AVAYA

Using
Avaya Workforce Optimization Select

Notice

While reasonable efforts have been made to ensure that the information in this document is complete and accurate at the time of printing, Avaya assumes no liability for any errors. Avaya reserves the right to make changes and corrections to the information in this document without the obligation to notify any person or organization of such changes.

Documentation disclaimer

"Documentation" means information published in varying mediums which may include product information, operating instructions and performance specifications that are generally made available to users of products. Documentation does not include marketing materials. Avaya shall not be responsible for any modifications, additions, or deletions to the original published version of Documentation unless such modifications, additions, or deletions were performed by or on the express behalf of Avaya. End User agrees to indemnify and hold harmless Avaya, Avaya's agents, servants and employees against all claims, lawsuits, demands and judgments arising out of, or in connection with, subsequent modifications, additions or deletions to this documentation, to the extent made by End User.

Link disclaimer

Avaya is not responsible for the contents or reliability of any linked websites referenced within this site or Documentation provided by Avaya. Avaya is not responsible for the accuracy of any information, statement or content provided on these sites and does not necessarily endorse the products, services, or information described or offered within them. Avaya does not guarantee that these links will work all the time and has no control over the availability of the linked pages.

Warranty

Avaya provides a limited warranty on Avaya hardware and software. Refer to your sales agreement to establish the terms of the limited warranty. In addition, Avaya's standard warranty language, as well as information regarding support for this product while under warranty is available to Avaya customers and other parties through the Avaya Support website: https://support.avaya.com/helpcenter/getGenericDetails?detailId=C20091120112456651010 under the link "Warranty & Product Lifecycle" or such successor site as designated by Avaya. Please note that if You acquired the product(s) from an authorized Avaya Channel Partner outside of the United States and Canada, the warranty is provided to You by said Avaya Channel Partner and not by Avaya.

"Hosted Service" means an Avaya hosted service subscription that You acquire from either Avaya or an authorized Avaya Channel Partner (as applicable) and which is described further in Hosted SAS or other service description documentation regarding the applicable hosted service. If You purchase a Hosted Service subscription, the foregoing limited warranty may not apply but You may be entitled to support services in connection with the Hosted Service as described further in your service description documents for the applicable Hosted Service. Contact Avaya or Avaya Channel Partner (as applicable) for more information.

Hosted Service

THE FOLLOWING APPLIES ONLY IF YOU PURCHASE AN AVAYA HOSTED SERVICE SUBSCRIPTION FROM AVAYA OR AN AVAYA CHANNEL PARTNER (AS APPLICABLE), THE TERMS OF USE FOR HOSTED SERVICES ARE AVAILABLE ON THE AVAYA WEBSITE, HTTPS://SUPPORT.AVAYA.COM/LICENSEINFO UNDER THE LINK "Avaya Terms of Use for Hosted Services" OR SUCH SUCCESSOR SITE AS DESIGNATED BY AVAYA, AND ARE APPLICABLE TO ANYONE WHO ACCESSES OR USES THE HOSTED SERVICE. BY ACCESSING OR USING THE HOSTED SERVICE, OR AUTHORIZING OTHERS TO DO SO, YOU, ON BEHALF OF YOURSELF AND THE ENTITY FOR WHOM YOU ARE DOING SO (HEREINAFTER REFERRED TO INTERCHANGEABLY AS "YOU" AND "END USER"), AGREE TO THE TERMS OF USE. IF YOU ARE ACCEPTING THE TERMS OF USE ON BEHALF A COMPANY OR OTHER LEGAL ENTITY, YOU REPRESENT THAT YOU HAVE THE AUTHORITY TO BIND SUCH ENTITY TO THESE TERMS OF USE. IF YOU DO NOT HAVE SUCH AUTHORITY, OR IF YOU DO NOT WISH TO ACCEPT THESE TERMS OF USE, YOU MUST NOT ACCESS OR USE THE HOSTED SERVICE OR AUTHORIZE ANYONE TO ACCESS OR USE THE HOSTED SERVICE.

Licenses

THE SOFTWARE LICENSE TERMS AVAILABLE ON THE AVAYA WEBSITE, HTTPS://SUPPORT.AVAYA.COM/LICENSEINFO, UNDER THE LINK "AVAYA SOFTWARE LICENSE TERMS (Avaya Products)" OR SUCH SUCCESSOR SITE AS DESIGNATED BY AVAYA, ARE APPLICABLE TO ANYONE WHO DOWNLOADS, USES AND/OR INSTALLS AVAYA SOFTWARE, PURCHASED FROM AVAYA INC., ANY AVAYA AFFILIATE, OR AN AVAYA CHANNEL PARTNER (AS APPLICABLE) UNDER A COMMERCIAL AGREEMENT WITH AVAYA OR AN AVAYA CHANNEL PARTNER. UNLESS OTHERWISE AGREED TO BY AVAYA IN WRITING, AVAYA DOES NOT EXTEND THIS LICENSE IF THE SOFTWARE WAS OBTAINED FROM ANYONE OTHER THAN AVAYA, AN AVAYA AFFILIATE OR AN AVAYA CHANNEL PARTNER; AVAYA RESERVES THE RIGHT TO TAKE LEGAL ACTION AGAINST YOU AND ANYONE ELSE USING OR SELLING THE SOFTWARE WITHOUT A LICENSE. BY INSTALLING, DOWNLOADING OR USING THE SOFTWARE, OR AUTHORIZING OTHERS TO DO SO, YOU, ON BEHALF OF YOURSELF AND THE ENTITY FOR WHOM YOU ARE INSTALLING, DOWNLOADING OR USING THE SOFTWARE (HEREINAFTER REFERRED TO INTERCHANGEABLY AS "YOU" AND "END USER"), AGREE TO THESE TERMS AND CONDITIONS AND CREATE A BINDING CONTRACT BETWEEN YOU AND AVAYA INC. OR THE APPLICABLE AVAYA AFFILIATE ("AVAYA").

Avaya grants You a license within the scope of the license types described below, with the exception of Heritage Nortel Software, for which the scope of the license is detailed below. Where the order documentation does not expressly identify a license type, the applicable license will be a Designated System License as set forth below in the Designated System(s) License (DS) section as applicable. The applicable number of licenses and units of capacity for which the license is granted will be one (1), unless a different number of licenses or units of capacity is specified in the documentation or other materials available to You. "Software" means computer programs in object code, provided by Avaya or an Avaya Channel Partner, whether as stand-alone products, pre-installed on hardware products, and any upgrades, updates, patches, bug fixes, or modified versions thereto. "Designated Processor" means a single stand-alone computing device. "Server" means a set of Designated Processors that hosts (physically or virtually) a software application to be accessed by multiple users. "Instance" means a single copy of the Software executing at a particular time: (i) on one physical machine; or (ii) on one deployed software virtual machine ("VM") or similar deployment.

License types

Concurrent User License (CU). End User may install and use the Software on multiple Designated Processors or one or more Servers, so long as only the licensed number of Units are accessing and using the Software at any given time. A "Unit" means the unit on which Avaya, at its sole discretion, bases the pricing of its licenses and can be, without limitation, an agent, port or user, an e-mail or voice mail account in the name of a person or corporate function (e.g., webmaster or helpdesk), or a directory entry in the administrative database utilized by the Software that permits one user to interface with the Software. Units may be linked to a specific, identified Server or an Instance of the Software.

Heritage Nortel Software

"Heritage Nortel Software" means the software that was acquired by Avaya as part of its purchase of the Nortel Enterprise Solutions Business in December 2009. The Heritage Nortel Software is the software contained within the list of Heritage Nortel Products located at https://support.avaya.com/LicenseInfo under the link "Heritage Nortel Products" or such successor site as designated by Avaya. For Heritage Nortel Software, Avaya grants Customer a license to use Heritage Nortel Software provided hereunder solely to the extent of the authorized activation or authorized usage level, solely for the purpose specified in the Documentation, and solely as embedded in, for execution on, or for communication with Avaya equipment. Charges for Heritage Nortel Software may be based on extent of activation or use authorized as specified in an order or invoice.

All non-Avaya trademarks are the property of their respective owners. Linux® is the registered trademark of Linus Torvalds in the U.S. and other countries.

Contents

Chapter 1: Introduction

Purpose

This document provides information about the Avaya Workforce Optimization Select user interface and explains how to use the features of the Avaya Workforce Optimization Select application.

This document also describes the operations that you can perform through the Live Monitoring, Interactions, Evaluate, Coach, Learn, Analyze, and Reports modules in the Avaya Workforce Optimization Select application.

This document is intended for people who want to use the features of Avaya Workforce Optimization Select application.

New in this release

Avaya Workforce Optimization Select release 5.2.3 supports the following new features and enhancements:

New feature or enhancement	Feature or enhancement name	Module name	Description
New Feature	Evaluation Overview report template	Reports	Using Evaluation Overview Report, you can get a snapshot view on total number of evaluations, sum total of scores of all evaluations and percentage of evaluations for various Queues, Organization Units, Sites, Groups Employees, Reviewers, and Forms.
New Feature	Evaluation Section Summary report template	Reports	Using Evaluation Section Summary Report, you can get a snapshot view of total number of evaluations, section level scores of all evaluations and percentage of evaluations for various Queues, Organization Units, Sites, Groups, and Employees.

Table continues…

New feature or enhancement	Feature or enhancement name	Module name	Description
New Feature	Speech	Speech	Using the Speech module you can take advantage of the following features: • Phrase Sets: Create your library of words and phrases to track agent's performance as a supervisor. • Search: Define your search criteria based on your business requirement. • Business Criteria: Save the search as a business criteria to reuse or share the search criteria with one or more users.. • Results: View and manage speech results. Avaya Workforce Optimization Select transcribes recorded interactions and identifies words and phrases defined as part of the search criteria, and highlights the words and phrases in the transcript.

Chapter 2: Navigation

Avaya Workforce Optimization Select overview

Avaya Workforce Optimization Select is a web-based suite of tightly integrated tools designed to enhance and improve all aspects of your contact center operations and performance. The solution is easy to implement, maintain, and manage in a variety of contact center deployment models from centralized contact centers to distributed branches and work-at-home agents.

It offers contact centers the ultimate workforce optimization functionality and flexibility. The comprehensive solution also provides scalable applications that synchronize and unify the entire workforce, regardless of the VoIP architecture.

Logging in to Avaya Workforce Optimization Select

About this task

Users can access Avaya Workforce Optimization Select 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>`

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

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

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

Logging out of Avaya Workforce Optimization Select

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 Select Sign In screen.

Avaya Workforce Optimization Select Home 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 application 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 overview

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.
Dashboard	Displays real time widgets of important functions in the application. Currently, you can see the live interactions of a logged-in user with the recording controls available for the respective interactions. Depending on your user privileges, you can use these indicators to start, pause, resume, stop, or cancel a recording.

Table continues…

Name	Description
Interactions	Enables supervisors to playback recorded and imported interactions. 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. Live monitoring helps to assess employee performance in real-time, and provide instant online feedback and assistance to employees.
Evaluate	Enables supervisors and quality managers to review and evaluate employee performance for both voice and non-voice 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.
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.
Analyze	Enables users with the appropriate permissions to create scorecards and metric views to measure and analyze the performance of employees, departments, roles, and sites in an organization.
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.
Speech	Enables users with the appropriate permissions to perform precision search by defining words and phrases as part of the search criteria. The speech engine transcribe recorded interactions, identifies words and phrases defined as part of the search criteria, and highlights the words and phrases in the transcript.
Administration	Provides administrators access to the organization, employee and group configuration, call recording settings, queue management, account configuration, and general settings.

Chapter 3: Managing Dashboard

Dashboard overview

Using Dashboard, you can see real-time widgets of important functions in Avaya Workforce Optimization Select. Currently, you can add six placeholders for widgets on your Dashboard that include the following categories:

- **Favorites**
- **Reports**
- **Scorecards**

Apart from these categories, you can also embed external links into Dashboard.

You can also see the live interactions of a logged-in user with the recording controls available for the respective interactions. From the Dashboard recording widget, you can get direct access to the recording controls. Depending on your user privileges, you can use these indicators to do the following:

- Start recording a live interaction.
- Pause or resume a recording.
- Stop a recording.
- Cancel a recording.

You can access the screen:

- From the **Dashboard** tab on the Avaya Workforce Optimization Select Home page.
- From the icon in the header next to the username and notification icons.

You can opt to have Dashboard as your default Home page depending on the permissions assigned to you by the administrator. Based on the need of the organization, an administrator can also make Dashboard the default landing page for a user.

Related links

[Dashboard field descriptions](#) on page 23

Creating Dashboard

Before you begin

Get the create and edit permissions to create a customized dashboard from the administrator.

Procedure

1. On the Avaya Workforce Optimization Select Home page, click **Dashboard** or the Dashboard icon 🦯 in the top-right corner.

2. Click **Create Dashboard**.

3. On the Create Dashboard page, do the following:

   - In the **Title** field, type the name of **Dashboard** that you want to create.

   - Select a structure to create a layout of your choice, and click **Save**.

   The system displays a **Dashboard** layout to add widgets.

Next steps

Add widgets to Dashboard.

Related links

[Dashboard field descriptions](#) on page 23

Adding widgets to Dashboard

About this task

Apart from the recording controls widget, you can add maximum six widgets to your dashboard. The maximum selections allowed from each of the respective categories are as follows:

- Six reports
- Six iFrames
- Four scorecards
- One favorite

For example, the combinations can be:

- Six reports or six iFrames
- Four reports, one iFrame, and one favorite
- Two scorecards, one iFrames, and three reports

Before you begin

Create Dashboard.

⊛ **Note:**

You can add only those scorecards and reports that are selected for adding to dashboard in the respective modules.

Procedure

1. Click the icon.

   The system displays the dashboard in edit mode.

2. Click the icon.

3. On the Add Widget page, click the category that you want to add to your dashboard.

   You can add only six widgets to your dashboard.

   For example:

   If you click **Reports**, the dashboard displays the Reports section with the following message: `Please select the Report.`

4. Click on the icons in the top-right corner of the selected widget to manage the widget.

   The icons to manage a widget vary from one widget to another.

Next steps

Edit Dashboard.

Related links

[Dashboard field descriptions](#) on page 23

Editing Dashboard

About this task

Use this procedure to make changes to an existing Dashboard.

Before you begin

Get the create and edit permissions to edit the existing Dashboard.

Procedure

1. On the Avaya Workforce Optimization Select Home page, click **Dashboard** or the Dashboard icon in the top right corner.

   The system displays the list of the existing Dashboards.

2. From the list, click the dashboard layout that you want to edit.

3. On the dashboard, click icon.

4. Click the icon.

5. On the Edit Dashboard page, do the following:

   a. To change the dashboard name, type the name in the **Title** field.

   b. To make the **Dashboard** layout the default view, select the **Default** checkbox.

   c. To change the current layout selection, select another structure to create a layout , and click **Close**.

6. **(Optional)** To undo the changes, click the ⟲ icon.

7. **(Optional)** To delete the **Dashboard** layout, click the 🗑 icon.

   ✱ **Note:**

   To delete a dashboard you should exit the edit mode.

Related links

[Dashboard field descriptions](#) on page 23

Editing widgets from Dashboard

About this task

You can edit an existing Dashboard layout using the different icons in the top-right corner of any widget.

Procedure

1. On the Avaya Workforce Optimization Select Home page, click **Dashboard** or the Dashboard icon 🗗 in the top right corner.

   The system displays the list of the existing Dashboards.

2. From the list, click the dashboard layout that you want to edit.

3. On the dashboard, click 🖉 icon.

4. To configure a widget, click the ⚙ icon.

   The system displays the *selected widget* page. For example, if you edit the Reports widget, the system displays the Reports page.

5. Do the following:

   a. Delete the existing name and type a new name of your choice.

   b. Pick the reports, scorecards, or favorite that you want to display on your **Dashboard** view.

   c. In the **Refresh interval (mins)** field, type the time duration when you want the selected widget to refresh and click **Apply**.

The system displays the widgets in graphs. You must maximize the widget to get a complete view in a tabular format.

6. To save the selected **Dashboard** layout, click the ![icon] icon.

7. **(Optional)** To view the selected widgets in a tabular format, click the ![icon] icon.

   You can view the tabular output only in the read-only mode on **Dashboard**.

8. **(Optional)** To remove a widget from your **Dashboard** layout, click the ![icon] icon.

9. **(Optional)** To rearrange the placement of a selected widget, click the ![icon] icon on the title of the Widget and drag to the new structure.

Related links

Dashboard field descriptions on page 23

Sharing Dashboard

About this task

For creating an individual **Dashboard**, you must have the create and edit permissions. However, you can share your **Dashboard** with users who do not have the permission to create **Dashboard**.

Procedure

1. On the Avaya Workforce Optimization Select Home page, click **Dashboard** or the

   Dashboard icon ![icon] in the top right corner.

   The system displays the list of the existing Dashboards.

2. From the list, click the dashboard layout that you want to share.

3. On your Dashboard, click the ![icon] icon.

4. On the Share Dashboard page, do the following:

   Select users with whom you want to share your **Dashboard**. You can select **Selected Groups** or **Everyone**. If selecting **Selected Groups** then go to step 5. If selecting **Everyone** then go to step 6.

5. Select the groups and employee to share the dashboard with.

   a. In **Available Groups**, click the group that you want to share your view with and click the ![icon] icon.

      The system displays the selected groups in the Selected Groups section.

   b. In **Available Employees**, click the employees that you want to share your view with and click the ![icon] icon.

The system displays the selected groups in the Selected Employees section.

    c. Click **Save**.

The system delivers your **Dashboard** to the selected groups and users. The receiver can save the settings and make it the default **Dashboard** .

6. Click **Save**.

The system delivers your **Dashboard** to all users. The receiver can save the settings and make it the default **Dashboard** .

Related links

[Dashboard field descriptions](#) on page 23

Viewing Dashboard

About this task

You can view different dashboard layouts depending on the permissions assigned to you.

Procedure

1. On the Avaya Workforce Optimization Select Home page, click **Dashboard** or the icon.

The Dashboard page displays the recording controls widget. You can use the controls to start, pause, resume, stop, or cancel a recording.

2. Click the dashboard layout that you want to view from the list next to the **Create Dashboard** field.

Avaya Workforce Optimization Select displays only those dashboards that you have permissions to access.

Dashboard field descriptions

Categories of Dashboard widgets

Name	Description
Favorites	The option to view all features that are flagged as favorite. You can select only one favorite for your dashboard at a time.
External Link	The option to embed an external page into a dashboard.

Table continues…

Name	Description
Reports	The option to view all reports that are added to a dashboard. To view these reports, you must select the **Add to Dashboard** check box in the respective modules. You can select six reports to display simultaneously.
Scorecards	The option to list all scorecards. You cannot add more than four scorecards to a scorecard.
Recording Controls	This option displays all live interactions along with the recording controls for each interaction.

Create or Edit Dashboard

Name	Description
Title	The name of the dashboard.
Default	The option to choose a dashboard as the default. You can select or clear the check box depending on your requirements.
Structure	The option to select a layout for your dashboard depending on the selected widgets. The options are: • 6–6 • 4–8 • 12/4–4/4 • 12/6–6 • 12/6–6/12 • 3/9–(12/6–6)

Share Dashboard

Name	Description
Share Dashboard	The option to share the dashboard. The options are: • **Me** • **Selected Groups** • **Everyone**
Available Groups	The custom groups available for an organization.
Selected Groups	The groups selected from the available groups to share the dashboard with.
Available Employees	The names of employees who are part of the selected group. This field lists only those employees who belong to the groups in the **Assigned Groups** section.
Selected Employees	The employees with whom you share the dashboard. You can select a group and exclude any employee from that group.

Icon	Name	Description
	Add Widget	To add a widget.
	Delete Dashboard	To delete a dashboard.
	Share Dashboard	To share a dashboard. The options are: • Me • Selected Groups • Everyone
	Manage Dashboard	To manage a dashboard.
	Save Dashboard Changes	To save a dashboard after making the required changes. This icon is displayed when you click on the Manage Dashboard icon.
	Maximize	To maximize a dashboard.
	Minimize	To minimize a dashboard.
	Undo Changes	To reset any changes you made in a dashboard.
	Refresh Widget	To refresh the view of a widget in a dashboard.
	Rearrange Widget	To move widgets from one place to another and change the layout.
	Edit Dashboard Layout	To make changes in a widget.
	Maximize	To maximize a widget in a dashboard.
	Minimize	To minimize a widget in a dashboard.
	Remove	To remove a widget from a dashboard.

Managing recording controls from Dashboard

About this task

For on-demand recordings, use the recording controls in the Controls column in the **Dashboard** recording controls widget to do the following:

- Start recording a live interaction.
- Pause or resume a recording.
- Stop a recording.
- Cancel a recording.

Before you begin

Get permissions from the administrator to record an interaction. If you are not configured for recording, then the system displays the following message: `You are not configured for recording`. If you do not have the permissions to manage the recording controls but you are configured for recording, then you can view only recorded interactions.

If you have the permissions, the Controls column in the **Dashboard** recording controls widget displays the following:

- : In an enabled state.

- : In a disabled state.

- : In a disabled state.

Procedure

1. On the Avaya Workforce Optimization Select Home page, click **Dashboard** or the icon.

   The Dashboard page displays the recording controls widget. You can use the controls to start, pause, resume, stop, or cancel a recording.

2. In the Controls column, click .

   The system displays the Start Recording page.

3. In **Reason Codes**, click the reason for starting the recording, if you do not want the default reason and enter your comments in the **Comments** field.

   The **Comments** field is an optional field.

4. Click **Submit**.

   The Recording Status column displays the status as Recording. The Controls column displays the following controls:

   -

   -

   -

5. In the Controls column, click .

   The system displays the Pause Recording page.

6. In **Reason Codes**, click the reason for pausing the recording and enter your comments in the **Comments** field.

   The **Comments** field is an optional field.

7. Click **Submit**.

   The Recording Status column displays the status as Paused. The Controls column displays the following controls:

   - Rec Paused

   -

   -

   ✳ **Note:**

   If auto-resume interval is set for the pause control, the interaction recording automatically resumes after the specified time.

8. In the Controls column, click .

   The system displays the Resume Recording page.

9. In **Reason Codes**, click the reason for resuming the recording and enter your comments in the **Comments** field.

10. Click **Submit**.

    The Recording Status column displays the status as Recording. The Controls column displays the following controls:

    - Recording

    -

    -

    ✳ **Note:**

    If auto-resume interval is set for the pause control, the interaction recording automatically resumes after the specified time.

11. In the Controls column, click .

    The system displays the Stop Recording page.

12. In **Reason Codes**, click the reason for stopping the recording, and enter your comments in the **Comments** field.

13. Click **Submit**.

The Recording Status displays the status as Stopped. The Controls column displays the following:

- Start Recording

-

-

You can stop and start recording an interaction several times in segment recording. Only those segments which you recorded is available for future reference.

14. In the Controls column, click .

   The system displays the Cancel Recording page.

15. In **Reason Codes**, click the reason for canceling the recording, and enter your comments in the **Comments** field.

16. Click **Submit**.

   The Recording Status displays the status as Cancelled. The Controls column does not display any recording control.

   ✱ **Note:**

   If you cancel a recording, you cannot recover the recording or start the recording.

Dashboard recording controls field description

Name	Description
Controls	The recording controls to record, pause or resume, cancel, and stop a recording. You can also see the status of the recording.
Recording status	The status of the recording. When the user clicks on any of the recording icons, the success message refers to the request processing and need not necessarily reflect a change in the recording icon immediately.
ANI	The phone number of the incoming call.
Extension	The extension number of the employee on which the interaction is being handled.

Table continues…

Name	Description
Channel	The type of channel on which the interaction is delivered. The options are: • Voice • Chat • Email • SMS
Start Time	The start time of the interaction in a date and 24–hour format: mm:dd:yyyy hh:mm:ss The start time of the interaction in a 24–hour format: hh:mm:ss.
Duration	The duration of the recording in a 24–hour format: hh:mm:ss
Interaction Type	The type of call direction. The options are: • Inbound • Outbound
Queue	The queue that the interaction is associated with.
Reason Codes	The reason for starting a recording, pausing, resuming, stopping, and canceling a recording. This field is mandatory when you click on any of the recording controls. In this scenario, the **Comments** and **Tags** fields are available as non-mandatory options. If you expand an interaction without clicking on any of the recording controls, keep the default **Pick one** option to disable it. The **Comments** and **Tags** fields remain non-mandatory options.
Comments	The text message included as comments to an interaction or recording. This option is non-mandatory.
Tags	The option to classify interactions or recordings. You can also use this option to restrict specific actions on an interaction or recording. This option is non-mandatory.

Controls	Name	Description
Start Recording	Start recording	Indicates that a recording has not started. Use this control to start a recording.
	Paused disabled	Indicates that the recording has not started.

Table continues…

Controls	Name	Description
	Cancel disabled	Indicates that the recording has not started.
Recording	Recording	Indicates that a recording is in progress.
	Pause/Resume	Indicates that a recording is in progress. Use this control to pause a recording.
	Cancel	Indicates that a recording is in progress. Use this control to cancel a recording.
Rec Paused	Recording paused	Indicates that the recording is paused.
	Resume recording	Indicates that the recording is paused. Use this control to resume a recording.
	Stop	Indicates that a recording is in progress. Use this control to stop a recording.
	Stop disabled	Indicates that a recording is in progress.

Selecting Dashboard as the landing page

About this task

You can select **Dashboard** as the default landing page depending on the permissions assigned to you.

Procedure

1. In the top right corner of the homepage, click the 🭶 icon.

2. Click **My Profile**.

   The system displays the basic information linked to your Avaya Workforce Optimization Select account.

3. In the **Landing Page** field, click **Dashboard** > **Set** .

WFM Reports overview

As a part of Teleopti WFM integration with Avaya Workforce Optimization Select, the WFM schedule reports are available as a widget in Dashboard. The WFM dashboard displays the

logged in user schedule and the team schedule for supervisors and managers in the Schedule widget.

Viewing Teleopti WFM Dashboard

Before you begin

Create a Dashboard specific to WFM and add a widget for My Schedule.

Procedure

1. On the Avaya Workforce Optimization Select Home page, click **Dashboard** or the

   Dashboard icon in the top-right corner.

2. Click the dashboard that you created for Teleopti WFM.

   The system displays the My Schedule widget with the data imported from Teleopti WFM.

3. On the My Schedule widget, do one of the following:

   - To view your schedule, click **Schedule**.
   - To view the schedule of your team, click **Team Schedule**. This privilege is permission driven.

Chapter 4: Monitoring interactions in real time

Live Monitoring overview

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 problem areas and take immediate steps to ensure customer satisfaction.

The Live Monitoring module provides the following benefits:

- Listen to agent and customer interactions in progress and view real-time agent information and interaction status.
- Respond to and mitigate caller objectives or complaints by providing instant feedback.
- Create different views that define individual search criteria to quickly access the required live interactions for listening.
- Customize various columns to quickly identify important interaction details,such as extension, queue, tenure, call duration, current state, current state duration, and ANI number.
- Allow supervisors to perform QA while monitoring to measure agent performance on aspects like average handling time and adherence to scripts provided by management. Supervisors can also flag an interaction for further evaluation.
- Email an interaction as a link to anyone.
- Record live interactions
- Pause or resume a recording
- Cancel and stop a recording

Using the Live Monitoring module, authorized users can:

- Manage views
- Monitor 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 Monitor page, you can:

- Assist new agents 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 using the recording controls.
- 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.

✹ Note:

If a voice or a non voice interaction configured for screen capture recording is paused, then during live monitoring, Avaya Workforce Optimization Select displays the image to indicate that no screens are captured during the paused state.

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 **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 AWFOS view, which is the default view. You can create a new view to search and play the desired interactions.

After you create a view, you can use it anytime later.

You can do the following while creating 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.

Adding a view

About this task

To search for live interactions, you can use the AWFOS Default view, 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 Default view consists of predefined filters configured by your system administrator. You cannot modify the filters on this view.

Procedure

1. Click **Live Monitoring** > **Monitor**.
2. On the Monitor page, click **Add**.
3. On the Create View page, type a name and description.

Next steps

Set up filters for a view.

Setting up filters for a view

About this task

Using filters in view, you can add:

- Multiple search parameters within a single filter criteria.
- Multiple values separated by commas to match a single parameter .

Procedure

1. In Filter add fields, operators and values for
   a. In **Field**, select the field on which to apply the filter.
   b. In **Operator**, select the operator which to apply.
   c. In **Value**, enter the value that the records must match.

2. To add additional filters, click **Add Field**.

3. In **Display Fields**, select the fields to be displayed.

4. In **Share**, select the groups and employee to share the view.

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

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 Selected 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 Selected Fields list:

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

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

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

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

3. **(Optional)** To rearrange the order of the selected fields, click the arrows next to the Selected Fields screen.

   The order selected in the views determine the sequence of the columns in the output.

Next steps

Share a view.

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 Edit View page displays the **Group** and the **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 Selected 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 Selected Employees list; select one or more employees and use the **Remove Selected** and **Remove All** buttons.

7. Click **Save and Close**.

Create 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. You can set a view as default if you want to see a certain set of interactions each time you login.
Description	The description that helps to understand the reason for creating a view.

Table continues…

Name	Description
Refresh Interval	The time in seconds to define the interval to refresh live interactions. For example, if you configure 20 seconds, the page will reload every 20 seconds to refresh the live interactions on that page.
Filter	The filter criteria used to search the interactions.
Display Fields	The columns displayed in the search results. You can move or remove the fields in the Available Fields screen to the Selected Fields screen while adding a view. The arrows next to the Selected Fields allows the user to rearrange the order of the selected fields.
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: • Role • Department • Employee Status • Groups • Is Masked • Is Muted • Contact Instances • No of holds • No of Transfers • Organization Unit • Queue • Recordings • Screen Title • Show Only Live Agents • Site • Reporting to • Tenure (In Weeks)

Table continues…

Name	Description
Operator	The operator used to specify the search criteria. The options are: • Equals To • Not Equal To • Contains • Does not Contain • Starts With • Does not Start With • Ends With • Does not End With • Less Than • Greater Than • Less Than or Equal • Greater Than or Equal • Between
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
Role	To search for interactions based on the designation of the employee in the organization.
Calling Party	To search for interactions by the extension number or email ID of the calling party. You can use any alphanumeric characters or symbols to search an interaction.
Called Party	To search for interactions by the extension number or email ID of the called party. You can use any alphanumeric characters or symbols to search an interaction.
Interaction Duration	To search for duration of the interactions in the hh:mm:ss format.
Department	To search for an interaction by the name of the department that the employee belongs to.
Employee Status	To search for an interaction by the status of the employee attending to the interaction. The options are: • Active • Inactive
Groups	To search for interactions of employees belonging to the specified group.

Table continues…

Name	Description
Interaction Type	To search for the channel of interaction. The options are: • Voice • Email • Chat • SMS
Is Masked	To search for a live interaction that is masked.
Is Muted	To search for a live interaction that is muted.
Contact Instances	To search for the line for which the user is configured for recording. For example; If the line instances are Line 1, Line 2, and Line 3 and the call landed on Line 2, the system displays the line instance as 2.
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.
Organization Unit	To search for interactions based on the name of the organizational unit. Use the available operators to define your search criteria.
Queue	To search for interactions by the queue that the interaction is associated with.
Recordings	To search for interactions that are live and also for agents that are not on a call. This option is permission based. If you do not choose this filter, you can view only the agents handling live interactions.
Screen Captures	To search for interactions that contain screen captures.
Screen Title	To search for interactions by the title of the window that the agent is accessing while handling an interaction.
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.
Tenure (In Weeks)	To search for interactions based on the tenure of the employee in weeks.

Table continues…

Name	Description
Show Only Live Agents	To search for agents who are handling calls. This is a default option and is available to supervisors only.
	To see all employees who are handling and not handling calls, the supervisor must create views by selecting the No option.
	The options are:
	• Yes
	• No
	The default option is Yes.

Operators

Name	Description
Equals To	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.
Does not Start With	To search for interactions that does not start with the specified value.
Ends With	To search for interactions that ends with the specified value.
Does not End With	To search for interactions that does not end 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
Role	The designation of the employee in the organization.
Department	The name of the department that the employee belongs to.
Employee Status	The status of the employee attending to the interaction. The options are:
	• Active
	• Inactive

Table continues…

Name	Description
Groups	The name of the group that the employee belongs to.
Is Masked	The live interaction that is masked.
Is Muted	The live interaction that is muted.
Line Instances	The line to which the user extension is associated in a scenario where a user is connected to multiple lines.
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.
Organization Unit	The name of the organization unit that the employee belongs to.
Queue-Queue Type	The queue that the interaction is associated with.
Recordings	
Screen Title	The title of the window that the employee accesses to handle an interaction.
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.

Share

Name	Description
Me	The option to set the view as private where other 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 with everyone, the system renders results based on the access with whom the view is shared. **Note:** Users can only view search results and cannot edit the search results.

Button Name	Description
Save as Report	The option to save a view as an adhoc report. You can view this report in the **Reports** tab.

Monitoring live interactions

About this task

On the Monitor page, you can view and monitor one or more voice or non voice interactions 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 Monitor page displays the live interactions in the default view.

2. On the **View** list, click the required view.

   The Monitor page 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. (Optional) On the pagination controls, choose the number of records that you want to view on each page.

6. (Optional) To filter the columns, click the ▼ icon in the column header of the column which you want to filter.

   You can apply filters on multiple columns.

7. (Optional) To clear the filters from all the columns, click the ▼x icon.

8. (Optional) To sort the columns, click the **Sort** 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. The third click removes the sorting.

9. (Optional) To reset the sorting, click the ↕x icon.

Monitor field descriptions

Name	Description
Recording Status	The current status of the recording.
Employee	The name of the employee who is interacting.
Agent ID	The ID of the agent logged in into the phone.
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.

Table continues…

Name	Description
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.
Interaction Duration	The duration of the interaction in the hh:mm:ss format.
Direction	The direction of the interaction. The options are: • Inbound • Outbound
Interaction Type	The channel of interaction. The options are: • Voice • Email • Chat • SMS
Current State	The current interaction state whether the employee is talking or has put the call on hold. By default, the supervisor can view only those employees who are handling calls. To view all the employees who are handling or not handling calls, the supervisor must create a view by clicking the No option for the **Show Only Live Agents** filter.
Current State Duration	The duration of the current state of interaction.
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: • Active • Inactive
Extension	The extension number of the agent.
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 screen capture of the employee desktop is enabled for recording. When it is enabled for recording, the screens get captured for the interactions.
Called Party	The extension number or email ID of the called party. You can use any alphanumeric character or symbol in this field.
Calling Party	The extension number or email ID of the calling party. You can use any alphanumeric character or symbol in this field.
No of holds	The number of holds for an interaction.
No of transfers	The number of transfers for an interaction.

Table continues…

Name	Description
Is Masked	The field to indicate whether an interaction is masked.
Is Muted	The field to indicate whether an interaction is muted.
Contact Instances	The field that displays the line which is configured for recording.

Icon	Name	Description
-	Controls	The recording control options that are available for monitoring the live interactions.
⌒	**Listen**	The live interactions that are available for monitoring.

Manage tags and reason codes

Tags overview

Use tags to classify interactions and enforce specific actions on interactions. You can associate a tag with a specific action. As a result, when you tag an interaction, Avaya Workforce Optimization Select executes the action associated with the tag. Naming a tag based on the action associated with it is a good practice for better identification.

If you do not want to associate any action to an interaction, associate the **No action required** tag to the interaction. You can use such tags to filter interactions with specific business needs. You can also associate such tags with business criteria. When Avaya Workforce Optimization Select fetches the interactions that meet the business criteria, these tags automatically get associated with the interactions.

Benefits:

* Supervisors can take advantage of tagging a live or a recorded interaction to execute certain actions or to filter interactions.
* Supervisors or managers can create multiple tags for the same action.

Avaya Workforce Optimization Select contains a default tag, which is Flag for QA. In a Data Partition (DP) environment, the following default tags get automatically created for each DP OU:

* Flag for QA

* Do not allow download

* Do not allow download and email

* Do not allow email

Apart from these, you can also create and manage additional tags based on your requirement.

✳ **Note:**

You must have the appropriate permissions to manage tags in Avaya Workforce Optimization Select.

Reason codes overview

Reason codes in Avaya Workforce Optimization Select is a feature that forces you to provide a reason when you use a recording control. Whenever you start, stop, pause, resume, or cancel the recording of an interaction, you are forced to provide a reason. Depending on the privileges assigned to you by your administrator, you can create additional reason codes apart from the default ones and associate them to the interaction.

Benefits:

- An auto-resume feature is available when you pause a recording to automatically resume recording after a predefined time interval. You can select a specific time interval in seconds to automatically resume a call.

- The reason codes that are specified as default get automatically tagged to the interaction on clicking the recording control.

- At a DP OU level, you can associate a reason code to a single client or to multiple clients.

For agents using the dashboard, the table below lists the recording controls for the corresponding recording states of an interaction.

Current recording state	Available recording controls		
Not recording	Start recording		
Recording	Pause recording	Stop recording	Cancel recording
Paused	Resume recording	Stop recording	Cancel recording
Stopped	Start recording		

You can click on the recording control for the default reason code to get tagged to the interaction or select another reason code and the selected reason code automatically gets tagged. In the latter, you do not have to click on the recording control.

Adding tags or reason codes

Procedure

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

2. To view the list of available tags or reason codes, click **Manage Tags/Reason Codes**.

3. To create a tag or reason code, click **Add Tag/Reason Code**.

4. Enter the appropriate details.

5. Click **Save & Close**.

Add Tags or Reason Codes field descriptions

Name	Description
DP OU	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.
Action	The action associated with a tag or a reason code. The options are: • Never delete the interaction: To tag interactions that you do not want anyone to delete. • No action required: To tag interactions without associating any action. Use this tag to filter interactions with specific or custom business needs. • 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. • Flag for QA: To tag interactions that you do not want to flag for quality analysis. • Start Recording: To provide reason codes to interactions that you want to start recording. • Stop Recording: To provide reason codes to interactions that you want to stop recording. • Resume Recording: To provide reason codes to interactions that you want to resume the recording. Selecting this option allows the user to resume the call recording in a specific time. • Pause Recording: To provide reason codes to interactions that you want to pause the recording. Selecting this option allows the user to pause the call recording in a specific time. You can set the time interval when you want to call auto-resume after a specific interval. • Cancel Recording: To provide reason codes to interactions that you want to cancel.

Table continues…

Using Avaya Workforce Optimization Select

Name	Description
Name	The name of the default tag or reason code 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.
Default	The option to choose a tag or a reason code as the default. By default, the first tag is considered the default.
Active	The option to choose the status of a tag or a reason code as active. By default, this option is not selected.
Description	The description of the tag or the reason code.
Auto-resume interval (Secs)	The option to select a specific time for the recording of the interaction to resume automatically. This option is only available only if you select pause recording.

Icon	Name	Description
⊕	Add Tag or Reason Code	The option to add a tag or a reason code.
⊗	Remove Tag or Reason Code	The option to remove a tag or a reason code.

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:

- Play a live interaction.
- Record a live interaction, pause or resume, cancel and stop a recording.
- Provide feedback for a live interaction.
- Comment or tag a live interaction.

Procedure

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

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

   The system displays the Interaction Details page with the interaction streaming in the Live Monitoring panel.

   > ✱ **Note:**

   The time to view a live interaction depends on the browser you are using. You might notice some delay in Chrome browser.

3. To view the screens that are captured in full screen, click the Fit to Width (↔) icon.

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

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

5. To play the previous interaction in the list, click the Previous (◁) icon.

6. To play the next interaction in the list, click the Next (▷) icon.

Managing recording controls from the Controls column

About this task

Use the recording icons in the Controls column in the **Live Monitoring** module to do the following:

- Start recording a live interaction
- Pause or resume a recording
- Stop a recording
- Cancel a recording

Before you begin

Get permissions from the administrator to record an interaction. If you have the permissions, the Controls column displays the following:

- **Start Recording** : In an enabled state.

- ⬚ : In a disabled state.

- ⊗ : In a disabled state.

Procedure

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

2. In the Controls column, click **Start Recording** .

The Recording Status column displays the status as Not Recording. The Controls column displays the following controls:

-

-

-

3. In the Controls column, click .

   The system displays the Pause Recording page.

4. In **Reason Codes**, click the reason for pausing the call, select the associated tag from the list of interaction tags, and enter your comments in the **Comments** field.

   The **Comments** and the **Interaction Tags** fields are not mandatory fields.

5. Click **Submit**.

   The Recording Status column displays the status as Paused. The Controls column displays the following controls:

-

-

-

   ✴ Note:

   If auto-resume interval is set for the pause control, the interaction recording automatically resumes after the specified time.

6. In the Controls column, click .

   The system displays the Resume Recording page.

7. In **Reason Codes**, click the reason for resuming the recording, select the associated tag from the list of interaction tags, and enter your comments in the **Comments** field.

   The **Comments** and the **Interaction Tags** fields are not mandatory fields.

8. Click **Submit**.

   The Recording Status column displays the status as Recording. The Controls column displays the following controls:

-

-

-

✱ Note:

If auto-resume interval is set for the pause control, the interaction recording automatically resumes after the specified time.

9. In the Controls column, click .

   The system displays the Stop Recording page.

10. In **Reason Codes**, click the reason for stopping the recording, select the associated tag from the list of tags, and enter your comments in the **Comments** field.

    The **Comments** and the **Interaction Tags** fields are not mandatory fields.

11. Click **Submit**.

    The Recording Status displays the status as Stopped. The Controls column displays the following:

    -

    -

    -

    You can stop and start recording an interaction several times. Only those segments which you recorded is available for future reference.

12. In the Controls column, click .

    The system displays the Cancel Recording page.

13. In **Reason Codes**, click the reason for canceling the recording, select the associated tag from the list of tags, and enter your comments in the **Comments** field.

    The **Comments** and the **Interaction Tags** fields are not mandatory fields.

14. Click **Submit**.

    The Recording Status displays the status as Cancelled. The Controls column does not display any recording control.

    ✱ Note:

    If you cancel a recording, you cannot recover the recording or start the recording.

Recording a live interaction from the Live Monitoring page

About this task

Use the recording controls from the Live Monitoring page to do the following:

- Start recording a live interaction.
- Pause or resume a recording.
- Stop a recording.
- Cancel a recording.

Before you begin

Get permissions from the administrator to record an interaction. If you have the permissions, the Interaction Details page displays the following:

- **Start Recording** : In an enabled state.

- (▣) : In a disabled state.

- (×) : In a disabled state.

Procedure

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

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

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

   ⊛ **Note:**

   The time to view a live interaction depends on the browser you are using. You might notice some delay in Chrome browser.

   Start recording a live interaction:

3. In the Controls column, click **Start Recording** .

   The Recording Status column displays the status as Not Recording. The Controls column displays the following controls:

   - 🔴 Recording

   - (▣)

- ⊗

Pausing a recording:

★ **Note:**

If auto-resume is set for an interaction, the interaction automatically resumes after the specified time.

4. In the Controls column, click ⊞.

   The system displays the Pause Recording page.

5. In **Reason Codes**, click the reason for pausing the call, select the associated tag from the list of interaction tags, and enter your comments in the **Comments** field.

   The **Comments** and the **Interaction Tags** fields are not mandatory fields.

6. Click **Submit**.

   The Recording Status column displays the status as Paused. The Controls column displays the following controls:

   - 🔴 Rec Paused

   - ⏸

   - ⊗

Resuming a recording:

★ **Note:**

If auto-resume is set for an interaction, the interaction automatically resumes after the specified time.

7. In the Controls column, click ⏸.

   The system displays the Resume Recording page.

8. In **Reason Codes**, click the reason for resuming the recording, select the associated tag from the list of interaction tags, and enter your comments in the **Comments** field.

   The **Comments** and the **Interaction Tags** fields are not mandatory fields.

