GENESYS™

Workspace Desktop Edition Deployment Guide

Email Quality Assurance

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Email Quality Assurance

Contents

Workspace supports Quality Assurance (QA) review of outbound email interactions. Team Leads (supervisors) or other individuals can approve or reject email interactions or email interactions in workbins. You can design your routing strategy to send all email 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 email interactions for review to a reviewer or a group or to a workbin. You can design your routing strategy to send rejected email interaction back to the originating agent or to a workbin.

Designing a Routing Strategy for an email quality assurance review

The email 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 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 keys prefixed by "BP_" are exclusively under the responsibility of the Routing Strategy or Business Process. The keys that do not have this prefix are keys that are defined by Workspace. The values of the keys are interpreted and/or updated by the core product implementation and can also be interpreted/edited by the Routing Strategy or Business Process.

Prerequisites to enable the "QA Review Disposition" feature:

- Create a Business Attribute in Genesys Administrator Extension that defines all possible QA review dispositions. The following example uses the `Rejected` and `Accepted` dispositions as samples. You should use values that suit your business purposes.

- Assign the name of this Business Attribute as the value of the email.qa-review-dispositions-business-attribute option.

- The QA Review disposition that is selected by a Team Lead (supervisor) is assigned to the attached data `Ixn.UserData.QAReviewDisposition`, described in the following section. Your Business Process must apply rules that are based on this disposition— for example, redistributing to the writer.

The following is an example of a Strategy workflow:

1. An inbound email is received by the Business Process

2. The inbound email is distributed to an agent

3. The agent writes a reply email and clicks Send

4. Workspace makes the following updates to the attached data of the reply email

   - In the UCS interaction record, `OwnerID` is set to the DBID of the agent.

   - In the UserData of the Interaction Server interaction record, `OriginalAgentEmployeeID` is set to the EmployeeID of the agent.

   - In the UserData of the Interaction Server interaction record, `OriginalAgentUserName` is set to the username of the agent.

5. The email is then directed to the Business Process, and the Business Process should make the following updates to the reply email and distribute it to the reviewer target:

   - In the UserData of the Interaction Server interaction record, `QAReviewFlag` is set to 1

- In the UserData of the Interaction Server interaction record, QAReviewDisposition is set to Unknown

- In the UserData of the Interaction Server interaction record, BP_QAReview_Status is set to Review

- In the UserData of the Interaction Server interaction record, BP_QAReview_Cycle# is set to 1

6. The reviewer reviews the email and edits it or provides feedback. If the reviewer sets the disposition to Rejected, it is sent back to the originating agent.

7. Workspace makes the following updates to the attached data of the rejected reply email:

- In the UCS interaction record, ReviewerID is set to the DBID of the reviewer.

- In the UserData of the Interaction Server interaction record, QAReviewerEmployeeId is set to the employee ID of the reviewer.

- In the UserData of the Interaction Server interaction record, QAReviewerUserName is set to the username of the reviewer.

- In the UserData of the Interaction Server interaction record, QAReviewDisposition is set to Rejected

8. The email is then directed to the Business Process, and the Business Process should make the following updates to the reply email and distribute it to the original agent:

- In the UserData of the Interaction Server interaction record, QAReviewFlag is set to 0

9. The agent makes the required changes and then clicks Send.

10. Workspace makes the following updates to the attached data of the reply email and directs it the the Business Process:

- In the UCS interaction record, OwnerID is set to the DBID of the agent.

- In the UserData of the Interaction Server interaction record, OriginalAgentEmployeeID is set to the employee ID of the agent.

- In the UserData of the Interaction Server interaction record, OriginalAgentUserName is set to the username of the agent.

11. The Business Process should make the following updates to the reply email and distribute it to the Reviewer Target:

- In the UserData of the Interaction Server interaction record, QAReviewFlag is set to 1

- In the UserData of the Interaction Server interaction record, QAReviewDisposition is set to Unknown

- In the UserData of the Interaction Server interaction record, BP_QAReview_Status is set to Review

- In the UserData of the Interaction Server interaction record, BP_QAReview_Cycle# is set to 2

12. The reviewer reviews the email reply again and sets the disposition to Accepted and clicks Send

13. Workspace makes the following updates to the attached data of the accepted reply email and directs it to the Business Process:

- In the UCS interaction record, ReviewerID is set to the DBID of the reviewer.

- In the UserData of the Interaction Server interaction record, QAReviewerEmployeeId is set to the employee ID of the reviewer.

- In the UserData of the Interaction Server interaction record, QAReviewerUserName is set to the username of the reviewer.

- In the UserData of the Interaction Server interaction record, QAReviewDisposition is set to

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Accepted
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14. The Business Process should make the following updates to the reply email and then distribute it to the Final 'Send Email' Business Process:

- In the UserData of the Interaction Server interaction record, clear key: `QAReviewFlag`
- In the UserData of the Interaction Server interaction record, clear key: `BP_QAReview_Status`

15. The email reply is sent to the contact.

Outbound email quality assurance review

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

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

The following is a sample of the outbound email 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 email interactions are to be sent for review before the email is sent to the contact.

2. The agent creates a reply to the inbound email interaction, or the agent creates a new outbound email interaction, and clicks **Send**.

3. Workspace tags the email interaction with the `EmployeeID` and `UserName` of the agent, and stores the `OwnerID` of the author in the email interaction history in Universal Contact Server.

4. The outbound business process for the agent is activated and the email 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 email 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 email interaction directly or retrieves it from a workbin.

6. The email interaction reviewer can modify the interaction, add information to the Notepad, and then accept or reject the email interaction.

   - If the reviewer accepts the interaction, the email interaction is sent to the contact.
   - If the reviewer rejects the interaction, the email interaction is sent back to the agent who created the email.

7. If the email interaction is returned to the agent, the agent can change the email 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 email interaction and then clicks **Send**.

9. The outbound business process for the agent is activated and the email interaction is flagged for second review.

10. The email interaction is redirected to the agent or agent group or roles who is defined by the business process as the reviewer.

11. The email interaction reviewer can modify the interaction, add information to the Notepad, and then accept or reject the email interaction, or apply some other disposition that is specific to the design of your business process or routing strategy. Workspace tags the email interaction with the `EmployeeID` and `UserName` of the reviewer, and stores the `ReviewerID` of the author in the email interaction history in Universal Contact Server.

    - If the reviewer accepts the interaction, the email interaction is sent to the contact.

    - If the reviewer rejects the interaction, the email interaction is sent back to the agent who created the email, either directly, or placed in a special workbin for rejected email 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 emails 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 email interaction reviewers by specifying the value `review_outbound_emails` for the workbin.<media-type>.<workbin-nickname> (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 email 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 Email workbin

If you want to direct to a workbin outbound emails 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 email interaction reviewers by specifying the value `rejected_outbound_emails` for the workbin.<media-type>.<workbin-nickname> (workbin.email.rejected) option in the `interaction-workspace` section.