Workspace Desktop Edition Deployment Guide

E-Mail Quality Assurance

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Interaction Workspace supports Quality Assurance (QA) review of outbound e-mail interactions. Team Leads or other individuals can approve or reject e-mail interactions or e-mail interactions in workbins. You can design your routing strategy to send all e-mail interactions from and agent or agent group to a reviewer; you can design your routing strategy to enable an agent to request a review; you can direct e-mail interactions for review to a reviewer or a group or to a workbin. You can design your routing strategy to send rejected e-mail interaction back to the originating agent or to a workbin.

Designing a Routing Strategy for an E-Mail Quality Assurance Review

The e-mail QA Review process is managed by a Routing Strategy and Business Process design. You must configure specific keys that are set in the interaction by Interaction Workspace; these keys are used by the Routing Strategy to route the interaction based on its review state, as defined by the keys. In the following example, the routing strategy keys are not prefixed by "BP_", and the keys that are defined by the business process are designated by the "BP_" prefix.

1. An inbound e-mail is received by the Business Process
2. The inbound e-mail is distributed to an agent
3. The agent writes a reply e-mail and clicks Send
4. Interaction Workspace makes the following updates to the attached data of the reply e-mail

    - `UCS.OwnerID` is set to `EMailAgent.DBID`
    - `IxnSvr.UserData.OriginalAgentEmployeeID` is set to `EMailAgent.EmployeeID`
    - `IxnSvr.UserData.OriginalAgentUserName` is set to `EMailAgent.UserName`

- The e-mail is then directed to the Business Process, and the Business Process should make the following updates to the reply e-mail and distribute it to the reviewer target:

    - `Ixn.UserData.QAReviewFlag` is set to `1`
    - `Ixn.UserData.QAReviewDisposition` is set to `Unknown`
    - `Ixn.UserData.BP_QAReview_Status` is set to `Review`
    - `Ixn.UserData.BP_QAReview_Cycle#` is set to `1`

- The reviewer reviews the e-mail and edits it or provides feedback. If the reviewer sets the disposition to `Rejected`, it is sent back to the originating agent.
- Interaction Workspace makes the following updates to the attached data of the rejected reply e-mail:

    - `UCS.ReviewerID` is set to `Reviewer.DBID`
    - `Ixn.UserData.QAReviewerEmployeeId` is set to `Reviewer.EmployeeID`
    - `Ixn.UserData.QAReviewerUserName` is set to `Reviewer.UserName`
    - `Ixn.UserData.QAReviewDisposition` is set to `Rejected`

- The e-mail is then directed to the Business Process, and the Business Process should make the following updates to the reply e-mail and distribute it to the original agent:
    - `Ixn.UserData.QAReviewFlag` is set to `0`
- The agent makes the required changes and then clicks Send.
- Interaction Workspace makes the following updates to the attached data of the reply e-mail and directs it the the Business Process:
    - `UCS.OwnerID` is set to `EMailAgent.DBID`
    - `IxnSvr.UserData.OriginalAgentEmployeeID` is set to `EMailAgent.EmployeeID`
    - `IxnSvr.UserData.OriginalAgentUserName` is set to `EMailAgent.UserName`
- The Business Process should make the following updates to the reply e-mail and distribute it to the Reviewer Target:
    - `Ixn.UserData.QAReviewFlag` is set to `1`
    - `Ixn.UserData.QAReviewDisposition` is set to `Unknown`
    - `Ixn.UserData.BP_QAReview_Status` is set to `Review`
    - `Ixn.UserData.BP_QAReview_Cycle#` is set to `2`
- The reviewer reviews the e-mail reply again and sets the disposition to `Accepted` and clicks Send
- Interaction Workspace makes the following updates to the attached data of the accepted reply e-mail and directs it to the Business Process:
    - `UCS.ReviewerID` is set to `Reviewer.DBID`
    - `Ixn.UserData.QAReviewerEmployeeId` is set to `Reviewer.EmployeeID`
    - `Ixn.UserData.QAReviewerUserName` is set to `Reviewer.UserName`
    - `Ixn.UserData.QAReviewDisposition` is set to `Accepted`
- The Business Process should make the following updates to the reply e-mail and distribute it to the Final Send E-Mail Business Process:
    - `Ixn.UserData.QAReviewFlag` is set to `1`
    - `Ixn.UserData.BP_QAReview_Status` is set to `Completed`
- The e-mail reply is sent to the contact.