9. Click **Submit**.

   The Recording Status column displays the status as Recording. The Controls column displays the following controls:

   - 🔴 Recording

-

-

Stopping a recording :

You can stop and start recording an interaction several times. Only those segments which you recorded is available for future reference.

10. In the Controls column, click .

   The system displays the Stop Recording page.

11. In **Reason Codes**, click the reason for stopping the recording, select the associated tag from the list of interaction tags, and enter your comments in the **Comments** field.

   The **Comments** and the **Interaction Tags** fields are not mandatory fields.

12. Click **Submit**.

   The Recording Status displays the status as Stopped. The Controls column displays the following:

   -

   -

   -

Canceling a recording:

If you cancel a recording, you cannot do the following:

- Recover the recording

- Start the recording

13. In the Controls column, click .

   The system displays the Cancel Recording page.

14. In **Reason Codes**, click the reason for canceling the recording, select the associated tag from the list of interaction tags, and enter your comments in the **Comments** field.

   The **Comments** and the **Interaction Tags** fields are not mandatory fields.

15. Click **Submit**.

   The Recording Status displays the status as Cancelled. The Controls column does not display any recording control.

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

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

3. On the Interaction 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 the following set of predefined actions:

- Never delete the call
- No action required
- 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 Monitor page, click the 🎧 icon next to the live interaction that you want to comment on.

3. Click **Comments/Tags**.

4. On the **Tags** list, click the required tag.

5. Click **Set**.

Comments/Tags field descriptions

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.
Do not allow download	The tag used to specify that the interaction cannot be downloaded.

Table continues…

Name	Description
Do not allow download and email	The tag used to specify that the interaction cannot be downloaded or sent by email.
Do not allow email	The tag used to specify that the interaction cannot be sent by email.
Flag for QA	The tag used to specify that the interaction is flagged for quality analysis.

Live interactions field descriptions

Profile

Name	Description
Controls	The recording controls to record, pause or resume, cancel, and stop a recording.
Play	The option to play a live interaction.
Recording status	The current status of the recording.
Employee Code	The employee ID of the person who is attending to the interaction.
Employee	The name of the employee who is interacting.
Extension	The extension number of the employee on which the interaction is being handled.
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.
Site	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 on which the interaction is being handled.

Table continues…

Name	Description
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 interacting.
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.

Recording controls

Name	Description
Reason Codes	The option to select the reason for starting a recording, pausing, resuming, canceling, and stopping a recording. This field is mandatory when you click on any of the recording controls. In this scenario, the **Comments** and **Tags** fields are available as non-mandatory options. If you expand an interaction without clicking on any of the recording controls, keep the default **Pick one** option to disable it. The **Comments** and **Tags** fields remain non-mandatory options.
Comments	The field for the user to enter the comments while starting a recording, pausing, resuming, canceling, or stopping a recording.

Controls	Name	Description
Start Recording	Start recording	Indicates that a recording has not started. Use this control to start a recording.

Table continues…

Controls	Name	Description
	Paused disabled	Indicates that the recording has not started.
	Cancel disabled	Indicates that the recording has not started.
Recording	Recording	Indicates that a recording is in progress.
	Pause/Resume	Indicates that a recording is in progress. Use this control to pause a recording.
	Cancel	Indicates that a recording is in progress. Use this control to cancel a recording.
Rec Paused	Recording paused	Indicates that the recording is paused.
	Resume recording	Indicates that the recording is paused. Use this control to resume a recording.
	Stop	Indicates that a recording is in progress. Use this control to stop a recording.
	Stop disabled	Indicates that a recording is in progress.

Chapter 5: Managing recorded interactions

Interactions overview

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:

- Playback recorded interactions including recordings done by an external party, or in a legacy system in the wav-G.711aLaw-mono, wav-G.711aLaw-stereo, wav-G.711uLaw-stereo, wav-G.711uLaw-mono, wav-PCM-stereo, wav-PCM-mono, wav-G.711–uLaw-stereo, wav-G.726-stereo, wav-G.726-mono, wav G.729–mono, mp4–H.264–stereo, mp4–H.264–mono, m4a-AAC-stereo, and m4a-AAC-mono audio formats.

- Create different views to define search criteria and quickly access the interactions that you want to frequently view and listen.

- Create adhoc interactions to listen to an interaction series, voice or non-voice, between a customer and the employees of an organization. You can either create interactions by importing from an external source or group a series of interactions to form composite interactions. Composite interactions can be a combination of system interactions, imported interactions or both. The supported formats for uploading adhoc interactions are: .wav, .m4a, .mpeg-4, and .mp3.

- Add comments to a recorded interaction especially when the supervisor wants to provide important information to the evaluator or reviewer.

- Download a recorded interaction in .wav, .mp4 for audio and screens, and m4a for mp4 audio formats.

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

- Customize the Interactions page with columns to quickly identify important interaction details. For example: The columns could be interaction start time, interaction end time, duration, who ended the interaction whether the customer or the agent, number of holds, number of transfers, and hold duration.

- Get a visual depiction of the conversation graphs that provide quick identification of problem areas such as crosstalk or elevated voices.
- View all interaction segments such as conference, transfers, and 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 employees.
- 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 provide information to the evaluator or reviewer.
- Download a recorded interaction in WAV, MP4 (Audio only), and MP4 formats.
- Tag the interaction to enforce an action or filter interactions based on custom business needs.
- View the conversation graph that provides quick identification of problem areas such as cross talk or elevated voices.

😶 **Note:**

- If a voice or a non voice interaction configured for screen capture recording is paused,

  then during playback, Avaya Workforce Optimization Select displays the 📷 image to indicate that no screens are captured during the paused state.

- If a voice or non voice interaction configured for screen capture recording is terminated when the recording is paused, then during playback, Avaya Workforce Optimization

  Select displays the 📷 image during the paused state and at the end of the screen cast.

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 **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 AWFOS view, which is the default view. You can create a new view to search and play the desired interactions.

After you create a view, you can use it anytime later.

You can do the following while creating 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.

Adding a view

About this task

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

By default, the AWFOS Default view comes with a set of pre defined filters configured by the system administrator. You cannot modify the filters on the AWFOS Default view. You can also save a view as an adhoc report.

Procedure

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

   Avaya Workforce Optimization Select displays the interactions in the default view.

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

   Avaya Workforce Optimization Select 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.

Setting up filters for a view

About this task

Using filters in view, you can add:

- Multiple search parameters within a single filter criteria.
- Multiple values separated by commas to match a single parameter .

Procedure

1. In Filter add fields, operators and values for

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

   b. In **Operator**, select the operator which to apply.

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

2. To add additional filters, click **Add Field**.

3. In **Display Fields**, select the fields to be displayed.

4. In **Share**, select the groups and employee to share the view.

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

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 Selected 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 Selected Fields list:

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

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

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

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

3. **(Optional)** To rearrange the order of the selected fields, click the arrows next to the Selected Fields screen.

The order selected in the views determine the sequence of the columns in the output.

Next steps

Share a view.

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 Edit View page displays the **Group** and the **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 Selected 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 Selected Employees list; select one or more employees and use the **Remove Selected** and **Remove All** buttons.

7. Click **Save and Close**.

Create 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. You can set a view as default if you want to see a certain set of interactions each time you login.
Description	The description that helps to understand the reason for creating a view.
Filter	The filter criteria used to search the interactions.
Display Fields	The columns displayed in the search results. You can move or remove the fields in the Available Fields screen to the Selected Fields screen while adding a view. The arrows next to the Selected Fields allows the user to rearrange the order of the selected fields.
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: • Role • Archived • Audio Codec • Interaction Status • Commented • Department • Employee Status • Evaluated • Flagged for QA • Groups • Hold Duration • Hunt Group • Interactions ID • Interaction Comments • Interaction Tags • Interaction Type • No of holds • No of Transfers • Organization Unit • User Name • Random Calls • Site • Source Type • Reporting to • Tagged • Tenure (In Weeks) • Transcribed • Transfer Number • Transfer Type • UCID

Table continues…

Name	Description
	• Variables 1–10
	• VDN
	• Interaction ended by
	• Employee
	• Transaction Date
	• Duration
	• Queue
	• Called Party
	• Calling Party
	• Agent ID
	• Extension
	• Screen Captures
Operator	The operator used to specify the search criteria. The options are:
	• Equals To
	• Not Equal To
	• Contains
	• Does not contain
	• Starts With
	• Does not Start With
	• Ends With
	• Does not End With
	• Less Than
	• Greater Than
	• Less Than or Equal
	• Greater Than or Equal
	• Not Equal To
	• Between
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
Role	To search for interactions of employees with the specified designation or role.
Archived	To search for interactions that are archived. The options to filter interactions based on archiving from the **Value** field are: • Yes: To filter the interactions that were archived. • No: To filter the interactions that were not archived.
Audio Codec	To search for interactions that are compressed using the selected audio codec.
Interaction Status	To search for interactions based on the recording status of the interaction. The options are: • NoRTP: Interactions that do not have any voice streams or RTP. • Connected: Interactions with voice streams or RTP. • Unknown: Non voice interactions.
Commented	To search for interactions that are commented. The options to filter interactions based on comments from the **Value** field are: • Yes: To filter the interactions that were commented. • No: To filter the interactions that were not commented.
Department	To search for interactions of employees who belong to the specified department.
Employee Status	To search for interactions by the status of the employee attending to the interaction. The options are: • Active • Inactive
Evaluated	To search for evaluated interactions.
Flagged for QA	To search for interactions that are flagged for QA. The options to filter interactions based on flagging from the **Value** field are: • Yes: To filter the interactions that were flagged for QA. • No: To filter the interactions that were not flagged for QA.
Groups	To search for interactions of employees belonging to the specified group.
Hold Duration	To search for interactions based on the hold duration.
Hunt Group	To search for interactions based on the grouping of extensions handled by agents to interact.

Table continues…

Name	Description
Interactions ID	To search for interactions based on the interaction ID.
Interaction Comments	To search for interactions based on specific comments provided by employees.
Interaction Tags	To search for interactions based on the specific tags used for association.
Interaction Type	To search for interactions based on the type of interaction.
User Name	To search for interactions based on the user name of the employee.
No of Holds	To search for interactions with the specified number of holds.
No of Transfers	To search for interactions with the specified number of transfers.
Organization Unit	To search for interactions based on the name of the organizational unit. Use the available operators to define your search criteria. 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.
Random Calls	To get a view of the interactions randomly. By default, Avaya Workforce Optimization Select displays the list of interactions in the same sequence for all employees using a shared view. If you select this option, Avaya Workforce Optimization Select randomly displays the same list of interactions.
Site	To search for the interactions of employees belonging to the specified site.
Source Type	To search for interactions based on the source. The options are: • System: The interactions recorded in the application • Adhoc-External: The interactions imported from external sources in the supported media formats. • Adhoc-Composite: The interactions grouped together from system and imported interactions. It can be a either a group of system interactions, imported interactions or both.
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.
Tagged	To search for tagged interactions. The options to filter interactions based on tags from the **Value** field are: • Yes: To filter the interactions that were tagged. • No: To filter the interactions that were not tagged.
Tenure (In Weeks)	To search for interactions based on the tenure of the employee in weeks.

Table continues…

Name	Description
Transcribed	To search for interactions that are transcribed by the speech engine.
Transfer Number	To search for interaction based on the station or the extension number of the party to whom the interaction is transferred.
Transfer Type	To search for interactions based on how you transfer a call. The options are: • Cold Transfer: An agent transfers the customer call to another user without any prior notice to the user to whom the call is transferred. The second user can be another agent or a supervisor. • Conference: An agent adds another agent or supervisor to the call. • Warm Transfer: An agent speaks to another agent or supervisor before transferring a call. The first agent can provide background information about the call to the other agent or supervisor without the caller hearing the conversation. • No Transfer: An agent answers the queries of the caller without transferring the call to another agent or supervisor.
UCID	To search for interactions based on the universal call ID. This ID remains the same even when a call is transferred to another agent or called party.
Custom Variables	To search for interactions based on custom variables defined for your business.
VDN	To search for interactions based on an extension number that is used to enable calls to connect to a vector for processing.
Interaction ended by	To search for interactions based on who ended a interaction. The options are: • Agent • Customer
Employee	To search for interactions based on the employees that you have access to.
Transaction Date	To search for interactions based on the following options: • Current Week • Last Month • Last Week • This Month • Today • Yesterday You can also search for interactions for a specific date range.
Duration	To search for interactions by the duration specified in the hh:mm:ss format.

Table continues…

Name	Description
Queue	To search for interactions by the queue that the interaction is associated with.
Called Party	To search for interactions by the extension number or email ID of the called party. You can use any alphanumeric characters or symbols to search an interaction.
Calling Party	To search for interactions by the extension number or email ID of the calling party. You can use any alphanumeric characters or symbols to search an interaction.
Agent ID	To search for interactions of employees with the specified agent or network ID.
Extension	To search for interactions by the extension number of the employee.
Screen Captures	To search for interactions with screens.

Operator

Name	Description
Equals To	To search for interactions that exactly match the specified value.
Not Equal To	To search for interactions that do not match the specified value. This search operator is not available for the **Transaction Date** field.
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.
Does not Start With	To search for interactions that does not start with a specified value.
Ends With	To search for interactions that ends with a specified value.
Does not End With	To search for interactions that does not end with a 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.
Not Equal To	To search for interactions that is not equal to a specified value.
Between	To search for interactions that lie between the specified values.

Display Fields

Name	Description
Role	The designation of the employee in the organization.

Table continues…

Name	Description
Archived	The option to indicate if the interaction is archived.
Audio Codec	The option to indicate interactions that are compressed using the selected audio codec.
Interaction Status	The option to indicate the status of an interaction. The options are: • Active • Inactive
Department	The name of the department that the employee belongs to.
Evaluated	The option to indicate if an interaction is already evaluated.
Flagged for QA	The option to indicate if an interaction is selected for quality analysis.
Groups	The name of the group that the employee belongs to.
Hold Duration	The total duration for which the employee put the interaction on hold in the hh:mm:ss format.
Hunt Group	The option to indicate interactions based on the grouping of extensions handled by agents to interact.
Interaction Tags	The option to indicate interactions based on the specific tags used for association.
Interaction Type	The option to indicate interactions based on the type of interaction.
User Name	The option to indicate interactions based on the user name of the employee.
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.
Organization Unit	The name of the organization unit that the employee belongs to.
Site	The name of the site that the employee belongs to.
Source Type	The source of the interaction. The options are: • System: The interactions recorded in the application • Adhoc-External: The interactions imported from external sources in the supported media formats. • Adhoc-Composite: The interactions grouped together from system and imported interactions. It can be a either a group of system interactions, imported interactions or both.
Reporting to	The supervisor to whom the employee handling the interaction reports to.
Tagged	The option to indicate if an interaction is tagged.
Tenure (In Weeks)	The employee's tenure in the organization in weeks.
Transcribed	The interactions that are transcribed by the speech engine.

Table continues…

Name	Description
Transfer Type	The option that specifies how you transfer a call. The options are: • Cold Transfer: An agent transfers the customer call to another user without any prior notice to the user to whom the call is transferred. The second user can be another agent or a supervisor. • Conference: An agent adds another agent or supervisor to the call. • Warm Transfer: An agent speaks to another agent or supervisor before transferring a call. The first agent can provide background information about the call to the other agent or supervisor without the caller hearing the conversation. • No Transfer: An agent answers the queries of the caller without transferring the call to another agent or supervisor.
Transfer Number	The option to indicate interaction based on the station or the extension number of the party to whom the interaction is transferred.
UCID	Universal Call ID is the unique tag assigned to a call. UCID provides a way to track calls across multiple communication servers and Voice Response Units. This ID remains the same even when a call is transferred to another agent or called party.
Custom Variables	The option to indicate interactions based on custom variables defined for your business.
VDN	The option to indicate interactions based on an extension number that is used to enable calls to connect to a vector for processing.
Interaction ended by	The interaction that indicates who ended a interaction. The options are: • Agent • Customer
Employee	The name of the employee who attended to the interaction.
Interaction Date	The option to indicate interactions based on the following options: • Current Week • Last Month • Last Week • This Month • Today • Yesterday You can also search for interactions for a specific date range.
End Time	The end time of the interaction in a 24–hour format: hh:mm:ss.

Table continues…

Name	Description
Duration	The option to indicate interactions by the duration specified in the hh:mm:ss format.
Direction	The direction of the interaction. The options are: • All • Inbound • Outbound
Queue	The option to indicate interactions by the queue that the interaction is associated with.
Called Party	The extension number or email ID of the called party.
Calling Party	The extension number of email ID of the calling party.
Agent ID	The specified agent or network ID.
Extension	The extension number of the employee.
Screen Captures	The option to indicate interactions with screens.

Share

Name	Description
Me	The option to set the view as private where other 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 with everyone, the system renders results based on the access with whom the view is shared. ✱ **Note:** Users can only view search results and cannot edit the search results.

Button Name	Description
Save as Report	The option to save a view as an adhoc report. You can view this report in the **Reports** tab.

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. On the **View** list, click the view you want to filter.

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

4. **(Optional)** On the pagination controls, choose the number of records that you want to view on each page.

5. **(Optional)** To filter the columns, click the ▼ icon in the column header of the column which you want to filter.

   You can apply filters on multiple columns.

6. **(Optional)** To clear the filters from all the columns, click the ▼x icon.

7. **(Optional)** To sort the columns, click the **Sort** 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. The third click removes the sorting.

8. **(Optional)** To reset the sorting, click the ⬍x icon.

Playback 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.

Table continues…

Name	Description
Tenure	The tenure of the employee in the organization, in weeks.
Called Party	To search for interactions by the extension number or email ID of the called party. You can use any alphanumeric characters or symbols to search an interaction.
Calling Party	To search for interactions by the extension number or email ID of the calling party. You can use any alphanumeric characters or symbols to search an 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.
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.
Transaction Date	The date on which the interaction is recorded.
Direction	The direction of the interaction. The options are: • Inbound • Outbound
Interaction Status	The recording status of the interaction.
Interaction Type	The type of the interaction. The options are: • Voice • Chat • Email • SMS You can also view customized interaction if you have created custom interaction types in the general settings.
Interaction ended by	The party who ended the interaction. The options are: • Agent • Customer

Table continues…

Name	Description
Transfer type	The option that specifies how you transfer a call. The options are: • Cold Transfer: An agent transfers the customer call to another user without any prior notice to the user to whom the call is transferred. The second user can be another agent or a supervisor. • Conference: An agent adds another agent or supervisor to the call. • Warm Transfer: An agent speaks to another agent or supervisor before transferring a call. The first agent can provide background information about the call to the other agent or supervisor without the caller hearing the conversation. • No Transfer: An agent answers the queries of the caller without transferring the call to another agent or supervisor.
Source type	The source of the interaction to be evaluated. The options are: • System: The interactions recorded in the application • Adhoc-External: The interactions imported from external sources in the supported media formats. • Adhoc-Composite: The interactions grouped together from system and imported interactions. It can be a either a group of system interactions, imported interactions or both.
Agent ID	The ID of the agent logged in into the phone.
Evaluated	The interactions that are already evaluated.
Tagged	The interactions that are tagged.
Flagged for QA	The interactions that are selected for quality analysis.
UCID	Universal Call ID is the unique tag assigned to a call. UCID provides a way to track calls across multiple communication servers and Voice Response Units.
Var 1 Var 2 Var 3 Var 4 Var 5 Var 6 Var 7 Var 8 Var 9 Var 10	The custom variables defined for an interaction based on your business.
Archived	The interactions that are archived.
Role	The designation of the employee who handled the interaction.

Table continues…

Name	Description
Transcribed	The interactions that are transcribed by the speech engine.

Icon	Name	Description
	Play	The interaction that is available to play for monitoring and evaluation. • Green: The customer has ended the interaction. • Red: The employee has ended the interaction.
	Interaction 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/ Tagged	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.

Manage tags and reason codes

Tags overview

Use tags to classify interactions and enforce specific actions on interactions. You can associate a tag with a specific action. As a result, when you tag an interaction, Avaya Workforce Optimization Select executes the action associated with the tag. Naming a tag based on the action associated with it is a good practice for better identification.

If you do not want to associate any action to an interaction, associate the **No action required** tag to the interaction. You can use such tags to filter interactions with specific business needs. You can also associate such tags with business criteria. When Avaya Workforce Optimization Select fetches the interactions that meet the business criteria, these tags automatically get associated with the interactions.

Benefits:

• Supervisors can take advantage of tagging a live or a recorded interaction to execute certain actions or to filter interactions.

• Supervisors or managers can create multiple tags for the same action.

Avaya Workforce Optimization Select contains a default tag, which is Flag for QA. In a Data Partition (DP) environment, the following default tags get automatically created for each DP OU:

• Flag for QA

• Do not allow download

• Do not allow download and email

• Do not allow email

Apart from these, you can also create and manage additional tags based on your requirement.

> ✱ **Note:**
>
> You must have the appropriate permissions to manage tags in Avaya Workforce Optimization Select.

Reason codes overview

Reason codes in Avaya Workforce Optimization Select is a feature that forces you to provide a reason when you use a recording control. Whenever you start, stop, pause, resume, or cancel the recording of an interaction, you are forced to provide a reason. Depending on the privileges assigned to you by your administrator, you can create additional reason codes apart from the default ones and associate them to the interaction.

Benefits:

- An auto-resume feature is available when you pause a recording to automatically resume recording after a predefined time interval. You can select a specific time interval in seconds to automatically resume a call.

- The reason codes that are specified as default get automatically tagged to the interaction on clicking the recording control.

- At a DP OU level, you can associate a reason code to a single client or to multiple clients.

For agents using the dashboard, the table below lists the recording controls for the corresponding recording states of an interaction.

Current recording state	Available recording controls		
Not recording	Start recording		
Recording	Pause recording	Stop recording	Cancel recording
Paused	Resume recording	Stop recording	Cancel recording
Stopped	Start recording		

You can click on the recording control for the default reason code to get tagged to the interaction or select another reason code and the selected reason code automatically gets tagged. In the latter, you do not have to click on the recording control.

Adding tags or reason codes

Procedure

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

2. To view the list of available tags or reason codes, click **Manage Tags/Reason Codes**.

3. To create a tag or reason code, click **Add Tag/Reason Code**.

4. Enter the appropriate details.

5. Click **Save & Close**.

Add Tags or Reason Codes field descriptions

Name	Description
DP OU	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.
Action	The action associated with a tag or a reason code. The options are: • Never delete the interaction: To tag interactions that you do not want anyone to delete. • No action required: To tag interactions without associating any action. Use this tag to filter interactions with specific or custom business needs. • 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. • Flag for QA: To tag interactions that you do not want to flag for quality analysis. • Start Recording: To provide reason codes to interactions that you want to start recording. • Stop Recording: To provide reason codes to interactions that you want to stop recording. • Resume Recording: To provide reason codes to interactions that you want to resume the recording. Selecting this option allows the user to resume the call recording in a specific time. • Pause Recording: To provide reason codes to interactions that you want to pause the recording. Selecting this option allows the user to pause the call recording in a specific time. You can set the time interval when you want to call auto-resume after a specific interval. • Cancel Recording: To provide reason codes to interactions that you want to cancel.

Table continues…

Name	Description
Name	The name of the default tag or reason code 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.
Default	The option to choose a tag or a reason code as the default. By default, the first tag is considered the default.
Active	The option to choose the status of a tag or a reason code as active. By default, this option is not selected.
Description	The description of the tag or the reason code.
Auto-resume interval (Secs)	The option to select a specific time for the recording of the interaction to resume automatically. This option is only available only if you select pause recording.

Icon	Name	Description
⊕	Add Tag or Reason Code	The option to add a tag or a reason code.
⊗	Remove Tag or Reason Code	The option to remove a tag or a reason code.

Manage recorded 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 onscreen 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 ▶ icon.

    The Interaction Details page displays a graph of the recorded interaction in the Audio section along with the interaction details and the playback controls.

3. On the Interaction Details page, in the recorder panel, click one of the following:

    • ▶ icon: To listen to the recorded interaction.

    • ■ icon: To stop the recorded interaction.

    • ❚❚ icon: To stop the playback of a recording and resume from where it stopped.

    • `1x ▾` icon: To increase or decrease the speed of the recorded interaction.

    • ⤢ icon: To open the screencast in a window to view the screens at any point of evaluation without scrolling the screen.

4. In the **Interaction Details** tab, view the interaction details.

Interaction Details field descriptions

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 for interactions by the extension number or email ID of the called party. You can use any alphanumeric characters or symbols to search an interaction.
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.
Number of Holds	The number of times that the employee put the interaction on hold.
Number of DTMF Keys	The number of times the DTMF (Dual Tone Multiple Frequency) keys were pressed by the participants of an interaction. Each number is associated with an action.
Groups	The groups that the supervisor or manager has access to.
Reporting To	The name of the supervisor or manager to whom the employee reports.

Table continues…

Name	Description
Queue	The queue that the interaction is associated with.
Screen	The field to indicate whether the screen capture is enabled for recording.
Transfers	The number of times that the employee transferred the interaction.
Agent ID	The ID of the agent logged in into the phone.
Called Party	The extension number or the email ID of the called party.
Calling Party	The extension number or the email ID of the calling party.
Total Hold Time	The total duration for which the employee put the interaction on hold in the hh:mm:ss format.

Hold Duration Details

Name	Description
Hold Start Time	The start time and date when the employee put the interaction on hold in a 24-hour format: mm/dd/yyyy hh:mm:ss.
Hold End Time	The end time and date when the employee put the interaction on hold in a 24-hour format: mm/dd/yyyy hh:mm:ss.
Hold Duration	The duration when the employee put the interaction on hold in a 24-hour format: hh:mm:ss.
DTMF Key	The DTMF key pressed by the participants of the interaction.
Talking to (Agent ID)	The ID of the agent logged in into the phone.
Agent Name	The name of the agent who attended the interaction.
Extension	The extension number of the employee on which the interaction is being handled..
Dialed to	The extension number of the calling party.

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 Interaction Details page, click the **Segment Details** tab.

2. In the Segment Overview section, click the segment of the interaction that you want to listen to or view.

   The segment of the interaction plays in the Recorder panel.

3. In the Customer Interaction across Segments section, view the details of the interaction across segments.

Segment Details field descriptions

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 for interactions by the extension number or email ID of the called party. You can use any alphanumeric characters or symbols to search an interaction. For example, to search for interactions of a specific employee, enter the extension number of the employee.
Dialed To	To search for interactions by the extension number or email ID of the calling party. You can use any alphanumeric characters or symbols to search an interaction.
Total Duration	The total duration of the interaction in a 24–hour format: hh:mm:ss format.
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.

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 Interaction 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**.

Comments/Tags field descriptions

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.
Do not allow download	The tag used to specify that the interaction cannot be downloaded.
Do not allow download and email	The tag used to specify that the interaction cannot be downloaded or sent by email.
Do not allow email	The tag used to specify that the interaction cannot be sent by email.
Flag for QA	The tag used to specify that the interaction is flagged for quality analysis.

Tagging an interaction

About this task

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

- Never delete the interaction
- No action required
- Do not allow download
- Do not allow download and email
- Do not allow email
- Flag for QA

Procedure

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

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

3. Click **Comments/Tags**.

4. On the **Tags** list, click the required tag.

5. Click **Set**.

Comments/Tags field descriptions

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.
Do not allow download	The tag used to specify that the interaction cannot be downloaded.
Do not allow download and email	The tag used to specify that the interaction cannot be downloaded or sent by email.
Do not allow email	The tag used to specify that the interaction cannot be sent by email.
Flag for QA	The tag used to specify that the interaction is flagged for quality analysis.

Evaluating interactions

About this task

Use this procedure to view the previous evaluation scores for an interaction and to evaluate the interaction. You can evaluate an interaction even when it is evaluated before.

Procedure

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

2. On the **View** list, click the view you want to filter.

3. To view the evaluation for an interaction, click the ▶ icon in the interaction row.

4. On the Interaction Details page, click the **Evaluations (*x*)** tab, where *x* denotes the number of times an interaction was evaluated.

5. Click the **View** (⟩) icon to view the details of the evaluation scores that was received for the interaction.

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

   The Avaya Workforce Optimization Select displays a blank form name and evaluation type with default value as *Normal*.

Evaluations field descriptions

Name	Description
Form	The evaluation form based on which the evaluation is performed.
Reviewer	The name of the employee who evaluated the interaction. Any employee with appropriate privileges can evaluate an 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.
Evaluation Modified Date	The latest date on which the evaluation was modified for the previous evaluation.
Courses	The course that was assigned to the employee based on the previous evaluation scores.
Quizzes	The quiz that was assigned to the employee based on the previous evaluation scores.

Playing interaction transcript

About this task

Use this procedure to playback interactions that are transcribed from the Speech module.

Procedure

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

2. On the **View** list, click the view you want to filter.

3. To playback the interaction, click the ▶ icon in the interaction row.

4. On the Interaction Details page, click the **Speech** tab.

   Avaya Workforce Optimization Select displays the interaction transcript.

Interaction transcript field descriptions

Avaya Workforce Optimization Select displays the following interaction transcript with speaker separation and time stamp if the speech parameter Diarization is set to True in SysAdmin. Click on any of the rows and the audio graph moves to the corresponding section of the conversation.

Name	Description
Speech Search	The list of searches and business criteria that fetched the interaction and which the logged in user has access to. The phrases and/or words defined as part of the search and business criteria that fetched the interaction are highlighted in the transcript.
Speaker	The splitting of audio recordings into individual speakers.
Start Time	The start time of the speaker conversation.
End Time	The end time of the speaker conversation.
Text	The text conversation or transcript of the speaker.

* **Note:**

Avaya Workforce Optimization Select displays the entire conversation without speaker separation and time stamp if the speech parameter Diarization is set to False in SysAdmin.

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 Interaction Details page, click the ⊙ 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**.

Emailing an interaction

About this task

You can send an interaction as an email 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 Interaction Details page, click the ✉ icon.

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

Email interaction field descriptions

Name	Description
From	The email address of the sender.
To	The email address of the recipient 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.
Extension	The phone extension number of the agent who handled the 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.

Managing adhoc interactions

Adhoc Interactions overview

Using adhoc interactions, you can import interactions, both voice and non-voice. You also have the flexibility to use a series of related interactions to create a composite interaction that depict an end-to-end customer journey.

Benefits:

• Import both voice and non-voice interactions to create an adhoc interaction.

- Build a composite interaction adding the existing imported interactions, system interactions, or both. You can add up to 15 interactions to form a composite interaction.

- Playback and evaluate the different adhoc interactions.

- Use the information to create a context from a series of interactions of a particular customer with possibly different employees of an organization.

- Add comments to an adhoc interaction if the evaluator wants to provide important information to another evaluator or reviewer.

- Upload an adhoc interaction in `WAV`, `MP4`, and `M4a` formats.

- Use existing tags or create one to apply to an adhoc interaction. Using tags, evaluators can restrict specific actions on interactions such as downloading or mailing of interactions.

You can create, edit, and delete adhoc interactions only if you have the permission to manage adhoc interactions. For more information about permissions and privileges, contact your system administrator.

Viewing adhoc interactions

Procedure

1. Click **Interactions** > **Adhoc Interactions**.

2. In the **View** list, click the view that you want to filter.

   The Adhoc Interactions page displays the details of each interaction for the selected view.

3. **(Optional)** On the pagination controls, choose the number of records that you want to view on each page.

4. **(Optional)** To filter the columns, click the ▼ icon in the column header of the column which you want to filter.

   You can apply filters on multiple columns.

5. **(Optional)** To clear the filters from all the columns, click the ▼ᵪ icon.

6. **(Optional)** To sort the columns, click the **Sort** 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. The third click removes the sorting.

7. **(Optional)** To reset the sorting, click the ⬍ᵪ icon.

8. **(Optional)** To edit an existing adhoc interaction, click **Edit**.

9. **(Optional)** To delete an existing adhoc interaction, click **Delete**.

   You cannot delete an interaction when:

   - A new evaluation task is associated with the interaction

   - An evaluation is in progress or is complete for the interaction

- An appeal is in progress for the interaction
- A calibration task is in progress for the interaction

Adhoc Interactions field descriptions

Name	Description
Employee	The name of the employee who handled the interaction.
Reporting to	The name of the employee to whom the employee who handled the interaction reports to.
Transaction Date	The date on which the interaction took place
Source Type	The source of the interaction. The options are: • System: The interactions recorded in the application • Adhoc-External: The interactions imported from external sources in the supported media formats. • Adhoc-Composite: The interactions grouped together from system and imported interactions. It can be a either a group of system interactions, imported interactions or both. The default option is Imported.
Interaction ended by	The employee who ended the interaction. The options are: • Agent • Customer
UCID	The unique tag assigned to a call. Universal Call ID (UCID) provides a way to track calls across multiple communication servers and Voice Response Units.
Interaction ID	The unique ID of the interaction.

Button	Description
Edit	To edit an adhoc interaction details.
Delete	To delete an adhoc interaction. If you delete a composite interaction, the evaluations associated with the interaction remain intact. Deleting the interaction does not impact the child interactions and the respective transactions. You cannot delete an interaction when: • A new evaluation task is associated with the interaction • An evaluation is in progress or is complete for the interaction • An appeal is in progress for the interaction • A calibration task is in progress for the interaction

Adding a view

About this task

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

By default, the AWFOS Default view comes with a set of pre defined filters configured by the system administrator. You cannot modify the filters on the AWFOS Default view. You can also save a view as an adhoc report.

> ✳ **Note:**

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

Procedure

1. Click **Interactions** > **Adhoc Interactions**.

2. To create a new view that match your required criteria, click **Add** .

   Avaya Workforce Optimization Select displays the Create View page where you can define the filter criteria and save the view.

3. On the Create View page, do the following:

   a. Type the name and description of the view.

   b. In **Field**, select the filter in which you want to apply the filter.

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

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

   e. In **Share**, select with whom you want to share the view.

4. Click **Save & Close**.

Create 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. You can set a View as default if you want to see a certain set of interactions each time you login.
Description	The description that helps to understand the reason for creating a view.
Filter	The filter criteria used to search the interactions.

Table continues…

Name	Description
Display Fields	The columns displayed in the search results. You can move or remove the fields in the Available Fields screen to the Selected Fields screen while adding a view. The arrows next to the Selected Fields allows the user to rearrange the order of the selected fields.
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:
	• Role
	• Agent ID
	• Extension
	• Archived
	• Called Party
	• Calling Party
	• End Time
	• Interaction Status
	• Direction
	• Commented
	• Department
	• Duration
	• Employee
	• Employee Status
	• Evaluated
	• Flagged for QA
	• Groups
	• Interactions ID
	• Interaction Comments
	• Interaction Tags
	• Interaction Type
	• Organization Unit
	• Queue
	• Screen Captures
	• Site
	• Source Type
	• Reporting to
	• Tagged
	• Tenure (In Weeks)
	• Transaction Date

Table continues…

Name	Description
	• UCID
	• Variables 1–10
	• Interaction ended by
Operator	The operator used to specify the search criteria. The options are:
	• Equals To
	• Not Equal To
	• Contains
	• Does not contain
	• Starts With
	• Does not Start With
	• Ends With
	• Does not End With
	• Less Than
	• Greater Than
	• Less Than or Equal
	• Greater Than or Equal
	• Not Equal To
	• Between
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
Role	To search for interactions of employees with the specified designation or role.
Agent ID	To search for interactions of employees with the specified agent or network ID.
Extension	To search for interactions by the extension number of the employee.
Archived	To search for interactions that are archived.
	The options to filter interactions based on archiving from the **Value** field are:
	• Yes: To filter the interactions that were archived.
	• No: To filter the interactions that were not archived.

Table continues…

Name	Description
Called Party	To search for interactions by the extension number or email ID of the called party. You can use any alphanumeric characters or symbols to search an interaction.
Calling Party	To search for interactions by the extension number or email ID of the calling party. You can use any alphanumeric characters or symbols to search an interaction.
End Time	To search for interactions based on a specific end time.
Interaction Status	To search for interactions based on the recording status of the interaction. The options are: • NoRTP: Interactions that do not have any voice streams or RTP. • Connected: Interactions with voice streams or RTP. • Unknown: Non voice interactions.
Direction	To search for interactions based on the interaction direction. The options are: • All • Inbound • Outbound
Commented	To search for interactions that are commented. The options to filter interactions based on comments from the **Value** field are: • Yes: To filter the interactions that were commented. • No: To filter the interactions that were not commented.
Department	To search for interactions of employees who belong to the specified department.
Duration	To search for interactions by the duration specified in the hh:mm:ss format.
Employee	To search for interactions based on the employees that you have access to.
Employee Status	To search for interactions by the status of the employee attending to the interaction. The options are: • Active • Inactive
Evaluated	To search for evaluated interactions.

Table continues…

Name	Description
Flagged for QA	To search for interactions that are flagged for QA.
	The options to filter interactions based on flagging from the **Value** field are:
	• Yes: To filter the interactions that were flagged for QA.
	• No: To filter the interactions that were not flagged for QA.
Groups	To search for interactions of employees belonging to the specified group.
Interactions ID	To search for interactions based on the interaction ID.
Interaction Comments	To search for interactions based on specific comments provided by employees.
Interaction Tags	To search for interactions based on the specific tags used for association.
Interaction Type	To search for interactions based on the type of interaction.
Organization Unit	To search for interactions based on the name of the organizational unit. Use the available operators to define your search criteria.
	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.
Queue	To search for interactions by the queue that the interaction is associated with.
Screen Captures	To search for interactions with screens.
Site	To search for the interactions of employees belonging to the specified site.
Source Type	To search for interactions based on the source.
	The options are:
	• System: The interactions recorded in the application
	• Adhoc-External: The interactions imported from external sources in the supported media formats.
	• Adhoc-Composite: The interactions grouped together from system and imported interactions. It can be a either a group of system interactions, imported interactions or both.
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.

Table continues…

Name	Description
Tagged	To search for tagged interactions. The options to filter interactions based on tags from the **Value** field are: • Yes: To filter the interactions that were tagged. • No: To filter the interactions that were not tagged.
Tenure (In Weeks)	To search for interactions based on the tenure of the employee in weeks.
Transaction Date	To search for interactions based on the following options: • Current Week • Last Month • Last Week • This Month • Today • Yesterday You can also search for interactions for a specific date range.
UCID	To search for interactions based on the universal call ID. This ID remains the same even when a call is transferred to another agent or called party.
Custom Variables	To search for interactions based on custom variables defined for your business.
Interaction ended by	To search for interactions based on who ended a interaction. The options are: • Agent • Customer

Operator

Name	Description
Equals To	To search for interactions that exactly match the specified value.
Not Equal To	To search for interactions that do not match the specified value. This search operator is not available for the **Transaction Date** field.
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.
Does not Start With	To search for interactions that does not start with a specified value.
Ends With	To search for interactions that ends with a specified value.
Does not End With	To search for interactions that does not end with a specified value.
Less Than	To search for interactions that have a value less than the specified value.

Table continues…

Name	Description
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.
Not Equal To	To search for interactions that is not equal to a specified value.
Between	To search for interactions that lie between the specified values.

Display Fields

Name	Description
Role	The designation of the employee in the organization.
Agent ID	The ID that the agent uses to log in to the phone. If you configure screen captures, the screen captures are recorded against the agent ID.
Extension	The extension number of the employee on which the interaction is being handled.
Archived	The option to indicate if the interaction is archived.
Called Party	The contact number of the called party.
Calling Party	The contact number of the called party.
End Time	The end time of the interaction.
Interaction Status	The option to indicate the status of an interaction. The options are: • Active • Inactive
Direction	The directions of the interaction.
Department	The name of the department that the employee belongs to.
Duration	The duration of the interaction in the hh:mm:ss format.
Employee Status	The status of the employee attending to the interaction. The options are: The options are: • Active • Inactive
Evaluated	The option to indicate if an interaction is already evaluated.
Flagged for QA	The option to indicate if an interaction is selected for quality analysis.
Groups	The name of the group that the employee belongs to.

Table continues…

Name	Description
Interaction Type	The type of channel on which the interaction is delivered. The options are: • Voice • Non Voice • Email • SMS • Chat
Organization Unit	The name of the organization unit that the employee belongs to.
Queue	The queue that the interaction is associated with.
Screen Captures	The field to indicate whether screen capture of the employee desktop is enabled for recording. When it is enabled for recording, the screens get captured for the interactions.
Site	The name of the site that the employee belongs to.
Tagged	The option to indicate if an interaction is tagged.
Tenure (In Weeks)	The employee's tenure in the organization in weeks.
Custom Fields	The interaction that consists of associated custom fields.

Share

Name	Description
Me	The option to set the view as private where other 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 with everyone, the system renders results based on the access with whom the view is shared. **✲ Note:** Users can only view search results and cannot edit the search results.

Button	Description
Edit	To edit an adhoc interaction details.

Table continues…

Button	Description
Delete	To delete an adhoc interaction.
	If you delete a composite interaction, the evaluations associated with the interaction remain intact. Deleting the interaction does not impact the child interactions and the respective transactions.
	You cannot delete an interaction when:
	• A new evaluation task is associated with the interaction
	• An evaluation is in progress or is complete for the interaction
	• An appeal is in progress for the interaction
	• A calibration task is in progress for the interaction

Creating an adhoc interaction

Defining an adhoc interaction

About this task

Use this procedure to define the content of an adhoc interaction by specifying the interaction source, employee association, interaction metadata, and business variables. Note that Avaya Workforce Optimization Select generates a unique interaction ID when you define and save the content of the adhoc interaction.

Composite interactions can consist up to 15 related interactions. A related interaction can be system recorded or externally sourced.

❗ Important:

You cannot create a composite interaction by using another composite interaction.

Before you begin

Get permission to manage adhoc interactions so that you can create, edit, and delete adhoc interactions.

Procedure

1. Click **Interactions** > **Adhoc Interactions**.

2. Click **Create Interaction**.

3. In **Interaction Source**, click one of the following:

   • **External**: To import interactions.

   • **Composite**: To create interactions from existing interactions from system interactions, imported interactions, or a combination of both.

4. Enter the details in all the fields and click one of the following:

   • **Save**: To save the details in the database without adding interaction media.

- **Save & Add another**: To save and create another adhoc interaction.
- **Save & Evaluate**: To save and evaluate the imported interaction immediately.

Next steps

Add interaction media.

Definition field descriptions

Name	Description
Interaction Source	
External	To create an interaction by importing from an external source for evaluation.
Composite	To create an interaction from existing imported and system interactions. You can create a combination of maximum 15 interactions.
Interaction ID	The unique ID that the system automatically generates when you save an adhoc interaction.
Select an Employee	
DP OU	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 Unit(s)	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.
Site(s)	To select the site to which the employee whose interaction is evaluated belongs to.
Department(s)	To select the department to which the employee whose interaction is evaluated belongs to.
Group(s)	To select the group to which the employee whose interaction is evaluated belongs to.

Table continues…

Name	Description
Employee	To select the employee whose interaction is evaluated from a list of employees, which is based on the organization unit and group that the user selects.
Interaction Metadata	
Interaction Type	To select the channel used for interaction. The options are: • Voice • Non Voice • Email • SMS • Chat You can also select customized interaction if any custom interaction type is created in the general settings by your administrator.
Interaction Date	To create a historical date that the user deems appropriate based on the context-specific interaction series between a customer and the organization. ⬤ **Important:** • This data does not have to match with the total duration of the related interaction. • Do not select the same start time and end time, or else the interaction duration displays the value as 0.
Start Time	To select the start time of the interaction in a date and 24–hour format: mm:dd:yyyy hh:mm:ss. This option is user specific. ⬤ **Important:** • This data does not have to match with the total duration of the related interaction. • Do not select the same start time and end time, or else the interaction duration displays the value as 0.
End Time	To select the end time of the interaction in a date and 24–hour format: mm:dd:yyyy hh:mm:ss. This option is user specific. If you enter a value that is less than the start time value, then the application calculates the end time on the following day. ✳ **Note:** Do not select the same start time and end time, or else the interaction duration displays the value as 0.
Queue	To select the queue that the interaction is associated with.

