task

Use the Broadcast feature to send messages to multiple employees through email or as a notification pop-up message. Supervisors or managers can send alerts to communicate critical information or notices to provide value add information to employees.

Procedure

1. In the top-right corner of the **Home** page, click **Broadcast**.

   The system displays the Broadcast window.

2. Select the recipients of the message.

   You can send the message to multiple recipients at the same time.

3. Select the option to send the message through email or to the notification inbox of recipients.

4. In **Message Type**, select one of the following:

   - **Alert**
   - **Notice**

5. Enter the message to be broadcast.

6. Click **Send**.

Broadcasting messages field descriptions

Name	Description
Broadcast To	The recipients who receive the broadcast message.
	You can send broadcast messages to multiple employees using the following options:
	• **Site**
	• **Organization Units**
	• **Departments**
	• **Groups**
	• **Employees**
	For example, to select a specific employee in a Department, select the Department from the drop-down list and the employee from the Employees drop-down list.

Table continues…

Name	Description
Broadcast On	The delivery mode of the broadcast message. The options are: • **Email**: To send the message to users through an email. • **Notification Inbox**: To send the message to users in their notification inbox. ⭐ **Note:** To broadcast messages through email: • Ensure you configure the mail server. • Ensure you use a valid email address of the recipients.
Message Type	The type of the broadcast message. The options are: • **Alert**: To alert users on critical information. For example, as a supervisor you can send alert messages to the team about adhering to rules such as greeting the customer or waiting for the customer to end the interaction • **Notice**: To communicate or convey general information. For example, as a supervisor you can send a notice to the team about a new policy or process in the department.
Message	The content of the message you want to broadcast.

Chapter 12: Resources

Documentation

See the following related documents at http://support.avaya.com.

Document number	Title	Use this document to:	Audience
Overview			
	Avaya Workforce Optimization Select Overview and Specification	Provide a high-level functional description of the capabilities of the Workforce Optimization Select application.	All
Implementing			
	Deploying Avaya Workforce Optimization Select	Provide an end-to-end deployment scenario including all products that must function together, checklists, and initial administration.	Deployment engineers and support personnel
Administering			
	Administering Avaya Workforce Optimization Select	Explain how to use Workforce Optimization Interface (WFO) to configure your system, employees, settings, and recording rules and perform routine maintenance tasks. The content is available in two formats: HTML and PDF.	Administrators
Using			
	Using Avaya Workforce Optimization Select	Explain how to use the Workforce Optimization Interface (WFO) to configure settings such as user preferences, monitor and record interactions, and access and generate reports. The content is available in two formats: HTML and PDF.	Users

Table continues…

Document number	Title	Use this document to:	Audience
	Avaya Workforce Optimization Select Quick Reference Guide for Supervisors	Understand the most common user tasks that a Supervisor performs.	Users
	Avaya Workforce Optimization Select Quick Reference Guide for Call Center Agents	Understand the most common user tasks that an Agent performs.	Users
	Avaya Workforce Optimization Select Quick Reference Guide for QA Analyst	Understand the most common user tasks that a QA Analyst performs.	Users
	Avaya Workforce Optimization Select Quick Reference Guide for Administrators	Understand the most common user tasks that an Administrator performs.	Administrators

Finding documents on the Avaya Support website

About this task

Use this procedure to find product documentation on the Avaya Support website.

Procedure

1. Use a browser to navigate to the Avaya Support website at http://support.avaya.com/.

2. At the top of the screen, enter your username and password and click **Login**.

3. Put your cursor over **Support by Product**.

4. Click **Documents**.

5. In the **Enter your Product Here** search box, type the product name and then select the product from the drop-down list.

6. If there is more than one release, select the appropriate release number from the **Choose Release** drop-down list.

7. Use the **Content Type** filter on the left to select the type of document you are looking for, or click **Select All** to see a list of all available documents.

   For example, if you are looking for user guides, select **User Guides** in the **Content Type** filter. Only documents in the selected category will appear in the list of documents.

8. Click **Enter**.

Viewing Avaya Mentor videos

Avaya Mentor videos provide technical content on how to install, configure, and troubleshoot Avaya products.

About this task

Videos are available on the Avaya Support website, listed under the video document type, and on the Avaya-run channel on YouTube.

Procedure

- To find videos on the Avaya Support website, go to http://support.avaya.com and perform one of the following actions:

  - In **Search**, type `Avaya Mentor Videos` to see a list of the available videos.

  - In **Search**, type the product name. On the Search Results page, select **Video** in the **Content Type** column on the left.

- To find the Avaya Mentor videos on YouTube, go to www.youtube.com/AvayaMentor and perform one of the following actions:

  - Enter a key word or key words in the **Search Channel** to search for a specific product or topic.

  - Scroll down Playlists, and click the name of a topic to see the available list of videos posted on the website.

  😎 **Note:**

  Videos are not available for all products.

Support

Go to the Avaya Support website at http://support.avaya.com for the most up-to-date documentation, product notices, and knowledge articles. You can also search for release notes, downloads, and resolutions to issues. Use the online service request system to create a service request. Chat with live agents to get answers to questions, or request an agent to connect you to a support team if an issue requires additional expertise.

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Comments on this document? infodev@avaya.com

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