You can specify the behavior of the QA review by modifying the options of the `QAReview_BPOptions` Transaction object. The following are examples of how you can control the routing of e-mail interactions for QA Review:

- You can force e-mail interactions to go through QA review by setting the `qa-review/force-qa-review` option to `true`.
- You can route e-mail interactions to a "QA-review Pending" workbin by setting the `qa-review/pending-qa-use-workbin` to `true`.

- You can route rejected e-mail interactions to a shared workbin to enable all agents in a group to access the interactions by setting the `qa-review/use-personal-rejected-workbin` option to `false`.

Outbound E-Mail Quality Assurance Review

The Interaction Workspace outbound e-mail review feature enables you to redirect outbound e-mail interactions to an internal target for review. The Quality Assurance Review function has the following features:

- Outbound e-mail interactions can be redirected to a reviewer or workbin
- Reviewers can accept and send the outbound e-mail to the recipient
- Reviewers can reject the outbound e-mail interaction and send it back to the author to be reworked
- Review of outbound e-mail interactions can be configured to be handled through a workbin folder
- Rejected outbound e-mail interactions can be configured to be handled through a workbin folder

The following is a sample of the outbound e-mail review process workflow:

1. E-mail interaction is received from a contact and is routed to an agent who, by a business process is identified as an agent whose outbound e-mail initeractions are to be sent for review before the e-mail is sent to the contact.
2. The agent creates a reply to the inbound e-mail interaction, or the agent creates a new outbournd e-mail interaction, and clicks **Send**.
3. Interaction Workspace tags the e-mail interaction with the `EmployeeID` and `UserName` of the agent, and stores the `OwnerID` of the author in the e-mail interaction history in Universal Contact Server.
4. The outbound business process for the agent is activated and the e-mail interaction is flagged for review. The review flag is a count of the number of review iterations which the interaction has undergone. The business process might also be configured to attach other key/value pairs to the interaction.
5. The e-mail interaction is redirected to the agent, agent group, role, or workbin who/that is defined by the business process as the reviewer. The reviewer either receives the e-mail interaction directly or retrieves it from a workbin.
6. The e-mail interaction reviewer can modify the interaction, add information to the Notepad, and then accept or reject the e-mail interaction.
   - If the reviewer accepts the interaction, the e-mail interaction is sent to the contact.
   - If the reviewer rejects the interaction, the e-mail interaction is sent back to the agent who created the e-mail.
7. If the e-mail interaction is returned to the agent, the agent can change the e-mail according to the comments that are provided by the reviewer or view the changes that were made by the reviewer.
8. The agent finishes updating the e-mail interaction and then clicks **Send**.
9. The outbound business process for the agent is activated and the e-mail interaction is flagged for second review.
10. The e-mail interaction is redirected to the agent or agent group or roles who is defined by the business process as the reviewer.

11. The e-mail interaction reviewer can modify the interaction, add information to the Notepad, and then accept or reject the e-mail interaction, or apply some other disposition that is specific to the design of your business process or routing strategy. Interaction Workspace tags the e-mail interaction with the `EmployeeID` and `UserName` of the reviewer, and stores the `ReviewerID` of the author in the e-mail interaction history in Universal Contact Server.
    - If the reviewer accepts the interaction, the e-mail interaction is sent to the contact.
    - If the reviewer rejects the interaction, the e-mail interaction is sent back to the agent who created the e-mail, either directly, or placed in a special workbin for rejected e-mail interactions, and the process begins again. The review count is incremented by one.

Creating a For-Review Workbin

If you want to direct to a workbin outbound e-mails that require review, you must create the workbin in the eServices Business Process (script name="review_outbound_emails"). Configure a group or user and make it available only to agents, agent groups, tenants, or roles whom you want to be e-mail interaction reviewers by specifying the value `review_outbound_emails` for the `workbin.email.review` option in the `interaction-workspace` section.

Displaying Review Information in the Case Information Area

You can create Business Attributes to populate the interaction Case Information area with information about the review process that informs the reviewer and the author of the e-mail about the status of the review. For example, you could create keys for Review Status and Review Cycle Count. You can create an editable Case Information attribute that is displayed as a drop-down list of disposition types. Refer to the interaction.case-data.format-business-attribute option for information about creating new attributes for case data.

Creating a Rejected Outbound E-Mail Workbin

If you want to direct to a workbin outbound e-mails that were rejected by a reviewer, you must create the workbin in the eServices Business Process (script name="rejected_outbound_emails"). Configure a group or user and make it available only to agents, agent groups, tenants, or roles whom you want to be e-mail interaction reviewers by specifying the value `rejected_outbound_emails` for the `workbin.email.rejected` option in the `interaction-workspace` section.