Table continues…

Name	Description
Interaction Direction	To select the interactions based on the direction of the interaction.
	The options are:
	• All
	• Inbound
	• Outbound
ID Type	To select the interaction based on the type of station.
	The options are:
	• Agent ID: The ID that the agent uses to log in to the phone. If you configure screen captures, the screen captures are recorded against the agent ID.
	• Extension: The VoIP phone extension of the employee. In a free seating environment, the extension can be any free and unique extension number.
	• Port: The dummy recording stations used to record calls in Avaya Session Border Controller for Enterprise deployments for calls that are routed through IVRs. You must configure this port number range in SIP adapter, where Avaya Session Border Controller for Enterprise is enabled.
	• Position ID: The ID that the agent uses to log in to the phone. If you configure screen capture, the screen captures are recorded against the position ID. This option is used for Avaya Communication Server 1000 deployment.
	• Account Name: The unique name used for non-voice transactions. For example, the name of the agent.
	• SIP URI: The unique identification of an extension on which the agent is taking calls in URI. For example, name@domain.com
	• VDN: An extension number that is used to enable calls to connect to a vector for processing. The calls are routed to a vector through VDNs. As part of processing, the calls whose digits match with that of the VDN, are routed to a specific destination.
	• Hunt Group: A grouping of extensions handled by agents to interact.
ID Value	To enter the relevant values based on the selected ID Type.
Called Party	To select interactions based on the extension number or email ID of the called party.
	You can use any alphanumeric character or symbol.
Calling Party	To select interactions by the extension number or email ID of the calling party.
Tag(s)	To add a tag to an adhoc interaction.
Business Variables	

Table continues…

Name	Description
Varname	The customized fields where an user can enter an option to create an adhoc interaction.

Icon	Name	Description
⊙	Add	To add a new business variable

Defining interaction media for external interactions

About this task

Use this procedure to define media to an adhoc interaction, when you select the source type as external. Adding media to an adhoc interaction is optional.

Before you begin

Define an adhoc interaction.

Procedure

1. Click **Interactions** > **Adhoc Interactions**.

2. In the **View** list, click the view that contains the interaction to which you want to add an interaction media.

3. Click the button in the required adhoc interaction row and click **Edit**.

4. Click **Interaction Media**.

5. On the Interaction Media page, do the following:

   a. In the **Transcript/Notes** field, enter the details of the media, if any.

   b. To import a media file, click **Choose File** in the Media Import section and select the file from your local machine.

   Composite interactions can consist up to 15 related interactions. A related interaction can be system recorded or externally sourced.

   > ❗ **Important:**
   >
   > You cannot create a composite interaction by using another composite interaction.

6. Click one of the following:

   • **Save**: To save the details of the adhoc interaction.

   • **Save & Add another**: To save and create another adhoc interaction

   • **Save & Evaluate**: To save and evaluate the imported interaction immediately

Next steps

Summarize interaction details.

Defining interaction media for composite interactions

About this task

Use this procedure to define media for an adhoc interaction and to add system and imported interactions to a composite interaction. Adding media to an interaction is an optional process.

Before you begin

Define an adhoc interaction.

Procedure

1. Click **Interactions** > **Adhoc Interactions**.

2. In the **View** list, click the view that contains the interaction to which you want to add an interaction media.

3. Click the button of the required adhoc interaction row and click **Edit**.

4. Click **Interaction Media**.

5. On the Interaction Media page, do the following:

   a. In the **Transcript/Notes** field, enter the details of the media, if any.

   b. In the Select Interactions section, select the required options, click ⊙ icon, and click **Apply**.

   The Select Interactions section displays a list of interactions based on the selected filters.

   c. Select the checkbox for the row that contains the required interaction.

   The Selected Interactions section displays the interaction added to the list in a sequence. You can drag and drop the selected interactions depending on the sequence in which you want to play the interaction.

6. Click one of the following:

   • **Save**: To save the details of the adhoc interaction.

   • **Save & Add another**: To save and create another adhoc interaction.

   • **Save & Evaluate**: To save and evaluate the imported interaction immediately.

Next steps

Summarize interaction details.

Interaction Media field descriptions

Name	Description
Interaction	
Transcript/Notes	The notes that you can enter while adding an interaction media to an adhoc interaction. This field is optional.

Table continues…

Name	Description
Selected Interactions	
Interaction ID	The unique ID of the interaction. This is automatically generated when an interaction is created.
Employee	The name of the employee who handled the interaction.
Transaction Date	The date on which the interaction took place.
Duration	The duration of the interaction in the hh:mm:ss format.
Called Party	The phone number of the called party.
Calling Party	The phone number of the calling party.
Select Interaction	
Interaction ID	The unique ID of the interaction. This ID is automatically generated when an interaction is created.
Employee	The name of the employee who handled the interaction.
Reporting to	The name of the supervisor or manager to whom the employee reports.
Extension	The phone number or email ID of the employee who interacted.
Queue	The queue that the interaction is associated with.
Direction	The direction of the interaction. The options are: • Inbound • Outbound
Screens	The field to indicate whether an interaction has screen capture. The options are: • Yes • No
Start Time	The start time of the interaction.
Duration	The duration of the interaction in the hh:mm:ss format.

Button	Description
Add to list	To add one or more interactions to the selected interactions for playing.
Apply	To filter the interactions based on the available fields.

Icon	Name	Description
⊕	Add Field	To add a new field, related operator, and value to a selected interaction.
⊗	Remove Field	To remove a field, related operator, and value to a selected interaction.

Summarizing interaction details

About this task

Use this procedure to review the details of an adhoc interaction, which is already created and is available for playback.

> ⓘ **Important:**
>
> Skipping this procedure does not impact the interaction.

Before you begin

- Define an adhoc interaction.
- Define interaction media for an interaction

Procedure

1. Click **Interactions** > **Adhoc Interactions**.

2. In the **View** list, click the view that contains the interaction to which you want to add an interaction media.

3. Click the button in the required adhoc interaction row and click **Edit**.

4. Click **Summary**.

   The Summary page displays the details of the adhoc interaction.

5. If you are satisfied with the entries, click one of the following:

   - **Save & Close**: To save the adhoc interaction on the Adhoc Interactions page.
   - **Save & Evaluate**: To save and evaluate the imported interaction immediately.

   > ✳ **Note:**

   Even if you do not save the interaction, the interaction is saved with the options you entered earlier in the Definition and Interaction Media pages.

Summary field descriptions

Name	Description
Interaction ID	The unique ID of the interaction. This ID is automatically generated when an interaction is created.
Interaction Source	The source of the interaction. The options are: • External • Composite
Employee	The name of the employee who handled the interaction
Interaction Type	The channel used for interaction.

Table continues…

Name	Description
Interaction Date	The historical date of the interaction, which the user deems appropriate based on the context-specific interaction series between a customer and the organization.
Start Time	The start time of the interaction.
End Time	The end time of the interaction.
Queue	The queue is the hunt group that you are associating with the interaction.
Interaction Direction	The direction of the interaction. The options are: • Inbound • Outbound
ID Type	The interaction based on the type of station. The options are: • Agent ID: The ID that the agent uses to log in to the phone. If you configure screen captures, the screen captures are recorded against the agent ID. • Extension: The VoIP phone extension of the employee. In a free seating environment, the Extension can be any free and unique extension number. • Port: The MAC (media access control) address of the physical device or phone that the employee uses. • Position ID: The ID that the agent uses to log in to the phone. If you configure screen capture, the screen captures are recorded against the position ID. This option is used for Avaya Communication Server 1000 deployment. • Account Name: The unique name for non-voice transactions. For example, the name of the agent. • SIP URI: The unique identification of an extension on which the agent is taking calls in URI. For example, name@domain.com • VDN: An extension number that is used to enable calls to connect to a vector for processing. The calls are routed to a vector through VDNs. As part of processing, the calls whose digits match with that of the VDN, are routed to a specific destination. • Hunt Group: A grouping of extensions handled by agents to interact.
ID Value	The relevant values based on the selected ID Type.
Called Party	The phone number of the called party.
Calling Party	The phone number of the calling party.
Tags	The tag added to an adhoc interaction.

Table continues…

Name	Description
Transcript Notes	The notes that you can enter while adding an interaction media to an adhoc interaction. This field is optional.
Selected Interactions	The interactions that are added to a composite interaction. A composite interaction can be a combination of only system interactions, imported interactions, or both.

Deleting an adhoc interaction

About this task

Use this procedure to delete an adhoc interaction from the Adhoc Interactions page. However, you cannot delete an interaction when:

- A new evaluation task is associated with the interaction
- An evaluation is in progress or is complete for the interaction
- An appeal is in progress for the interaction
- A calibration task is in progress for the interaction

Use this procedure also to remove the interaction association with evaluations, calibrations, or appeals before you delete an adhoc interaction.

Before you begin

- Ensure that a purge rule exists in the application to delete the media files and associated database records for an adhoc interaction.
- Get the required permissions to manage adhoc interactions for deleting an interaction.

Procedure

1. To delete an adhoc interaction from the Adhoc Interactions page, click the button next to the required row and click **Delete**.

2. To delete an interaction that has a new evaluation task associated to it, decline the corresponding task:

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

   b. On the My Assignment page, click the button next to the required row and click **Decline Selected Evaluations**.

   c. On the Adhoc Interactions page, click the button next to the required row and click **Delete**.

3. To delete an interaction that has an evaluation in progress, delete the corresponding evaluation task:

   a. Click **Evaluate** > **Evaluations** > **Draft Evaluations**.

   b. On the Draft Evaluations page, click the button next to the required row and click **Delete**.

    c. On the Adhoc Interactions page, click the button next to the required row and click **Delete**.

4. To delete an interaction that has an evaluation in progress or complete, delete the corresponding evaluation task:

    a. Click **Evaluate** > **Evaluations** > **View Evaluations**.

    b. On the View Evaluations page, click the button next to the required row and click **Delete**.

    c. On the Adhoc Interactions page, click the button next to the required row and click **Delete**.

5. To delete an interaction that has an appeal in progress, delete the corresponding evaluation task:

    a. Click **Evaluate** > **Evaluations** > **Draft Evaluations**.

    b. On the Draft Evaluations page, click the button next to the required row and click **Delete**.

    c. On the Adhoc Interactions page, click the button next to the required row and click **Delete**.

6. To delete an interaction that has a calibration task in progress, delete the corresponding calibration task:

    a. Click **Evaluate** > **Calibration**.

    b. On the Calibration page, click the button next to the required row and click **Delete**.

    c. On the Adhoc Interactions page, click the button next to the required row and click **Delete**.

Playing adhoc interactions

About this task

During an enquiry, customer dispute, or noncompliance issue, or to evaluate, a supervisor or manager can listen to an adhoc interaction and view the associated onscreen activity. An adhoc interaction can be a combination of system interactions, imported interactions, or both.

While listening to an adhoc interaction, the supervisor or manager can:

- Comment or tag an interaction to provide information to the evaluator or reviewer.
- Email an interaction.
- View previous evaluation comments.
- View interaction segments.

Procedure

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

The Playback page displays the interactions under the default view.

2. To playback the corresponding interaction, click the ▶ icon.

   ❗ Important:

   The source type field for the adhoc interactions can be **Adhoc-External** or **Adhoc-Composite**.

   The Interaction Details page displays a dummy graph of the interaction in the Audio section, the interaction details, and the playback controls.

3. On the Interaction Details page, in the recorder panel, click one of the following:

   • ▶ icon: To listen to the recorded interaction.

   • ■ icon: To stop the recorded interaction.

   • ⏸ icon: To stop the playback of a recording and resume from where it stopped.

   • `1x ▾` icon: To increase or decrease the speed of the recorded interaction.

   • ↗ icon: To open the screencast in a window to view the screens at any point of evaluation without scrolling the screen.

   • ↪ icon: To get screen displays in a new window. This option is helpful when you are working using multiple display monitors.

   • ◀ icon: To play the previous interaction.

   • ▶ icon: To play the next interaction.

4. In the **Interaction Details** tab, view the interaction details.

Interaction Details field descriptions

✳ Note:

For a composite interaction, the interaction details fields refer to the related interaction that is playing in the screen.

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.

Table continues…

Name	Description
Extension	To search for interactions by the extension number or email ID of the called party. You can use any alphanumeric characters or symbols to search an interaction.
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.
Number of Holds	The number of times that the employee put the interaction on hold.
Number of DTMF Keys	The number of times the DTMF or Dual Tone Multiple Frequency keys were pressed by the participants of an interaction. Each number is associated with an action.
Groups	The groups that the supervisor or manager has access to.
Reporting To	The name of the supervisor or manager to whom the employee reports.
Queue	The queue that the interaction is associated with.
Screen	The field to indicate whether the screen capture is enabled for recording.
Transfers	The number of times that the employee transferred the interaction.
Agent ID	The ID of the agent logged in into the phone.
Called Party	The phone number or the email ID of the called party.
Calling Party	The phone number or the email ID of the calling party.
Total Hold Time	The total duration for which the employee put the interaction on hold in the hh:mm:ss format.

Hold Duration Details

Name	Description
Hold Start Time	The start time and date when the employee put the interaction on hold in a 24-hour format: mm/dd/yyyy hh:mm:ss.
Hold End Time	The end time and date when the employee put the interaction on hold in a 24-hour format: mm/dd/yyyy hh:mm:ss.
Hold Duration	The duration when the employee put the interaction on hold in a 24-hour format: hh:mm:ss.
DTMF Key	The DTMF key pressed by the participants of the interaction.
Talking to (Agent ID)	The ID of the agent logged in into the phone.
Agent Name	The name of the agent who attended the interaction.
Extension	The extension number of the employee on which the interaction is being handled..
Dialled to	The extension number of the calling party.

Viewing and playing related interactions

About this task

Use this procedure to view and play the related interactions that are associated with a composite adhoc interaction. You can also use this option to manage externally sourced interactions.

Before you begin

Get the permission to manage adhoc interactions.

Procedure

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

2. On the Playback page, click the ▶ icon for the row that contains the required interaction.

   ❗ Important:

   The source type field for the adhoc interaction must be **Adhoc-Composite** or **Adhoc-External**.

   The Interaction Details page displays a dummy graph of the interaction in the Audio section, the related interaction details, and the playback controls.

3. Click **Related Interactions** *(x)*, where *(x)* is the number of interactions that form the composite interaction.

   The Related Interactions page displays the details of the interactions that form the composite interaction and the composite interaction details.

4. Click the ▶ icon in the required row.

   ❗ Important:

   You can play any interaction in any sequence. You can even start playing a new interaction without finishing another interaction. If you do not intervene, the related interactions play these interactions in the sequence in which they were added to the list .

Next steps

Add comments or tags to an adhoc interaction.

Related Interactions field descriptions

Interactions List

The name of this section is the name of the composite adhoc interaction.

Name	Description
Play	The option to play the different interactions that form a composite interaction.
Interactions ID	The unique IDs of the child interactions. These IDs are system generated.
Employee	The name of the employee whose interaction is evaluated.
Start time	The start time of the interaction.
Duration	The end time of the interaction.
Called Party	The extension number of the called party.
Calling Party	The extension number of the calling party.
Source Type	The source of the interaction. The options are: • System: The interactions recorded in the application • Adhoc-External: The interactions imported from external sources in the supported media formats. • Adhoc-Composite: The interactions grouped together from system and imported interactions. It can be a either a group of system interactions, imported interactions or both.

Details of the Composite Interaction

Name	Description
Interaction ID	The unique ID of the interaction. This ID is automatically generated when an interaction is created.
Start time	The start time of the interaction. This value is the cumulative start date of all the related interactions that form the composite interaction. ✳ **Note:** A composite interaction consists of a series of interactions that might have taken place across days, weeks, or months with different durations and possibly different employees. So, when you create a composite interaction, you cannot enter a specific start time and end time. However, to maintain consistency and a chronological flow, you must associate the earliest related interaction start time with the composite interaction. Then calculate the cumulative value of the series of the related interaction durations.
Employee	The name of the employee who created the composite interaction.

Table continues…

Name	Description
ID Type	The interaction based on the type of station.
	The options are:
	• Agent ID: The ID that the agent uses to log in to the phone. If you configure screen captures, the screen captures are recorded against the agent ID.
	• Extension: The VoIP phone extension of the employee. In a free seating environment, the Extension can be any free and unique extension number.
	• Port: The MAC address of the physical device or phone that the employee uses.
	• Position ID: The ID that the agent uses to log in to the phone. If you configure screen capture, the screen captures are recorded against the position ID. This option is used for Avaya Communication Server 1000 deployment.
	• Account Name: The unique name for non-voice transactions. For example, the name of the agent.
	• SIP URI: The unique identification of an extension on which the agent takes calls in URI. For example, name@domain.com
	• VDN: An extension number that is used to enable calls to connect to a vector for processing. The calls are routed to a vector through VDNs. As part of processing, the calls whose digits match with that of the VDN, are routed to a specific destination.
	• Hunt Group: A grouping of extensions handled by agents to interact.
Called Party	The contact number of the party that was dialed.
Interaction Type	The channel used for interaction.
Tags	The tag added to an adhoc interaction.
	Adding a tag is an optional process.
Interaction Date	The historical date of the interaction, which the user deems appropriate based on the context-specific interaction series between a customer and the organization.

Table continues…

Name	Description
End Time	The end time of the interaction.
	This value is the cumulative end date of all the related interactions that form the composite interaction.
	✱ **Note:**
	A composite interaction consists of a series of interactions that might have taken place across days, weeks, or months with different durations and possibly different employees. So, when you create a composite interaction, you cannot enter a specific start time and end time. However, to maintain consistency and a chronological flow, you must associate the earliest related interaction end time with the composite interaction. Then calculate the cumulative value of the series of the related interaction durations.
Interaction Direction	The direction of the interaction.
	The options are:
	• Inbound
	• Outbound
ID Value	The relevant values based on the selected ID Type.
Calling Party	The contact number of the party who is dialing.
Queue	The skill or hunt group associated with the interaction.

Icon	Name	Description
▶	Play	To play the individual interactions of a composite interaction.
		You can play any interaction in any sequence. You can play a new interaction even without completing the previous interaction..
		❗ **Important:**
		If you do not intervene, the child interactions play in the sequence when these interactions were added to the list

Evaluating adhoc interactions

About this task

Use this procedure to evaluate an external interaction or a composite interaction. By evaluating, you can further gauge a series of related interactions between the customer with different

employees of an organization over a period of time. You can even evaluate an interaction that was evaluated earlier.

Procedure

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

2. On the **View** list, click the view you want to filter.

3. To play the adhoc interaction, click the ▶ icon in the interaction row.

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

   Avaya Workforce Optimization Select displays a blank form name and evaluation type with the default value as *Normal*.

5. **(Optional)** To view the previous evaluations on the interaction, click the **Evaluations (*x*)** tab, where *x* denotes the number of times an interaction was evaluated.

6. **(Optional)** To view the details of the evaluation scores for the interaction, click the ❯ icon.

Evaluation field descriptions

Name	Description
Form	The evaluation form based on which the evaluation is performed.
Evaluation Type	The name denoting the type of evaluation. These types indicate the purpose or category of evaluation. The options are: • Normal • Adhoc • Training
General Comments	The field to enter comments while evaluating an adhoc interaction. This comment applies to the entire evaluation form.
Criteria	The specific criterion that must be used while evaluating an interaction You can also add one or more child criteria to a parent criterion.

Icon	Name	Description
🗨	-	To define how an evaluator can enter comments after an evaluation against a specific criterion for an interaction.

Playing interaction transcript

About this task

Use this procedure to playback interactions that are transcribed from the Speech module.

Procedure

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

2. On the **View** list, click the view you want to filter.

3. To playback the interaction, click the ▶ icon in the interaction row.

4. On the Interaction Details page, click the **Speech** tab.

   Avaya Workforce Optimization Select displays the interaction transcript.

Interaction transcript field descriptions

Avaya Workforce Optimization Select displays the following interaction transcript with speaker separation and time stamp if the speech parameter Diarization is set to True in SysAdmin. Click on any of the rows and the audio graph moves to the corresponding section of the conversation.

Name	Description
Speech Search	The list of searches and business criteria that fetched the interaction and which the logged in user has access to.
	The phrases and/or words defined as part of the search and business criteria that fetched the interaction are highlighted in the transcript.
Speaker	The splitting of audio recordings into individual speakers.
Start Time	The start time of the speaker conversation.
End Time	The end time of the speaker conversation.
Text	The text conversation or transcript of the speaker.

> ✱ **Note:**
>
> Avaya Workforce Optimization Select displays the entire conversation without speaker separation and time stamp if the speech parameter Diarization is set to False in SysAdmin.

Downloading an adhoc interaction

About this task

Supervisors and managers must use this procedure to download interactions in the `WAV`, `MP4`, `MP3`, and `M4a` formats.

> **Note:**
>
> - You can download only external or imported interactions. You cannot download a composite interaction because it is only a placeholder with a group of related interactions.
> - You cannot download an interaction that is tagged as **Do not download** or **Do not download & email**.

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 Interaction Details page, click the 🕐 icon.
4. On the Download page, type appropriate comments for the interaction.
5. Click **Submit**.
6. Click **Download**.

   a. For Google Chrome 72.x, Avaya Workforce Optimization Select opens the file in a pop-up window from where you can play directly. Click ⋮ on the player to download the file to your local machine and listen in your desired media player.

   b. For Internet Explorer 11, Avaya Workforce Optimization Select prompts you to specify the location where you want to save the file.

   > **Note:**
   >
   > For `WAV` format audio files, click the download link at the end of the error message to download and save the file.

   c. For Microsoft Edge 42.x, Avaya Workforce Optimization Select opens the file in a pop-up window from where you can play directly. Right-click ▶ and click **Save audio as** to download the file to your local machine and listen in your desired media player.

   d. For Mozilla Firefox 68.x, Avaya Workforce Optimization Select opens the file in a pop-up window from where you can play directly. Right-click ▶ and click **Save audio as** to download the file to your local machine and listen in your desired media player.

   > **Note:**
   >
   > For `WAV` format audio files, Avaya Workforce Optimization Select prompts you to specify the location where you want to save the file.

   > **Important:**

   Only those files that are uploaded in the `WAV`, `MP4`, `MP3`, and `M4a` formats are eligible for downloading. Note that you can only download the files in the same format in which the files were uploaded.

Emailing an adhoc interaction

About this task

You can send an adhoc interaction as an email 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.

> **Note:**
> - This option is available even when there is no media attached to an adhoc interaction.
> - You cannot send an interaction as an email if it is tagged as **Do not email** or **Do not download & email**.

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 Interaction Details page, click the ✉ icon.

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

Email interaction field descriptions

Name	Description
From	The email address of the sender. This field is system populated.
To	The email address of the recipient to whom you want to mail the interaction.
Interaction ID	The unique ID of the interaction. This field is system populated.
Subject	The subject of the email.
Comments	The body of the email.
Agent Name	The name of the agent who handled the interaction.
Extension	The phone number of the agent who handled the interaction.
Start Time	The start time of the interaction in a mm:dd:yyyy hh:mm:ss format.
CC	The email address of the employee to whom you want to mail a copy of the interaction.

Adding comments to an adhoc interaction

About this task

Supervisors and managers can add comments to an external or composite interaction.

Procedure

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

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

3. 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**.

   You can delete a comment after submitting, but you cannot edit it.

   The Comments/Tags page displays the comment on the same page.

Adding tags to an adhoc interaction

About this task

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

- Never delete the interaction.
- Do not allow download.
- Do not allow download & email.
- Do not allow email.
- Flag for QA.

Procedure

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

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

3. Click **Comments/Tags**.

4. On the **Tags** list, click the required tag.

5. Click **Set**.

Comments/Tags field descriptions

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.
Do not allow download	The tag used to specify that the interaction cannot be downloaded.
Do not allow download and email	The tag used to specify that the interaction cannot be downloaded or sent by email.
Do not allow email	The tag used to specify that the interaction cannot be sent by email.
Flag for QA	The tag used to specify that the interaction is flagged for quality analysis.

Viewing previous evaluations

About this task

Use this procedure to view the details of the previous evaluations for an adhoc interaction, if there are any existing evaluations.

Procedure

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

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

3. Click **Evaluations** *(x)*, where *(x)* is the number of times an interaction is evaluated.

Evaluations field descriptions

Name	Description
Form	The evaluation form based on which the evaluation is performed.

Table continues…

Name	Description
Reviewer	The name of the employee who evaluated the interaction. Any employee with appropriate privileges can evaluate an interaction.
Evaluation Type	The name denoting the type of evaluation. The type indicates the purpose or category of evaluation. The options are: • Normal • Adhoc • Training
Score	The score received by the employee during evaluation of the interaction.
Evaluation Date	The date on which the evaluation is performed.
Evaluation Modified Date	The latest date on which the previous evaluation was modified .
Courses	The course that was assigned to the employee based on the previous evaluation scores.
Quizzes	The quiz that was assigned to the employee based on the previous evaluation scores.

Managing adhoc reports

Adhoc reports overview

Using adhoc reports, a user can access, and generate reports in the following modules of Avaya Workforce Optimization Select view criteria.

- Interactions
- Evaluate
- Learn
- Coach

Adhoc reports are ideal for users who do not have access to the Reports module or who want to use the comprehensive view criteria to generate a report.

Each module contains a **Reports** tab from where you can access the adhoc reports. You can also access these reports from the Reports module from the **Adhoc Reports** tab. The adhoc reports data in any interface is specific to the module in which it is placed. For example, the Reports tab in the Interaction module contains only those reports that are generated using Interaction View.

Using adhoc reports, you can:

- View the data generated by using Views in the respective modules.

- Edit the adhoc reports depending on your business needs.

- Select and generate any report and view the reports in the Results screen of the Reports module.

- Schedule the adhoc reports based on user preferences by providing email options.

- Export the data from the adhoc reports to Excel and PDF formats and print, email, or download the files for future use.

- Share the reports with selected employees or with everyone.

- Delete and run the reports in the respective modules without navigating to the Reports module.

Saving a view as an adhoc report

About this task

Use this procedure to save an existing view in the Interactions module as an adhoc report.

Before you begin

Ensure that a view exists or create a view.

Procedure

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

   Avaya Workforce Optimization Select displays the interactions in the default view.

2. In the **View** field, click the view that you want to edit and save as an adhoc report.

3. Click **Edit**.

   The system displays the Edit View page where you can make the required changes, if you want.

4. After making the changes, click **Save as Report**.

   Avaya Workforce Optimization Select displays the Adhoc Reports page.

5. Type the name of the reports, and select the output type that you want to generate the report.

6. Click **Save**.

Related links

[Adding a view](#) on page 61
[Create View field descriptions](#) on page 64

Viewing adhoc report

About this task

Use this procedure to view the reports generated using the Interactions module views.

Procedure

1. Click **Interactions** > **Reports**.

   The Reports page displays the list of existing reports.

2. From the drop-down list, click the report you want to view, which you have saved as an adhoc report.

   Avaya Workforce Optimization Select displays the details of the report. You can download, email, or print the report.

3. **(Optional)** On the pagination controls, choose the number of records that you want to view on each page.

4. **(Optional)** To filter the columns, click the ▼ icon in the column header of the column which you want to filter.

   You can apply filters on multiple columns.

5. **(Optional)** To clear the filters from all the columns, click the ▼x icon.

6. **(Optional)** To sort the columns, click the **Sort** 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. The third click removes the sorting.

7. **(Optional)** To reset the sorting, click the ♦x icon.

Editing an adhoc report

Procedure

1. Click **Interactions** > **Reports**.

   The Reports page displays the list of existing reports.

2. From the drop-down list, click the report you want to edit, and click **Edit**.

3. On the Edit View page, make the required changes, and click **Save & Close**.

Emailing an adhoc report

About this task

You can email an adhoc report to other users, but they can view the report in read-only mode. The report is sent as an attachment in the format in which the view is saved as an adhoc report.

Procedure

1. Click **Interactions** > **Reports**.

   The Reports page displays the list of existing reports.

2. From the drop-down list, click the report that you want to send as an email, and click **Email**.

3. On the Email Report window, type the name of the recipient, enter your comments, and click **Send**.

Downloading an adhoc report

About this task

Supervisors and managers can download adhoc reports in a specified format and save them for future reference.

Before you begin

Specify the format when saving the view as an adhoc report.

Procedure

1. Click **Interactions** > **Reports**.

   The Reports page displays the list of existing reports.

2. From the drop-down list, click the report that you want to download, and click **Download**.

   Avaya Workforce Optimization Select downloads the adhoc reports in the format that you specified while saving the view. You can save the report on your machine for future use.

Printing an adhoc report

About this task

You can print adhoc reports in the format in which you saved the view as an adhoc report.

Procedure

1. Click **Interactions** > **Reports**.

   The Reports page displays the list of existing reports.

2. From the drop-down list, click the report that you want to print, and click **Print**.

   Avaya Workforce Optimization Select displays the adhoc report in the format in which you saved the view as a report.

3. To get a hard copy of the report, click the icon in the lower-right corner of the page.

Adhoc reports field descriptions

Name	Description
Employee	The name of the employee for whom the adhoc report is created.
Reporting to	The name of the reporting manager to whom the employee reports.
Start Time	The time when the adhoc report is created in a date and 24–hour format: dd:mm:yyyy hh:mm:ss. For example: 05/02/2017 23:21:03
End Time	The time when the adhoc report ends in a date and 24–hour format: dd:mm:yyyy hh:mm:ss. For example: 05/02/2017 23:21:03
Duration	The duration of the interaction in an hh:mm:ss format.
Queue	The queue that the adhoc report is associated with.
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 for interactions by the extension number or email ID of the called party. You can use any alphanumeric characters or symbols to search an interaction.
Calling Party	To search for interactions by the extension number or email ID of the calling party. You can use any alphanumeric characters or symbols to search an interaction.
No of Holds	The number of times that the employee put the interaction on hold.
Transfers	The number of times that the employee transferred the interaction.
Total Hold Time	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

Table continues…

Name	Description
Var1 **Var2** **Var3** **Var4** **Var5** **Var6** **Var7** **Var8** **Var9** **Var10**	The customized fields where an user can enter an option to create an adhoc report.
Client Name	The name of the client. This field is available only when you are using a data partitioned environment.
Flagged for QA	The option to flag an adhoc report for quality analysis.
Evaluated	The option to select whether an interactions is evaluated. The options are: • Yes • No
Tagged	The option to tag an adhoc report.
Roles	The option to select roles for creating an adhoc report. For example: Agent, Supervisor, and Manager .
Department	The option to select departments for creating an adhoc report.
ARCHIVED	The option select the interactions that are archived.
Queue Type	The option to select the interactions selected in a particular queue.
Interaction ID	The unique ID of the interaction.
Interaction Status	The recording status of the interaction.
Transfer Type	The option that specifies how you transfer a call. The options are: • Cold Transfer: An agent transfers the customer call to another user without any prior notice to the user to whom the call is transferred. The second user can be another agent or a supervisor. • Conference: An agent adds another agent or supervisor to the call. • Warm Transfer: An agent speaks to another agent or supervisor before transferring a call. The first agent can provide background information about the call to the other agent or supervisor without the caller hearing the conversation. • No Transfer: An agent answers the queries of the caller without transferring the call to another agent or supervisor.

Button	Description
Download	To download the adhoc report.
Email	To mail the adhoc report.
Print	To print the adhoc report.

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. You can view details such as file name or record ID, start and end time, status, and the request date of the downloaded interaction. You can click the **Link** 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 the 👤 icon.

2. Click **Media Downloads**.

    The Downloads page displays the details of the requested download.

3. **(Optional)** On the pagination controls, choose the number of records that you want to view on each page.

4. **(Optional)** To filter the columns, click the ▼ icon in the column header of the column which you want to filter.

    You can apply filters on multiple columns.

5. **(Optional)** To clear the filters from all the columns, click the ▼ₓ icon.

6. **(Optional)** To sort the columns, click the **Sort** 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. The third click removes the sorting.

7. **(Optional)** To reset the sorting, click the ⬍ₓ icon.

8. To view the change in status of the interaction downloads, click **Refresh**.

Downloads field descriptions

Name	Description
Link	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.
Interaction ID	The unique ID of the interaction.
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.
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.
Requested Time	The time at which the interaction download was requested.

Chapter 6: Evaluating interactions

Evaluate overview

The Evaluate module in Avaya Workforce Optimization Select helps in 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

With 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 137.		

Table continues…

No.	Task	Description	Notes	✔
2	Set up the Evaluation Plan.	Evaluation plan is a mechanism to automate the process of selecting interactions using predefined criteria and assigning interactions to reviewers to evaluate. See Defining an evaluation plan on page 156.		
3	Evaluate interactions assigned through the Evaluation Plan	With Evaluation Forms, you can evaluate and score interactions. See Evaluating an interaction on page 169		
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 151		
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 209.		
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 349.		

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 133.		
2	Build evaluation forms with flexible criteria and scoring to track the quality of an interaction.	See Defining an evaluation form on page 137.		
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 139.		
4	Add parent and child criteria to determine the measures on which the interaction must be evaluated.	See Defining criteria for evaluation on page 140.		
5	Define the evaluating mechanism as weighted or nonweighted.	See Defining scoring options on page 143.		

Response Sets overview

Response Sets are scoring variables that you can use to measure agent performance 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 criterion. 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 this procedure to view the list of response sets that you 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.

ⓘ Important:

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

Procedure

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

   The Response Sets page displays a 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 forms** column.

3. **(Optional)** On the pagination controls, choose the number of records that you want to view on each page.

4. **(Optional)** To filter the columns, click the ▼ icon in the column header of the column which you want to filter.

   You can apply filters on multiple columns.

5. **(Optional)** To clear the filters from all the columns, click the ▼ₓ icon.

6. **(Optional)** To sort the columns, click the **Sort** 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. The third click removes the sorting.

7. **(Optional)** To reset the sorting, click the ↕ₓ icon.

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

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

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

Response Sets field descriptions

Name	Description
Response Set	The name used to identify the Response Set used in an evaluation form.

Table continues…

Name	Description
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.
Has Evaluations	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 Response Sets page displays a list of response sets.

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

3. On the Add Response Set 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.

Add Response Set field descriptions

Name	Description
Response Set Name	The name used to identify the Response Set used in an evaluation form.

Table continues…

Name	Description
Control Type	The type of control used to display options in an evaluation form. The options are: • **Single Select** : To create a drop down list of items for the user to select. Use this option when you have many values, because the values are 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 using spaces and special characters. Note that you cannot use the following special characters in between words in a response: tilt (~), comma (,), hyphen (-), curly brackets ({}), brackets([]), colon (:), quotation marks ("), Apostrophe ('), backslash (\), vertical bar (|), semicolon (;), percentage (%), and angle quotes (<>).
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 overview

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 conditions 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 the required details in the fields.

   You can add the header information in the form only after you enter all the mandatory fields.

4. Click **Save as Draft**.

   The Evaluation Form page changes automatically to the name of the form and displays the following message: `Definition has been saved successfully.`

Next steps

Add header information in the evaluation form.

Definition field descriptions

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 to enter comments while evaluating an interaction.

Table continues…

Name	Description
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.
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.

Button	Description
Save as Draft	To save the evaluation form as a draft in the Forms page.

Icon	Name	Description
⊕	Add Organization Unit	To add a new organization unit
⊗	Remove Organization Unit	To remove an organization unit

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 want to capture the information.

Before you begin

Define the evaluation form.

Procedure

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

2. Click the row of the form for which you want to add the header information.

3. Click the **Header Information** tab.

4. Click the **Edit** icon.

5. Click the **Add** button.

6. On the Evaluation Form page, enter the required details.

7. Click one of the following:

   - **Save & Add Another**: To save the header Information and add another header.

   - **Save & Close**: To save the header information that you created.

Next steps

Define the evaluation form criteria.

Header Information field descriptions

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 must be displayed.

Table continues…

Name	Description
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.

Defining criteria for evaluation

Before you begin

1. Define the evaluation form.
2. Add header information to the form.

Procedure

1. Click **Evaluate** > **Setup** > **Forms**.
2. Click the row of the form for which you want to define the criteria.
3. Click **Edit**.
4. Click **Criteria**.
5. To enter the name and description for a parent criterion, click **Add Criterion**.

   The Criteria tab displays the options to add child criterion and responses.
6. To add a child, click **Add Child** for the corresponding parent criterion.

   You can also create multiple parent criteria first and then create one or more child criteria for each parent criterion.
7. Enter a sub-criteria name and click the ⬓ icon.
8. To add a response set, click **Add Responses**.
9. In the Responses tab, provide information for the following based on which the interaction is evaluated:

   a. In **Response Set**, click the required response set.

      The **Response(s)** tab 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. **(Optional)** Add conditional branching for a response.

    e. Assign a course or quiz for each response.

    f. Click **Set**.

      If a quiz is associated with a course and the assignment is in new or pending state, then you cannot assign the same quiz to a user.

    🛈 **Important:**

    You must always click **Set** while adding a criterion. Otherwise, the criteria and the responses do not get added to the evaluation form.

10. To define the structure of comments while evaluating, click the **Comments** tab.

11. Enter your comments and click **Submit**.

Next steps

Add weightages.

Defining Criteria field descriptions

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.
Criterion	The option to define a criterion that can be used to evaluate an interaction. You can create a criterion and add child criteria to it.

Button	Description
Reorder Form	To move criteria across or within sections.
Add Criterion	To add a criterion. For example, you can add a criterion to check whether the agent greets the customer before starting a conversation.
Add Child	To add one or more 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 criteriaon. You can add responses only to the last node in the hierarchy.

Response(s)

Name	Description
Response Set	Associate a response set to the criterion. The application populates the scoring variables defined for the response set.

Table continues…

Name	Description
Response	View the responses or scoring variables defined for the response set you associate with a criterion.
Scoring Conditions	Define a scoring condition for a response that the reviewer can select while evaluating an interaction. The criteria response scores you enter can contain zero, negative values, or integers. The options 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 and score for a response at the criteria level. • Bonus Parent Criteria: Define a bonus and score for a response at the parent criteria level. • Bonus Form: Define a bonus and score for a response at the form level. • Penalty Criteria: Define a penalty and score for a response at the criteria level. • Penalty Form: Define a penalty and 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:** You can add 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. You can predefine a set of standard comments and make it mandatory for the evaluator to 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 might 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 you select while evaluating, the application assigns the course or quiz automatically to the employee. You can assign multiple courses or quizzes to a user.

Comments

Name	Description
Comments	Add comments to a criterion. Evaluators use comments to flag important information or common problems in agent performance against a response. For example, for a criteria for listening, you can add a comment `Agent interrupted customer` if this is a common problem. Evaluators can either select from a predefined list of comments or enter comments .
Description	Add a description to a comment. Use this option to provide reasons for adding a comment.
Default	Mark a particular comment as the default. The default comment gets associated with the criterion by default.
Active	Make a comment active so that it becomes available while evaluating an interaction.

Adding weightages

About this task

Use this procedure to add weightages to a criterion. You can define the evaluating mechanism as:

- Weighted: you must define weights for every criterion. Weights defined at every criterion node, parent or child, must add up to 100.
- Nonweighted: The scores achieved at the child criterion level roll up to the parent criterion. The overall score is a sum of all scores achieved against the criterion. The score achieved is the product of the raw score and the weight.

Before you begin

Do the following:

1. Define the evaluation form.
2. Add header information to the form.
3. Add evaluation criteria to the form

Procedure

1. Click **Evaluate** > **Setup** > **Forms**.
2. Click the button on the row of the form for which you want to add weightages.
3. Click **Edit**.
4. Click **Weightages**.
5. Select one of the following Scoring options:
   - **Non Weighted Scores**: If you select this option, click **Save as a Draft**.
   - **Weighted Scores**: If you select this option, the Weightages page displays the **Formula** field.

6. **(Optional)** If you select **Non Weighted Scores**, click **Save as a Draft**. delete

7. **(Optional)** If you select **Weighted Scores**, the Weightages page displays the **Formula** field. delete

8. To calculate scores based on weights, do the following :

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

   You can define the formula only at the parent criteria level. The default formula for evaluation form weightages is the sum of all the parent criteria.

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

   • The parent criteria scores is the sum of all subcriteria level weighted scores.

   • The sum of weighted scores of child criteria rolls up to the parent criteria. To that sum, the application applies the weight assigned to that parent criterion. Weights defined at every criteria node, parent or child, must add up to 100.

Next steps

Preview the evaluation form.

Weightages field descriptions

Name	Description
Scoring options	Define the scoring mechanism. The options are: • Non Weighted Scores: In this option, the scores achieved at the child criterion level roll up to the parent criterion. The overall score is a sum of scores achieved against all the criteria. • Weighted Scores: In this option, you must define weights for every criterion. Weights defined at every criterion node, parent or child, must add up to 100. The score achieved is a product of the raw score and the weight.
Formula	Define the arithmetic formula to calculate the overall score. This option is available when you select Weighted Scores. The default formula for evaluation form weightages is the sum of all the criteria. However, if you add a criterion later, you must manually update the weightage because the criterion does not get updated automatically. For example, if the default formula is C1 + C2 and you add C3, the formula does not change to C1 + C2 + C3.

Previewing the evaluation form

About this task

Use this procedure to review all the sections, criteria and child criteria, the selected scoring mechanism, and the scores in the evaluation form. The form is displayed in the evaluation form preview when you evaluate an agent or employee.

To edit the evaluation form, you can go back to the respective screen and modify any section.

Before you begin

1. Define the evaluation form.
2. Add header information to the form.
3. Add evaluation criteria to the form
4. Assign weights for scoring evaluation criteria.

Procedure

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

2. Click the button next to the row of the form for which you want to preview the evaluation form.

3. Click **Edit**.

4. To view the details of the evaluation form, click the **Preview** tab.

5. To validate if the evaluation form is complete and ready to be saved or published, click the **Test Form** button.

6. To run the evaluation form, click **Publish**.

   Evaluators can now evaluate by using the form.

Preview field descriptions

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 and the responses before publishing the form.
Weightages	Preview the weights defined for all the criteria before publishing the form.
Test Form	Validate that the form created is complete.

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** > **Forms**

   The Forms page displays the list of Evaluation Forms.

2. **(Optional)** On the pagination controls, choose the number of records that you want to view on each page.

3. **(Optional)** To filter the columns, click the ▼ icon in the column header of the column which you want to filter.

   You can apply filters on multiple columns.

4. **(Optional)** To clear the filters from all the columns, click the ▼ₓ icon.

5. **(Optional)** To sort the columns, click the **Sort** 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. The third click removes the sorting.

6. **(Optional)** To reset the sorting, click the ⇕ₓ icon.

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

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

8. To view the details of an evaluation form, click the ❯ icon in the specific row.

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

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

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

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

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**

Table continues…

Name	Description
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 overview

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 Evaluation Type page displays the list of evaluations.

2. **(Optional)** On the pagination controls, choose the number of records that you want to view on each page.

3. **(Optional)** To filter the columns, click the ▼ icon in the column header of the column which you want to filter.

   You can apply filters on multiple columns.

4. **(Optional)** To clear the filters from all the columns, click the ▼× icon.

5. **(Optional)** To sort the columns, click the **Sort** 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. The third click removes the sorting.

6. **(Optional)** To reset the sorting, click the ↕× icon.

7. To edit an evaluation type, click the **View** (➤) icon in the desired row.

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

   You cannot edit or delete an evaluation type that has evaluations associated with it.

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. ✴ **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.

Table continues…

Name	Description
Has Evaluations	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 Evaluation Type page displays the list of evaluations.

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.

Add 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.

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.
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.

Appeals Workflow overview

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 211.

✳ 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 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

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

   The Appeals Workflow page displays a list of appeals workflow with names and other details.

2. **(Optional)** On the pagination controls, choose the number of records that you want to view on each page.

3. **(Optional)** To filter the columns, click the ▼ icon in the column header of the column which you want to filter.

   You can apply filters on multiple columns.

4. **(Optional)** To clear the filters from all the columns, click the ▼x icon.

5. **(Optional)** To sort the columns, click the **Sort** 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. The third click removes the sorting.

6. **(Optional)** To reset the sorting, click the ↕x icon.

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.
Approver	The names of the employees who have access to the organization unit for which the appeals workflow is created to approve or reject an 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 Appeals Workflow page displays a list of appeals workflow with names and other details.

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.
Name User(s)	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.

Evaluation Metric overview

You can create an evaluation metric from the Evaluation Forms definition screen by associating the metric to a particular criteria. The measures related to the metric get created as evaluations. You can create multiple metrics for a particular criteria. Whenever a evaluation is performed on this evaluation form, the score in the measure gets applied to that particular metric. For example, you might have a evaluation form with the criteria:

```
Is welcome message prompted?
```

and you want to find out how many agents are greeting the customers with an welcome message. You must tag this metric as a criteria and then create a performance scorecard. For those employees who did not greet the customers, the system displays the score as zero.

Deleting an evaluation metric from the metrics screen disassociates it from the evaluation form. However, you can delete an evaluation metric only when it is not associated with any scorecard or metric views. To delete the metric, you must first disassociate it from any scorecard or metric views where it is used.

Creating an evaluation metric

Procedure

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

2. Select the form for which you want to create a metric and click the **Edit** button.

   The system displays the following message: `A new version of the form will be created. Do you want to continue?`

3. Click **Yes**.

4. On the Edit Form page, click **Criteria**.

5. On the Criteria page, scroll down and select the **Create Metric** check box.

6. On the Create Metric page, type the metric name.

   The measure name is populated automatically with the metric name that you enter.

7. Click **Apply**.

   The system displays the new metric and creates the related evaluation measure .

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 156.		
2	Identify employees whose interactions must be picked as part of the evaluation plan.	See Selecting employees for evaluation on page 157.		
3	Define the target number of interactions to be picked for each selected employee.	See Setting employee targets for evaluation on page 158.		
4	Select a specific set of interactions for evaluation.	See Selecting interactions for evaluation on page 160.		

Table continues…

No.	Task	Description	Notes	✔
5	Assign interactions to reviewers and evaluators for scoring.	See [Assigning interactions for evaluation](#) on page 161.		
6	Review and publish the evaluation plan.	See [Reviewing and publishing an evaluation plan](#) on page 162.		
7	Schedule to execute the evaluation plan so that the interactions get assigned as tasks to the evaluator.	See [Scheduling evaluation plans](#) on page 163.		

Defining an evaluation plan

Procedure

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

2. Click **Create 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. **(Optional)** 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 Definition**, 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. Click **Save**.

Next steps

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

Definition field descriptions

Name	Description
Name	The name of the evaluation plan.
Description	The description of the evaluation plan.

Table continues…

Name	Description
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** • **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.

Selecting employees for evaluation

Before you begin

Define an evaluation plan.

About this task

Use this procedure to select employees whose interactions must be selected as a 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 **Evaluate** > **Management** > **Plans**.

2. Click on the row of the plan for which you want to select employees for evaluation.

3. Click the **Employee Section** tab.

4. 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.
(Optional) To add multiple filters, click the ⊕ icon.

e. Click **Apply Filter**.

The Employee List section system displays the list of employees that match the search criteria and are selected in the evaluation plan.

Next steps

Define the evaluation plan target.

Employee Section field descriptions

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.

Button name	Description
Apply Filter	To view the list of employees that match your search criteria.

Setting employee targets

Before you begin

• Define an evaluation plan

• Select employee for evaluation

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 checks for interactions from previous days of the week or weeks of a month to meet the distribution target.

Procedure

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

2. Click on the row of the plan for which you want to select employees for evaluation.

3. Click **Target**.

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

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

6. 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.

7. 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.

Target field descriptions

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.

Table continues…

Name	Description
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.
Reporting to	The supervisor to whom the employee reports.
Department	The department to which the employee belongs.

Defining the interaction selection criteria

Before you begin

- Define an evaluation plan
- Select employee for evaluation
- Set employee targets

Procedure

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

2. Double-click the row of the plan for which you want to select employees for evaluation.

3. Click **Interaction Selection**.

4. To specify the search criteria to filter interactions to be evaluated do the following:

   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 ⊕ icon.

Next steps

Assign interactions to be evaluated.

Interaction Selection field descriptions

Name	Description
Field	The fields used to filter the interactions. The options are: • **Archived** • **Calling Party** • **Called Party** • **Channel** • **Commented** • **DNIS** • **Duration** • **Hold Duration** • **Interaction Tags** • **Interaction Type** • **No of Holds** • **No of Transfers** • **Queue** • **Screen Captures** • **Source Type** • **Transcribed** • **Transfer Number** • **Transfer Type** • **Variables 1 to 10** • **Interaction Ended By**
Operator	The operator used in the search criteria.
Value	The value to match in the search.

Assigning interactions for evaluation

Before you begin

- Define an evaluation plan
- Select employee for evaluation
- Set employee targets
- Define interaction selection criteria

Procedure

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

2. Click on the row of the plan for which you want to select employees for evaluation.

3. Click **Assignment**.

4. In **Default Form**, select the default form to be associated with the evaluation plan.

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

6. To view a list of eligible reviewers who have access to the interactions and can evaluate the interactions, click **To Reviewers** .

   Avaya Workforce Optimization Select displays the reviewers, assignments under the current plan, and the total assignments across all plans.

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

   Avaya Workforce Optimization Select displays the interactions in the **Evaluate** > **Evaluations** > **My Assignments** page of reviewers.

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

Next steps

Preview and publish an evaluation plan.

Assignment field descriptions

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.

Reviewing and publishing an evaluation plan

Before you begin

- Define an evaluation plan
- Select employee for evaluation

- Set employee targets
- Define interaction selection criteria
- Assign interactions for evaluation

Procedure

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

2. Click on the row of the plan for which you want to select employees for evaluation.

3. Click **Preview**.

4. On the Preview page, view the details of the evaluation plan.

5. To publish the evaluation plan, click **Publish**.

   The plan starts running from the moment you publish the evaluation plan. Depending on the plan definition, Avaya Workforce Optimization Select automatically searches for interactions and starts assigning them.

   Avaya Workforce Optimization Select displays the evaluation plan in the list on the View Plans page with Active status.

6. To set the plan for execution, click **Publish & Schedule**.

   From the scheduled data and time, the plan runs everyday and assigns tasks to the selected reviewers.

   Avaya Workforce Optimization Select assigns interactions to reviewers and evaluators everyday from the scheduled date and time.

   > **✱ Note:**

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

Preview field descriptions

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**: Specify a date from when the evaluation plan must run everyday and assign interactions to the selected reviewers.

   • **Run At**: Specify a particular date and time when the evaluation plan must run.

   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.

On 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 Plans page displays the list of saved and published evaluation plans.

2. **(Optional)** On the pagination controls, choose the number of records that you want to view on each page.

3. **(Optional)** To filter the columns, click the 🔻 icon in the column header of the column which you want to filter.

You can apply filters on multiple columns.

4. **(Optional)** To clear the filters from all the columns, click the ⊽ₓ icon.

5. **(Optional)** To sort the columns, click the **Sort** 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. The third click removes the sorting.

6. **(Optional)** To reset the sorting, click the ⬥ₓ icon.

7. To edit an evaluation plan, click the **View** (❯) icon on the desired row.

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

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

9. 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.

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.
Employees 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.
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** > **Employees Coverage**.

2. To view a list of employees covered across all plans, select the view and click **View** .

3. **(Optional)** On the pagination controls, choose the number of records that you want to view on each page.

4. **(Optional)** To filter the columns, click the ⊤ icon in the column header of the column which you want to filter.

   You can apply filters on multiple columns.

5. **(Optional)** To clear the filters from all the columns, click the ⊼ icon.

6. **(Optional)** To sort the columns, click the **Sort** 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. The third click removes the sorting.

7. **(Optional)** To reset the sorting, click the ⇅× icon.

Employee Coverage field descriptions

Name	Description
Employee	The name of the employee who is evaluated.
Average QA Score	The average score an employee receives during evaluation.
Avg Handle Time	The average duration from the start of the interaction till the end including the hold time.
Plans	The total number of evaluation plans that an employee is covered in.
Tenure (In Wks)	The tenure of the employee in the organization, in weeks.

Table continues…

Name	Description
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 adhoc evaluations.
Projected Coverage	The total number of evaluations targeted for the employee across different evaluation plans.
	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 QA Coverage page displays a list of evaluations covered for various employees.

2. **(Optional)** On the pagination controls, choose the number of records that you want to view on each page.

3. **(Optional)** To filter the columns, click the ⊤ icon in the column header of the column which you want to filter.

   You can apply filters on multiple columns.

4. **(Optional)** To clear the filters from all the columns, click the ⊤× icon.

5. **(Optional)** To sort the columns, click the **Sort** 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. The third click removes the sorting.

6. **(Optional)** To reset the sorting, click the ⬍× icon.

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

   Avaya Workforce Optimization Select displays the evaluation task under the My Assignments screen for the assigned employee.

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

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.
Queue	The queue that the interaction is associated with.
Origin	The field to indicate the origin of the evaluation. The options are: • Plan • Adhoc
Screens	The field to indicate if the interaction has screenscapture.
Interaction ID	The unique ID of the interaction.
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 Assignments 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 Distribution Pool page displays the list of available interactions.

2. Click the check box of the row of the interaction that you want to assign from the list and click the employee to whom you want to assign in the **Assign to** , and click **Assign**.

   The **Assign** button automatically gets enabled.

3. Click **Assign**.

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

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

4. To assign an interaction to yourself , click the check box of the row of the interaction that you want to assign from the list and click **Add to My Assignments**.

5. To delete an interaction from Distribution Pool, click the check box of the row of the interaction that you want to assign 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.
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 screenscaptures.

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 from a previously recorded interaction.

- Evaluate when playing back screen captures in a separate window 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 ▶ icon next to the recorded interaction that you want to evaluate.

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

2. To evaluate a live interaction:

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

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

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

3. To evaluate interactions from My Assignments:

   a. Click **Evaluate** > **Evaluations** > **My Assignments (*x*)**, where *x* is the number is incomplete tasks.

   b. Click the ❯ icon in the specific row.

      Avaya Workforce Optimization Select displays the interaction in the Recorder panel.

      When there is no evaluation form associated for an evaluation, the section below the Recorder panel appears blank.

   c. In **Evaluation Type** , click any active evaluation type.

   d. In **Form** , click any active evaluation form.

      Avaya Workforce Optimization Select displays the blank fields and sections that you must enter details to complete the evaluation process.

   e. In **General Comments**, enter your comments.

   f. **(Optional)** Select the required header information.

   g. Click the required criteria response, enter your criteria comments, and click **Save**.

      You can enter criteria comments depending on how it is defined while creating the form.

   h. To enter snippet comments, click the **Snippet Comments** tab.

   i. To view previous evaluations on the interaction during evaluation, click the **Previous Evaluations (*x*)** tab, where *x* is the number of times an interaction was evaluated.

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

   k. To view the interaction details during evaluation, click the **Interaction Details** tab.

The Adhoc Evaluations page displays the evaluation details.

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.

2. Enter your comments in the text area.

   You can see the comments after you save the evaluation form.

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

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 penatly percentage/100 added to or subtracted from the actual score that is awarded..

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

Criteria score = Bonus or penatly 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 score weight x the actual score that is awarded.

Score weight = 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.

Acknowledging an evaluation

About this task

After an evaluation is complete, the concerned employee receives a notification about the evaluation score achieved with comments, if any. It is at the discretion of the employee to accept, appeal, or take no action for an evaluation.

- Accept the evaluation.
- Appeal for another round of evaluation.

  You can raise multiple appeals for the same evaluation. However, if an appeal is in progress, you cannot simultaneously raise another appeal for the same evaluation.

You can also just view the interaction and take no action. In this scenario, the acceptance status displays **No Action** when you view the evaluation.

⊛ **Note:**

These options are available only to those employees whose interactions are already evaluated.

Procedure

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

2. Click the view that contains the evaluated interaction.

   Avaya Workforce Optimization Select displays a list of interactions that are already evaluated depending on your view permissions.

3. To view and acknowledge the evaluation score of an interaction, click the ❯ icon of the desired interaction row.

4. To acknowledge the evaluation scores, do one of the following:

   - To accept the evaluation, click **Accept**.

The Interaction Details page displays the following pop-up message: `Are you sure you want to Accept the Evaluation.` and the option to enter optional comments.

- To appeal for another round of evaluation, click **Appeal**.

  On the New Appeal page, enter optional comments for the appropriate performance criteria.

5. Click **Save**.

   Avaya Workforce Optimization Select sends a notification to the employees who are selected as reviewers in the appeal reviewer role.

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, Adhoc, Mock, or Normal.
General Comments	The comments that are entered by the evaluator during evaluation.
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.

Snippet Comments

Name	Description
Start Time	The start time of a particular segment of the interaction on which the evaluator provided the comments in hh:mm:ss format.
End Time	The end time of a particular segment of the interaction on which the evaluator provided the comments in hh:mm:ss format.
Severity	The degree of severity of the evaluation results for a particular segment of the interaction on which the evaluator provided the comments. The options are: • Low • Medium • High
Comments	The comments that the evaluator provides for a particular segment of the interaction that is being evaluated.

Previous Evaluations

Name	Description
Form	The form based on which the evaluation is performed.
Reviewer	The name of the supervisor or manager who evaluated the interaction.
Evaluation Type	The type of evaluation. For example, Training, Adhoc, 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.
Evaluation Modified Date	The date on which the evaluation is modified.
Courses	The course that is assigned to the employee based on the evaluation scores.
Quizzes	The 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.
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.
Do not allow email	The tag used to specify that the interaction cannot be sent by email.

Interaction 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.

Table continues…

Name	Description
Employee Name	The name of the employee who attended to the interaction.
Extension	To search for interactions by the extension number or email ID of the called party. You can use any alphanumeric characters or symbols to search an interaction.
Site	The name of the site the employee belongs to.
Groups	The name of the group that the employee belongs to.
Reporting To	The name of the supervisor or manager to whom the employee reports.
Screen	The field to indicate if the interaction has screens captured. The options are: • **Yes** • **No**
Transfers	The number of times that the employee transferred the interaction.
Agent Id	The ID of the agent logged in into the phone.
Called Party	The extension number or email ID of the called party.
Calling Party	The extension number or email ID of the calling party.
Number of Holds	The number of times that the employee put the interaction on hold.
Total Hold Time	The total duration for which the employee put the interaction on hold in the hh:mm:ss format.
Number of DTMF Keys	The number of times the DTMF (Dual Tone Multiple Frequency) keys were pressed by the participants of an interaction. Each number is associated with an action.

Hold Duration Details

Name	Description
Hold Start Time	The start time and date when the employee put the interaction on hold in a 24-hour format: mm/dd/yyyy hh:mm:ss.
Hold End Time	The end time and date when the employee put the interaction on hold in a 24-hour format: mm/dd/yyyy hh:mm:ss.
Hold Duration	The duration when the employee put the interaction on hold in a 24-hour format: hh:mm:ss.
DTMF Key	The DTMF key pressed by the participants of the interaction.
Talking to (Agent ID)	The ID of the agent logged in into the phone.
Agent Name	The name of the agent who attended the interaction.
Extension	The extension number of the employee on which the interaction is being handled..
Dialled to	The extension number of the calling party.

Emailing an evaluation

About this task

You can send an evaluated interaction as an email if you want other users to view or give feedback on the evaluation. The evaluation gets displayed 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 on Select for the row to view the evaluations and scroll to the extreme right and click icon.

   Avaya Workforce Optimization Select displays the Evaluations Details page.

3. In the Evaluations tab, click **Email**.

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. In the list next to the **Print** tab, click **Pdf** or **Excel**.

   Use the Excel option if you have a lengthy criteria name, because lengthy names get truncated in the PDF format.

   The system prints the evaluation criteria, responses, and scores given to the interaction in the chosen format. The maximum score to the report and the percentage is rounded off to 2 decimals in both the formats.

Viewing assignments for evaluations

About this task

Use this procedure 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 Assignments**. The system displays the forms that are incomplete in the **Draft Evaluations** tab, while the completed evaluation forms are displayed in the **View Evaluations** tab. 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 Assignments (*x*)**, where *x* is the number of pending assignments.

   The My Assignments (*x*) page displays a list of evaluations that are assigned to you.

2. **(Optional)** On the pagination controls, choose the number of records that you want to view on each page.

3. **(Optional)** To filter the columns, click the ▼ icon in the column header of the column which you want to filter.

   You can apply filters on multiple columns.

4. **(Optional)** To clear the filters from all the columns, click the ▼× icon.

5. **(Optional)** To sort the columns, click the **Sort** 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. The third click removes the sorting.

6. **(Optional)** To reset the sorting, click the ⬥× icon.

7. In the My Assignments (*x*) page do the following:

   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 Interaction 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.

8. 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 is available for assignment.

My Assignments field descriptions

Name	Description
Interaction ID	The unique ID of the interaction that is evaluated.
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: • **Voice** • **Chat** • **Email**
Type	The name of the evaluation type. Reviewers or evaluators select an evaluation type while evaluating an interaction.
Employee	The name of employee whose interaction is evaluated.
Reporting To	The name of the supervisor or manager to whom the employee reports.
Queue	The queue that the interaction is associated with.
Screens	The field to indicate if the interaction has screens captures. The options are: • **Yes** • **No**

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

Adding a view

About this task

To search for evaluations, you can use the AWFOS Default view, 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 Default view consists of predefined filters configured by your system administrator. You cannot modify the filters on this view.

Procedure

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

   The system displays the evaluations in the default view.

2. Click **Add**.

   The system displays the Create View page.

3. On the Create View page, do the following:

   a. Type the name and description of the view.

   b. In **Field**, select the filter in which you want to apply the filter.

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

   d. In value, enter the value that the records must match.

4. Click **Save & Close**.

Add View field descriptions

Name	Description
Name	The name of the view.
Default	The option to display the selected view as the default. You can set a view as default if you want to see a certain set of evaluations each time you login.
Description	The description that helps to understand the reason for creating a view.
Filter	The filter criteria used to search the evaluations.
Display Fields	The columns displayed in the search results.

You can move or remove the fields in the Available Fields screen to the Selected Fields screen while adding a view. The arrows next to the Selected Fields allows the user to rearrange the order of the selected fields. |
| **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: • Role • Archived • Acceptance Comments • Acceptance Date • Acceptance Status • Called Party • Calling Party • Commented • Criteria Comments • Department • Duration • Employee • Employee Status • Evaluation Date • Evaluation Form • Evaluation Modified Date • Evaluation Type • General Comments • Groups • Include Calibration Evaluations • Interactions ID • Interaction Comments • Interaction Direction • Interaction Tags • Max Score • Organization Unit • Queue • Raw Score • Reviewers • Screen Captures

Table continues…

Name	Description
	• Site
	• Snippets
	• Source Type
	• Reporting to
	• Interaction Date
	• Interaction Type
	• Transfer Number
	• Transfer Type
	• UCID
	• Percentage
	• Interaction Ended By
Operator	The operator used to specify the search criteria. The options are:
	• Equals
	• Not Equal To
	• Contains
	• Does not Contain
	• Starts With
	• Does not Starts With
	• Ends With
	• Does not Ends With
	• Less Than
	• Greater Than
	• Less Than or Equal
	• Greater Than or Equal
	• Not Equal To
	• Between
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
Role	To search for evaluations of employees with the specified designation or role.

Table continues…

Name	Description
Archived	To search for archived evaluations.
Acceptance Comments	To search for evaluations based on the acceptance comments provided by an employee after accepting an evaluation.
Acceptance Date	To search for evaluations based on the date on which the agent accepted the evaluation comments.
Acceptance Status	To search for evaluations based on the status of an evaluated interaction after it is signed off by an employee.
Called Party	To search for interactions by the extension number or email ID of the called party. You can use any alphanumeric characters or symbols to search an interaction.
Calling Party	To search for interactions by the extension number or email ID of the calling party. You can use any alphanumeric characters or symbols to search an interaction.
Commented	To search for interactions that are commented. The options to filter interactions based on comments from the **Value** field are: • Yes: To filter the interactions that were commented. • No: To filter the interactions that were not commented.
Criteria Comments	To search for evaluations based on criteria comments.
Department	To search for evaluations of employees belonging to the specified department.
Duration	To search for evaluations by the duration specified in the hh:mm:ss format.
Employee	To search for evaluations based on the employees that you have access to.
Employee Status	To search for evaluations based on employee status. The options are: • Active • Inactive
Evaluation Date	To search for evaluations based on the specified evaluation date.
Evaluation Form	To search for evaluations based on the name of the evaluation form.
Evaluation Modified Date	To search for modified evaluations based on the following options: • Current Week • Last Month • Last Week • This Month • Today • Yesterday

Table continues…

Name	Description
Evaluation Type	To search for evaluations based on the evaluation type.
General Comments	To search for evaluations based on the general comments provided for an evaluation.
Groups	To search for evaluations of employees belonging to the specified group.
Include Calibration Evaluations	To search for evaluations that have been assigned for calibration.
Interactions ID	To search for evaluations based on the interaction ID.
Interaction Comments	To search for evaluations based on the interaction comments.
Interaction Direction	To search for evaluations based on the interaction direction. The options are: • All • Inbound • Outbound
Interaction Tags	To search for evaluations based on the interaction tags.
Max Score	To search for evaluations based on the specified max score.
Organization Unit	To search for evaluations based on the organization unit the employee belongs to.
Queue	To search for evaluations of employees belonging to the specified group.
Raw Score	To search for evaluations based on the specified raw score.
Reviewers	To search for evaluations based on the specified reviewers.
Screen Captures	To search for evaluations of interactions with screens. The options to filter evaluations whether the screens are captured from the **Value** field are: • Yes: To filter the evaluations that have screen captures. • No: To filter the evaluations that do not have screen captures.
Site	To search for evaluations of employees belonging to the specified site.
Snippet	To search for a snippet that is a part of an interaction and associate a comment to that section. An employee can click on start and stop and provide a comment for that segment.

Table continues…

Name	Description
Source Type	To search for interactions based on the source.
	The options are:
	• System: The interactions recorded in the application
	• Adhoc-External: The interactions imported from external sources in the supported media formats.
	• Adhoc-Composite: The interactions grouped together from system and imported interactions. It can be a either a group of system interactions, imported interactions or both.
Reporting to	To search for evaluations 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.
Interaction Date	To search for evaluations based on the specific interaction dates.
	The options available when you select **Equals to** as the operator are:
	• Current Week
	• Last Month
	• Last Week
	• This Month
	• Today
	• Yesterday
	For the operators **Not Equal To**, **Contains**, **Does not contain**, **Starts with**, **Does not Starts With**, **Ends With**, **Does not Ends With**, **Less Than**, **Greater Than**, **Less Than or Equal**, and **Greater Than or Equal**, you can select a date.
	For the operator **Between**, you can select a date range.
Interaction Type	To search for evaluations based on the interaction type. The options aer:
	• All
	• Chat
	• Email
	• Sms
Transfer Number	To search for interaction based on the station or the extension number of the party to whom the interaction is transferred.

Table continues…

Name	Description
Transfer Type	To search for interactions based on how you transfer a call. The options are: • Cold Transfer: An agent transfers the customer call to another user without any prior notice to the user to whom the call is transferred. The second user can be another agent or a supervisor. • Conference: An agent adds another agent or supervisor to the call. • Warm Transfer: An agent speaks to another agent or supervisor before transferring a call. The first agent can provide background information about the call to the other agent or supervisor without the caller hearing the conversation. • No Transfer: An agent answers the queries of the caller without transferring the call to another agent or supervisor.
UCID	To search for interactions based on the universal call ID. This ID remains the same even when a call is transferred to another agent or called party.
Percentage	To search for an evaluation based on the evaluation percentage.
Interaction ended by	To search for interactions based on who ended a interaction. The options are: • Agent • Customer

Operators

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

Display Fields

Name	Description
Role	The evaluations of employees with the specified designation or role.
Archived	The option to indicate archived evaluations.
Acceptance Comments	The option to indicate evaluations based on the acceptance comments provided by an employee after accepting an evaluation.
Acceptance Date	The option to indicate evaluations based on the date on which the agent accepted the evaluation comments.
Acceptance Status	The option to indicate evaluations based on the status of an evaluated interaction after it is signed off by an employee.
Called Party	The extension or email ID of the called party.
Calling Party	The extension or email ID of the calling party.
Commented	The option to indicate interactions that are commented. The options to filter interactions based on comments from the **Value** field are: • Yes: To filter the interactions that were commented. • No: To filter the interactions that were not commented.
Criteria Comments	The option to indicate evaluations based on criteria comments.
Department	The option to indicate evaluations of employees belonging to the specified department.
Duration	The option to indicate evaluations by the duration specified in the hh:mm:ss format.
Employee	The option to indicate evaluations based on the employees that you have access to.
Employee Status	The option to indicate evaluations based on employee status. The options are: • Active • Inactive
Evaluation Date	The option to indicate evaluations based on the specified evaluation date.
Evaluation Form	The option to indicate evaluations based on the name of the evaluation form.

Table continues…

Name	Description
Evaluation Modified Date	The option to indicate modified evaluations based on the following options: • Current Week • Last Month • Last Week • This Month • Today • Yesterday
Evaluation Type	The option to indicate evaluations based on the evaluation type.
General Comments	The option to indicate evaluations based on the general comments provided for an evaluation.
Groups	The option to indicate evaluations of employees belonging to the specified group.
Include Calibration Evaluations	The option to indicate evaluations that have been assigned for calibration.
Interactions ID	The option to indicate evaluations based on the interaction ID.
Interaction Comments	The option to indicate evaluations based on the interaction comments.
Interaction Direction	The option to indicate evaluations based on the interaction direction. The options are: • All • Inbound • Outbound
Interaction Tags	The option to indicate evaluations based on the interaction tags.
Max Score	The option to indicate evaluations based on the specified max score.
Organization Unit	The option to indicate evaluations based on the organization unit the employee belongs to.
Queue	The option to indicate evaluations of employees belonging to the specified group.
Raw Score	The option to indicate evaluations based on the specified raw score.
Reviewers	The option to indicate evaluations based on the specified reviewers.
Screen Captures	The option to indicate evaluations of interactions with screens. The options to filter evaluations whether the screens are captured from the **Value** field are: • Yes: To filter the evaluations that have screen captures. • No: To filter the evaluations that do not have screen captures.

Table continues…

Name	Description
Site	The option to indicate evaluations of employees belonging to the specified site.
Snippet	The option to indicate a snippet that is a part of an interaction and associate a comment to that section. An employee can click on start and stop and provide a comment for that segment.
Source Type	The option to indicate interactions based on the source. The options are: • System: The interactions recorded in the application • Adhoc-External: The interactions imported from external sources in the supported media formats. • Adhoc-Composite: The interactions grouped together from system and imported interactions. It can be a either a group of system interactions, imported interactions or both.
Reporting to	The option to indicate evaluations 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.
Interaction Date	The option to indicate evaluations based on the specific interaction dates. The options available when you select **Equals to** as the operator are: • Current Week • Last Month • Last Week • This Month • Today • Yesterday For the operators **Not Equal To**, **Contains**, **Does not contain**, **Starts with**, **Does not Starts With**, **Ends With**, **Does not Ends With**, **Less Than**, **Greater Than**, **Less Than or Equal**, and **Greater Than or Equal**, you can select a date. For the operator **Between**, you can select a date range.

Table continues…

Name	Description
Interaction Type	The option to indicate evaluations based on the interaction type. The options aer: • All • Chat • Email • Sms
Transfer Number	The option to indicate interaction based on the station or the extension number of the party to whom the interaction is transferred.
Transfer Type	The option to indicate interactions based on how you transfer a call. The options are: • Cold Transfer: An agent transfers the customer call to another user without any prior notice to the user to whom the call is transferred. The second user can be another agent or a supervisor. • Conference: An agent adds another agent or supervisor to the call. • Warm Transfer: An agent speaks to another agent or supervisor before transferring a call. The first agent can provide background information about the call to the other agent or supervisor without the caller hearing the conversation. • No Transfer: An agent answers the queries of the caller without transferring the call to another agent or supervisor.
UCID	The option to indicate interactions based on the universal call ID. This ID remains the same even when a call is transferred to another agent or called party.
Percentage	The option to indicate the evaluation percentage.
Interaction ended by	The option to indicate interactions based on who ended a interaction. The options are: • Agent • Customer

Share

Name	Description
Me	The option to set the view as private where other 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 with everyone, the system renders results based on the access with whom the view is shared. ✱ **Note:** Users can only view search results and cannot edit the search results.

Button Name	Description
Save as Report	The option to save a view as an adhoc report. You can view this report in the **Reports** tab.

Viewing draft evaluations

About this task

Use the **Draft Evaluations** tab to view the list of evaluations that are work in progress or are incomplete.

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.

Before you begin
Procedure

1. Click **Evaluate** > **Evaluations** > **Draft Evaluations (*x*)**, where *x* is the number of evaluations that are started but not complete.

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

   The Draft Evaluations page displays a list of evaluations that are in draft state in the selected view.

3. **(Optional)** On the pagination controls, choose the number of records that you want to view on each page.

4. **(Optional)** To filter the columns, click the ▼ icon in the column header of the column which you want to filter.

   You can apply filters on multiple columns.

5. **(Optional)** To clear the filters from all the columns, click the ▼× icon.

6. **(Optional)** To sort the columns, click the **Sort** 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. The third click removes the sorting.

7. **(Optional)** To reset the sorting, click the ◆× icon.

8. To view the details of an evaluation, click the ❯ icon in the specific row.

9. 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.

10. 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.

Draft Evaluations field descriptions

Name	Description
Employee	The name of employee whose interaction is evaluated.
Acceptance Status	The acknowledgement status of an evaluation by an employee. The options are: • Accepted: When an employee accepts an evaluation. The status displays the date and time of the acceptance along with the comments, if any. • Appealed: When an employee rejects the evaluation and requests for another round of evaluation. The status displays the date and time on which the appeal was raised. • No action: When an employee only views the evaluation and takes no action.
Reporting To	The name of the supervisor or manager to whom the employee reports.
Evaluation Date	The date on which the interaction is evaluated.
Evaluated By	The name of the employee who has evaluated the interaction.
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: • Yes • No
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.

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** drop down to search for evaluations that match the filter criteria defined in the view.

   The View Evaluations page displays a list of completed evaluations in the selected view.

3. **(Optional)** On the pagination controls, choose the number of records that you want to view on each page.

4. **(Optional)** To filter the columns, click the ▼ icon in the column header of the column which you want to filter.

   You can apply filters on multiple columns.

5. **(Optional)** To clear the filters from all the columns, click the ▼× icon.

6. **(Optional)** To sort the columns, click the **Sort** 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. The third click removes the sorting.

7. **(Optional)** To reset the sorting, click the ⬍× icon.

8. 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.

9. 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.

10. To view the details of an evaluation, click the ➤ icon in the specific row.

    Avaya Workforce Optimization Select displays the details of the evaluated interaction and a recorder panel for playing back the interaction, where you can click any of the following:

    • ▶ icon: To listen to the recorded interaction.

    • ■ icon: To stop the recorded interaction.

- $\blacksquare$ icon: To stop the playback of a recording and resume from where it stopped.

- [1x ▼] icon: To increase or decrease the speed of the recorded interaction.

- ⊙ icon: To download the interaction.

- ✉ icon: To email the interaction

- ➡ icon: To open the details in a new tab. This is helpful when you are viewing in multiple monitors.

View evaluations field descriptions

Name	Description
Employee	The name of employee whose interaction is evaluated.
Acceptance Status	The acknowledgement status of an evaluation by an employee. The options are:
	• Accepted: When an employee accepts an evaluation. The status displays the date and time of the acceptance along with the comments, if any.
	• Appealed: When an employee rejects the evaluation and requests for another round of evaluation. The status displays the date and time on which the appeal was raised.
	• No action: When an employee only views the evaluation and takes no action.
Reporting To	The name of the supervisor or manager to whom the employee reports.
Evaluation Date	The date on which the interaction is evaluated.
Evaluated By	The name of the employee who has evaluated the interaction.
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.

Table continues…

Name	Description
Screens	The field to indicate if the interaction has screens captures. The options are: • Yes • No
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 adhoc 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 the view options and the sort and filter options in the list.

Procedure

1. Click **Evaluate** > **Evaluations** > **Adhoc Evaluations**.

2. Select a view in the view drop down to search for evaluations that match the filter criteria defined in the view.

   The selected view provides the interactions that match the filters.

3. **(Optional)** On the pagination controls, choose the number of records that you want to view on each page.

4. **(Optional)** To filter the columns, click the ▼ icon in the column header of the column which you want to filter.

   You can apply filters on multiple columns.

5. **(Optional)** To clear the filters from all the columns, click the icon.

6. **(Optional)** To sort the columns, click the **Sort** 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. The third click removes the sorting.

7. **(Optional)** To reset the sorting, click the icon.

8. On the Adhoc Evaluations page, do any of the following:

   • To evaluate an interaction, click the icon in the specific row.

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

The **Type** column in the My Assignments page displays whether the interaction is from Plans or Adhoc.

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

Adhoc 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. The time is available in a mm/dd/yyy hh:mm format.
Transaction Type	The type of channel in which the interaction is recorded. The options are: • **Voice** • **Chat** • **Email**
Queues	The queue that the interaction is associated with. The options are: • Inbound • Outbound
Screens	The field to indicate if the interaction has screens captures. The options are: • **Yes** • **No**
Interaction ID	The unique ID of the interaction that is evaluated.
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.

Table continues…

Name	Description
Transfer Type	The option that specifies how you transfer a call. The options are: • Cold Transfer: An agent transfers the customer call to another user without any prior notice to the user to whom the call is transferred. The second user can be another agent or a supervisor. • Conference: An agent adds another agent or supervisor to the call. • Warm Transfer: An agent speaks to another agent or supervisor before transferring a call. The first agent can provide background information about the call to the other agent or supervisor without the caller hearing the conversation. • No Transfer: An agent answers the queries of the caller without transferring the call to another agent or supervisor.
Transfer Number	The extension or station number of the party to whom the interaction is transferred. In case of conference calls, it is the station or the extension number of another party such as a supervisor or an agent, who's added in to the conference.
Source Type	The source of the interaction to be evaluated. The options are: • System: The interactions recorded in the application • Adhoc-External: The interactions imported from external sources in the supported media formats. • Adhoc-Composite: The interactions grouped together from system and imported interactions. It can be a either a group of system interactions, imported interactions or both.
Interaction ended by	The party who ended the interaction. The options are: • Agent • Customer
UCID	Universal Call ID is the unique tag assigned to a call. UCID provides a way to track calls across multiple communication servers and Voice Response Units.

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: • **Active** • **Inactive**
Score	The score received by the employee during evaluation.

Table continues…

Name	Description
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.

Icon	Name	Description
✎	Edit Interaction	To edit the properties of an imported interaction.

Adding a view

About this task

To search for adhoc evaluations, you can use the AWFOS Default View, 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 Default View consists of predefined filters configured by your system administrator. You cannot modify the filters on this View.

Procedure

1. Click **Evaluate** > **Evaluations** > **Adhoc Evaluations**.

2. To create a new View that match your required criteria, click **Add** .

   Avaya Workforce Optimization Select displays the Create View page where you can define the filter criteria and save the View.

3. On the Create View page, do the following:

   a. Type the name and description of the view.

   b. In **Field**, select the filter in which you want to apply the filter.

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

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

   e. In **Share**, select with whom you want to share the view.

4. Click **Save & Close**.

Create 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. You can set a View as default if you want to see a certain set of interactions each time you login.
Description	The description that helps to understand the reason for creating a view.
Filter	The filter criteria used to search the interactions.
Display Fields	The columns displayed in the search results.
	You can move or remove the fields in the Available Fields screen to the Selected Fields screen while adding a view. The arrows next to the Selected Fields allows the user to rearrange the order of the selected fields.
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: • Role • Archived • Audio Codec • Called Party • Calling Party • Direction • Commented • Department • Duration • Employee • Employee Status • Flagged for QA • Groups • Hold Duration • Hunt Group • Interactions ID • Interaction Comments • Interaction Tags • Interaction Type • No of holds • No of Transfers • Organization Unit • Queue • Queue-Queue Type • Screen Captures • Site • Source Type • Reporting to • Tagged • Tenure (In Weeks)

Table continues…

Using Avaya Workforce Optimization Select
Comments on this document? infodev@avaya.com

Name	Description
	• Transaction Date
	• Transaction Type
	• Transfer Number
	• Transfer Type
	• UCID
	• VDN
	• Interaction ended by
Operator	The operator used to specify the search criteria. The options are:
	• Equals To
	• Not Equal To
	• Contains
	• Does not contain
	• Starts With
	• Does not Start With
	• Ends With
	• Does not End With
	• Less Than
	• Greater Than
	• Less Than or Equal
	• Greater Than or Equal
	• Not Equal To
	• Between
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
Role	To search for interactions of employees with the specified designation or role.
Agent ID	To search for interactions of employees with the specified agent or network ID.

Table continues…

Name	Description
Archived	To search for interactions that are archived.
	The options to filter interactions based on archiving from the **Value** field are:
	• Yes: To filter the interactions that were archived.
	• No: To filter the interactions that were not archived.
Called Party	To search for interactions by the extension number or email ID of the called party. You can use any alphanumeric characters or symbols to search an interaction.
Calling Party	To search for interactions by the extension number or email ID of the calling party. You can use any alphanumeric characters or symbols to search an interaction.
Interaction Status	To search for interactions based on the recording status of the interaction. The options are:
	• NoRTP: Interactions that do not have any voice streams or RTP.
	• Connected: Interactions with voice streams or RTP.
	• Unknown: Non voice interactions.
Commented	To search for interactions that are commented.
	The options to filter interactions based on comments from the **Value** field are:
	• Yes: To filter the interactions that were commented.
	• No: To filter the interactions that were not commented.
Department	To search for interactions of employees who belong to the specified department.
Duration	To search for interactions by the duration specified in the hh:mm:ss format.
Employee	To search for interactions based on the employees that you have access to.
Employee Status	To search for interactions by the status of the employee attending to the interaction. The options are:
	• Active
	• Inactive
Evaluated	To search for evaluated interactions.
Extension	To search for interactions by the extension number of the employee.

Table continues…

Name	Description
Flagged for QA	To search for interactions that are flagged for QA.
	The options to filter interactions based on flagging from the **Value** field are:
	• Yes: To filter the interactions that were flagged for QA.
	• No: To filter the interactions that were not flagged for QA.
Groups	To search for interactions of employees belonging to the specified group.
Hold Duration	To search for interactions based on the hold duration.
Interactions ID	To search for interactions based on the interaction ID.
Interaction Comments	To search for interactions based on specific comments provided by employees.
Interaction Tags	To search for interactions based on the specific tags used for association.
Interaction Type	To search for interactions based on the type of interaction.
No of Holds	To search for interactions with the specified number of holds.
No of Transfers	To search for interactions with the specified number of transfers.
Organization Unit	To search for interactions based on the name of the organizational unit. Use the available operators to define your search criteria.
	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.
Queue	To search for interactions by the queue that the interaction is associated with.
Random Calls	To get a view of the interactions randomly.
	By default, Avaya Workforce Optimization Select displays the list of interactions in the same sequence for all employees using a shared view. If you select this option, Avaya Workforce Optimization Select randomly displays the same list of interactions.
Screen Captures	To search for interactions with screens.
Site	To search for the interactions of employees belonging to the specified site.
Source Type	To search for interactions based on the source.
	The options are:
	• System: The interactions recorded in the application
	• Adhoc-External: The interactions imported from external sources in the supported media formats.
	• Adhoc-Composite: The interactions grouped together from system and imported interactions. It can be a either a group of system interactions, imported interactions or both.

Table continues…

Name	Description
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.
Tagged	To search for tagged interactions. The options to filter interactions based on tags from the **Value** field are: • Yes: To filter the interactions that were tagged. • No: To filter the interactions that were not tagged.
Tenure (In Weeks)	To search for interactions based on the tenure of the employee in weeks.
Transaction Date	To search for interactions based on the following options: • Current Week • Last Month • Last Week • This Month • Today • Yesterday You can also search for interactions for a specific date range.
Language	To search for interactions based on a specified language.
Transfer Type	To search for interactions based on how you transfer a call. The options are: • Cold Transfer: An agent transfers the customer call to another user without any prior notice to the user to whom the call is transferred. The second user can be another agent or a supervisor. • Conference: An agent adds another agent or supervisor to the call. • Warm Transfer: An agent speaks to another agent or supervisor before transferring a call. The first agent can provide background information about the call to the other agent or supervisor without the caller hearing the conversation. • No Transfer: An agent answers the queries of the caller without transferring the call to another agent or supervisor.
UCID	To search for interactions based on the universal call ID. This ID remains the same even when a call is transferred to another agent or called party.
Custom Variables	To search for interactions based on custom variables defined for your business.

Table continues…

Name	Description
Interaction ended by	To search for interactions based on who ended a interaction. The options are: • Agent • Customer

Operator

Name	Description
Equals To	To search for interactions that exactly match the specified value.
Not Equal To	To search for interactions that do not match the specified value. This search operator is not available for the **Transaction Date** field.
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.
Does not Start With	To search for interactions that does not start with a specified value.
Ends With	To search for interactions that ends with a specified value.
Does not End With	To search for interactions that does not end with a 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.
Not Equal To	To search for interactions that is not equal to a specified value.
Between	To search for interactions that lie between the specified values.

Display Fields

Name	Description
Role	The designation of the employee in the organization.
Archived	The option to indicate if the interaction is archived.
Audio Codec	To search for interactions that are compressed using the selected audio codec.
Called Party	To search for interactions by the extension number or email ID of the called party. You can use any alphanumeric characters or symbols to search an interaction.

Table continues…

Name	Description
Calling Party	To search for interactions by the extension number or email ID of the calling party. You can use any alphanumeric characters or symbols to search an interaction.
Direction	To direction of the interaction. The options are • All • Inbound • Outbound
Commented	To search for interactions that are commented. The options to filter interactions based on comments from the **Value** field are: • Yes: To filter the interactions that were commented. • No: To filter the interactions that were not commented.
Department	The name of the department that the employee belongs to.
Duration	To search for interactions by the duration specified in the hh:mm:ss format.
Employee	To search for interactions based on the employees that you have access to.
Employee Status	To search for interactions by the status of the employee attending to the interaction. The options are: • Active • Inactive
Flagged for QA	The option to indicate if an interaction is selected for quality analysis.
Groups	The name of the group that the employee belongs to.
Hold Duration	The total duration for which the employee put the interaction on hold in the hh:mm:ss format.
Hunt Group	A grouping of extensions handled by agents to interact.
Interaction ID	To search for interactions based on the interaction ID.
Interaction Comments	To search for interactions based on specific comments provided by employees.
Interaction Tags	To search for interactions based on the specific tags used for association.
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.
Organization Unit	The name of the organization unit that the employee belongs to.
Queue	To search for interactions by the queue that the interaction is associated with.
Queue-Queue Type	The queue that the interaction is associated with.
Screen Captures	To search for interactions with screens.

Table continues…

Name	Description
Site	The name of the site that the employee belongs to.
Source Type	The source of the interaction. The options are: • System: The interactions recorded in the application • Adhoc-External: The interactions imported from external sources in the supported media formats. • Adhoc-Composite: The interactions grouped together from system and imported interactions. It can be a either a group of system interactions, imported interactions or both.
Reporting to	The supervisor to whom the employee handling the interaction reports to.
Tagged	The option to indicate if an interaction is tagged.
Tenure (In Weeks)	The employee's tenure in the organization in weeks.
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: • Voice • Chat • Email
Transfer Number	The station or extension number of the party to whom the interaction is transferred.
Transfer Type	The option that specifies how you transfer a call. The options are: • Cold Transfer: An agent transfers the customer call to another user without any prior notice to the user to whom the call is transferred. The second user can be another agent or a supervisor. • Conference: An agent adds another agent or supervisor to the call. • Warm Transfer: An agent speaks to another agent or supervisor before transferring a call. The first agent can provide background information about the call to the other agent or supervisor without the caller hearing the conversation. • No Transfer: An agent answers the queries of the caller without transferring the call to another agent or supervisor.
UCID	Universal Call ID is the unique tag assigned to a call. UCID provides a way to track calls across multiple communication servers and Voice Response Units. This ID remains the same even when a call is transferred to another agent or called party.
VDN	An extension number that is used to enable calls to connect to a vector for processing. The calls are routed to a vector through VDNs. As part of processing, the calls whose digits match with that of the VDN, are routed to a specific destination.

Table continues…

Name	Description
Interaction ended by	The interaction that indicates who ended a interaction. The options are: • Agent • Customer

Share

Name	Description
Me	The option to set the view as private where other users cannot 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 with everyone, the system renders results based on the access with whom the view is shared. **⊛ Note:** Users can only view search results and cannot edit the search results.

Calibrations overview

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 calibration

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 Calibration page displays list of all calibrations that you have created.

2. **(Optional)** On the pagination controls, choose the number of records that you want to view on each page.

3. **(Optional)** To filter the columns, click the ▼ icon in the column header of the column which you want to filter.

   You can apply filters on multiple columns.

4. **(Optional)** To clear the filters from all the columns, click the ▼ₓ icon.

5. **(Optional)** To sort the columns, click the **Sort** 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. The third click removes the sorting.

6. **(Optional)** To reset the sorting, click the ⬍ₓ icon.

7. To edit a calibration, click the ❯ 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.

8. 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.

Calibration 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 Date	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. Click **Create Calibration**.

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

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

5. 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.

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

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

8. If you do not want evaluators to calibrate post the due date, click the **Lock On Due Date** check box.

9. If you want the system to display the evaluation as a Calibration, click the **Show it as a Calibration** check box.

   Avaya Workforce Optimization Select displays the evaluation as Calibration in the My Assignments page of the evaluators.

   If the user does not select the option, the My Assignments screen displays the evaluation as a task from Evaluation Plan.

New 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.
Reporting To	The name of the supervisor or manager the employee reports to.
Extension	The extension of the employee.
Queue	The queue to which the interaction belongs.

Table continues…

Using Avaya Workforce Optimization Select

Name	Description
Direction	The direction of the call. The options are: • Inbound • Outbound
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.
Duration	The total duration of the interaction.

Select Reviewers

Name	Description
Evaluation Form	The form based on which the evaluation is performed.
Due Date	The due by which the calibration needs to be performed.
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 overview

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. The 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 the appeal. 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

Processing appeals

About this task

Depending on the role defined in the appeals workflow, you can process appeals from the Appeals page. Use this procedure to review, accept, decline, draw, and escalate an appeal request. You can also track the status of the appeal from the Appeals page.

Procedure

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

   The Appeals page displays the list of appeals raised.

2. **(Optional)** On the pagination controls, choose the number of records that you want to view on each page.

3. **(Optional)** To filter the columns, click the ▼ icon in the column header of the column which you want to filter.

   You can apply filters on multiple columns.

4. **(Optional)** To clear the filters from all the columns, click the ▼x icon.

5. **(Optional)** To sort the columns, click the **Sort** 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. The third click removes the sorting.

6. **(Optional)** To reset the sorting, click the ↕x icon.

7. To view the appeal details, click the ❯ icon in the desired row.

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

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

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

    The appeal status changes and appears on the Appeals page.

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.
Pre-Appeal 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.

Managing adhoc reports

Adhoc reports overview

Using adhoc reports, a user can access, and generate reports in the following modules of Avaya Workforce Optimization Select view criteria.

- Interactions
- Evaluate
- Learn
- Coach

Adhoc reports are ideal for users who do not have access to the Reports module or who want to use the comprehensive view criteria to generate a report.

Each module contains a **Reports** tab from where you can access the adhoc reports. You can also access these reports from the Reports module from the **Adhoc Reports** tab. The adhoc reports data in any interface is specific to the module in which it is placed. For example, the Reports tab in the Interaction module contains only those reports that are generated using Interaction View.

Using adhoc reports, you can:

- View the data generated by using Views in the respective modules.
- Edit the adhoc reports depending on your business needs.
- Select and generate any report and view the reports in the Results screen of the Reports module.
- Schedule the adhoc reports based on user preferences by providing email options.
- Export the data from the adhoc reports to Excel and PDF formats and print, email, or download the files for future use.
- Share the reports with selected employees or with everyone.
- Delete and run the reports in the respective modules without navigating to the Reports module.

Saving a view as adhoc report

About this task

Use this procedure to save an existing view in the Evaluate module as an adhoc report. You cannot edit or save a view if an appeal is in progress against an evaluation view.

Before you begin

Ensure that a view exists or create a view.

Procedure

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

   The system displays the evaluations in the default view.

2. In the **View** field, click the view that you want to edit and save as an adhoc report.

3. Click **Edit**.

   The system displays the Edit View page where you can make the required changes, if you want.

4. After making the changes, click **Save as Report**.

   Avaya Workforce Optimization Select displays the Adhoc Reports page.

5. Type the name of the reports, and select the output type that you want to generate the report.

6. Click **Save**.

Viewing adhoc report

About this task

Use this procedure to view the reports generated using the Evaluate module.

Procedure

1. Click **Evaluate** > **Reports**.

   The Reports page displays the list of existing reports.

2. From the drop-down list, click the report you want to view, which you have saved as an adhoc report.

   Avaya Workforce Optimization Select displays the details of the report. You can download, email, or print the report.

3. **(Optional)** On the pagination controls, choose the number of records that you want to view on each page.

4. **(Optional)** To filter the columns, click the ⬇ icon in the column header of the column which you want to filter.

   You can apply filters on multiple columns.

5. **(Optional)** To clear the filters from all the columns, click the ⬇ icon.

6. **(Optional)** To sort the columns, click the **Sort** 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. The third click removes the sorting.

7. **(Optional)** To reset the sorting, click the ⬍ icon.

Editing an adhoc report

Before you begin

Ensure that a view exists or create a view.

Procedure

1. Click **Evaluate** > **Reports**.

   The Reports page displays the list of existing reports.

2. From the drop-down list, select the report that you want to edit, and click **Edit**.

3. On the Edit View page, make the required changes, and click **Save & Close**.

Emailing an adhoc report

Before you begin

Ensure that a view exists or create a view.

About this task

You can email an adhoc report if you want other users to view it. The report is sent as an attachment in the format in which the view is saved as an adhoc report.

Procedure

1. Click **Evaluate** > **Reports**.

   The system displays the list of existing reports.

2. Select the report that you want to send as an email, and click **Email**.

3. On the Email Report window, type the name of the recipient, and enter your comments.

4. Click **Send**.

Downloading an adhoc report

About this task

Use this procedure to download your report in a pdf, excel, or csv format, which depends on the format that you specify when saving the view as an adhoc report.

Before you begin

Ensure that a view exists or create a view.

Specify the format when saving the view as an adhoc report.

Procedure

1. Click **Evaluate** > **Reports**.

   The Reports page displays the list of existing reports.

2. Select the report that you want to download, and click **Download**.

   The system downloads the adhoc reports in the format that you specified while saving the view.

3. Save the report for future reference.

Printing an adhoc report

About this task

You can print the adhoc reports in the format in which you saved the view as a report.

Before you begin

Ensure that a view exists or create a view.

Procedure

1. Click **Evaluate** > **Reports**.

   The Reports page displays the list of existing reports.

2. Select the report that you want to print, and click **Print**.

   The system displays the adhoc report in the format in which you saved the view as a report.

3. **(Optional)** To get a hard copy of the report, click the 🖶 icon in the lower-right corner of the page.

Adhoc reports field descriptions

Evaluate Reports

Name	Description
Employee	The name of the employee for whom the adhoc report is created.
Acceptance Status	The status of an evaluated interaction after it is signed off by an employee. The options are: • Accepted: When an employee accepts an evaluation. The status displays the date and time of the acceptance along with the comments, if any. • Appealed: When an employee rejects the evaluation and requests for another round of evaluation. The status displays the date and time on which the appeal was raised. • No action: When an employee only views the evaluation and takes no action.
Interaction ID	The unique ID of the interaction that is evaluated.
Transaction Type	The type of channel on which the transaction is delivered. The options are: • Voice • Chat • Email
Queue	The queue that the evaluation is associated with.
Form	The form based on which the evaluation is performed.
Score	The score that the employee receives during the evaluation.
Max Score	The cumulative score of the raw scores or the weighted scores. Note that the bonus score or the penalty score does not get added to the max possible score. For example: If the maximum score is 100 and bonus is 5, then the agent scores 105, the percentage is 105%. However the maximum score is 100. The application does not add bonus or penalty to the max score.
Evaluated By	The name of the employee who evaluated the adhoc report.
Evaluation Date	The time when the adhoc report is created in a date and 24–hour format: dd:mm:yyyy hh:mm:ss. For example: 05/02/2017 23:21:03
Screens	The field to indicate if the evaluation has screen captures. The options are: • Yes • No

Table continues…

Name	Description
Acceptance Comments	The option for an agent to comment after accepting an evaluation of an interaction. This is an optional field.
Acceptance Date	The date on which the agent accepted the evaluation comments.
Evaluation Type	The type of evaluation. For example, Adhoc, Exclude, Mock, or Normal.
Source Type	The source of the interaction. The options are: • System: The interactions recorded in the application • Adhoc-External: The interactions imported from external sources in the supported media formats. • Adhoc-Composite: The interactions grouped together from system and imported interactions. It can be a either a group of system interactions, imported interactions or both.
Reporting to	The name of the reporting manager of the employee.
Transfer Type	The option that specifies how you transfer a call. The options are: • Cold Transfer: An agent transfers the customer call to another user without any prior notice to the user to whom the call is transferred. The second user can be another agent or a supervisor. • Conference: An agent adds another agent or supervisor to the call. • Warm Transfer: An agent speaks to another agent or supervisor before transferring a call. The first agent can provide background information about the call to the other agent or supervisor without the caller hearing the conversation. • No Transfer: An agent answers the queries of the caller without transferring the call to another agent or supervisor.
UCID	Universal Call ID is the unique tag assigned to a call. UCID provides a way to track calls across multiple communication servers and Voice Response Units.
Interaction ended by	The party who ended the interaction. The options are: • Agent • Customer

Button	Description
Download	To download the adhoc report.
Email	To mail the adhoc report.
Print	To print the adhoc report.

Chapter 7: Managing coaching

Coach overview

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.

Using the Coach module, you can:

- Address coaching needs of an agent by identifying areas of focus and define parameters to specify skills and reasons for coaching.
- Build a coaching plan to define the number of coaching sessions agents need to complete within a specified period.
- Create task-oriented action plans in the form of coachings and assign them to agents to improve specific areas. Coachings are usually Instructor Led Training (ILT) sessions that are tracked in Avaya Workforce Optimization Select. Supervisors and managers 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 coaching assignments 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 Skill 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 Skills page displays the new skill that you created.

Add New Skill field descriptions

Name	Description
Skills	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.

Add New Reason field descriptions

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

Supervisors, managers, or quality analysts can use the coaching plans to plan the number of coaching assignments that the employees are assigned to.

Procedure

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

   The Plan page displays the list of coaching plans.

2. **(Optional)** On the pagination controls, choose the number of records that you want to view on each page.

3. **(Optional)** To filter the columns, click the ▾ icon in the column header of the column which you want to filter.

   You can apply filters on multiple columns.

4. **(Optional)** To clear the filters from all the columns, click the ▾ₓ icon.

5. **(Optional)** To sort the columns, click the **Sort** 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. The third click removes the sorting.

6. **(Optional)** To reset the sorting, click the ◆ₓ icon.

Plan 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.
Status	The status of the plan. The options are: • Active: You must publish a plan to make it active. • Inactive: This is the default option.

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 Plan page displays the list of coaching plans.

2. Click **Create**.

3. On the Definition page, enter the appropriate details and click **Save**.

   Avaya Workforce Optimization Select displays the Employee Section page.

4. On the Employee Section page, do the following:

   a. To apply the filter that you defined in the employee filter to be assigned to the coaching plan, click **Apply Filter**.

b. Assign the number of coaching assignments that the assigned employees are expected to complete in the **Target** field.

c. Select the check box next to the employee based on the criteria available and define the number of assignments to be taken by them as part of the plan and click **Save**.

Avaya Workforce Optimization Select displays the Preview & Save page where you can review the accuracy and a summary of the details of the coaching plan.

5. On the Preview & Save page, click one of the following:

   • **Save**: to save the coaching plan in the Plans list

   • **Publish**: to change the plan into active state

   > ✱ **Note:**
   >
   > Only active plans are available to supervisors or managers for associating with a coaching task.

Plans field descriptions

Definition

Name	Description
Coaching Plan	The coaching plan that is associated with the coaching. Depending on the plan selected, coaching assignments are 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. 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.

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 To** • **Not Equal To** • **Contains** • **Does Not Contain** • **Starts With** The default value is **Equals**.
Value	The numerical value or value ranges selected for the **Field** and **Operator** selected. This field cannot exceed 500 characters.

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.

Table continues…

Name	Description
Number of Coaching Assignments	The number of coaching assignments that you want the employee to complete. You must type `0` in the **Number of Coaching Assignments** 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.
Supervisor	The reporting manager of the employee. This field is mandatory.
Department	The department that the employee belongs to.
Average QA Score	The average quality score received by the employee across all evaluations.

Preview & Save

Name	Description
Coaching Plan	The coaching plan that is associated with the coaching. Depending on the plan selected, coaching assignments are created for the employees who were targeted as part of plan.
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.
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.
Status	The status of the plan. Only active plans are available to supervisors or managers for associating with a coaching task.
Employee	The name of the employee to whom the coaching assignment is assigned.
Tenure	The tenure in weeks of the employee in the organization.
Number of Coaching Assignments	The number of coaching assignments that you want the employee to complete.

Button Name	Description
Save	To save the plan at any stage of creating
Edit	To edit the plan details
Publish	To publish the plan to change the status of the plan to active Only active plans are available to supervisors or managers for associating with a coaching task.

Adding a view

About this task

To search for coachings, you can use the AWFOS Default view, 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 Default view consists of predefined filters configured by your system administrator. You cannot modify the filters on this view.

Procedure

1. Click **Coach** > **Coachings**.

   The system displays the coachings in the default view.

2. Click **Add**.

   The system displays the Create View page.

3. On the Create View page, do the following:

   a. Type the name and description of the view.

   b. In **Field**, select the filter in which you want to apply the filter.

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

   d. In value, enter the value that the records must match.

4. Click **Save & Close**.

   Note:

   Alternatively the view can be saved as a report.

Add View field descriptions

Name	Description
Name	The name of the view.
	This field is mandatory.
Default	The option to display the selected view as the default. You can set a view as default if you want to see a certain set of coachings each time you login.
Description	The description that helps to understand the reason for creating a view.
Filter	The filter criteria used to search the coachings.
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: • Role • Coaching Level • Coaching Status • Completion Date • Delivery Date • Department • Employee Status • Follow Up Date Time • Groups • Organization Unit • Site
Operator	The operator used to specify the search criteria. The options are: • Equals To • Not Equal To • Contains • Does not Contain • Starts With • Does not Starts With • Ends With • Does not Ends With • Less Than • Greater Than • Less Than or Equal • Greater Than or Equal • Not Equal To • Between • Includes • Excludes
Value	The value specified in the search query that is used to match the records. You can view the list of coachings that match the value in this list.

Field

Name	Description
Role	To search for coachings based on the designation of the employee in the organization.
Coaching Level	To search for coachings
Coaching Status	To search for the status of the coaching whether the coaching is accepted, completed, or new.
Completion Date	To search for coachings based on the completion date.
Delivery Date	To search for coachings based on a delivery day, week, or month.
Department	To search for a coaching by the name of the department that the employee belongs to.
Employee Status	To search for an interaction by the status of the employee attending to the interaction. The options are: • Active • Inactive
Follow Up Date Time	To search for coachings based on a follow up day, week, or month.
Groups	To search for coachings of employees belonging to the specified group. To search for coachings based on the status of the employee. The options are: • Active • Passive
Organization Unit	To search for coachings based on the name of the organizational unit. Use the available operators to define your search criteria. 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 coachings of employees belonging to the specified site.

Operator

Name	Description
Equals To	To search for coachings that exactly match the specified value.
Not Equal To	To search for coachings that do not match the specified value.
Contains	To search for coachings that have the string or text that match the specified value.
Does not Contain	To search for coachings that do not have the specified value.
Starts with	To search for coachings that start with the specified value.
Does not Starts With	To search for coachings that does not start with the specified value.
Ends With	To search for coachings that ends with the specified value.

Table continues…

Name	Description
Does not Ends With	To search for coachings that does not end with the specified value.
Less Than	To search for coachings that have a value less than the specified value.
Greater Than	To search for coachings that have a value that is greater than the specified value.
Less Than or Equal	To search for coachings that have a value less than or equal to the specified value.
Greater Than or Equal	To search for coachings that have a value greater than or equal to the specified value.
Between	To search for coachings that lie between the specified value.

Share

Name	Description
Me	The option to set the view as private where other 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 with everyone, the system renders results based on the access with whom the view is shared.
	✳ **Note:**
	Users can only view search results and cannot edit the search results.

Button Name	Description
Save as Report	The option to save a view as an adhoc report. You can view this report in the **Reports** tab.

Viewing coaching assignments

About this task

Use this procedure to view the Coachings 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.

You can create a new coaching assignment, edit or delete existing coaching sessions if you have adequate privileges.

Procedure

1. Click **Coach** > **Coachings**.

   The Coachings page displays a list of coaching sessions.

2. To view the details of a coaching assignment, click the ❯ icon in the desired row.

3. **(Optional)** On the pagination controls, choose the number of records that you want to view on each page.

4. **(Optional)** To filter the columns, click the ▼ icon in the column header of the column which you want to filter.

   You can apply filters on multiple columns.

5. **(Optional)** To clear the filters from all the columns, click the ▼× icon.

6. **(Optional)** To sort the columns, click the **Sort** 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. The third click removes the sorting.

7. **(Optional)** To reset the sorting, click the ⬍× icon.

8. To delete a coaching assignment, click **Delete**.

My 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.
Skills	The unique name of the skill that you are creating for a coaching assignment.
Reasons for Coaching	The unique name of the reason that you are creating for a coaching assignment.
Delivery Date	The expected delivery 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.
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 also 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 Assignments page.

Procedure

1. Click **Coach** > **Coachings**.

   The Coachings page displays a list of coaching sessions.

2. Click **Create**.

3. On the Coachings page, do the following:

   a. Enter the appropriate details in the **Coaching Plan**, **Coach**, **Coaching Level**, and **Coaching Purpose** fields.

   b. To apply the filter that you defined in the employee filter to be assigned to the coaching assignment, click **Apply Filter**.

   c. In Employee List section, select the check box next to the employee based on the criteria available and enter the details rest of the fields.

   d. Click **Assign Coaching**.

   The system saves the coaching assignment and displays on the Coachings screen. Employees whom you have assigned this coaching assignment receive a notification in their inbox that a new coaching assignment is available for them.

Coachings 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.

Table continues…

Name	Description
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**.

Table continues…

Name	Description
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.
Number of Coaching Assignments	The number of coaching assignments that you want the employee to complete.
	You must enter `0` in the **Number of Coaching Assignments** 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.
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.
Skills	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.

Button Name	Description
Apply Filter	To apply the filter that you defined in the employee filter to be assigned to the coaching assignment
Assign	To associate a course or a quiz to an assignment
Assign Coaching	To assign the coaching assignment after entering all the details on the Coachings page

Viewing My Assignments

About this task

Use the My Assignments 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 Assignments 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

1. Click **Coach** > **My Assignments** *(x)*, where *(x)* is the number of assignments assigned to you.

   The My Assignments page displays the assignments assigned to you.

2. **(Optional)** On the pagination controls, choose the number of records that you want to view on each page.

3. **(Optional)** To filter the columns, click the ▼ icon in the column header of the column which you want to filter.

   You can apply filters on multiple columns.

4. **(Optional)** To clear the filters from all the columns, click the ⧨ icon.

5. **(Optional)** To sort the columns, click the **Sort** 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. The third click removes the sorting.

6. **(Optional)** To reset the sorting, click the ⧩ icon.

My 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.

Table continues…

Name	Description
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.

Managing adhoc reports

Adhoc reports overview

Using adhoc reports, a user can access, and generate reports in the following modules of Avaya Workforce Optimization Select view criteria.

- Interactions
- Evaluate
- Learn
- Coach

Adhoc reports are ideal for users who do not have access to the Reports module or who want to use the comprehensive view criteria to generate a report.

Each module contains a **Reports** tab from where you can access the adhoc reports. You can also access these reports from the Reports module from the **Adhoc Reports** tab. The adhoc reports data in any interface is specific to the module in which it is placed. For example, the Reports tab in the Interaction module contains only those reports that are generated using Interaction View.

Using adhoc reports, you can:

- View the data generated by using Views in the respective modules.
- Edit the adhoc reports depending on your business needs.
- Select and generate any report and view the reports in the Results screen of the Reports module.
- Schedule the adhoc reports based on user preferences by providing email options.
- Export the data from the adhoc reports to Excel and PDF formats and print, email, or download the files for future use.
- Share the reports with selected employees or with everyone.

• Delete and run the reports in the respective modules without navigating to the Reports module.

Saving a view as an adhoc report

Before you begin

Ensure that a view exists or create a view.

Procedure

1. Click **Coach** > **Coachings**.

   The system displays the coachings in the default view.

2. In the **View** field, click the view that you want to edit and save as an adhoc report.

3. Click **Edit**.

   The system displays the Edit View page where you can make the required changes, if you want.

4. After making the changes, click **Save as Report**.

   Avaya Workforce Optimization Select displays the Adhoc Reports page.

5. Type the name of the reports, and select the output type that you want to generate the report.

6. Click **Save**.

Related links

[Adding a view](#) on page 228

Viewing adhoc reports

About this task

Use this procedure to view the reports generated by using the Coach module.

Procedure

1. Click **Coach** > **Reports**.

   The Reports page displays the list of existing reports.

2. From the drop-down list, click the report that you want to view, which you saved as an adhoc report.

   displays the details of the report. You can download, email, or print the report.

3. **(Optional)** On the pagination controls, choose the number of records that you want to view on each page.

4. **(Optional)** To filter the columns, click the ⧩ icon in the column header of the column which you want to filter.

You can apply filters on multiple columns.

5. **(Optional)** To clear the filters from all the columns, click the ⧩ icon.

6. **(Optional)** To sort the columns, click the **Sort** 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. The third click removes the sorting.

7. **(Optional)** To reset the sorting, click the ⧩ icon.

Editing an adhoc report

Before you begin

Ensure that a view exists or create a view.

Procedure

1. Click **Coach** > **Reports**.

The Reports page displays the list of existing reports.

2. Select the report that you want to edit, and click **Edit**.

3. On the Edit View page, make the required changes, and click **Save & Close**.

Emailing an adhoc report

Before you begin

Ensure that a view exists or create a view.

About this task

Use this procedure to email an adhoc report if you want other users to view it. The report is sent as an attachment in the format in which the view is saved as an adhoc report.

Before you begin
Procedure

1. Click **Coach** > **Reports**.

The Reports page displays the list of existing reports.

2. Select the report that you want to send as an email, and click **Email**.

3. On the Email Report page, type the name of the recipient, and enter your comments.

4. Click **Send**.

Downloading an adhoc report

About this task

Supervisors and managers can download adhoc reports in a specified format to keep for future reference.

Before you begin

- Ensure that a view exists or create a view.
- Ensure that you specify the format when saving the view as an adhoc report.

Procedure

1. Click **Coach** > **Reports**.

   The Reports page displays the list of existing reports.

2. Select the report that you want to download, and click **Download**.

   The system downloads the adhoc reports in the format that you specified while saving the view.

Printing an adhoc report

About this task

You can print the adhoc reports in the format in which you saved the view as a report.

Before you begin

Ensure that a view exists or create a view.

Procedure

1. Click **Coach** > **Reports**.

   The Reports page displays the list of existing reports.

2. Select the report that you want to print, and click **Print**.

   The system displays the adhoc report in the format in which you saved the view as a report.

3. **(Optional)** To get a hard copy of the report, click on the 🖶 icon in the upper-right corner of the page.

Reports field descriptions

Coach Reports

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.
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.
Coach	The name of the coach assigned to the employee for coaching.
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. The options are: • New • Complete

Button	Description
Download	To download the adhoc report.
Email	To mail the adhoc report.
Print	To print the adhoc report.

Chapter 8: Managing learning

Learn overview

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.

Using the Learn module you can:

- Upload videos, slide presentations, and other courseware to assign to selected employees.
- 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

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

2. **(Optional)** On the pagination controls, choose the number of records that you want to view on each page.

3. **(Optional)** To filter the columns, click the ▼ icon in the column header of the column which you want to filter.

   You can apply filters on multiple columns.

4. **(Optional)** To clear the filters from all the columns, click the ▼ₓ icon.

5. **(Optional)** To sort the columns, click the **Sort** 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. The third click removes the sorting.

6. **(Optional)** To reset the sorting, click the ⬍ₓ icon.

Library field descriptions

Name	Description
Format	The format of the course or quiz.
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 created.
Duration	The duration of the course or quiz that is assigned.
Type	The type of assignment. The options are: • **Course** • **Quiz** • **Course & Quiz**
Status	The status of the assignment. You can assign an option only when it is in active state. The options are: • Inactive: This is the default option. • Active: Only active assignments are available for associating with a library.

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**.

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, and also on the My Assignments screen of the employee.

Adding a quiz

Procedure

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

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

3. On the Definitions screen, enter the appropriate details and click **Save as Draft**.

4. On the Questions screen, click **Add**.

5. On the Add Question page, do the following:

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

   b. In the **Options** 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. To save the question, click **Save & Close**.

   e. To add as many questions to the quiz as you want, click **Save & Add another**

   The question automatically gets displayed in the **Questions** tab.

6. Click **Save as Draft**.

7. On the Grading screen, enter a grade to the quiz and click **Save as Draft**.

8. On the Preview screen, get a view of the summary of the quiz and to review the data for accuracy and click one of the following:

9. Click one of the following:

   • **Save**: To save the quiz

   • **Publish**: To change the plan to active state

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.

Table continues…

Name	Description
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. The value for this field cannot exceed 4 characters.
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. The value for 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. The value for this field cannot exceed 3 characters.
OUs	The organization associated with the library.
Skills	The skill or competency that you want the employee to develop. ✱ **Note:** Skills are created in the Parameters section.

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	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.
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.

Preview

Name	Description
Definition	The quiz details you have entered while adding the quiz.
Questions	The questions and the options you have created while adding the quiz.
Grading	The grading range details you specified while adding the quiz.

Copying a quiz

About this task

Use this procedure to copy a quiz from the source to the destination library to increase its reach in the organization. Unlike a course, a quiz cannot be uploaded to the assignments, must be manually created, and can be specific.

Procedure

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

2. On the Library page, select the quiz that you want to copy from the directory list.

   ⊛ **Note:**

   • You can select only one quiz at a time.

   • You can select only the quizzes with active status.

3. Click **Copy**.

4. On the Create duplicate Course/Quiz page, type the name of the quiz.

   • You can also retain the default, which is the name of the original quiz. In this case, the Library page displays the name as Copy of *x*, where x is the name of the original quiz.

   • You can also create a copy of the copied quiz.

5. Click **Create**.

   The Library page displays the copy of the quiz in the directory list.

6. To delete a copy, select the row that contains the quiz and click **Delete** .

   If you delete the original quiz, the copy of the quiz is not impacted.

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 Course page, enter the appropriate details and click one of the following:

   • **Save & Close**: To save the course.

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

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.
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 for number of days is 4 digits.
OU(s)	The name of the organization units who can access the course.
Skills	The skill or competency that you want the employee to develop. 😊 **Note:** Skills are created in the Parameters section.

Adding a view

About this task

To search for learning assignments, you can use the AWFOS Default view, 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 Default view consists of predefined filters configured by your system administrator. You cannot modify the filters on this view.

Procedure

1. Click **Learn** > **Team Assignments**.

   The system displays the assignments in the default view.

2. Click **Add**.

   The system displays the Create View page.

3. On the Create View page, do the following:

   a. Type the name and description of the view.

   b. In **Field**, select the filter in which you want to apply the filter.

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

   d. In value, enter the value that the records must match.

4. Click **Save & Close**.

Related links

[Add a view field descriptions](#) on page 250

Add a view field descriptions

Create View

Name	Description
Name	The name of the view. This field is mandatory.
Default	The option to display the selected view as the default. You can set a view as default if you want to see a certain set of assignments each time you login.
Description	The description that helps to understand the reason for creating a view.
Filter	The filter criteria used to search the assignments.
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: • Role • Assigned Date • Department • Due Date • Employee Status • Groups • Organization Unit • Site
Operator	The operator used to specify the search criteria. The options are: • Equals To • Not Equal To • Contains • Does not Contain • Starts With • Does not Starts With • Ends With • Does not Ends With • Less Than • Greater Than • Less Than or Equal • Greater Than or Equal • Not Equal To • Between
Value	The value specified in the search query that is used to match the records. You can view the list of assignments that match the value in this list.

Field

Name	Description
Role	To search for assignments based on the designation of the employee in the organization.
Assigned Date	To search for an assignment based on the day, week, or month when the assignment was assigned.
	A user can access the data based on a specific selected date.
Department	To search for an assignment by the name of the department that the employee belongs to.
Due Date	To search for an assignment by based on the completion day, week, or month.
	A user can access the data based on a specific selected date.
Employee Status	To search for an assignment by the status of the employee attending to the interaction. The options are:
	• Active
	• Inactive
Groups	To search for assignments of employees belonging to the specified group.
Organization Unit	To search for assignments based on the name of the organizational unit. Use the available operators to define your search criteria.
Site	To search for assignments of employees belonging to the specified site.

Operators

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

Table continues…

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

Button Name	Description
Save as Report	The option to save a view as an adhoc report. You can view this report in the **Reports** tab.

Related links

Viewing team assignments

About this task

Use the Team Assignments 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

1. Click **Learn** > **Team Assignments**.

   Avaya Workforce Optimization Select displays the list of team assignments.

2. **(Optional)** On the pagination controls, choose the number of records that you want to view on each page.

3. **(Optional)** To filter the columns, click the ▼ icon in the column header of the column which you want to filter.

   You can apply filters on multiple columns.

4. **(Optional)** To clear the filters from all the columns, click the ▼× icon.

5. **(Optional)** To sort the columns, click the **Sort** 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. The third click removes the sorting.

6. **(Optional)** To reset the sorting, click the ↕× icon.

Team Assignments field descriptions

Name	Description
Format	The format of the course or quiz.
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 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. The system displays the scores only if the assignment contains 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 Assignments 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

1. Click **Learn** > **My Assignments**.

   The My Assignments (x) page displays a list of courses or quizzes that are assigned to you, where *x* denotes the number of incomplete tasks.

2. **(Optional)** On the pagination controls, choose the number of records that you want to view on each page.

3. **(Optional)** To filter the columns, click the ▼ icon in the column header of the column which you want to filter.

   You can apply filters on multiple columns.

4. **(Optional)** To clear the filters from all the columns, click the ▼ₓ icon.

5. **(Optional)** To sort the columns, click the **Sort** 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. The third click removes the sorting.

6. **(Optional)** To reset the sorting, click the ⬍ₓ icon.

My Assignments field descriptions

Name	Description
Format	The format of the course or quiz.
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 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.

Table continues…

Name	Description
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

Before you begin

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

Procedure

1. Click **Learn** > **My Assignments**.

   The My Assignments (x) page displays a list of courses or quizzes that are assigned to you, where *x* denotes the number of incomplete tasks.

2. Click the course or quiz.

   Avaya Workforce Optimization Select plays the course or quiz directly in your default web browser using Windows Media Player.

3. View the course status on completion.

   If a particular course is not yet complete, the quiz details associated to that course displays as `Pending`.

Managing adhoc reports

Adhoc reports overview

Using adhoc reports, a user can access, and generate reports in the following modules of Avaya Workforce Optimization Select view criteria.

- Interactions
- Evaluate
- Learn
- Coach

Adhoc reports are ideal for users who do not have access to the Reports module or who want to use the comprehensive view criteria to generate a report.

Each module contains a **Reports** tab from where you can access the adhoc reports. You can also access these reports from the Reports module from the **Adhoc Reports** tab. The adhoc reports data in any interface is specific to the module in which it is placed. For example, the Reports tab in the Interaction module contains only those reports that are generated using Interaction View.

Using adhoc reports, you can:

- View the data generated by using Views in the respective modules.
- Edit the adhoc reports depending on your business needs.
- Select and generate any report and view the reports in the Results screen of the Reports module.
- Schedule the adhoc reports based on user preferences by providing email options.
- Export the data from the adhoc reports to Excel and PDF formats and print, email, or download the files for future use.
- Share the reports with selected employees or with everyone.
- Delete and run the reports in the respective modules without navigating to the Reports module.

Saving a view as an adhoc report

About this task

Use this procedure to save an existing view in the Learn module as an adhoc report.

Before you begin

Ensure that a view exists or create a view.

Procedure

1. Click **Learn** > **Team Assignments**.

   The system displays the assignments in the default view.

2. In the **View** field, click the view that you want to edit and save as an adhoc report.

3. Click **Edit**.

   The system displays the Edit View page where you can make the required changes, if you want.

4. After making the changes, click **Save as Report**.

   Avaya Workforce Optimization Select displays the Adhoc Reports page.

5. Type the name of the reports, and select the output type that you want to generate the report.

6. Click **Save**.

Related links

[Adding a view](#) on page 249

Viewing adhoc report

About this task

Use this procedure to view the reports generated using the Learn module.

Procedure

1. Click **Learn** > **Reports**.

   The Reports page displays the list of existing reports.

2. From the drop-down list, click the report you want to view, which you have saved as an adhoc report.

   Avaya Workforce Optimization Select displays the details of the report. You can download, email, or print the report.

3. **(Optional)** On the pagination controls, choose the number of records that you want to view on each page.

4. **(Optional)** To filter the columns, click the ▼ icon in the column header of the column which you want to filter.

   You can apply filters on multiple columns.

5. **(Optional)** To clear the filters from all the columns, click the ▼ₓ icon.

6. **(Optional)** To sort the columns, click the **Sort** 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. The third click removes the sorting.

7. **(Optional)** To reset the sorting, click the ⬇x icon.

Editing an adhoc report

Before you begin

Ensure that a view exists or create a view.

Procedure

1. Click **Learn** > **Reports**.

   The Reports page displays the list of existing reports.

2. Select the report you want to edit, and click **Edit**.

3. On the Edit View page, make the required changes, and click **Save & Close**.

Emailing an adhoc report

About this task

You can email an adhoc report if you want other users to view the report. The report is sent as an attachment in the format in which the view is saved as an adhoc report.

Before you begin

Ensure that a view exists or create a view.

Procedure

1. Click **Learn** > **Reports**.

   The Reports page displays the list of existing reports.

2. Select the report that you want to send as an email, and click **Email**.

3. On the Email Report window, type the name of the recipient, and enter your comments.

4. Click **Send**.

Downloading an adhoc report

About this task

Supervisors and managers can download adhoc reports in a specified format to keep for future reference.

Before you begin

- Ensure that a view exists or create a view.
- Ensure that you specify the format when saving the view as a report.

Procedure

1. Click **Learn** > **Reports**.

   The Reports page displays the list of existing reports.

2. Select the report, which you want to download, and click **Download**.

   The system downloads the adhoc reports in the format which you specified while saving the view.

Printing an adhoc report

About this task

Use this procedure to print an adhoc report in the format in which you saved the view as a report.

Before you begin

Ensure that a view exists or create a view.

Procedure

1. Click **Learn** > **Reports**.

   The Reports page displays the list of existing reports.

2. Select the report that you want to print, and click **Print**.

   Avaya Workforce Optimization Select displays the adhoc report in the format in which you saved the view as a report.

3. To get a hard copy of the report, click on the 🖶 icon on the upper-right corner of the page.

Adhoc reports field descriptions

Name	Description
Format	The format of the course or quiz.
Agent	The name of the agent who is taking an 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.

Table continues…

Name	Description
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 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.
Type	The type of assignment. The options are: • **Course** • **Quiz** • **Course & Quiz**
Score	The score of the employee. The system displays the scores only if the assignment contains a quiz.
Status	The status of the course or quiz. The options are: • **New** • **Pending** • **Completed**

Button	Description
Download	To download the adhoc report.
Email	To mail the adhoc report.
Print	To print the adhoc report.

Chapter 9: Analyzing contact center performance

Analyze overview

Using the Analyze module, a user with the appropriate permissions can create scorecards and metric views to measure and analyze the performance of employees, departments, roles, and sites in an organization.

Using Analyze module you can:

- Measure the performance of employees from raw transaction data, such as the number of interactions handled, total talk time, or number of coachings taken.
- Define metrics that determine the criteria to measure performance. You can use a variety of sources to define a comprehensive metric library that align with your business processes and strategic organizational goals.
- Generate time-based scorecards to get a snap shot of the overall performance of employees, departments, roles, or sites.

Features of the Analyze module

- Measures: For more information see, <u>Measures overview</u> on page 262.
- Metrics: For more information see, <u>Metrics overview</u> on page 265.
- Scorecards: For more information see, <u>Scorecards overview</u> on page 285.

Managing Measures

Measures overview

A measure is the raw transaction data associated with an employee. For example, the number of interactions handled, the total talk time, the number of evaluations completed, or the hold time of an interaction. You can view the measures in read-only mode. All measures are calculated and stored on a daily basis. You can use one or more measures to create custom metrics, which is further used in metric views and scorecards for analyzing the performance of an employee, a role, a department, and a site.

Measures are categorized under the following Avaya Workforce Optimization Select modules:

- Interactions
- Evaluate
- Coach
- Learn

Apart from these categories, some measures are also categorized under WFM as a part of Teleopti WFM integration.

Viewing system measures

About this task

Measures are raw transaction data associated with an employee. These measures are generated by the system and are calculated and stored on a daily basis in the database. You can use these measures to create custom metrics.

Procedure

1. Click **Analyze** > **Measures**.

   Avaya Workforce Optimization Select displays the Measures page with all the system measures in a read-only mode.

2. **(Optional)** On the pagination controls, choose the number of records that you want to view on each page.

3. **(Optional)** To filter the columns, click the ▼ icon in the column header of the column which you want to filter.

   You can apply filters on multiple columns.

4. **(Optional)** To clear the filters from all the columns, click the ▼ₓ icon.

5. **(Optional)** To sort the columns, click the **Sort** 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. The third click removes the sorting.

6. **(Optional)** To reset the sorting, click the ⬍ₓ icon.

System Measures field descriptions

View Measures

Name	Description
Name	The name of the measure.
Alias	The acronym for the name of the measure.
Description	A brief description of the measure .
Category	The field name to categorize the measures based on the modules. The modules are: • Interactions • Coach • Learn • Evaluate

Avaya Workforce Optimization Select Measures

Name	Description
Total Talk Time	The duration of the call.
Total Hold Time	The duration of the total number of times an employee keeps a call on hold.
Number Of Interactions	The number of interactions handled by an employee.
Number Of Interactions With Transfers	The number of calls transferred by a employee.
Number Of Interactions With conferences	The number of calls where an employee could not resolve a customer issue and set up a conference call between a senior employee and the customer.
Number Of Interactions With Holds	The number of calls that were put on hold.
Quality Score	The evaluation score received by an employee.
Appeals Accepted	The number of appeals based on which the scores are modified.
Appeals Declined	The number of appeals based on which the scores remain the same.
Appeals Drawn	The number of appeals based on which the scores do not change.
Appeals Raised	The number of appeals raised for the evaluations.
Evaluations Completed by Reviewers	The number of evaluations completed.
Number Of Evaluations accepted by Agents	The number of evaluations for each employee.
QuizScore	The score received by an employee when an assignment contains a quiz.

Table continues…

Name	Description
Number Of Quizzes	The number of quizzes assigned to an employee.
Coachings delivered	The number of coaching sessions delivered to an employee.
Coachings taken	The number of coaching sessions taken by an employee.
Wrapup Time	The time an employee spends in updating the information associated with the concluded interaction.

WFM Measures

Name	Description
Idle Time	The duration of the time an employee is not engaged in an interaction.
Logged In Time	The total duration of the time when the employee is logged in for an interaction.
Ready Time	The duration of time when an employee is logged in and is in a ready state.
READY_TIME_OF_SCHEDULED	The time duration in ready state as defined in a schedule.
Schedule Ready Time	The duration of time when an employee is ready as defined in a schedule.

Managing Metrics

Metrics overview

Metrics are performance indicators. The Analyze module provides a predefined set of system metrics. You can also create custom metrics based on your specific business needs. If you want to give importance to a metrics that drives performance improvements, you can flag the metric as a Key Performance Indicator (KPI) in the system. One or more metrics are used to build scorecards for assessing the performance of an employee, role, department, or site in an organization over a period of time. As a part of integration with Teleopti WFM, both the predefined and custom metrics are divided into two sets.

Avaya Workforce Optimization Select system metrics

- Interactions Handled
- Average Quiz score
- Coachings Taken
- Average Talk Time
- Average QA score
- Coachings Delivered

- Average Handle Time

WFM system metrics

- Availability
- Occupancy
- Adherence
- Attendance

Custom metrics

Custom metrics are created from the following sources:

- Measures: One or more measures are used as the source to create a custom metric. You can tie multiple measures by a formula that defines how the system must calculate the custom metric. For example, to calculate the average talk time for employees, you choose the Total Talk Time measure and the Number of Interactions measure, and specify Average as the formula.

- Derived: An existing metric is used as the source to create a custom metric. You can specify an aggregation and a formula to define how the custom metric is calculated.

- Data Entry: Manual data entries are used as the source to create a custom metric. You can add values for a metric for a specific period of time. You can define an aggregation to specify whether you want the system to calculate the sum, average, minimum, or maximum range of the values that you enter. For example, you might want to create a custom metric where you manually enter values for the number of interactions or evaluations completed by all departments every quarter. In this case, you must use Data Entry as the metric source, define the time period as quarterly, and aggregation as Average.

- External Import: External data is imported in a specified template to create a custom metric. For example, if you are using an HR system to track the attendance of employees, you can use External Import as the metric source to import that data as a custom metric. Depending on the parameters that you define for the custom metric, the system provides a template, which you can download to enter values for the custom metric and import the same into the system.

✱ **Note:**

You cannot delete a custom metric if it is used in any metric view or is a part of a scorecard.

System Metrics field descriptions

System Metrics are applied at employee level and are available only in the read-only mode.

All System Metrics are stored on a daily basis.

Avaya Workforce Optimization Select system metrics

Name	Description
Average Handle Time	An employees's average handle time for interactions.

Table continues…

Name	Description
Calls Handled	The number of calls handled by each employee.
Average QA Score	The average quality score.
Coachings delivered	The average coachings delivered.
Coachings taken	The number of coachings taken by each agent.
Average Quiz Score	The average quiz score for assignments that contain a quiz.

WFM system metrics

Name	Description
Availability	The time when the agent is attending to a customer or waiting for a call. The formula for calculating this metric is Ready Time/Logged in Time.
Occupancy	The percentage of ready time that an agent spends actively handling interactions. The formula for calculating this metric is (Ready Time - Idle Time) / Ready Time.
Adherence	The average of the ready time versus the scheduled ready time. The formula for calculating this metric is Ready Time / Schedule Ready Time.
Attendance	The percentage of the number of hours when an agent attended an interaction over the number of hours the interaction was scheduled. The formula for calculating this metric is Sum of Ready Time / Sum of Schedule Ready Time.

Viewing Metrics Definition

About this task

Use this procedure to view the available system and custom metrics in the application.

Procedure

1. Click **Analyze** > **Metrics**.

   The **Definition** tab on the left panel gets selected. The system displays the Metric page with the details of the available metrics.

2. **(Optional)** On the pagination controls, choose the number of records that you want to view on each page.

3. **(Optional)** To filter the columns, click the ▼ icon in the column header of the column which you want to filter.

   You can apply filters on multiple columns.

4. **(Optional)** To clear the filters from all the columns, click the ▼x icon.

5. **(Optional)** To sort the columns, click the **Sort** 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. The third click removes the sorting.

6. **(Optional)** To reset the sorting, click the ✦ₓ icon.

7. **(Optional)** To view the measures that are used in a particular metric, click the ✛ icon next to the metric.

   Avaya Workforce Optimization Select displays the expanded view of the measures for the selected metric in a read-only mode.

8. **(Optional)** To edit a particular metric, click on the metric row.

   Avaya Workforce Optimization Select displays the Edit Metric page.

9. **(Optional)** To delete a particular metric, click on the radio button next to the metric.

   The **Delete** tab gets enabled for deleting the metric.

Creating or adding a custom metric

About this task

Use this procedure to create custom metrics if the system metrics do not meet your requirements.

Before you begin

Get the required permissions to create a custom metric.

Procedure

1. Click **Analyze** > **Metrics**.

2. Click the **Add** button.

3. On the Create Metric page, do the following:

   a. Type the name, alias, and description of the metric.

   b. To select a category, click one of the existing categories in the **Category** field.

   c. **(Optional)** If you do not find the category you want, click **Add** to add a custom category.

      The system displays the Add Category page, where you can enter the name of the category and save it.

   d. To select the source of the metric, click one of the sources in the **Source** field.

      The system displays a dynamic screen that changes with the selected metric source.

   e. Enter the required fields.

4. Click **Save & Close**.

5. To add or create another metric, click the **Save & Add another** button.

Create Metric field descriptions

Name	Description
Name	The name of the metric
Key Performance Indicator	The option to select a metric as the key indicator for measuring an employee's performance. All the metrics that are flagged as KPIs contains a * symbol before them.
Alias	The alias name of the metric. The alias must be within a DP OU.
Description	A description of the specifications of the metric.
Category	The option to group the metric under a category for generating an output. Depending on the metric definition, you can group metrics under relevant categories. For example, if the metric is used to calculate AHT, you can group it under a category called Interactions. You can create custom categories to group metrics based on your requirements by clicking the **Add** button. You can also delete a category, if it is not associated with any metric.
Source	The option to define the source of the metric. The options are: • Measure • Derived • Data Entry • External Import
Measure(s)	The option to select the system measure for creating a particular metric. This option is only available when you select the source as: • Measure • Derived

Table continues…

Name	Description
Formula	The option to add a formula for multiple measures to specify what the system must do to derive a metric. For example, if you add the Total Talk Time measure and the Number of Interactions measure and specify Average as the formula, the system calculates the AHT of all calls handled by employees. This field is only available when you select the metric source options as Derived.
Metric	The option to select a metric for creating a derived metric. This field is available when you select the source as Derived.
Period	The option to select the time period for the metric. The options are: • Daily • Weekly • Monthly • Quarterly • Yearly This field is available when you select the source as: • Data Entry • External Import
Aggregation	The option to specify an aggregation to define what calculation is applied to derive the metric. The options are: • Average • Sum This option is available only when you select the metric source option as: • Data Entry • External Import

Table continues…

Using Avaya Workforce Optimization Select

Name	Description
Units of Measure	The unit of measure for the metric. All metrics are measured against a number indicating a count or time indicating a period. For example, for the AHT metric, the unit of measure is time. The options are: • Number • Time
Direction	The option to specify the direction of the metric in increasing or decreasing order in percentage for a particular period of time. For example, for the AHT metric, you must specify a decreasing scale to see this metric decrease for an agent. The options are: • Increasing is Better • Decreasing is Better The increasing score is calculated by dividing your score divided by the target score. The decreasing score is divided score is calculated by dividing the target by your score.
Minimum Value	The minimum value for a derived metric. You must type the specified minimum value. This option is available only when you select the metric source option as: • Data Entry • External Import
Maximum Value	The maximum value for a custom metric. You must type the specified maximum value. This option is available only when you select the metric source option as: • Data Entry • External Import
Association	The option to specify to whom the metric calculation must be associated. The options are: • Employee • Department • Role This option is available only when you select the metric source option as: • Data Entry • External Import

Editing a custom metric

About this task

Use this procedure to edit a custom metric if you want to change the details associated with it. All custom metrics are active unless you choose to make them inactive while editing the metric. However, if the metric is used in an active scorecard, you cannot make it inactive or delete it. To make it inactive or delete it, you must disassociate it from the scorecards in which it is used.

Procedure

1. Click **Analyze** > **Metrics**.

   The system displays the list of metrics that exists in the system.

2. Select the metrics that you want to edit from the list and click **Edit**.

3. On the **Edit** page, make changes to the required fields

   a. Change the name, alias, and description of the metric, if required.

   b. To flag a metric as a KPI to drive a performance measure, select the **Key Performance Indicator** check box.

      Alternately, you can clear the **Key Performance Indicator** check box, if you do not want to flag it as a KPI.

   c. To make the metric as inactive, clear the **Active** check box.

   d. To change a category, click one of the existing categories in the **Category** field.

   e. **(Optional)** If you do not find the category you want, click **Add** to add a custom category.

      The system displays the Add Category page, where you can enter the name of the category and save it.

   f. To change the source of the metric, click one of the sources in the **Source** field.

      The system displays a dynamic screen that changes with the selected metric source.

   g. Enter the required fields.

4. Click **Save & Close**.

5. To add or create another metric, click the **Save & Add another** button.

Edit Metric field descriptions

Name	Description
Name	The name of the metric

Table continues…

Name	Description
Key Performance Indicator	The option to flag a metric as the key indicator for measuring an employee's performance.
	All the metrics that are flagged as KPIs contains a * symbol before them.
Alias	The alias name of the metric.
	The alias must be within a DP OU.
Active	The option to change a custom metric to inactive.
	All custom metrics are active unless you choose to make them inactive while editing the metric. However, if the metric is used in an active scorecard, you cannot make it inactive or delete it. To make it inactive or delete it, users have to disassociate it from the scorecards in which it is used.
Description	A description of the specifications of the metric.
Category	The option to group the metric under a category for generating an output.
	Depending on the metric definition, you can group metrics under relevant categories. For example, if the metric is used to calculate AHT, you can group it under a category called Interactions.
	You can create custom categories to group metrics based on your requirements by clicking the **Add** button.
	You can also delete a category, if it is not associated with any metric.
Source	The option to define the source of the metric. The options are:
	• Measure
	• Derived
	• Data Entry
	• External Import
Measure(s)	The option to select the system measure for creating a particular metric.
	This option is only available when you select the source as:
	• Measure
	• Derived
Formula	The option to add a formula for multiple measures to specify what the system must do to derive a metric. For example, if you add the Total Talk Time measure and the Number of Interactions measure and specify Average as the formula, the system calculates the AHT of all calls handled by employees.
	This field is only available when you select the metric source options as Derived.
Metric	The option to select a metric for creating a derived metric.
	This field is available when you select the source as Derived.

Table continues…

Name	Description
Period	The option to select the time period for the metric. The options are: • Daily • Weekly • Monthly • Quarterly • Yearly This field is available when you select the source as: • Data Entry • External Import
Aggregation	The option to specify an aggregation to define what calculation is applied to derive the metric. The options are: • Average • Sum This option is available only when you select the metric source option as: • Data Entry • External Import
Units of Measure	The unit of measure for the metric. All metrics are measured against a number indicating a count or time indicating a period. For example, for the AHT metric, the unit of measure is time. The options are: • Number • Time
Direction	The option to specify the direction of the metric in increasing or decreasing order in percentage for a particular period of time. For example, for the AHT metric, you must specify a decreasing scale to see this metric decrease for an agent. The options are: • Increasing is Better • Decreasing is Better The increasing score is calculated by dividing your score divided by the target score. The decreasing score is divided score is calculated by dividing the target by your score.
Minimum Value	The minimum value for a derived metric. You must type the specified minimum value. This option is available only when you select the metric source option as: • Data Entry • External Import

Table continues…

Name	Description
Maximum Value	The maximum value for a custom metric. You must type the specified maximum value.
	This option is available only when you select the metric source option as:
	• Data Entry
	• External Import
Association	The option to specify to whom the metric calculation must be associated. The options are:
	• Employee
	• Department
	• Role
	This option is available only when you select the metric source option as:
	• Data Entry
	• External Import

Metrics Views

Manage views

Using views, you can filter data by specific criteria.

Depending on the business requirement, you can create different views with filters using logical conditions. For example, to search for metrics that are grouped by employee role, you can define filters based on the designation of the employees in the organization. The view displays the metrics that match the search criteria.

> **✱ Note:**

When you log in to the application for the first time, the system displays the default AWFOS View with a preconfigured set of parameters. You can create a new view to search and play the desired interactions.

After you create a view, you can use it anytime later.

You can do the following while creating 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.
- Share the new view with other users.

Viewing Metrics

Procedure

1. Click **Analyze** > **Metrics**.

2. In the left pane, click **Views**.

3. Click one of the available views.

   The system displays the details of the selected view in a tabular format .

4. **(Optional)** To view the selected metrics view in view mode, click **View**.

   The system displays the metric on the View Mode screen with related details .

5. **(Optional)** To view the selected metrics in full screen mode, click the ⤢ icon.

6. **(Optional)** To view the details in the Category column, click on the hyperlink.

   You can drill down to the next level metrics in the hierarchy. For example: If you selected the Group by use tags as Department, then you can click the particular Department and the system displays the Employee-level metrics. If you further click the name of the employee, the system displays the metric view output of the employee only. If there are other employees reporting to that particular employee, then the system displays the names of all the employees.

7. **(Optional)** To go back to the previous metric views, click the breadcrumbs provided on the top of the page.

   For example: To go back to the Department view, click **Department** on the top of the page that displays `Department>Employee`.

Adding a metric view

Procedure

1. Click **Analyze** > **Metrics**.

2. In the navigation pane, click **Views**.

3. Click **Add**.

4. On the Create View page, enter the required details.

5. Click **Save & Close**.

6. **(Optional)** To add another metric view, click **Save & Add another**.

Setting up filters for a view

About this task

Using filters in view, you can add:

- Multiple search parameters within a single filter criteria.
- Multiple values separated by commas to match a single parameter .

Procedure

1. In Filter add fields, operators and values for

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

   b. In **Operator**, select the operator which to apply.

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

2. To add additional filters, click **Add Field**.

3. In **Display Fields**, select the fields to be displayed.

4. In **Share**, select the groups and employee to share the view.

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

Configuring display fields for a view

About this task

When you select a view, you can view the details of the metrics in the list. All metric information 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 Selected Metric(s) list:

1. Select one or more fields from the Available Metric(s) list by doing one of the following:

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

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

   c. To move multiple selections from the list, click the **Move All** button.

To remove fields from the Selected Metric(s) list:

2. Select one or more fields from the Selected Metric(s) list by doing one of the following:

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

   b. To remove a single selection from the list, click the **Remove Selected** button.

   c. To move multiple selections from the list, click the **Remove All** button.

Next steps

Share a view.

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 metrics.

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

Procedure

1. In **Share**, select one of the following :

   • **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 Selected 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 Selected Employees list; select one or more employees and use the **Remove Selected** and **Remove All** buttons.

7. Click **Save and Close**.

Create View field descriptions

Create View

Name	Description
Name	The name of the custom metric view.
Default	The option to select a view as the default view.
Category	The option to select a category for adding or creating a metric view or for generating view output based on categories. The options are: • Interactions • Evaluate • Coach & Learn • System You can also add system and custom categories.

Table continues…

Name	Description
Period Type	The time period for which you want to create the metric view. The options are: • Weekly • Monthly • Quarterly • Yearly
Period	The option to select a time period based on the period type selected. For example, if you choose period type as Weekly, the options can be Current Week, Last Two Weeks, Last One Week + Current. Current Week includes the beginning of the ongoing week to the day when the option is selected. For example, if you are creating a metric view on Wednesday, the current week is from Monday to Wednesday. You can also enter a specific date range by selecting the **Custom Period** option.
From	The option to select a time period from when you want to add or create a metric view or to generate a view output based on the period type selected. This option is only available when you select **Custom Period** in the **Period** field.
To	The option to select a time period until when you want to add or create a metric view or to generate a view output based on the period type selected. This option is only available when you select **Custom Period** in the **Period** field.
Show Only KPIs	The option to filter metrics and choose KPIs while building metric views for flagging metrics as KPIs.
Available Metric(s)	The list of available metrics for creating a metric view. The list consists of both system metrics and custom metrics.
Selected Metric(s)	The list of metrics that are selected from the list of available metrics.
Group by	The option to group the metrics view depending on the output. The options are: • Site • Department • Role • Employee
Export	The option to export the metric view on your system. The options are: • Excel • CSV

Table continues…

Name	Description
Filter	The filter criteria used to search the metric.
Share	The option to share your metric view with specific users. The options are: • Me • Selected Groups • Everyone

Filter

Name	Description
Field	The option to filter a metric criteria. The options are: • Role • Department • Employee • Site
Value	The option to enter the value, which must be based on the option selected in the **Field** option. The default value is All. For example: If you select Department, then you can type the value as *Name of the department*. If you select Employee, then you can type the name of one or more employee or retain the default value All to indicate all employees.

Editing a metric view

Procedure

1. Click **Analyze** > **Metrics**.

2. Click **Views** and click the view that you want to edit.

3. Click **Edit**.

4. On the Edit View page, enter the required details.

5. Click **Save & Close**.

Edit View field descriptions

Edit View

Name	Description
Name	The name of the custom metric view.
Default	The option to select a view as the default view.

Table continues…

Name	Description
Category	The option to select a category for adding or creating a metric view or for generating view output based on categories. The options are: • Interactions • Evaluate • Coach & Learn • System You can also add system and custom categories.
Period Type	The time period for which you want to create the metric view. The options are: • Weekly • Monthly • Quarterly • Yearly
Period	The option to select a time period based on the period type selected. For example, if you choose period type as Weekly, the options can be Current Week, Last Two Weeks, Last One Week + Current. Current Week includes the beginning of the ongoing week to the day when the option is selected. For example, if you are creating a metric view on Wednesday, the current week is from Monday to Wednesday. You can also enter a specific date range by selecting the **Custom Period** option.
From	The option to select a time period from when you want to add or create a metric view or to generate a view output based on the period type selected. This option is only available when you select **Custom Period** in the **Period** field.
To	The option to select a time period until when you want to add or create a metric view or to generate a view output based on the period type selected. This option is only available when you select **Custom Period** in the **Period** field.
Show Only KPIs	The option to filter metrics and choose KPIs while building metric views for flagging metrics as KPIs.
Available Metric(s)	The list of available metrics for creating a metric view. The list consists of both system metrics and custom metrics.
Selected Metric(s)	The list of metrics that are selected from the list of available metrics.

Table continues…

Name	Description
Group by	The option to group the metrics view depending on the output. The options are: • Site • Department • Role • Employee
Export	The option to export the metric view on your system. The options are: • Excel • CSV
Filter	The filter criteria used to search the metric.
Share	The option to share your metric view with specific users. The options are: • Me • Selected Groups • Everyone

Filter

Name	Description
Field	The option to filter a metric criteriabased on the following options: • Role • Department • Employee • Site
Value	The option to enter the value based on the field entered in the **Field** option. The default value is All. For example: If you select Department, then you can enter the value as *Name of the department*. If you select Employee, then you can retain the default value All to indicate all employees, or type the names of the employees.

Downloading a metric view

Procedure

1. Click **Analyze** > **Metrics**.

2. To view the list of available metrics, click **Views**.

   The system displays a list of the available metrics.

3. Click any of the available metric views you want to download.

   The system displays the details of the metric view you select in a tabular format .

4.
To download the selected metric view, click the ⊕ icon.

The system downloads the metrics as an Excel file.

Importing a custom metric

About this task

To create a custom metric, you can import the metric data from a file import or through a data entry. Use this procedure to generate a template, replicate the required data, and import custom metrics data from the external spreadsheet at employee level.

Procedure

1. Click **Analyze** > **Metrics**.

2. Click **Custom Metric Import**.

3. On the Metric Import Screen page, do the following:

    a. Enter the required details in following fields:

      - **Association**

      - **Period**

      You can enter only those details in the fields that are flagged for import when a metric was defined.

    b. Click **Generate Template**.

      The system displays the hyperlink for downloading the template.

4. **(Optional)** To make changes to your template selections, click the **Reset** button.

5. Click **DownloadTemplate**.

    The system downloads the template as an Excel file.

6. Enter and replicate the data in the file based on your requirements.

    You can replicate multiple data entries by using this option at one go. For example, you select time period as monthly, and create data for January. You can now replicate the subsequent months at one time and change the name of the month to February, March, and so on in the Excel file.

7. To import the `.xls` file, click **Browse**, and then click the **Import** button.

Custom Metric Import field descriptions

Name	Description
Association	The option that was specified at the organization level while defining a metric. The options are: • Employee • Department • Role
Period	The time period that was specified to define at what intervals the metric must be calculated by the system. The options are: • Daily • Weekly • Monthly • Quarterly • Yearly

Button	Description
Generate template	To generate a template.
Reset	To reset the selections for the **Association** and **Period** fields.
Browse	To open the file from your local machine.
Import	To import the template after filling the data for the metric for a stipulated period.

Creating a custom metric data entry

About this task

Use this procedure to create custom metrics by manually adding values for a metric. The values are entered at a department, role, or employee level for a fixed period to define this metric.

Procedure

1. Click **Analyze** > **Metrics**.

2. Click **Custom Metric Data Entry**.

   The system displays the Metric Data Entry Screen page.

3. In **Metric**, click an option depending on your requirements.

   The system displays the time period and the option to type the values for your selected association.

4. Click **Save**.

   The system displays a message that the metrics data is saved successfully.

Custom Metric Data Entry field descriptions

Name	Description
Metric	The name of the metric that was provided when defining a metric with the source as **Data Entry**.
Time Period	The option to select the dates for which the metric data entry is applicable. The time period is the same as the time that was selected while defining the metrics.
Value	The option to type a value for the association. Use the minimum value and the maximum value column as guidelines to type this value for each association.

Managing Scorecards

Scorecards overview

Scorecards are statistical templates that are used for deriving performance data by using various metrics . Scorecards provide a systematic approach to measure, monitor, and act upon the different metrics in a contact center environment. These metrics are used by supervisors and managers to track and manage the performance of employees. You can build a scorecard at role, department, employee, or site level by adding metrics to analyze the performance during a specific period within your organization .

Depending on the kind of performance scorecard report you want to generate, you can build customized scorecards by using various filters. You can build time-based scorecards by associating one or more metrics, adding categories to group multiple metrics, and defining grades. The grades are defined at the metric level, category level, and at the scorecard level based on your specific requirements. The grading level in scorecards is used only for the purpose of grouping metrics.

Scorecards can be divided into two types depending on their views:

- Scorecard view: To generate reports for generic performance measurement based on employee, role, department, and site.

- Performance view: To view the relative performance of an employee at role and department levels. For example, using a performance scorecard, you can view the top or bottom performers in a department.

Viewing scorecard templates

About this task

With appropriate permissions, you can view the scorecard templates that you created. You can also view the scorecards that are created by another user and already exist in the system.

Procedure

1. Click **Analyze** > **Scorecards**.

2. On the Scorecards screen, click **Scorecard**.

   The Scorecard page displays a list where you can see the details of the scorecard templates.

3. **(Optional)** To view the revisions of a particular scorecard, click the ✚ next to the scorecard.

   The Scorecard page displays the expanded view of all the versions for the scorecard.

4. Click **Analyze** > **Metrics**.

   The **Definition** tab on the left panel gets selected. The system displays the Metric page with the details of the available metrics.

5. **(Optional)** On the pagination controls, choose the number of records that you want to view on each page.

6. **(Optional)** To filter the columns, click the ▾ icon in the column header of the column which you want to filter.

   You can apply filters on multiple columns.

7. **(Optional)** To clear the filters from all the columns, click the ⛟ icon.

8. **(Optional)** To sort the columns, click the **Sort** 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. The third click removes the sorting.

9. **(Optional)** To reset the sorting, click the ⬍ₓ icon.

Viewing saved scorecards

Procedure

1. Click **Analyze** > **Scorecards**.

2. On the Scorecards screen, click the ✚ icon next to the **Saved Scorecards *x***, where x is the number of scorecards saved in your application.

   The system displays all the scorecards saved according to category.

3. To view the details of the saved scorecards in a particular category, click the ✚ icon.

   The system displays the scorecards list in that category.

4. In the scorecard list, click the scorecard that you want to view.

   The system displays the details of the scorecard in a tabular format.

View Scorecards field descriptions

Name	Description
Add Scorecard	The option to add a new scorecard.
Scorecard	The name of the scorecard.
Grading Level	The option to define at what value level the scorecard is graded. The options are: • Category level • Metric level • Scorecard level The scores graded at the grading level gets selected in the scorecard definition interface. For example, if the grading level is category, the metric scores gets grouped to the corresponding category and the output is graded at the categories.
Target	The option to enter a value to define the scorecard target. The target can be any of the following: • Time in hh/mm/ss format upto 23:59:59 • Number upto 10,000 • Percentage upto 100%
Effective From	The date from which the scorecard is applied. The date is in the mm/dd/yyyy format.
Status	The status of the scorecard. The options are: • Draft • Active A scorecard is in Draft status until all the steps and their definitions are complete and you do not click the **Publish** tab. The status changes to Active from Draft when you publish it. You can then save it for different purposes.

Table continues…

Name	Description
Version	The version number of the scorecard. The system displays the latest version as the default version. You cannot roll back to a previous version. However, you can view the details of any of the previous versions, and use the information to create a new scorecard template.
Created By	The name of user who created the scorecard.
Created Date	The date and time on which the scorecard was created. The date is in the mm/dd/yyyy format hr/min/sec format.
Updated By	The name of the user who updated the scorecard.
Updated Date	The date on which the scorecard was updated. The date is in the mm/dd/yyyy hr/min/sec format.
Used in Scorecard	The number of scorecards in which the scorecard template is used. The system displays whole numbers only.
Description	The description of the scorecard. Do not create a new revision of a scorecard, if there is a change in the title or description of the scorecard.

Creating or adding a scorecard

About this task

Use this procedure to create a scorecard using one or more system or custom metrics.

Procedure

1. Click **Analyze** > **Scorecards**.

2. Click **Scorecard**.

3. On the Scorecard screen, click the **Add Scorecard** button.

   Avaya Workforce Optimization Select displays the Create Scorecard page.

4. On the **Definition** tab, enter the required details.

   Avaya Workforce Optimization Select displays the scorecard in the scorecard view in the draft status. You cannot run the scorecard to generate an output in the draft state, until you enter the details in the remaining tabs.

5. Click **Save**.

   Avaya Workforce Optimization Select displays the message that the scorecard is saved successfully and the remaining tags get enabled.

6. Click the **Metric** tab, and click **Add Category**.

   Avaya Workforce Optimization Select displays dynamic fields.

7. Enter the required details and click **Save**.

Avaya Workforce Optimization Select displays the message that the scorecard is saved successfully.

8. **(Optional)** To add another category, click **Add Category**.

9. Click the **Grades** tab.

10. Select one of the following and enter the required details:

    - **Grading Scale**: This is the default option.

    - **Make or Break**

11. Click **Save**.

    Avaya Workforce Optimization Select displays the message that the scorecard grading is saved successfully.

12. Click the **Share** tab and select the required option.

13. Click **Save**

    Avaya Workforce Optimization Select displays the message that the scorecard details are saved successfully.

14. To preview the details of the scorecard in a read-only mode, click the **Preview** tab. You can go back to any of the tabs to make changes to your scorecard, if required.

15. To publish the scorecard select one of the options from the **Effective Date** field, and then click **Publish**.

    Avaya Workforce Optimization Select displays the message that the scorecard is published successfully. The scorecard status changes from draft to active in scorecards view, and you can save the scorecard for future use.

Editing a scorecard

About this task

Use this procedure to edit an existing scorecard and saving as a revision for future reference. Do not create a new revision if the title or description of an existing scorecard is changed. The **Grading Level** field is disabled in edit mode.

Procedure

1. Click **Analyze** > **Scorecards**.

2. Click **Scorecard**.

3. On the Scorecard screen, select the scorecard that you want to edit, and click **Edit**.

4. On the **Definition** tab, enter the required details.

    Avaya Workforce Optimization Select displays the scorecard in the scorecard view in the draft status. You cannot run the scorecard to generate an output in the draft state, until you enter the details in the remaining tabs.

5. Click **Save**.

   Avaya Workforce Optimization Select displays the message that the scorecard is saved successfully and the remaining tags get enabled.

6. Click the **Metric** tab, and click **Add Category**.

   Avaya Workforce Optimization Select displays dynamic fields.

7. Enter the required details and click **Save**.

   Avaya Workforce Optimization Select displays the message that the scorecard is saved successfully.

8. **(Optional)** To add another category, click **Add Category**.

9. Click the **Grades** tab.

10. Select one of the following and enter the required details:

    • **Grading Scale**: This is the default option.

    • **Make or Break**

11. Click **Save**.

    Avaya Workforce Optimization Select displays the message that the scorecard grading is saved successfully.

12. Click the **Share** tab and select the required option.

13. Click **Save**

    Avaya Workforce Optimization Select displays the message that the scorecard details are saved successfully.

14. To preview the details of the scorecard in a read-only mode, click the **Preview** tab. You can go back to any of the tabs to make changes to your scorecard, if required.

15. To publish the scorecard select one of the options from the **Effective Date** field, and then click **Publish**.

    Avaya Workforce Optimization Select displays the message that the scorecard is published successfully. The scorecard status changes from draft to active in scorecards view, and you can save the scorecard for future use.

Create, Add, or Edit Scorecards field descriptions

Name	Description
Definition	The option to define a new scorecard. The criteria are: • Organization units, departments, or designations • Daily, Weekly, Monthly, Quarterly, or Yearly • Existing set of metrics • Grading level: Category, metrics, and scorecard levels • Weightages and targets at the metric level
Metric	The option to select one or more metrics for a scorecard.
Grades	The option to describe a grade. Some of the options are: • Excellent • Good • Poor You can add customized grades based on the need of the organization. The grades are also associated with colors. For example: Excellent can be mapped with green, and a poor grade can be mapped with red.
Share	The option to share a scorecard. The options are: • Me • Selected Groups • Every one
Preview	The option to view the completed scorecard draft and make any changes if required. This option also contains the **Publish** button to change the status of the scorecard from draft to active. You can save a scorecard only when the status is active.

Definition

Name	Description
Name	The name of the scorecard.
Alias	The alias name of the scorecard.

Table continues…

Name	Description
Target	The time period for which you are creating the scorecard.
	You can choose only the next target levels in the target hierarchy. For example: For a daily scorecard, you can choose only daily as the metrics. For weekly, you can choose daily and weekly. Again, for yearly targets, you can choose daily, weekly, monthly, quarterly, and yearly metrics as the target time.
	If you want to change the target for a particular scorecard, you must delete the scorecard and create a new one with the required definitions.
Grading Level	The option to define at what value level the scorecard is graded. The options are:
	• Category level
	• Metric level
	• Scorecard level
	The scores graded at the grading level gets selected in the scorecard definition interface. For example, if the grading level is category, the metric scores gets grouped to the corresponding category and the output is graded at the categories.
	The **Grading Level** field is disabled in edit mode.
Description	A brief description of the scorecard.
Scorecard Association	The associated field, operator, and value for a scorecard view.
Field	The parameters used to filter the scorecards. The options are:
	• Role
	• Department
	• Site
	You can add more than one field depending on your requirements.

Table continues…

Name	Description
Operator	The operator used to specify the scorecard criteria. The options vary depending on the field that you select. For Role: • All • Agent • Role 1: This is a variable. You can add customized roles depending on the need of your organization. • Supervisor For Department: • All • Dept 1: This is a variable. You can add customized departments depending on the need of your organization. • IT • Operations For Site: • All • Site 1: This is a variable. You can add customized departments depending on the need of your organization.
Value	The value specified for the operator to apply in the scorecard.

Metric

Name	Description
Category	The option to provide a category for defining a metric. The options are: • Interactions • Evaluations • Coach • Learn You can also add customized options as required. This option is mandatory for a category-level and metric-level scorecard. For scorecard-level metrics, the category field is optional. If the definition of category is complete the color associated with it is green. If it is incomplete, the color is red. You can also delete a category if no metrics are associated with the particular category.

Table continues…

Name	Description
Metric	The option to associate a metric to a scorecard. The options vary depending on your selections while defining the scorecard in the **Definition** tab.
Target	The target time or number for which the metric is associated to the scorecard. You can add whole numbers or time in hh:mm:ss format .
Units of Measure	The unit of measure for calculating the target for a metric. The options are: • Number • Time
Weight	The weightage given to each metric within a category and at all grading levels. The weightage must follow the following rules: • The sum of category weights must sum up to 100% • The sum of metric weights within a category must sum up to 100%
Display Order	The order in which the metrics are displayed. The system displays the order in whole numbers only.

Grades

Name	Description
Grading Scale	The option to define multiple metric or category value ranges and grade each of them. This is the default option. You can select distinct colors for each grading range defined.
Make or Break	The option to create a make or break range and assign a corresponding score to the threshold value. When you add a value in the **Value** field, the value in percentage gets automatically displayed in the **Value(%)** field.

Grading Scale

Name	Description
Metric Value	
From	The option to enter the lower bound metric value for a grading scale. The corresponding percentage gets populated automatically in the **From (%)** field.
To	The option to enter the upper bound metric value for a grading scale. When you enter the upper bound metric value, the corresponding percentage gets populated automatically in the **To (%)** field.
Score	

Table continues…

Name	Description
Type	The type of score associated with a scorecard. The options are: • Varying • Fixed
From	The option to enter the lower bound score value for a grading scale. For example, if you enter the From range as 50 and the To range as 100, the scorecard displays the absolute score of the employee within the range of 50 to 100. The application displays to the accuracy of two decimals. Natural numbers are not supported.
To	The option to enter the upper bound score value for a grading scale. For example, if you enter the From range as 50 and the To range as 100, the scorecard displays the absolute score of the employee within the range of 50 to 100.
Grade	
Grade	The option to apply grades to a particular scorecard metric. For example: You can select A, B, and C. You can add customized grades based on the needs of the organization. The grades are also associated with colors.
Color	The option to associate a color to a grade. For example: An A grade can be mapped to green , and a C grade can be mapped to red.

Make or Break

Name	Description
Metric Value	
Operator	The option to select the relational operator around a metric or category value to create a make or break range. The option to select a criteria for assigning a threshold value to create a make or break range. The options can be: • Greater Than or Equal To • Lesser Than or Equal To
Value	The option to enter the lower bound metric value for a grading scale. The corresponding percentage gets populated automatically in the **From (%)** field.
Score	
Score	The option to enter a threshold value to create a make or break range.
Grade	

Table continues…

Name	Description
Grade	The option to apply grades to a particular scorecard metric.
	For example: You can select A, B, and C.
	You can add customized grades based on the needs of the organization. The grades are also associated with colors.
Color	The option to associate a color to a grade.
	For example: An A grade can be mapped to green , and a C grade can be mapped to red.

Share

Name	Description
Me	The option to not share the scorecard .
	This is the default option.
Selected Groups	The option to share the scorecard with selected groups within the organization.
Everyone	The option to share the scorecard with everyone who has the appropriate permissions.

Preview

Name	Description
Scorecard Effective	The option to select the date from which the scorecard must be applied. The date is in the mm/dd/yyyy format. You can apply it immediately or from a later date .
	The effective date must be from the beginning of a period. For example, if it is monthly, the selected date must be from the beginning of next month. If it is for next year, the selected date must be from the beginning of next year.
Publish	The option to publish a scorecard. A scorecard becomes active only after it is published and available for saving.

Running a scorecard

Procedure

1. Click **Analyze** > **Scorecards**.

2. On the Scorecards screen, click one of the following:

   - **Scorecard**

   - **Saved Scorecard *x***, where x is the number of scorecards saved in your application.

   The Scorecard page displays a list of available scorecards.

3. Select the scorecard that you want to modify, and click **Run**.

Based on your selections , the system displays dynamic fields for the particular scorecard.

4. Select one of the following and enter the required details:

   • **Scorecard View**: This is the default option.

   • **Performance View**

5. Click **Run**.

   The system displays the requested output in a tabular format.

6. **(Optional)** To edit the output, click **Edit**.

   Repeat Step 4 and Step 5.

7. **(Optional)** To save the output, click **Save as**.

   a. In the pop-up window, enter a name, category, and the export format option.

   b. Click **Submit**.

   The system displays the message that the scorecard is saved successfully. You can view the scorecard in **Saved Scorecards *x***.

Run Scorecard field descriptions

Scorecard View

Name	Description
Run	The option to run a saved scorecard template to add filters to the scorecard.
Scorecard View	The option to create a view for a scorecard for employee, role, department, and site levels.
Period	The time period that was selected while creating the scorecard.
	Based on the period selected you can further select the time period from the drop-down list. For example, if you choose period type as Weekly, the options can be Current Week, Last Two Weeks, Last One Week + Current and so on. Current week refers from the beginning of the ongoing week to the day when the option is selected. For example, if you are creating a metric view on Wednesday, the current week is from Monday to Wednesday.
	If you select the Custom Period option, then you can view the specific date range for that scorecard.
Version	The option to select a version each time you change the filters in a scorecard.
Field	The scorecard association that was selected while creating the scorecard.
Value	The option to enter a value depending on the **Field** that you select.

Table continues…

Name	Description
Group by	The field to group scorecards output types. The options are: • Site • Department • Role • Employee

Performance View

Name	Description
Run	The option to run a saved scorecard template to add filters to the scorecard.
Performance View	The option to create a view for a scorecard for measuring relative performance of employees. Using this option, you can view the top or bottom performers for the selected category and metric.
Category	The option to group one or more metrics based on a category.
Metric	The option to create scorecards at metric level. You can create a performance view to rate the performance of employees.
Order	The order for selecting the performance view of employees. The options are: • Top • Bottom For both the options, you can select one of the following numbers : 3, 5,10, or 15. Only a supervisor can see the names of the employees for this selection. If you are a contact center agent, then you can only see your ranking in the list. For the other employees, the system displays options such as Employee1 and Employee2 instead of the employee name.
Period	The time period that was selected while creating the scorecard. Based on the period selected you can further select the time period from the drop-down list. For example, if you choose period type as Weekly, the options can be Current Week, Last Two Weeks, Last One Week + Current and so on. Current week refers from the beginning of the ongoing week to the day when the option is selected. For example, if you are creating a metric view on Wednesday, the current week is from Monday to Wednesday. If you select the Custom Period option, then you can view the specific date range for that scorecard.
Version	The version that was selected while defining the scorecard template.

Table continues…

Name	Description
Field	The option to select employees based on the following options: • Site • Department • Role • Employee
Value	The option to enter the value based on the field entered in the **Field** option above. The default option is All. For example: If you select Department, then you can enter the value as *Name of the department*. If you select Employee, then you can retain the default value All to indicate all employees, or type the names of the employees.

Generating and saving a scorecard view

Procedure

1. Click **Analyze** > **Scorecards**.

2. Click **Scorecard**.

   The Scorecard page displays a list of available scorecards.

3. Select the scorecard for which you want to generate the scorecard view, and click **Run**.

4. Select the **Scorecard View** option, enter the required details, and click **Run**.

   The Scorecard page displays the template output in a tabular format.

5. **(Optional)** To edit the view, click **Edit**.

   Repeat Step 4.

6. **(Optional)** To save the output, click **Save as**.

   a. In the pop-up window, enter a name, category, and the export format option.

   b. Click **Submit**.

   The system displays the message that the scorecard is saved successfully. You can view the scorecard in **Saved Scorecards *x***.

7. **(Optional)** To view the card from the Save Scorecards section, click one of the following depending on the type of scorecard:

   • **Save Scorecards** > **Custom**: To view saved custom scorecards.

   • **Save Scorecards** > **System**: To view saved system scorecards.

   • **Save Scorecards** > *category name*: To view the saved scorecards in any other category.

Scorecard View field descriptions

Name	Description
Period	The time period that was selected while creating the scorecard template.
	Based on the period selected you can further select the time period from the drop-down list. For example, if you choose period type as Weekly, the options can be Current Week, Last Two Weeks, Last One Week + Current and so on. Current week refers from the beginning of the ongoing week to the day when the option is selected. For example, if you are creating a metric view on Wednesday, the current week is from Monday to Wednesday.
	If you select the Custom Period option, then you can view the specific date range for that scorecard.
Field	The option to select employees based on the following options:
	• Site
	• Department
	• Role
	• Employee
Group by	The field to group scorecards based on the output type. The options are:
	• Site
	• Department
	• Role
	• Employee

Button	Description
Run	To generate the scorecard template.

Generating and saving a performance view

About this task

Use this procedure to create a scorecard template for a performance view. Using this scorecard, you can view the performance of an organization at an employee level, for example, you can view the top 3, 5, or 10 performers.

Procedure

1. Click **Analyze** > **Scorecards**.

2. Click **Scorecard**.

3. From the available list of scorecards, select the scorecard for which you want to generate the scorecard view, and then click **Run**.

4. Select the **Performance View** option and enter the required fields.

   The system displays the template output in a tabular format.

5. **(Optional)** To edit the view, click **Edit**.

   Repeat Step 4.

6. **(Optional)** To save the output, click **Save as**.

   a. In the pop-up window, enter a name, category, and the export format option.

   b. Click **Submit**.

   The system displays the message that the scorecard is saved successfully. You can view the scorecard in **Saved Scorecards *x***.

7. **(Optional)** To view the card from the Save Scorecards section, click one of the following depending on the type of scorecard:

   • **Save Scorecards** > **Custom**: To view saved custom scorecards.

   • **Save Scorecards** > **System**: To view saved system scorecards.

   • **Save Scorecards** > *category name*: To view the saved scorecards in any other category.

Performance View field descriptions

Name	Description
Category	The option to categorize performance scores.
	The default option is All.
Metric	The option to select a metric for generating the scorecard.
	The default option is All.
Order	The order in which the performance rating must display. The options are:
	• Top
	• Bottom
Version	The option to provide a version number of the scorecard template.

Table continues…

Name	Description
Period	The time period specified while creating the scorecard template. This is a pre-populated field.
	Based on the period selected you can further select the time period from the drop-down list. For example, if you choose period type as Weekly, the options can be Current Week, Last Two Weeks, Last one week + current and so on. Current week refers from the beginning of the ongoing week to the day when the option is selected. For example, if you are creating a metric view on Wednesday, the current week is from Monday to Wednesday.
	If you select the Custom Period option, then you can view the specific date range for that scorecard.
Field	The option to select the organization unit. The options in this field were specified while creating the scorecard template, except for the last option where you must select Role, Department, or Site.
Value	The option to enter the values depending on the selected **Field**.
	The default option is All.

Save Performance View Scorecard

Name	Description
Name	The name of the scorecard view.
Category	The option to categorize a scorecard. The options are:
	• Admin
	• Coach & Learn
	• Custom
	• Evaluate
	• Interactions
	• System
	You can also add customized categories depending on your business needs.
Export	The option to export the view in one of the following formats:
	• Excel
	• CSV

| Button	Description
Run	To run a saved scorecard template to add filters to the scorecard.

Scorecard output drill-down options

You can group the scorecard outputs by using the **Group by** option. Scorecard outputs include the scorecard view and the performance view. Groups can be classified based on site, department, role, or employee. Each employee can view scorecard outputs of all the employees who are directly below that employee in the organizational hierarchy.

Refer to the following example to understand the drill-down options available for each employee in a scorecard output.

The following flowchart provides the access level for each designation. This is only a sample organizational hierarchy. In a real life scenario, the flowchart displays the names of the employees instead of the specific designations, and Site 1 and Site 2 is replaced by the names of the actual geographical locations.

* **Note:**

- Site 1: Gray color

- Site 2: Blue color
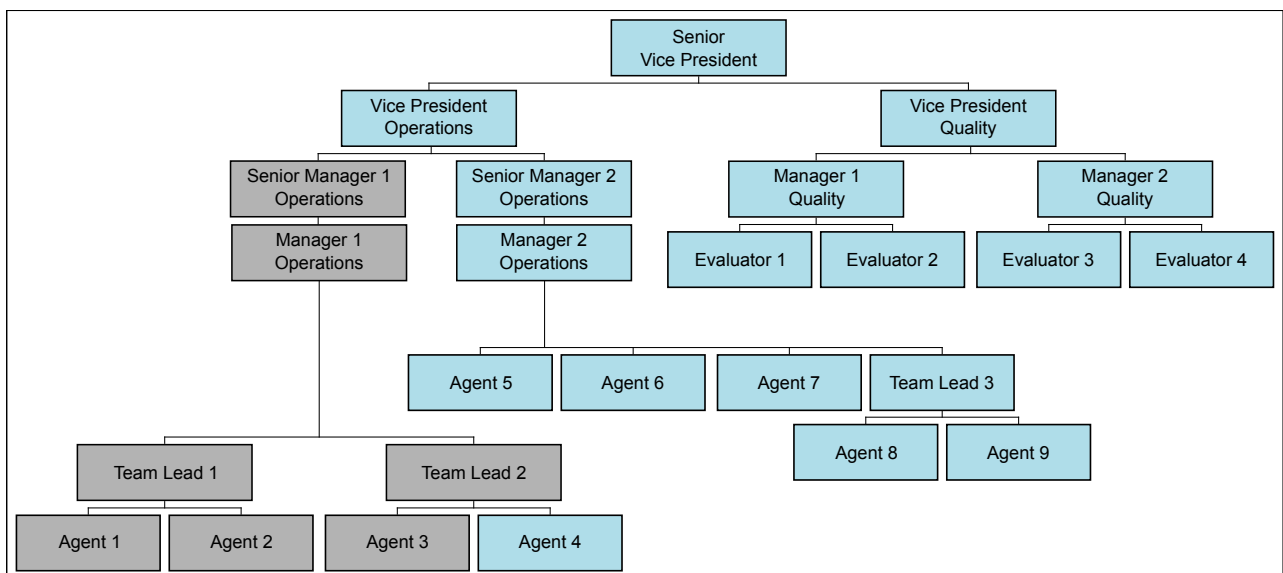
The access level to the scorecard output for the designations are as follows:

Senior Vice President:

If you are the Senior Vice President, generating the scorecard output, with the **Group by** option as **Site**, you get a snap shot of both the sites, Site 1 and Site 2.

If you click on Site 1, you can view the details of the employees within the Senior Vice President hierarchy and the employees associated to that site as follows:

- Senior Manager 1, Operations: When you, as the Senior Vice President, click on the employee who is the Senior Manager 1, Operations, you can drill down until the last node in the hierarchy. The sample is as follows:

  - Manager 1, Operations

    - Team Lead 1

      - Agent 1

      - Agent 2

    - Team Lead 2

      - Agent 3

      - Agent 4 – The output does not display this employee, who is the Agent 4, because this employee belongs to a different geographical location, that is, Site 2 and not to Site 1.

If you, as the Senior Vice President, click on Site 2, you can view the details of the employees within the Senior Vice President hierarchy and the employees associated to that site as follows:

- Vice President, Operations — When you click on the employee who is Vice President, Operations, you can drill down to the next level and view the direct reports and continue until the last node in the hierarchy.

  - Senior Manager 2, Operations

    - Manager 2, Operations

      - Agent 5

      - Agent 6

      - Agent 7

      - Team Lead 3

        - Agent 8

        - Agent 9

      - Agent 4

- Vice President, Quality

  - Manager 1, Quality

    - Evaluator 1

    - Evaluator 2

  - Manager 2, Quality

    - Evaluator 3

- Evaluator 4

Based on the hierarchy and the access privileges, all employees in the organization can perform the drill downs for the employees within the respective hierarchy.

Chapter 10: Analyze Speech

Speech overview

With the Speech module, you can perform precision search of recorded interactions. The third-party engine transforms audio recordings into actionable assets by producing search-optimized text output from single or multi-speaker audio file. You can search specific data from a large number of recorded interactions and provide valuable insights into the operations of the call center.

Using the Speech module you can take advantage of the following features:

- Phrase Sets: Create your library of words and phrases to track agent's performance as a supervisor.
- Search: Define your search criteria based on your business requirement.
- Business Criteria: Save the search as a business criteria to reuse or share the search criteria with one or more users..
- Results: View and manage speech results.

Avaya Workforce Optimization Select transcribes recorded interactions and identifies words and phrases defined as part of the search criteria, and highlights the words and phrases in the transcript.

Note:

You can manage phrase sets, searches, business criteria, and speech results only if you have the appropriate permissions. For more information about permissions and privileges, contact your system administrator.

Phrase sets

Using phrase sets, you can:

- Create your library of words, and phrases.

- Select the following logical conditions to define the search criteria for phrases within a phrase set:

  - Any of these (OR): Avaya Workforce Optimization Select searches for interactions that have at least one of the phrases defined in the phrase set and highlights the phrase in the result.

  - All of these (AND): Avaya Workforce Optimization Select searches for interactions that have all the phrases defined in the phrase set and highlights the phrase in the result.

  - None of these (NOT): Avaya Workforce Optimization Select searches for interactions that do not have any of the phrases defined in the phrase set and renders those interactions as part of the result.

Viewing phrase sets

About this task

Use this procedure to view the list of available phrase sets.

Procedure

1. Click **Speech** > **Phrase Sets**.

2. **(Optional)** On the pagination controls, choose the number of records that you want to view on each page.

3. **(Optional)** To filter the columns, click the ▼ icon in the column header of the column which you want to filter.

   You can apply filters on multiple columns.

4. **(Optional)** To clear the filters from all the columns, click the ▼× icon.

5. **(Optional)** To sort the columns, click the **Sort** 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. The third click removes the sorting.

6. **(Optional)** To add a phrase set, click **Add Phrase Set**.

7. **(Optional)** To edit a phrase set, click on the phrase set that you want to edit.

8. **(Optional)** To delete a phrase set, click on the radio button next to the phrase set, and click **Delete**.

Phrase Sets field descriptions

Name	Description
Name	The name of the phrase set.
Description	The description of the phrase set.

Table continues…

Name	Description
Used in Business Criteria	The number of business criteria that the phrase set is used in. You can click on the number or hover your mouse to view the name of the business criteria.
Created/Updated On	The date and time when the phrase set was created or updated. The date and time is in mm/dd/yyyy hh:mm:ss format.
Created/Updated By	The name of the employee by whom the phrase set was created or updated.
Status	The status of the business criteria. The options are: • Active: The default value. You can choose a phrase set while performing searches only if the phrase set is active. • Inactive: Inactive phrase sets are not available for selection when you define a search or edit a business criteria.

Button Name	Description
Add Phrase Set	To add a phrase set.
Delete	To delete a phrase set. The deletion of a phrase set does not impact any prior searches performed using the same phrase set.

Creating phrase sets

About this task

Use this procedure to create phrase sets by adding words or phrases and logical conditions to a phrase set.

Procedure

1. Click **Speech** > **Phrase Sets**.

2. On the Phrase Sets page, click **Add Phrase Set**.

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

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

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

   The Phrase Sets page displays the new phrase set that you created.

Add Phrase Set field descriptions

Name	Description
Phrase Set	The name of the phrase set that you are creating. You can enter up to 100 characters in this field. This field is mandatory.
Description	A brief description of the phrase set. You can enter up to 500 characters in this field.
Active	The option to select the phrase set as an active phrase set. By default, **Active** is selected. You can choose a phrase set while performing searches only if the phrase set is active.
Word/Phrase	The word or phrase that you want the speech engine to search for within interactions. You can enter up to 500 characters in this field. This field is mandatory.
Conditions	The logical conditions that define the search criteria for phrases within a phrase set. The options are: • Any of these (OR): Avaya Workforce Optimization Select searches for interactions that have at least one of the phrases defined in the phrase set and highlights the phrase in the result. • All of these (AND): Avaya Workforce Optimization Select searches for interactions that have all the phrases defined in the phrase set and highlights the phrase in the result. • None of these (NOT): Avaya Workforce Optimization Select searches for interactions that do not have any of the phrases defined in the phrase set and renders those interactions as part of the result.

Search

Using the Search feature, you can either transcribe or search for specific words and phrases in the transcript. You can:

- Create searches based on existing phrase sets. You can add or remove words or phrases within an existing phrase set.
- Refine your search criteria using filters based on numerous parameters.
- Save the search as a business criteria for reuse. Additionally, you can:
  - Share the business criteria with selected employees or everyone.

- Add tags or select from a list of existing tags to the business criteria. Avaya Workforce Optimization Select searches for interactions based on the tags you add.

> ✱ **Note:**
>
> You can run a search without saving it as a business criteria. Navigate to the Results page to view the request status and cancel or delete a requrest. You can also play the interactions that match your search criteria.

Create a search criteria

Selecting a phrase set

About this task

Use this procedure to select a phrase set for which you want to perform speech-based searches on interactions.

Procedure

1. Click **Speech** > **Search**.

2. On the Search page, click the **Phrase Set** tab.

3. To transcribe all interactions that meet your search criteria, click the **Transcribe only** checkbox.

4. To configure a phrase set, clear the **Transcribe Only** checkbox, and enter the appropriate details.

5. Click **Save**.

Next steps

Define employee selection.

Defining the employee selection criteria

About this task

Use this procedure to select employees whose interactions must be picked as part of the ad hoc search for speech analysis.

Procedure

1. Click the **Employee Selection** 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. **(Optional)** To add multiple filters, click the ⊕ icon.

e. Click **Apply Filter**.

The Employee List section displays the list of employees that match the search criteria.

Next steps

Define interaction selection.

Defining the interaction selection criteria

About this task

Use this procedure to define interactions that must be picked as part of the search criteria for transcription.

Procedure

1. Click the **Interaction Selection** tab.

2. To specify the search criteria to filter interactions to be evaluated do the following:

   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 [+] icon.

3. Click **Run** to run the search.

   ⊛ **Note:**

   You can run a search without saving it as a business criteria. Navigate to the Results page to view the request status and cancel or delete a request. You can also play the interactions that match your search criteria.

Next steps

Save the search as a business criteria.

Saving the search

About this task

Use this procedure to save the search as a business criteria for reuse.

Procedure

1. In the **Save Settings** tab, in **Business Criteria**, enter the name by which you want to save the search.

2. In **Description**, enter a description for the business criteria.

3. To activate the business criteria, select **Active**.

4. From Share, select one of the following to share the search with other users.

- **Me**: To configure the security option for the business criteria.

- **Selected Groups**: To share the search with the groups that you have access to. Employees belonging to the group can use the search.

- **Everyone**: To share the search with all available users.

5. To share the search with specific employees and groups, select **Selected Groups**.

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

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

7. 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.

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

9. In Tag(s), do any on of the following:

    a. Enter comma-separated multiple search tags.

    b. Select from existing system or custom tags.

10. Click **Save & Close** to save and close the search.

    The search is saved in the Business Criteria page.

11. Click **Run** to run the search.

12. Click **Reset** to reset the selection.

Search field descriptions

Phrase Set

Name	Description
Transcribe Only	The option to only transcribe all the interactions that meet the search criteria. ⊛ **Note:** Clear the **Transcribe Only** check box to configure a phrase set.
Phrase Set	The option to select from a list of available phrase sets.

Table continues…

Name	Description
Word/Phrase	The word or phrase that you want the speech engine to search for within interactions. You can add or remove a word or phrase within a phrase set.
Conditions	The logical conditions that define the search criteria for phrases within a phrase set. The options are: • Any of these (OR): Avaya Workforce Optimization Select searches for interactions that have at least one of the phrases defined in the phrase set and highlights the phrase in the result. • All of these (AND): Avaya Workforce Optimization Select searches for interactions that have all the phrases defined in the phrase set and highlights the phrase in the result. • None of these (NOT): Avaya Workforce Optimization Select searches for interactions that do not have any of the phrases defined in the phrase set and renders those interactions as part of the result.

Employee Selection

Filter	Description
Field	The parameters used to filter the search results for employees. The options are: • **DP OU** • **Department** • **Employee** • **Groups** • **Organization Unit** • **Reporting To** • **Role** • **Site** • **Tenure (Weeks)**

Table continues…

Filter	Description
Operator	The Operator relative to the field selected. The options are: • **Equals To** • **Not Equal To** • **Contains** • **Does Not Contain** • **Starts With** • **Does Not Start With** • **Ends With** • **Does Not End With** • **Less Than** • **Greater Than** • **Less Than or Equal** • **Greater Than or Equal** • **Not Equal To** • **Between** The default value is **Equals**.
Value	The numerical value or value ranges selected for the **Field** and **Operator** selected. This field cannot exceed 500 characters.

Field

Name	Description
Department	To search for interactions of employees who belong to the specified department.
DP OU	To search for interactions of employees based on 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.
Employee	To search for interactions based on the employees that you have access to.
Groups	To search for interactions of employees belonging to the specified group.
Organization Unit	To search for interactions based on the name of the organizational unit.
Role	To search for interactions of employees with the specified designation or role.

Table continues…

Name	Description
Site	To search for the interactions of employees belonging to the specified site.
Reporting To	To search for interactions based on the name of the supervisor.
Tenure (Weeks)	To search for interactions based on the tenure of the employee in weeks.

Operator

Name	Description
Equals To	To search for interactions that exactly match the specified value.
Not Equal To	To search for interactions that do not match the specified value. This search operator is not available for the **Transaction Date** field.
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.
Does not Start With	To search for interactions that does not start with a 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.
Not Equal To	To search for interactions that is not equal to a specified value.
Between	To search for interactions that lie between the specified values.

Employee List

Name	Description
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	The reporting manager of the employee.
Department	The department that the employee belongs to.

Interaction Selection

Name	Description
Field	The parameters used to filter the search results. The options are:
	• Agent ID
	• Archived
	• Called Party
	• Calling Party
	• Channel
	• Commented
	• Duration
	• Evaluated
	• Extension
	• Flagged for QA
	• Hold Duration
	• Interaction Comments
	• Interaction Ended By
	• Interaction Tags
	• Interaction Type
	• Interaction ID
	• No of Holds
	• No of Transfers
	• Queue
	• Screen Captures
	• Source Type
	• Tagged
	• Transfer Number
	• Transfer Type
	• Variables 1–10
	• VDN

Table continues…

Using Avaya Workforce Optimization Select

Name	Description
Operator	The Operator relative to the field selected. The options are: • **Equals To** • **Not Equal To** • **Contains** • **Does Not Contain** • **Starts With** • **Does Not Start With** • **Ends With** • **Does Not End With** • **Less Than** • **Greater Than** • **Less Than or Equal** • **Greater Than or Equal** • **Not Equal To** • **Between** The default value is **Equals**.
Value	The numerical value or value ranges selected for the **Field** and **Operator** selected. This field cannot exceed 500 characters.

Field

Name	Description
Agent ID	To search for interactions of employees with the specified agent or network ID.
Archived	To search for interactions that are archived. The options to filter interactions based on archiving from the **Value** field are: • Yes: To filter the interactions that were archived. • No: To filter the interactions that were not archived.
Called Party	To search for interactions by the extension number or email ID of the called party. You can use any alphanumeric characters or symbols to search an interaction.
Calling Party	To search for interactions by the extension number or email ID of the calling party. You can use any alphanumeric characters or symbols to search an interaction.

Table continues…

Name	Description
Channel	The type of channel in which the interaction is recorded. The options are: • **Chat** • **Email** • **Voice**
Commented	To search for interactions that are commented. The options to filter interactions based on comments from the **Value** field are: • Yes: To filter the interactions that were commented. • No: To filter the interactions that were not commented.
Duration	To search for interactions by the duration specified in the hh:mm:ss format.
Evaluated	To search for evaluated interactions.
Flagged for QA	To search for interactions that are flagged for QA. The options to filter interactions based on flagging from the **Value** field are: • Yes: To filter the interactions that were flagged for QA. • No: To filter the interactions that were not flagged for QA.
Extension	To search for interactions by the extension number of the employee.
Hold Duration	To search for interactions based on the hold duration.
Interaction Comments	To search for interactions based on specific comments provided by employees.
Interaction Date	To search for interactions based on the following options: • Current Week • Last Month • Last Week • This Month • Today • Yesterday You can also search for interactions for a specific date range.
Interaction Ended By	To search for interactions based on who ended a interaction. The options are: • Agent • Customer
Interaction ID	To search for interactions based on the interaction ID.
Interaction Tags	To search for interactions based on the specific tags used for association.

Table continues…

Name	Description
Interaction Type	To search for interactions based on the type of interaction.
No of Holds	To search for interactions with the specified number of holds.
No of Transfers	To search for interactions with the specified number of transfers.
Queue	To search for interactions by the queue that the interaction is associated with.
Screen Captures	To search for interactions with screens.
Source Type	To search for interactions based on the source. The options are: • System: The interactions recorded in the application • Adhoc-External: The interactions imported from external sources in the supported media formats. • Adhoc-Composite: The interactions grouped together from system and imported interactions. It can be a either a group of system interactions, imported interactions or both.
Tagged	To search for tagged interactions. The options to filter interactions based on tags from the **Value** field are: • Yes: To filter the interactions that were tagged. • No: To filter the interactions that were not tagged.
Transfer Number	To search for interaction based on the station or the extension number of the party to whom the interaction is transferred.
Transfer Type	To search for interactions based on how you transfer a call. The options are: • Cold Transfer: An agent transfers the customer call to another user without any prior notice to the user to whom the call is transferred. The second user can be another agent or a supervisor. • Conference: An agent adds another agent or supervisor to the call. • Warm Transfer: An agent speaks to another agent or supervisor before transferring a call. The first agent can provide background information about the call to the other agent or supervisor without the caller hearing the conversation. • No Transfer: An agent answers the queries of the caller without transferring the call to another agent or supervisor.
Variables 1–10	To search for interactions based on custom variables defined for your business.
VDN	To search for interactions based on an extension number that is used to enable calls to connect to a vector for processing.

Operator

Name	Description
Equals To	To search for interactions that exactly match the specified value.
Not Equal To	To search for interactions that do not match the specified value. This search operator is not available for the **Transaction Date** field.
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.
Does not Start With	To search for interactions that does not start with a 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.
Not Equal To	To search for interactions that is not equal to a specified value.
Between	To search for interactions that lie between the specified values.

Save Settings

Name	Description
Business Criteria	To save the search as a business criteria.
Description	To enter a description for the business criteria.
Active	To activate the business criteria.
Tag(s)	To select one or more interaction tags and associate the tags when the search criteria fetches one or more interaction.
Share	To share the business criteria. The options are: • **Me** • **Selected Groups** • **Everyone**

Button Name	Description
Reset	To reset the selection.
Save & Close	To save the search.
Run	To run the search.

Business criteria

Using the Business Criteria feature, you or the user with whom the business criteria is shared can reuse the saved search criteria.

Viewing business criteria

About this task

Use this procedure to view the list of available business criteria.

Procedure

1. Click **Speech** > **Business Criteria**.

   The page displays a list of all searches that you saved as business criteria.

2. **(Optional)** On the pagination controls, choose the number of records that you want to view on each page.

3. **(Optional)** To filter the columns, click the ▼ icon in the column header of the column which you want to filter.

   You can apply filters on multiple columns.

4. **(Optional)** To clear the filters from all the columns, click the ▼ₓ icon.

5. **(Optional)** To sort the columns, click the **Sort** 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. The third click removes the sorting.

6. **(Optional)** To run the business criteria, click on the radio button next to the business criteria, and click **Run**.

7. **(Optional)** To edit the business criteria, click on the radio button next to the business criteria, and click **Edit**.

8. **(Optional)** To delete a business criteria, click on the radio button next to the business criteria, and click **Delete**.

Business criteria field descriptions

Name	Description
Name	The name you provided while saving the search as a business criteria.
Description	The description you provided while saving the search as a business criteria.
Last Run On	The date and time when the business criteria was last run. The date and time is in mm/dd/yyyy hh:mm:ss format.

Table continues…

Name	Description
Last Run By	The name of the employee by whom the business criteria was last run.
Created On	The date and time when the business criteria was created. The date and time is in mm/dd/yyyy hh:mm:ss format.
Created By	The name of the employee by whom the business criteria was created.
Status	The status of the business criteria. The options are: • Active: The default value. • Inactive: You cannot run a business criteria that is inactive.

Button Name	Description
Run	To run the business criteria. Navigate to the Results page to view and play the interactions that match your business criteria.
Edit	To edit the business criteria.
Delete	To delete the business criteria.

Icon	Name	Description
	Public	The business criteria that is shared with all users in the selected group.

Editing business criteria

About this task

Use this procedure to edit a business criteria.

Procedure

1. Click **Speech** > **Business Criteria**.

   The page displays a list of all searches that you saved as business criteria.

2. Click the radio button next to the business criteria and click **Edit**.

3. In the Search page, do the following:

   a. Select a phrase set.

   b. Define employee selection.

   c. Define interaction selection.

   d. Save the business criteria.

Selecting a phrase set

About this task

Use this procedure to select a phrase set for which you want to perform speech-based searches on interactions.

Procedure

1. Click **Speech** > **Search**.

2. On the Search page, click the **Phrase Set** tab.

3. To transcribe all interactions that meet your search criteria, click the **Transcribe only** checkbox.

4. To configure a phrase set, clear the **Transcribe Only** checkbox, and enter the appropriate details.

5. Click **Save**.

Next steps

Define employee selection.

Defining the employee selection criteria

About this task

Use this procedure to select employees whose interactions must be picked as part of the ad hoc search for speech analysis.

Procedure

1. Click the **Employee Selection** 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. **(Optional)** To add multiple filters, click the icon.

   e. Click **Apply Filter**.

   The Employee List section displays the list of employees that match the search criteria.

Next steps

Define interaction selection.

Defining the interaction selection criteria

About this task

Use this procedure to define interactions that must be picked as part of the search criteria for transcription.

Procedure

1. Click the **Interaction Selection** tab.

2. To specify the search criteria to filter interactions to be evaluated do the following:

   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 [icon] icon.

3. Click **Run** to run the search.

   > ⊛ **Note:**
   >
   > You can run a search without saving it as a business criteria. Navigate to the Results page to view the request status and cancel or delete a requrest. You can also play the interactions that match your search criteria.

Next steps

Save the search as a business criteria.

Saving the search

About this task

Use this procedure to save the search as a business criteria for reuse.

Procedure

1. In the **Save Settings** tab, in **Business Criteria**, enter the name by which you want to save the search.

2. In **Description**, enter a description for the business criteria.

3. To activate the business criteria, select **Active**.

4. From Share, select one of the following to share the search with other users.

   - **Me**: To configure the security option for the business criteria.

   - **Selected Groups**: To share the search with the groups that you have access to. Employees belonging to the group can use the search.

   - **Everyone**: To share the search with all available users.

5. To share the search with specific employees and groups, select **Selected Groups**.

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

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

7. 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.

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

9. In Tag(s), do any on of the following:

      a. Enter comma-separated multiple search tags.

      b. Select from existing system or custom tags.

10. Click **Save & Close** to save and close the search.

    The search is saved in the Business Criteria page.

11. Click **Run** to run the search.

12. Click **Reset** to reset the selection.

Search field descriptions

Phrase Set

Name	Description
Transcribe Only	The option to only transcribe all the interactions that meet the search criteria. ⊛ **Note:** Clear the **Transcribe Only** check box to configure a phrase set.
Phrase Set	The option to select from a list of available phrase sets.
Word/Phrase	The word or phrase that you want the speech engine to search for within interactions. You can add or remove a word or phrase within a phrase set.
Conditions	The logical conditions that define the search criteria for phrases within a phrase set. The options are: • Any of these (OR): Avaya Workforce Optimization Select searches for interactions that have at least one of the phrases defined in the phrase set and highlights the phrase in the result. • All of these (AND): Avaya Workforce Optimization Select searches for interactions that have all the phrases defined in the phrase set and highlights the phrase in the result. • None of these (NOT): Avaya Workforce Optimization Select searches for interactions that do not have any of the phrases defined in the phrase set and renders those interactions as part of the result.

Employee Selection

Filter	Description
Field	The parameters used to filter the search results for employees. The options are: • **DP OU** • **Department** • **Employee** • **Groups** • **Organization Unit** • **Reporting To** • **Role** • **Site** • **Tenure (Weeks)**
Operator	The Operator relative to the field selected. The options are: • **Equals To** • **Not Equal To** • **Contains** • **Does Not Contain** • **Starts With** • **Does Not Start With** • **Ends With** • **Does Not End With** • **Less Than** • **Greater Than** • **Less Than or Equal** • **Greater Than or Equal** • **Not Equal To** • **Between** The default value is **Equals**.
Value	The numerical value or value ranges selected for the **Field** and **Operator** selected. This field cannot exceed 500 characters.

Field

Name	Description
Department	To search for interactions of employees who belong to the specified department.
DP OU	To search for interactions of employees based on 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.
Employee	To search for interactions based on the employees that you have access to.
Groups	To search for interactions of employees belonging to the specified group.
Organization Unit	To search for interactions based on the name of the organizational unit.
Role	To search for interactions of employees with the specified designation or role.
Site	To search for the interactions of employees belonging to the specified site.
Reporting To	To search for interactions based on the name of the supervisor.
Tenure (Weeks)	To search for interactions based on the tenure of the employee in weeks.

Operator

Name	Description
Equals To	To search for interactions that exactly match the specified value.
Not Equal To	To search for interactions that do not match the specified value. This search operator is not available for the **Transaction Date** field.
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.
Does not Start With	To search for interactions that does not start with a 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.
Not Equal To	To search for interactions that is not equal to a specified value.
Between	To search for interactions that lie between the specified values.

Employee List

Name	Description
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	The reporting manager of the employee.
Department	The department that the employee belongs to.

Interaction Selection

Name	Description
Field	The parameters used to filter the search results. The options are: • Agent ID • Archived • Called Party • Calling Party • Channel • Commented • Duration • Evaluated • Extension • Flagged for QA • Hold Duration • Interaction Comments • Interaction Ended By • Interaction Tags • Interaction Type • Interaction ID • No of Holds • No of Transfers • Queue • Screen Captures • Source Type • Tagged • Transfer Number • Transfer Type • Variables 1–10 • VDN

Table continues…

Name	Description
Operator	The Operator relative to the field selected. The options are: • **Equals To** • **Not Equal To** • **Contains** • **Does Not Contain** • **Starts With** • **Does Not Start With** • **Ends With** • **Does Not End With** • **Less Than** • **Greater Than** • **Less Than or Equal** • **Greater Than or Equal** • **Not Equal To** • **Between** The default value is **Equals**.
Value	The numerical value or value ranges selected for the **Field** and **Operator** selected. This field cannot exceed 500 characters.

Field

Name	Description
Agent ID	To search for interactions of employees with the specified agent or network ID.
Archived	To search for interactions that are archived. The options to filter interactions based on archiving from the **Value** field are: • Yes: To filter the interactions that were archived. • No: To filter the interactions that were not archived.
Called Party	To search for interactions by the extension number or email ID of the called party. You can use any alphanumeric characters or symbols to search an interaction.
Calling Party	To search for interactions by the extension number or email ID of the calling party. You can use any alphanumeric characters or symbols to search an interaction.

Table continues…

Name	Description
Channel	The type of channel in which the interaction is recorded. The options are: • **Chat** • **Email** • **Voice**
Commented	To search for interactions that are commented. The options to filter interactions based on comments from the **Value** field are: • Yes: To filter the interactions that were commented. • No: To filter the interactions that were not commented.
Duration	To search for interactions by the duration specified in the hh:mm:ss format.
Evaluated	To search for evaluated interactions.
Flagged for QA	To search for interactions that are flagged for QA. The options to filter interactions based on flagging from the **Value** field are: • Yes: To filter the interactions that were flagged for QA. • No: To filter the interactions that were not flagged for QA.
Extension	To search for interactions by the extension number of the employee.
Hold Duration	To search for interactions based on the hold duration.
Interaction Comments	To search for interactions based on specific comments provided by employees.
Interaction Date	To search for interactions based on the following options: • Current Week • Last Month • Last Week • This Month • Today • Yesterday You can also search for interactions for a specific date range.
Interaction Ended By	To search for interactions based on who ended a interaction. The options are: • Agent • Customer
Interaction ID	To search for interactions based on the interaction ID.
Interaction Tags	To search for interactions based on the specific tags used for association.

Table continues…

Name	Description
Interaction Type	To search for interactions based on the type of interaction.
No of Holds	To search for interactions with the specified number of holds.
No of Transfers	To search for interactions with the specified number of transfers.
Queue	To search for interactions by the queue that the interaction is associated with.
Screen Captures	To search for interactions with screens.
Source Type	To search for interactions based on the source. The options are: • System: The interactions recorded in the application • Adhoc-External: The interactions imported from external sources in the supported media formats. • Adhoc-Composite: The interactions grouped together from system and imported interactions. It can be a either a group of system interactions, imported interactions or both.
Tagged	To search for tagged interactions. The options to filter interactions based on tags from the **Value** field are: • Yes: To filter the interactions that were tagged. • No: To filter the interactions that were not tagged.
Transfer Number	To search for interaction based on the station or the extension number of the party to whom the interaction is transferred.
Transfer Type	To search for interactions based on how you transfer a call. The options are: • Cold Transfer: An agent transfers the customer call to another user without any prior notice to the user to whom the call is transferred. The second user can be another agent or a supervisor. • Conference: An agent adds another agent or supervisor to the call. • Warm Transfer: An agent speaks to another agent or supervisor before transferring a call. The first agent can provide background information about the call to the other agent or supervisor without the caller hearing the conversation. • No Transfer: An agent answers the queries of the caller without transferring the call to another agent or supervisor.
Variables 1–10	To search for interactions based on custom variables defined for your business.
VDN	To search for interactions based on an extension number that is used to enable calls to connect to a vector for processing.

Using Avaya Workforce Optimization Select

Operator

Name	Description
Equals To	To search for interactions that exactly match the specified value.
Not Equal To	To search for interactions that do not match the specified value. This search operator is not available for the **Transaction Date** field.
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.
Does not Start With	To search for interactions that does not start with a 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.
Not Equal To	To search for interactions that is not equal to a specified value.
Between	To search for interactions that lie between the specified values.

Save Settings

Name	Description
Business Criteria	To save the search as a business criteria.
Description	To enter a description for the business criteria.
Active	To activate the business criteria.
Tag(s)	To select one or more interaction tags and associate the tags when the search criteria fetches one or more interaction.
Share	To share the business criteria. The options are: • **Me** • **Selected Groups** • **Everyone**

Button Name	Description
Reset	To reset the selection.
Save & Close	To save the search.
Run	To run the search.

Running a business criteria

About this task

Use this procedure to run a business criteria.

Procedure

1. Click **Speech** > **Business Criteria**.

   The page displays a list of all searches that you saved as business criteria.

2. Click the business criteria that you want to run and click **Run**.

   The system displays the results of the business criteria in the **Results** tab. The xRun column displays the number of times a business criteria is run.

3. **(Optional)** To view the number of business criteria records, click on the xRun column of the respective business criteria.

   The system displays the business criteria, the date and time when the business criteria was run, and the status of the business criteria.

4. **(Optional)** To view the corresponding interaction list of a business criteria, click the ❯ icon.

Results

Once you run a search or a business criteria, Avaya Workforce Optimization Select displays the search results in the Results page. You can view the search name, status, and the number of interactions that match your search criteria. You can play an interaction and select a search criteria to quickly navigate to those sections that list the words, phrases, or expressions defined in your search criteria. You can edit, cancel, and delete a speech request from this page.

Viewing speech results

About this task

Use this procedure to view the results of running a search or a business criteria. You can view and play the interactions that match your search criteria.

Procedure

1. Click **Speech** > **Results**.

2. **(Optional)** On the pagination controls, choose the number of records that you want to view on each page.

3. **(Optional)** To filter the columns, click the ▾ icon in the column header of the column which you want to filter.

You can apply filters on multiple columns.

4. **(Optional)** To clear the filters from all the columns, click the ▾ icon.

5. **(Optional)** To sort the columns, click the **Sort** 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. The third click removes the sorting.

6. **(Optional)** To refresh the change in the status of a speech request, click **Refresh**.

7. **(Optional)** To edit a speech request, click the radio button next to the speech request, and click **Edit**.

8. **(Optional)** To delete a speech request, click the radio button next to the speech request, and click **Delete**.

9. **(Optional)** To cancel a speech request, click on the radio button next to the business criteria, and click **Cancel**.

You can cancel only those speech requests for which the status is New and In Progress.

10. **(Optional)** To view the number of business criteria records, click on the xRun column of the respective business criteria.

The system displays the business criteria, the date and time when the business criteria was run, and the status of the business criteria.

11. **(Optional)** To view the corresponding interaction list of a business criteria, click the ❯ icon.

12. **(Optional)** To view the interaction transcripts or phrase hits, click the ❯ icon or on the Status column of the respective speech result.

    a. To view the interactions for which no transcripts are available, click the **No transcript** check box.

    b. To view only those interactions for which transcripts are available, click the **Transcript** check box.

    c. To view only those interactions that have phrase hits, click the **Phrase hits** check box.

Results field descriptions

Name	Description
Search Name	The name of the speech request that was run as a search or a business criteria.
Interactions Selected	The number of interactions that were selected for a particular speech request.

Table continues…

Name	Description
xRun	The number of times a business criteria is run. Click to view the historical data of the search or business criteria. You can view the transcripts or phrase hits of interactions that are associated with the search or business criteria.
Last Run By	The name of the employee by whom the speech request was last run.
Last Run On	The date and time when the speech request was last run. The date and time is in mm/dd/yyyy hh:mm:ss format.
Status	The status of the speech request. The options are: • New: A new speech request for which processing has not started. • Processing: A speech request for which the processing is in progress. • Completed: A speech request for which the processing is completed. • Cancelled: A speech request that is cancelled. You can cancel a request that is in Processing and Completed status. • Failed: A speech request for which the processing has failed due to some reason.

Button Name	Description
Refresh	To refresh the Results page.
Edit Search	To edit the speech request.
Delete	To delete the speech request.
Cancel	To cancel the speech request.

Icon	Name	Description
›	View results	The option to view interaction transcripts or phrase hits.

View Results 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.
Interaction Date	The date on which the interaction takes place.
Duration	The duration of the interaction in the hh:mm:ss format.
Agent ID	The ID of the agent logged in into the phone.
Extension	To search for interactions by the extension number or email ID of the called party. You can use any alphanumeric characters or symbols to search an interaction.
Queue	The queue that the interaction is associated with.

Table continues…

Name	Description
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.
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.
Department	The department that the employee belongs to.
Role	The designation of the employee in the organization.
Tag(s)	The speech tags associated with those interaction that have phrase hits.

Checkbox Name	Description
No transcript	To view the interactions for which no transcripts are available.
	When you run a search criteria or a business criteria, Avaya Workforce Optimization Select might fail to transcribe few interactions that meet the criteria due to some reason. Therefore, you can select this option to view those interactions that did not get transcribed.
Transcript	To view only those interactions for which transcripts are available.
	When you run a search criteria or a business criteria, Avaya Workforce Optimization Select might fail to transcribe few interactions that meet the criteria due to some reason. Therefore, you can select this option to view those interactions that got transcribed.
Phrase hits	To view only those interactions that have phrase hits.
	Not all interactions that match the search or business criteria contain phrases defined within the phrase set. You can select this option to view only those interactions that contain the phrase hits.

Icon	Name	Description
▶	**Play**	The interaction that matches the search criteria or the business criteria and is available to play.
		• Green: The customer has ended the interaction.
		• Red: The employee has ended the interaction.

Editing speech results

About this task

Use this procedure to edit a speech result.

Procedure

1. Click **Speech** > **Results**.

2. Click the radio button next to the speech request and click **Edit**.

3. In the Search page, do the following:

   a. Select a phrase set.

   b. Define employee selection.

   c. Define interaction selection.

   d. Save the business criteria.

Selecting a phrase set

About this task

Use this procedure to select a phrase set for which you want to perform speech-based searches on interactions.

Procedure

1. Click **Speech** > **Search**.

2. On the Search page, click the **Phrase Set** tab.

3. To transcribe all interactions that meet your search criteria, click the **Transcribe only** checkbox.

4. To configure a phrase set, clear the **Transcribe Only** checkbox, and enter the appropriate details.

5. Click **Save**.

Next steps

Define employee selection.

Defining the employee selection criteria

About this task

Use this procedure to select employees whose interactions must be picked as part of the ad hoc search for speech analysis.

Procedure

1. Click the **Employee Selection** 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. **(Optional)** To add multiple filters, click the icon.

e. Click **Apply Filter**.

   The Employee List section displays the list of employees that match the search criteria.

Next steps

Define interaction selection.

Defining the interaction selection criteria

About this task

Use this procedure to define interactions that must be picked as part of the search criteria for transcription.

Procedure

1. Click the **Interaction Selection** tab.

2. To specify the search criteria to filter interactions to be evaluated do the following:

   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 [+] icon.

3. Click **Run** to run the search.

   > ⊛ **Note:**
   >
   > You can run a search without saving it as a business criteria. Navigate to the Results page to view the request status and cancel or delete a requrest. You can also play the interactions that match your search criteria.

Next steps

Save the search as a business criteria.

Saving the search

About this task

Use this procedure to save the search as a business criteria for reuse.

Procedure

1. In the **Save Settings** tab, in **Business Criteria**, enter the name by which you want to save the search.

2. In **Description**, enter a description for the business criteria.

3. To activate the business criteria, select **Active**.

4. From Share, select one of the following to share the search with other users.

   • **Me**: To configure the security option for the business criteria.

   • **Selected Groups**: To share the search with the groups that you have access to. Employees belonging to the group can use the search.

   • **Everyone**: To share the search with all available users.

5. To share the search with specific employees and groups, select **Selected Groups**.

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

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

7. 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.

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

9. In Tag(s), do any on of the following:

   a. Enter comma-separated multiple search tags.

   b. Select from existing system or custom tags.

10. Click **Save & Close** to save and close the search.

    The search is saved in the Business Criteria page.

11. Click **Run** to run the search.

12. Click **Reset** to reset the selection.

Search field descriptions

Phrase Set

Name	Description
Transcribe Only	The option to only transcribe all the interactions that meet the search criteria. ★ **Note:** Clear the **Transcribe Only** check box to configure a phrase set.
Phrase Set	The option to select from a list of available phrase sets.

Table continues…

Name	Description
Word/Phrase	The word or phrase that you want the speech engine to search for within interactions. You can add or remove a word or phrase within a phrase set.
Conditions	The logical conditions that define the search criteria for phrases within a phrase set. The options are: • Any of these (OR): Avaya Workforce Optimization Select searches for interactions that have at least one of the phrases defined in the phrase set and highlights the phrase in the result. • All of these (AND): Avaya Workforce Optimization Select searches for interactions that have all the phrases defined in the phrase set and highlights the phrase in the result. • None of these (NOT): Avaya Workforce Optimization Select searches for interactions that do not have any of the phrases defined in the phrase set and renders those interactions as part of the result.

Employee Selection

Filter	Description
Field	The parameters used to filter the search results for employees. The options are: • **DP OU** • **Department** • **Employee** • **Groups** • **Organization Unit** • **Reporting To** • **Role** • **Site** • **Tenure (Weeks)**

Table continues…

Filter	Description
Operator	The Operator relative to the field selected. The options are: • **Equals To** • **Not Equal To** • **Contains** • **Does Not Contain** • **Starts With** • **Does Not Start With** • **Ends With** • **Does Not End With** • **Less Than** • **Greater Than** • **Less Than or Equal** • **Greater Than or Equal** • **Not Equal To** • **Between** The default value is **Equals**.
Value	The numerical value or value ranges selected for the **Field** and **Operator** selected. This field cannot exceed 500 characters.

Field

Name	Description
Department	To search for interactions of employees who belong to the specified department.
DP OU	To search for interactions of employees based on 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.
Employee	To search for interactions based on the employees that you have access to.
Groups	To search for interactions of employees belonging to the specified group.
Organization Unit	To search for interactions based on the name of the organizational unit.
Role	To search for interactions of employees with the specified designation or role.

Table continues…

Name	Description
Site	To search for the interactions of employees belonging to the specified site.
Reporting To	To search for interactions based on the name of the supervisor.
Tenure (Weeks)	To search for interactions based on the tenure of the employee in weeks.

Operator

Name	Description
Equals To	To search for interactions that exactly match the specified value.
Not Equal To	To search for interactions that do not match the specified value. This search operator is not available for the **Transaction Date** field.
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.
Does not Start With	To search for interactions that does not start with a 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.
Not Equal To	To search for interactions that is not equal to a specified value.
Between	To search for interactions that lie between the specified values.

Employee List

Name	Description
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	The reporting manager of the employee.
Department	The department that the employee belongs to.

Interaction Selection

Name	Description
Field	The parameters used to filter the search results. The options are: • Agent ID • Archived • Called Party • Calling Party • Channel • Commented • Duration • Evaluated • Extension • Flagged for QA • Hold Duration • Interaction Comments • Interaction Ended By • Interaction Tags • Interaction Type • Interaction ID • No of Holds • No of Transfers • Queue • Screen Captures • Source Type • Tagged • Transfer Number • Transfer Type • Variables 1–10 • VDN

Table continues…

Name	Description
Operator	The Operator relative to the field selected. The options are: • **Equals To** • **Not Equal To** • **Contains** • **Does Not Contain** • **Starts With** • **Does Not Start With** • **Ends With** • **Does Not End With** • **Less Than** • **Greater Than** • **Less Than or Equal** • **Greater Than or Equal** • **Not Equal To** • **Between** The default value is **Equals**.
Value	The numerical value or value ranges selected for the **Field** and **Operator** selected. This field cannot exceed 500 characters.

Field

Name	Description
Agent ID	To search for interactions of employees with the specified agent or network ID.
Archived	To search for interactions that are archived. The options to filter interactions based on archiving from the **Value** field are: • Yes: To filter the interactions that were archived. • No: To filter the interactions that were not archived.
Called Party	To search for interactions by the extension number or email ID of the called party. You can use any alphanumeric characters or symbols to search an interaction.
Calling Party	To search for interactions by the extension number or email ID of the calling party. You can use any alphanumeric characters or symbols to search an interaction.

Table continues…

Name	Description
Channel	The type of channel in which the interaction is recorded. The options are: • **Chat** • **Email** • **Voice**
Commented	To search for interactions that are commented. The options to filter interactions based on comments from the **Value** field are: • Yes: To filter the interactions that were commented. • No: To filter the interactions that were not commented.
Duration	To search for interactions by the duration specified in the hh:mm:ss format.
Evaluated	To search for evaluated interactions.
Flagged for QA	To search for interactions that are flagged for QA. The options to filter interactions based on flagging from the **Value** field are: • Yes: To filter the interactions that were flagged for QA. • No: To filter the interactions that were not flagged for QA.
Extension	To search for interactions by the extension number of the employee.
Hold Duration	To search for interactions based on the hold duration.
Interaction Comments	To search for interactions based on specific comments provided by employees.
Interaction Date	To search for interactions based on the following options: • Current Week • Last Month • Last Week • This Month • Today • Yesterday You can also search for interactions for a specific date range.
Interaction Ended By	To search for interactions based on who ended a interaction. The options are: • Agent • Customer
Interaction ID	To search for interactions based on the interaction ID.
Interaction Tags	To search for interactions based on the specific tags used for association.

Table continues…

Name	Description
Interaction Type	To search for interactions based on the type of interaction.
No of Holds	To search for interactions with the specified number of holds.
No of Transfers	To search for interactions with the specified number of transfers.
Queue	To search for interactions by the queue that the interaction is associated with.
Screen Captures	To search for interactions with screens.
Source Type	To search for interactions based on the source. The options are: • System: The interactions recorded in the application • Adhoc-External: The interactions imported from external sources in the supported media formats. • Adhoc-Composite: The interactions grouped together from system and imported interactions. It can be a either a group of system interactions, imported interactions or both.
Tagged	To search for tagged interactions. The options to filter interactions based on tags from the **Value** field are: • Yes: To filter the interactions that were tagged. • No: To filter the interactions that were not tagged.
Transfer Number	To search for interaction based on the station or the extension number of the party to whom the interaction is transferred.
Transfer Type	To search for interactions based on how you transfer a call. The options are: • Cold Transfer: An agent transfers the customer call to another user without any prior notice to the user to whom the call is transferred. The second user can be another agent or a supervisor. • Conference: An agent adds another agent or supervisor to the call. • Warm Transfer: An agent speaks to another agent or supervisor before transferring a call. The first agent can provide background information about the call to the other agent or supervisor without the caller hearing the conversation. • No Transfer: An agent answers the queries of the caller without transferring the call to another agent or supervisor.
Variables 1–10	To search for interactions based on custom variables defined for your business.
VDN	To search for interactions based on an extension number that is used to enable calls to connect to a vector for processing.

Operator

Name	Description
Equals To	To search for interactions that exactly match the specified value.
Not Equal To	To search for interactions that do not match the specified value. This search operator is not available for the **Transaction Date** field.
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.
Does not Start With	To search for interactions that does not start with a 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.
Not Equal To	To search for interactions that is not equal to a specified value.
Between	To search for interactions that lie between the specified values.

Save Settings

Name	Description
Business Criteria	To save the search as a business criteria.
Description	To enter a description for the business criteria.
Active	To activate the business criteria.
Tag(s)	To select one or more interaction tags and associate the tags when the search criteria fetches one or more interaction.
Share	To share the business criteria. The options are: • **Me** • **Selected Groups** • **Everyone**

Button Name	Description
Reset	To reset the selection.
Save & Close	To save the search.
Run	To run the search.

Chapter 11: Managing reports

Reports overview

With the Reports module, you can translate data to business intelligence. Contact centers need efficient and powerful tools for executives to analyze the performance of the organization. Supervisors and managers need statistics around individual or team performance. With this module in Avaya Workforce Optimization Select, you can generate different types of report views that are essential for the success of your business.

Using the Reports module, you can get:

- Predefined set of report templates for each module.
- Report output in various formats, such as PDF, Excel, HTML, and CSV.

  ✳ **Note:**

  Reports such as Evaluation Criteria Details, Evaluations Criteria Summary, Evaluations Overview, and Evaluations Section Summary do not support the PDF output.

- 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.

Report templates

Interactions

Name	Description
Interactions Details	Highlights the 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 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	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 average handle time, , hold count, transfers, screens, and number of interactions that the employees made. • 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	Displays the interactions recorded for employees in the contact center over a specific period, such as quarterly, monthly, weekly, or daily. The report output displays the interaction count and duration for the specified time depending on the filter criteria that you select.
AHT Trend	Displays the average handle time between the employee and customer based on organization unit, group, and employees, over a specific period. Supervisors or managers can choose to view the output in a graphical or data format displaying the trend.

Evaluate

Name	Description
Evaluation Criteria Detail	Provides the details on every evaluation performed for employees using selected forms to the criterion level. The report output depends on how you group the data when you filter the report criteria.
	Supervisors can:
	• Get a summary of the total number of evaluations with average QA scores, the maximum QA score, and average percentage.
	• Get details on how an agent performed against one or more criteria in the evaluations summary.
	• View the score achieved at a criterion level, and the scoring condition applicable to a criterion.
	The report output displays the following details about the interaction:
	• Evaluations Summary
	• Evaluation Details
	• General Comments
	• Header Information

Table continues…

Using Avaya Workforce Optimization Select

Name	Description
Evaluation Criteria Summary	Provides the details depending on each criterion used in an evaluation form.
	Supervisors can:
	• Get a summary of the criteria used in an evaluation form and break down how many times a question is responded in a particular way.
	• Get details on what an agent scored in numbers and percentage for each way the agent responded to a question.
	• Narrow down the results by date, date type, form name, form status, agent, evaluator, and group.
	The report output displays the following details about the interaction:
	• Group by information
	• Overall summary of each criterion
	• Form name
	• Total number of evaluations performed
	• Average score
	• Maximum score
	• Average percentage
Evaluation Details	Highlights the 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 the primary performance criteria
	• Scores for the individual scoring criteria
	• Overall average score of the selected employees

Table continues…

Name	Description
Evaluations Overview	Summarizes the quality scores for a site, organization unit, group, employee, queues, reviewers, and forms depending on the filter criteria that you select. Supervisors can: • Get a snapshot view on total number of evaluations, sum total of scores of all evaluations and percentage of evaluations for various Queues, Organization Units, Sites, Groups Employees, Reviewers, and Forms. • Filter the results by interaction date, evaluation date, and evaluation modified date. • View the report output grouped by Organization Units, Sites, Groups, Employees, Forms, Reviewers, and Queues. The report output displays the following details about the group by option that you select: • Total evaluations • Score • Max score • Percentage
Evaluation Section Summary	Summarizes the quality scores for the employees at a section level for selected forms. Supervisors can: • Get a snapshot view of total number of evaluations, section level scores of all evaluations and percentage of evaluations for various Queues, Organization Units, Sites, Groups, and Employees. • Filter the results by interaction date, evaluation date, and evaluation modified date. The report output displays the following details about the employee: • Total evaluations • Score • Max score • Percentage

Table continues…

Name	Description
Evaluations Summary	Highlights the 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	Displays a 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. The report output displays the following details about the interaction: • Number of evaluations • Average score • Total number of evaluations • Total average score

| Using Avaya Workforce Optimization Select |

Coach

Name	Description
Coaching Summary	Highlights the 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

Learn

Name	Description
Course & Quiz Summary	Highlights the 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

Administration

Name	Description
Employee Recording Configuration	The report provides information of all the recording configuration options enabled for employees. The user who generates the report can view all the recording configuration options enabled for employees that the user has access to.
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.
Web Usage Audit	The report displays the details of the web application access and user activity like modifications done on the current values, clicking on any action buttons for example reset password and adding, editing, or deleting any data.

Create a new report

Selecting a report template

Procedure

1. Click **Reports** > **Reports** > **Templates**.

2. To select the template category, click one of the following:

   - **Interactions**

   - **Evaluate**

   - **Coach**

   - **Learn**

   - **Administration**

3. To create a report of contact center use and agent performance, select a template from **Interactions**.

4. To create a report on agent evaluations, select a template from **Evaluate**.

5. To create a report on agent coaching, select a template from **Coach**.

6. To create a report on agent learning and assessment, select a template from **Learn**.

7. To create an administrative report of user access and voice configuration settings, select a template from **Administration**.

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 Filter 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 **Filter**, enter the parameters for the report from the available report criteria.

   The parameters define the columns available in the report output.

2. To view the reports in data and chart or both formats for the **Interactions Trend**, **AHT Trend**, **Evaluations Summary**, **Evaluations Trend**, **Coaching Summary**, **Course and Quiz Summary** templates, click the options in the **Display** field.

3. In **Export**, click the output format of the templates you want:

- **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 created at the organization unit level that the user generating the report has access to. The report output contains data pertaining to the DP OU you select. For example, **Business**, **Client**, **Customer**, or **Line of Business**. ★ Note: Avaya Workforce Optimization Select displays this mandatory field only if your system administrator enables the data partition option during the application set up.
Organization Units	The organization units that the user generating the report has access to. This field is mandatory.
Sites	The active sites available for selection. This field is mandatory. The default option is All
Groups	The groups that the user generating the report has access to. This field is mandatory.

Table continues…

Name	Description
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 • 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 created at the organization unit level that is accessible to the user who generates the report. The report output contains data pertaining to the DP OU you select. For example, **Business**, **Client**, **Customer**, or **Line of Business**. ✳ **Note:** Avaya Workforce Optimization Select displays this mandatory field only if your system administrator enables the data partition option during the application set up.

Table continues…

Name	Description
Organization Units	The organization units that are accessible to the user who generates the report. This field is mandatory.
Sites	The active sites available for selection. This field is mandatory. The default option is All
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 • 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: • **Interaction 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 created at the organization unit level that is accessible to the user who generates the report. The report output contains data pertaining to the DP OU you select. For example, **Business**, **Client**, **Customer**, or **Line of Business**. ★ **Note:** Avaya Workforce Optimization Select displays this mandatory field only if your system administrator enables the data partition option during the application set up.
Organization Units	The organization units that are accessible to the user who generates the report. This field is mandatory.
Sites	The active sites available for selection. This field is mandatory. The default option is All
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
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: • Both • Chart • Data 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. • **Interaction 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 created at the organization unit level that is accessible to the user who generates the report. The report output contains data pertaining to the DP OU you select. For example, **Business**, **Client**, **Customer**, or **Line of Business**. **✱ Note:** Avaya Workforce Optimization Select displays this mandatory field only if your system administrator enables the data partition option during the application set up.
Organization Units	The organization units that are accessible to the user who generates the report. This field is mandatory.
Sites	The active sites available for selection. This field is mandatory. The default option is All
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: • Both • Chart • Data This field is mandatory.

Table continues…

Name	Description
Export	The report output format. The options are: • HTML • PDF • Excel • CSV This field is mandatory.

Evaluation Criteria Detail field descriptions

Name	Description
Range	The time range of a report. The options are: • **Today** • **Yesterday** • **Current Week** • **Last Week** • **Current Month** • **Last Month** • **Custom** This field is mandatory.
DP OU Type	The partition created at the organization unit level that is accessible to the user who generates the report. The report output contains data pertaining to the DP OU you select. For example, **Business**, **Client**, **Customer**, or **Line of Business**. 😊 **Note:** Avaya Workforce Optimization Select displays this mandatory field only if your system administrator enables the data partition option during the application set up.
Organization Units	The organization units that are accessible to the user who generates the report. This field is mandatory. The default option is All.
Sites	The active sites available for selection. This field is mandatory. The default option is All

Table continues…

Name	Description
Groups	The groups that the user generating the report has access to.
	You can select multiple groups depending on your business requirements.
	This field is mandatory.
	The default option is All.
Employees	The employee list available for selection, which is based on the organization unit and group that the user selects.
	You can also select individual employees based on business requirements.
	This field is mandatory.
	The default option is All.
Evaluation Type	The name of the evaluation type. Reviewers or evaluators select an evaluation type while evaluating an interaction.
	This field is mandatory.
	The default option is Normal.
Forms	The evaluation forms available for selection, which is based on the organization unit and group that the user selects.
	You can also select multiple forms based on your business requirements.
	This field is mandatory.
Criteria	The criteria used to evaluate an interaction for the selected forms.
	You can also select a parent criteria that has a child criteria associated to it.
	This is an optional field.
	The default option is Normal.
Reviewers	The employees who have access to the interactions of the selected agents and who possess evaluation permission.
	This field is mandatory.
Interaction Direction	The option to select the direction of the interaction. options are:
	• Outbound
	• Inbound
	• Bi Direction

Table continues…

Name	Description
Interaction Type	The type of channel on which the interaction is delivered. The options are: The options are: • Voice • Non Voice • Email • SMS • Chat
Interaction Tags	The tags applied to an interaction after evaluation.
Queue(s)	The queue and queue type that the interaction is associated with. The options are: • Chat • Email • Inbound • Outbound • SMS • All • Custom: These are queues that the system administrator manually creates to define an additional level of tracking.
Interaction Ended By	The party who ended the interaction. The options are: • Customer Ended • Agent Ended
Group by	The order in which you want to group the report data. The options are: • Organization Units • Sites • Groups • Employees • Forms • Reviewers • Queues This field is mandatory.

Table continues…

Name	Description
Export	The report output format. The options are: • HTML • Excel • CSV This field is mandatory.

Button	Description
Save & Close	To save the evaluation report that you have created.
Run	To run the report.

Evaluation Criteria Summary field descriptions

Name	Description
Date Type	The specific date on which a particular action is taken. The options are: • Interaction Date • Evaluation Date • Modified Evaluation Date
Range	The time range of a report. The options are: • Today • Yesterday • Current Week • Last Week • Current Month • Last Month • Custom: You can select a custom period using this option. This field is mandatory.
Source Type	The source of the interaction for a report. • System: The interactions recorded in the application • Adhoc-External: The interactions imported from external sources in the supported media formats. • Adhoc-Composite: The interactions grouped together from system and imported interactions. It can be a either a group of system interactions, imported interactions or both. • All: The total interactions available in the application.

Table continues…

Name	Description
DP OU Type	The partition created at the organization unit level that is accessible to the user who generates the report. The report output contains data pertaining to the DP OU you select. For example, **Business**, **Client**, **Customer**, or **Line of Business**. ★ **Note:** Avaya Workforce Optimization Select displays this mandatory field only if your system administrator enables the data partition option during the application set up.
Organization Units	The organization units that are accessible to the user who generates the report. This field is mandatory.
Sites	The active sites available for selection. This field is mandatory. The default option is All
Departments	The available departments in the organization. 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.
Evaluation Type	This field is mandatory.
Form(s)	The evaluation forms available for selection. The forms listed are based on the DP OU type you select if the DP OU option is enabled. If the DP OU option is not enabled, Avaya Workforce Optimization Select lists all available forms. You can also select multiple forms based on your business requirements. This field is mandatory.
Criteria	The criteria used to evaluate an interaction for the selected forms.
Response	The option used to specify the responses to the evaluation criteria defined in an evaluation form. The options are: • All • Yes • No • True • False

Table continues…

Name	Description
Reviewers	The users who have the privileges to evaluate an employee. This field is mandatory.
Interaction Direction	The direction of the interaction. The options are: • Inbound • Outbound • Bi Direction
Interaction Type	The channel used for interaction. The options are: • Voice • Chat • Email • SMS • All
Interaction Tags	The tag added to a specific interaction. One of more actions can be added to a tag. The options are: • Flag for QA • Record this interaction • Stop recording • Pause recording • Resume recording • Discard this recording • Do not allow download • Do not allow email • Do not allow download & email

Table continues…

Name	Description
Queues	The queue that the interaction is associated with. The options: • Chat • Email • Outbound • Inbound • SMS • All • Custom: These are queues that the system administrator manually creates to define an additional level of tracking.
Interaction Ended By	The party who ended the interaction. The options are: • Agent • Customer
Group by	The order in which you want to group the report data. The options are: • Organization Units • Sites • Groups • Employees • Forms: This is the default option. • Reviewers • Queues This field is mandatory.
Export	The report output format. The options are: • HTML • Excel • CSV This field is mandatory.

Button	Description
Save & Close	To save the evaluation report that you have created.
Run	To run the report.

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** • **Custom**
DP OU Type	The partition created at the organization unit level that is accessible to the user who generates the report. The report output contains data pertaining to the DP OU you select. For example, **Business**, **Client**, **Customer**, or **Line of Business**. ⊛ **Note:** Avaya Workforce Optimization Select displays this mandatory field only if your system administrator enables the data partition option during the application set up.
Organization Units	The organization units that are accessible to the user who generates the report. This field is mandatory.
Sites	The active sites available for selection. This field is mandatory. The default option is All
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. The forms listed are based on the DP OU type you select if the DP OU option is enabled. If the DP OU option is not enabled, Avaya Workforce Optimization Select lists all available forms. You can also select multiple forms based on your business requirements. This field is mandatory.

Table continues…

Name	Description
Evaluation Type	The name of the evaluation type. Reviewers or evaluators select an evaluation type while evaluating an interaction. The options are: • All • Adhoc • Normal
Reviewers	The users 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 - Evaluations Overview field descriptions

Name	Description
Date Type	The specific date when a particular action is taken. The options are: • Interaction Date • Evaluation Date • Evaluation Modified Date

Table continues…

Name	Description
Range	The time range of a report. The options are: • **Today** • **Yesterday** • **Current Week** • **Last Week** • **Current Month** • **Last Month** • **Custom** This field is mandatory.
DP OU Type	The partition created at the organization unit level that is accessible to the user who generates the report. For example, **Business**, **Client**, **Customer**, or **Line of Business**. This field is mandatory.
Organization Units	The organization units that are accessible to the user who generates the report. This field is available based on the **DP OU Type** you select in a data partitioned environment. This field is mandatory. The default option is All.
Sites	The available sites. This field is mandatory. The default option is All.
Groups	The groups that the user generating the report has access to. You can select multiple groups depending on your business requirements. This field is mandatory. The default option is All.
Employees	The employee list available for selection, which is based on the organization unit and group that the user selects. You can also select individual employees based on business requirements. This field is mandatory. The default option is All.

Table continues…

Name	Description
Forms	The evaluation forms available for selection. Forms are listed based on the organization unit and group that you select. You can also select multiple forms based on your business requirements. This field is mandatory.
Evaluation Type	The name of the evaluation type. Reviewers or evaluators select an evaluation type while evaluating an interaction. This field is mandatory. The default option is All.
Reviewers	The supervisors or managers who have the privileges to evaluate an employee.
Queues	The queue that the interaction is associated with. The options: • Chat • Email • Outbound • Inbound • SMS • All • Custom
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 • Excel • CSV This field is mandatory.

Using Avaya Workforce Optimization Select

Report template - Evaluations Section Summary field descriptions

Name	Description
Date Type	The specific date when a particular action is taken. The options are: • Interaction Date • Evaluation Date • Evaluation Modified Date
Range	The time range of a report. The options are: • **Today** • **Yesterday** • **Current Week** • **Last Week** • **Current Month** • **Last Month** • **Custom** This field is mandatory.
DP OU Type	The partition created at the organization unit level that is accessible to the user who generates the report. For example, **Business**, **Client**, **Customer**, or **Line of Business**. ✴ **Note:** Avaya Workforce Optimization Select displays this mandatory field only if your system administrator enables the data partition option during the application set up.
Organization Units	The organization units that are accessible to the user who generates the report. This field is mandatory. The default option is All.
Sites	The active sites available for selection. This field is mandatory. The default option is All
Groups	The groups that the user generating the report has access to. You can select multiple groups depending on your business requirements. This field is mandatory. The default option is All.

Table continues…

Name	Description
Employees	The employee list available for selection, which is based on the organization unit and group that the user selects.
	You can also select individual employees based on your business requirements.
	This field is mandatory.
	The default option is All.
Forms	The evaluation forms available for selection. Forms are listed based on the DP OU type that you select if the DP OU option is enabled. If the DP OU option is disabled, Avaya Workforce Optimization Select lists all available forms.
	You can also select multiple forms based on your business requirements.
	This field is mandatory.
Evaluation Type	The name of the evaluation type. Reviewers or evaluators select an evaluation type while evaluating an interaction.
	This field is mandatory.
	The default option is All.
Reviewers	The users who have the privileges to evaluate an employee.
Queues	The queue that the interaction is associated with.
	The options are:
	• Chat
	• Email
	• Outbound
	• Inbound
	• SMS
	• All
	• Custom: These are queues that the system administrator manually creates to define an additional level of tracking.
Export	The report output format. The options are:
	• HTML
	• 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 created at the organization unit level that is accessible to the user who generates the report. The report output contains data pertaining to the DP OU you select. For example, **Business**, **Client**, **Customer**, or **Line of Business**. ✱ **Note:** Avaya Workforce Optimization Select displays this mandatory field only if your system administrator enables the data partition option during the application set up.
Organization Units	The organization units that are accessible to the user who generates the report. This field is mandatory.
Sites	The active sites available for selection. This field is mandatory. The default option is All
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. The forms listed are based on the DP OU type you select if the DP OU option is enabled. If the DP OU option is not enabled, Avaya Workforce Optimization Select lists all available forms. You can also select multiple forms based on your business requirements. This field is mandatory.

Table continues…

Name	Description
Evaluation Type	The name of the evaluation type. Reviewers or evaluators select an evaluation type while evaluating an interaction. The options are: • All • Adhoc • Normal
Reviewers	The users who have the privileges to evaluate an employee.
Status	The status of the assigned coaching. The options are: • **All** • **Completed** • **New**
Display	The format in which you want to display the report output. The options are: • Both • Chart • Data This field is mandatory.
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: • **Interaction 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 created at the organization unit level that is accessible to the user who generates the report. The report output contains data pertaining to the DP OU you select. For example, **Business**, **Client**, **Customer**, or **Line of Business**. ⊛ **Note:** Avaya Workforce Optimization Select displays this mandatory field only if your system administrator enables the data partition option during the application set up.
Organization Units	The organization units that are accessible to the user who generates the report. This field is mandatory.
Sites	The active sites available for selection. This field is mandatory. The default option is All
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. The forms listed are based on the DP OU type you select if the DP OU option is enabled. If the DP OU option is disabled, Avaya Workforce Optimization Select lists all available forms. You can also select multiple forms based on your business requirements. This field is mandatory.

Table continues…

Name	Description
Evaluation Type	The name of the evaluation type. Reviewers or evaluators select an evaluation type while evaluating an interaction. The options are: • All • Adhoc • Normal
Reviewers	The users 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.
Display	The format in which you want to display the report output. The options are: • Both • Chart • Data This field is mandatory.
Export	The report output format. The options are: • HTML • PDF • Excel • CSV This field is mandatory.

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 created at the organization unit level that is accessible to the user who generates the report. The report output contains data pertaining to the DP OU you select. For example, **Business**, **Client**, **Customer**, or **Line of Business**. ⭐ **Note:** Avaya Workforce Optimization Select displays this mandatory field only if your system administrator enables the data partition option during the application set up.
Organization Units	The organization units that are accessible to the user who generates the report. This field is mandatory.
Sites	The active sites available for selection. This field is mandatory. The default option is All
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. The forms listed are based on the DP OU type you select if the DP OU option is enabled. If the DP OU option is not enabled, Avaya Workforce Optimization Select lists all available forms. You can also select multiple forms based on your business requirements. This field is mandatory.

Table continues…

Using Avaya Workforce Optimization Select
Comments on this document? infodev@avaya.com

Name	Description
Reviewers	The users 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.
Display	The format in which you want to display the report output. The options are: • Both • Chart • Data 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.

Table continues…

Name	Description
DP OU Type	The partition created at the organization unit level that is accessible to the user who generates the report. The report output contains data pertaining to the DP OU you select. For example, **Business**, **Client**, **Customer**, or **Line of Business**. 😀 **Note:** Avaya Workforce Optimization Select displays this mandatory field only if your system administrator enables the data partition option during the application set up.
Organization Units	The organization units that are accessible to the user who generates the report. This field is mandatory.
Sites	The active sites available for selection. This field is mandatory. The default option is All
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.
Status	The status of the course and quiz completion. The options are: • **All** • **Completed**
Display	The format in which you want to display the report output. The options are: • Both • Chart • Data This field is mandatory.
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.
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.

Table continues…

Name	Description
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.
Modules	The modules in the application.
Sub modules	The sub modules for each module.

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. You can only add those reports or favorites as Dashboard widgets if you select them while saving a report.

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.

3. **(Optional)** To select a report as favorite, select the **Favorite** check box.

4. **(Optional)** To enable the report to be added to Dashboard, select the **Add to Dashboard** check box.

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 Selected 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 Selected 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 descriptions

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.

Table continues…

Name	Description
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.
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.

Saving a report as a favorite

About this task

You can save a report as a favorite for future reference.

Procedure

1. Click **Reports** > **Reports**.

2. On the Reports page, click **Templates**.

3. Click one of the available templates.

4. Select the required fields and click **Save Settings**.

5. Type the name and description of the report , and select the **Is Favorite** check box.

6. **(Optional)** Select the users with whom you want to share the saved report.

7. Click **Save & Close**.

   The system displays the report in the Saved Reports section of the Reports page.

Saving a report to add to Dashboard

About this task

Use this procedure to save a new report or an existing report to add to Dashboard in the future.

Procedure

1. Click **Reports** > **Reports**.

2. On the Reports page, click **Templates**.

3. Click one of the available templates.

4. Select the required fields and click **Save Settings**.

5. Type the name of the report and the description, and select the **Add to Dashboard** check box.

6. Click **Save & Close**.

View report results

Viewing report 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. Go to the row of the required report and click the status link of the report.

   The status options are:

   • **New**

   • **Assigned**

   • **In Progress**

   • **Completed**

   • **Failed**

   The Results page displays the report in one of the following formats depending on what you selected at the time of publishing the report:

   • HTML

   • PDF

   • Excel

   • CSV

3. **(Optional)** On the pagination controls, choose the number of records that you want to view on each page.

4. **(Optional)** To filter the columns, click the ▼ icon in the column header of the column which you want to filter.

   You can apply filters on multiple columns.

5. **(Optional)** To clear the filters from all the columns, click the 🔻 icon.

6. **(Optional)** To sort the columns, click the **Sort** 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. The third click removes the sorting.

7. **(Optional)** To reset the sorting, click the ⬍ₓ icon.

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: • New: A report generation request that is new. • Assigned: A report request that is accepted, and awaiting to be processed. • In Progress: A report that is in progress. • Completed: A report that is complete and published successfully. • Failed: A report that has failed due to some reason.

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 that you want to view.

   Avaya Workforce Optimization Select downloads the report in the specified format on the Results page.

3. Click the ⊙ icon.

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 that you want to view.

   Avaya Workforce Optimization Select downloads the report in the specified format on the Results page.

3. To print a report, click **Print**

4. To print reports that are in PDF output, click the ⎙ Print icon.

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 Saved Reports (x) page displays the list of saved reports, where *(x)* denotes the number of saved reports.

2. Select the report that you want to modify and click the ✎ icon.

3. Modify the appropriate fields in the following tabs:

   • **Filters** : 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.

Managing adhoc reports

Adhoc Reports overview

Every adhoc report that is generated in the Avaya Workforce Optimization Select modules get listed as canned reports in the **Adhoc Reports** tab in the Reports module. You can delete, schedule, email, or run the reports depending on the permissions assigned to you. All the reports already generated are saved in the **Results** tab of the Reports module.

The **Adhoc Reports** tab in the Reports module also lists scorecards and metric views from the Analyze module. You can schedule, email, and run the scorecards and metric views. The scorecards and the metric views already generated are saved in the **Results** tab of the Reports module.

Running an adhoc report from the Adhoc Reports tab

About this task

Use this procedure to run an adhoc report, a scorecard, or a metric view from the **Adhoc Reports** tab in the Reports module. You can also run a an adhoc report, a scorecard, or a metric view from the **Results** tab in the Reports module

Before you begin

Save the report, scorecard, or metric view.

Procedure

1. Click **Reports** > **Reports** > **Adhoc Reports (x)**, where x is the number of reports saved in the Reports module.

2. Click the report, scorecard, or the metric view that you want to run, and click the **Run** button.

   The system displays the report, scorecard, or the metric view in the **Results** tab. The xRun column displays the number of times a report is run.

3. **(Optional)** To view the number of times an adhoc report, scorecard, or metric view is run, click on the xRun column of the respective report.

   The system displays the reports and the respective dates on which the report was run.

Running an adhoc report from the Results tab

About this task

Use this procedure to run an adhoc report, a scorecard, or a metric view from the **Results** tab in the Reports module. You can also run an adhoc report, a scorecard, or a metric view from the **Adhoc Reports** tab in the Reports module.

Before you begin

Save the report, scorecard, or metric view.

Procedure

1. Click **Reports** > **Reports** > **Results**.

2. Click the report, scorecard, or the metric view that you want to run, and click the **Run** button.

   The system displays the report, scorecard, or the metric view that was run last in the **Results** tab. The xRun column displays the number of times a report is run.

3. **(Optional)** To view the number of times an adhoc report, scorecard, or metric view is run, click on the xRun column of the respective report.

   The system displays the reports and the respective dates on which the report was run.

Scheduling adhoc reports

About this task

Use this procedure to schedule an adhoc report, a scorecard, or a metric view to run on a one-time basis, hourly, daily, weekly, or monthly basis. You can email reports in the PDF, Excel, and CSV format to users in your organization.

Before you begin

Save the report, scorecard, or metric view before scheduling it.

Procedure

1. Click **Reports** > **Results**.

2. In the status column, click **Completed** for the scorecard, metric view, or the report that you want to create a schedule for.

   The system downloads the report, scorecard, or metric view output in the saved format. You can make changes to the output based on your requirements.

3. Click **Edit**.

4. Click the **Scheduler** tab.

5. Select the **Enable Schedule** check box.

The system enables the fields in the Scheduler section.

6. In the Scheduler section, do the following:

   a. Select or enter the options to schedule the report on a one-time, hourly, daily, weekly, or monthly basis.

   b. Enter the time details, and select the time from when you want the schedule to begin and end.

7. Click **Save**.

Emailing adhoc reports

Before you begin

Save the report, scorecard, or metric view before scheduling it.

Procedure

1. Click **Reports** > **Results**.

2. In the status column, click **Completed** for the scorecard, metric view, or the report that you want to create a schedule for.

   The system downloads the report, scorecard, or metric view output in the saved format. You can make changes to the output based on your requirements.

3. Click **Edit**.

4. Click the **Scheduler** tab.

5. Select the **Enable Email** check box.

6. Enter the required details and click **Save**.

Chapter 12: Managing notifications

Notifications overview

With the Notifications feature, you 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, you can subscribe to alerts to manage and control contact center activities. You can also specify whether you want these alerts and notices to appear in the notification inbox or sent yo you through email. The notifications inform you about issues or situations that require immediate attention or notify you about general information on 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.

  > ✳ **Note:**
  >
  > Avaya Workforce Optimization Select displays only the latest system-generated alert.

- Notifications: Custom messages that can be sent to users that you have access to. Notifications 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.

Procedure

1. On the Avaya Workforce Optimization Select Home page, click **Notifications**, or the 🔔 icon.

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.

4. **(Optional)** On the pagination controls, choose the number of records that you want to view on each page.

5. **(Optional)** To filter the columns, click the ▼ icon in the column header of the column which you want to filter.

   You can apply filters on multiple columns.

6. **(Optional)** To clear the filters from all the columns, click the ▼× icon.

7. **(Optional)** To sort the columns, click the **Sort** 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. The third click removes the sorting.

8. **(Optional)** To reset the sorting, click the ↕× icon.

Notifications field descriptions

General

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. • Notifications: Custom messages that users can send to provide feedback or any other general information that the receiver needs to know.
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.

Table continues…

Name	Description
Count	The number of times that the notification alert is triggered.
Message	The message of the notification.

Icon	Name	Description
🔔	**Notifications**	The option to view the notifications.
⚠️	**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. • Notifications: 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** • **Number of holds exceeded by me in Queue** • **My hold duration exceeded in Queue** Supervisors can subscribe to the following alerts: • **AHT exceeded by my team in Queue** • **Number of holds exceeded by my team in Queue** • **Hold duration exceeded by my team in Queue** Users can subscribe to the following notifications: • **Number of coaching assignments assigned to me** • **Number of courses assigned to me** • **Number of Courses/Quizzes assigned to me** Evaluators, reviewers, or moderators can subscribe to the following notifications: • **Number of evaluation tasks assigned to me** • **Number of calibration tasks assigned to me** • **Number of appeals to be processed** • **Number of calibration tasks assigned by me** Supervisors can subscribe to the following notifications: • **Number of evaluation tasks completed by my team** • **Number of interactions evaluated for my team** • **Number of coaching assignments completed by my team** • **Number of pending coaching assignments for my team** • **Number of Courses/Quizzes assigned to my team** • **Number of coaching assignments to be created for your team as part of a coaching plan** • **Number of coaching assignments completed by my team** Coach or the coaching assignment owner can subscribe for the following notifications: • **Number of coaching assignments to be followed-up**

Table continues…

Name	Description
	• **Number of coaching assignments to be delivered by me**
	• **Number of coaching assignments to be created as part of a coaching plan**
	• **Number of Courses/Quizzes assigned by me**
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.

Messages

Messages	Description
Alerts from the Administration module	
My AHT exceeded by Queue	The alert is triggered when the user exceeds the Average Handle Time (AHT) specifying by how many minutes the user has exceeded the AHT levels.
	The recipient of this alert is any user who belongs to the specified Queue.
Number of holds exceeded by me in Queue	The alert is triggered when the user exceeds the number of holds placed during the interaction.
	The recipient of this alert is any user who belongs to the specified Queue.
My hold duration exceeded in Queue	The alert is triggered when the user exceeds the hold duration during the interaction.
	The recipient of this alert is any user who belongs to the specified Queue.
AHT exceeded by my team in Queue	The alert is triggered when the members in the supervisor's team exceed the AHT.
	The recipient of this alert is the supervisor who manages users who belong to the specified queue.
Number of holds exceeded by my team in Queue	The alert is triggered when members in the supervisor's team exceed the number of holds placed during the interaction.
	The recipient of this alert is the supervisor who manages users who belong to the specified queue.
Hold duration exceeded by my team in Queue	The alert is triggered members in the supervisor's team exceed the hold duration during the interaction.
	The recipient of this alert is the supervisor who manages users who belong to the specified queue.

Table continues…

Messages	Description
Notifications from the Evaluate module	
Number of evaluation tasks assigned to me	The notification is triggered when the evaluation tasks are assigned to an evaluator, reviewer, or moderator. The recipients of this notification are evaluators, reviewers, or moderators.
Number of calibration tasks assigned to me	The notification is triggered when the calibration tasks are assigned to an evaluator, reviewer, or moderator. The recipients of this notification are evaluators, reviewers, or moderators.
Number of calibration tasks assigned by me	The notification is triggered when the system assigns an evaluation to a set of reviewers to calibrate the effectiveness of the reviewers. The recipient of this notification are evaluators and reviewers.
Number of interactions evaluated for my team	The notification is triggered when the interactions are evaluated for the members in the supervisor's team. The recipient for this notification are supervisors or anyone who manages a team.
Number of evaluation tasks completed by my team	The notification is triggered when a reviewer completes an evaluation task. The recipient for this notification are quality managers.
Number of appeals to be processed	The notification is triggered when the appeals to be processed are assigned to the employee who has the rights to act on an appeal. This notification is sent 48 hours before due date, 24 hours before due- date, and on the last due day. The recipient for this notification are reviewers who can review an appeal. When an appeal is processed an update is also sent to the individual who raised the appeal with the status with the change in scores, if any.
Number of Courses assigned to me	The notification is triggered when a course is assigned to a user for performance improvement. This course can be assigned through the library, or the Evaluate, or the Coach module. The recipient of this notification are users who subscribe to receive it.

Table continues…

Messages	Description
Number of Course(s)/Quizz(es) assigned to me	The notification is triggered when a course or a quiz is assigned to a user. This course can be assigned through the library, or the Evaluate, or the Coach module. The recipient of this notification are users who subscribe to receive it.
Number of Quizz(es) assigned to me	The notification is triggered when a quiz associated to the course is assigned to a user. This course can be assigned through the library, or the Evaluate, or the Coach module. The recipient of this notification are users who subscribe to receive it.
Notifications from the Coach module	
Number of coaching assignments to be followed-up	The notification is triggered when the coach or the employee who assigned a coaching assignment is notified to follow-up an assignment. The notifications are sent 48 hours and 24 hours before the follow up date to the coach, reporting manager and the employee(s). The recipient for this notification are coaches or users who has the right to assign coaching assignments.
Number of coaching assignments to be delivered by me	The notification is triggered when the coach receives a notification for a coaching assignment that must be completed by the employee. The notification specifies the number of coaching assignments that are pending for a logged user's team members. The recipient for this notification are coaches.
Number of coaching assignments to be created as part of a coaching plan	The notification is triggered when the reporting manager or the creator of a coaching plan receives a notification that the targeted number of assignments are not assigned to the employee(s) as per the plan. The recipient for this notification are the reporting manager or the creator of a coaching plan.
Number of coaching assignments to be created for your team as part of a coaching plan	The notification is triggered when the reporting manager or the creator of a coaching plan receives a notification to create coaching plans for a particular team. The recipient for this notification are the reporting manager or the creator of a coaching plan.

Table continues…

Messages	Description
Number of Course(s)/Quizz(es) assigned by me	The notification is triggered when the reporting manager receives notifications for courses or quizzes assigned by him or her to his or her team members.
	The recipient for this notification are reporting managers of the respective team.
Number of coaching assignments assigned to me	The notification is triggered when the user receives notifications for coaching assignments that are assigned for a particular period.
	The recipient for this notification are users who is assigned a coaching assignment.
Number of Courses assigned to me	The notification is triggered when the user receives notification that a course is assigned by the reporting manager or the coach. This course can be assigned through the library, or the Evaluate, or the Coach module.
	The recipient of this notification are users who subscribe to receive it.
Number of Course(s)/Quizz(es) assigned to me	The notification is triggered when the user receives a notification that a course or a quiz that is associated to the course is assigned by the reporting manager or the coach. This course can be assigned through the library, or the Evaluate, or the Coach module.
	The recipient of this notification are users who subscribe to receive it.
Number of Quizz(es) assigned to me	The notification is triggered when the user receives a notification that a quiz that is associated to the course is assigned by the reporting manager or the coach. This course can be assigned through the library, or the Evaluate, or the Coach module.
	The recipient of this notification are users who subscribe to receive it.
Notifications from the Learn module	
Number of Courses assigned to me	The notification is triggered when the user receives notification that a course is assigned by the reporting manager or the coach. This course can be assigned through the library, or the Evaluate, or the Coach module.
	The recipient of this notification are users who subscribe to receive it.

Table continues…

Messages	Description
Number of Course(s)/Quizz(es) assigned to me	The notification is triggered when the user receives a notification that a course or a quiz that is associated to the course is assigned by the reporting manager or the coach. This course can be assigned through the library, or the Evaluate, or the Coach module. The recipient of this notification are users who subscribe to receive it.
Number of Quizz(es) assigned to me	The notification is triggered when the user receives a notification that a quiz that is associated to the course is assigned by the reporting manager or the coach. This course can be assigned through the library, the Evaluate, or the Coach module. The recipient of this notification are users who subscribe to receive it.
Number of Course(s)/Quizz(es) assigned to my team	The notification is triggered when the reporting manager receives a notification for the courses or quizzes assigned to the members of his/her respective team. The recipient of this notification are reporting managers.
Number of coaching assignments completed by my team	The notification is triggered when the reporting manager receives a notification for the coaching assignments that are completed by the members of his/her respective team. The recipient of this notification are reporting managers.
Number of coaching assignments assigned for my team	The notification is triggered when the reporting manager receives a notification for the courses or quizzes assigned to the members of his/her respective team. The recipient of this notification are reporting managers.

Icon	Name	Description
Type		
⚠	**Alert**	System-generated messages for AHT, hold count, hold duration, notifications from the Appeals, Coach, Learn, and Evaluate modules. The alerts are not based on subscription.

Table continues…

Icon	Name	Description
	Notification	Custom messages that users can send to provide feedback or any other general information that the receiver needs to know.
Message		
	Edit Message	The option to add a message to an existing notification. The system displays the content as an extension to the existing message.

Chapter 13: Customization

Updating profile settings

About this task

Use this procedure to view your profile information such as name, reporting hierarchy, hire date, and other details. You can also change the time zone and language preferences on the profile page.

Procedure

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

   You profile page displays the basic profile information linked to your Avaya Workforce Optimization Select account.

2. In **Time Zone**, click your preferred time zone preference, and click **Set**.

3. In **Language**, click your preferred language, and click **Set**.

4. In **Landing Page**, click your preferred landing page, and click **Set**.

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.

Table continues…

Name	Description
Landing Page	The preferred default landing page setting. ⭐ **Note:** This is an permission driven option. The user can see this option only if the administrator has given access to this option.
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	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 👤 > **Settings**.

2. On the Settings page, do the following:

   a. In the Password section, type the current and new passwords.

   b. Reenter the new password to confirm and click **Save**.

   c. In the Secret Questions section, click the question of your choice and click **Save**.

      You can choose two secret questions. Ensure that the answers are private and easy to remember.

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**.

2. On the Broadcast Message page, do the following:

   a. Select the recipients of the message.

      You can send the message to multiple recipients at the same time.

   b. Select the option to send the message through email or to the notification inbox of recipients.

   c. In **Message Type**, select whether you want to send alert or notice.

   d. Type the message that you want to broadcast.

3. Click **Send**.

Broadcast Message 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.
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.

Watching training videos

About this task

Use this procedure to watch training videos from Avaya Learning specific to your requirements. The training videos for the supervisor and the agent are available to any user logged in to the application. However, the training video for admin is available only to the administrator.

> ⚠️ **Important:**

Use Google Chrome to play the training videos.

Procedure

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

2. Click one of the following:

   - **Training Videos - Admin**: To watch the basics of administering Avaya Workforce Optimization Select. This training is intended for business partners and customers with an administrator role.

   - **Training Videos - Agent**: To watch the basics of using Avaya Workforce Optimization Select features with an agent role.

   - **Training Videos - Supervisor**: To watch the basics of using Avaya Workforce Optimization Select features with a supervisor role.

Chapter 14: Troubleshooting

Reports generation fails

Condition

When a user tries to generate a report, the system displays the following message: `Failed/Schedule is not working`. This message might get displayed frequently or when a particular criteria is selected.

Cause

Your browser might still be using earlier files which can cause display or access problems.

Solution

Clear the browser cache and log in into the application again.

Call or mail interaction details do not download

Condition

When a user tries to download an interaction mail or interaction details, the system displays an alert that prevents the action.

Cause

The interaction is tagged as Do not download or Do not email by another user.

Solution

1. Check to see if the interaction is tagged as do not download or do not email.
2. Send a request to the user who has tagged the interaction to remove the tag.

Records do not display in Interactions or View Evaluations

Condition

This issue occurs when a user who is logged in cannot view records in Interactions or View Evaluations.

Cause

The default view settings are not set properly.

Solution

1. Verify that the default view for Interactions displays `Today's Interactions.`

2. Verify that the default view for View Evaluations displays `Current Week Evaluations.`

3. Check the filters and values used within the view that is selected by the logged in user by creating a view with filters one by one and verify if the data imports correctly.

   If the problem still persists, contact the system administrator.

Interaction playback fails

Condition

Interaction playback fails and the system displays the following error message: `You cannot play this interaction as the audio could not be loaded either because of unsupported file formant or server/network failure.`

Cause

The browser does not support HTML5.

Solution

1. Install one of the following supported browser versions:

   • Internet Explorer 11 and later

   • Google Chrome 43.x and later

   • Mozilla Firefox 33.x and later

2. **(Optional)** If the problem persists, contact your system administrator.

Unable to evaluate imported WAV file interactions

Condition

When an evaluator tries to evaluate an interaction that is imported in WAV format on Internet Explorer (IE), the application displays the following message: `You cannot evaluate this interaction because the audio could not be loaded. It could either be because of unsupported file format or server/network failure.`

Cause

IE does not support WAV file format.

Solution

Use the following browsers to evaluate an interaction imported in WAV format:

- Google Chrome
- Mozilla Firefox
- Microsoft Edge

Permission denied to access training videos

Condition

When a user clicks the options to watch a training video in Avaya Workforce Optimization Select, the application displays the error message: `APIWrapper_scorm_12.js :: findAPI() :: ERROR HANDLED Permission denied to access property "API" on cross-origin object.`

Cause

Unknown issue from the host provider.

Solution

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

2. Click one of the following:

    - **Training Videos - Admin**: To watch the basics of administering Avaya Workforce Optimization Select. This training is intended for business partners and customers with an administrator role.

    - **Training Videos - Agent**: To watch the basics of using Avaya Workforce Optimization Select features with an agent role.

    - **Training Videos - Supervisor**: To watch the basics of using Avaya Workforce Optimization Select features with a supervisor role.

    Avaya Workforce Optimization Select displays the following error message: `APIWrapper_scorm_12.js :: findAPI() :: ERROR HANDLED Permission denied to access property "API" on cross-origin object`

3. Ignore the error message and click `OK` and close the message window.

    The selected training videos begin to play without any break.

Chapter 15: Resources

Documentation

See the following related documents at http://support.avaya.com:

Document number	Title	Use this document to:	Audience
			Table continues…
Overview			
	Avaya Workforce Optimization Select Overview and Specification	Provide a high-level functional description of the capabilities of the Avaya Workforce Optimization Select application.	All
Implementing			
	Deploying Avaya Workforce Optimization Select with Avaya Aura® Communication Manager and Avaya Aura® Call Center Elite	Provides checklist and procedures for the installation, configuration, initial administration, and basic maintenance of Avaya Workforce Optimization Select with Avaya Aura® Communication Manager and Avaya Aura® Call Center Elite.	Deployment engineers and support personnel
	Deploying Avaya Workforce Optimization Select with IP Office and IP Office Contact Center	Provides checklist and procedures for the installation, configuration, initial administration, and basic maintenance of Avaya Workforce Optimization Select with IP Office and IP Office Contact Center.	Deployment engineers and support personnel

Document number	Title	Use this document to:	Audience
	Deploying Avaya Workforce Optimization Select with IP Office and Avaya Contact Center Select	Provides checklist and procedures for the installation, configuration, initial administration, and basic maintenance of Avaya Workforce Optimization Select with IP Office and Avaya Contact Center Select.	Deployment engineers and support personnel
	Deploying Avaya Workforce Optimization Select with Avaya Aura® Communication Manager and Avaya Oceana® Solution	Provides checklist and procedures for the installation, configuration, initial administration, and basic maintenance of Avaya Workforce Optimization Select with Avaya Aura® Communication Manager and Avaya Oceana® Solution.	Deployment engineers and support personnel
	Deploying Avaya Workforce Optimization Select with Avaya Communication Server 1000 and Avaya Aura® Contact Center	Provides checklist and procedures for the installation, configuration, initial administration, and basic maintenance of Avaya Workforce Optimization Select with Avaya Communication Server 1000 and Avaya Aura® Contact Center.	Deployment engineers and support personnel
	Deploying Avaya Workforce Optimization Select with Avaya Aura® Communication Manager and Avaya Aura® Contact Center	Provides checklist and procedures for the installation, configuration, initial administration, and basic maintenance of Avaya Workforce Optimization Select with Avaya Aura® Communication Manager and Avaya Aura® Contact Center.	Deployment engineers and support personnel
Administering			

Table continues…

Resources

Document number	Title	Use this document to:	Audience
	Administering Avaya Workforce Optimization Select	Explain how to use Avaya Workforce Optimization Select to configure your system, employee data, settings, and recording rules and perform routine maintenance tasks. The content is available in two formats: HTML and PDF.	Administrators
	Administering SysAdmin	Provides information on how to perform administration tasks in the SysAdmin application including how to manage tenants, assets, component configuration, and diagnostics.	System administrators
	Avaya Workforce Optimization Select Quick Reference Guide for Administrators	Understand the most common user tasks that an Administrator performs.	Administrators
Using			
	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
	Using Desktop Monitor	Explain how to use Desktop Monitor. Supervisors can use this document to create and assign projects to employees in a contact center environment. Employees can use the document to monitor the projects assigned to each employee.	Users

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 https://support.avaya.com/ and do one of the following:

  - In **Search**, type `Avaya Mentor Videos`, click **Clear All** and select **Video** in the **Content Type**.

  - In **Search**, type the product name. On the Search Results page, click **Clear All** and select **Video** in the **Content Type**.

    The **Video** content type is displayed only when videos are available for that product.

  In the right pane, the page displays a list of available videos.

- To find the Avaya Mentor videos on YouTube, go to www.youtube.com/AvayaMentor and do one of the following:

  - Enter a key word or key words in the **Search Channel** to search for a specific product or topic.

  - Scroll down Playlists, and click a topic name to see the list of videos available for the topic. For example, Contact Centers.

  ⊛ **Note:**

    Videos are not available for all products.

Support

Go to the Avaya Support website at https://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.

Index

Index

Comments on this document? infodev@avaya.com

Index

W